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# HRMS

## Import Format Guide

## Download the Import format

Please refer to Figure 1

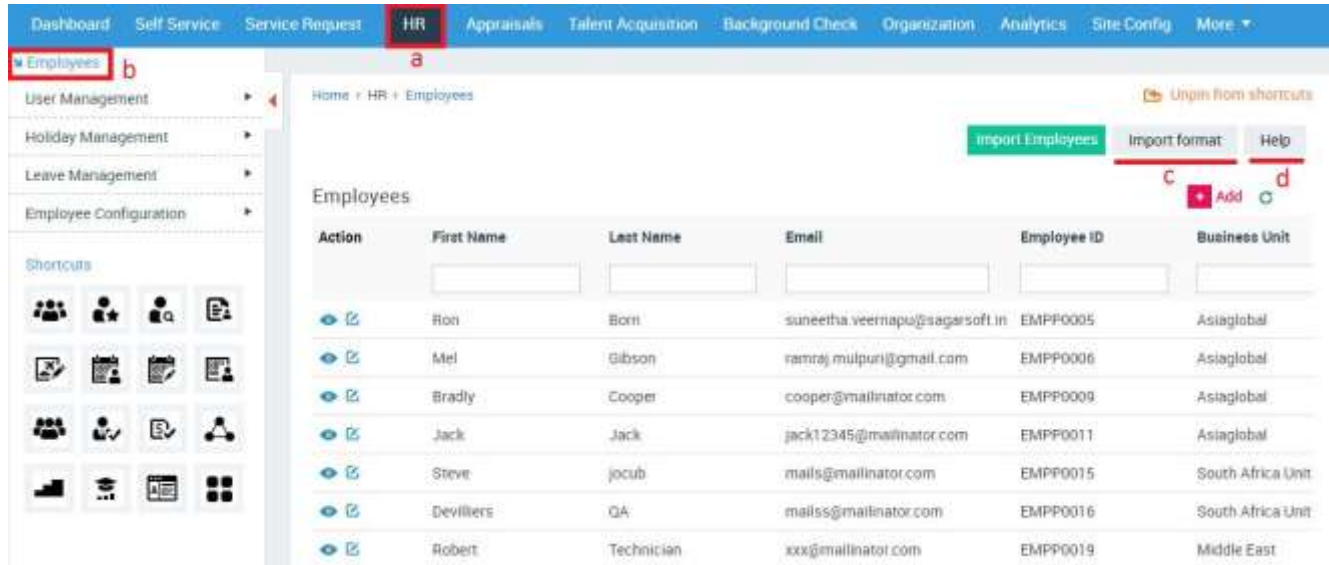


Figure 1

- Click **HR** in the top menu
- Click **Employees** on the left menu panel
- Click **Import Format** button placed above the grid on the top right corner
- For further guidance, click **Help** button

When you click **Import format**, it will automatically download an excel sheet which contains the format to add employees.

Please refer Figure 2 for the import format

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
First Name	Last Name	Employee ID	Role Type	Email	Business Unit	Department	Reporting Manager Employee ID	Job Title	Position	Employment Status	Date of joining	Date of leaving	Experience	Extension	Work telephone number	Fax	Salary Currency	Pay Frequency	Salary
Steve	Smith	0001	Manager	person@company.com	SAU	HR	EMPP0002	Manager	HR	Full	2013-01-01	2013-01-01	5	524	12345678	4012345678	USD	Monthly	2000
John	Doe	0002	Employee	john.doe@company.com	SAU	HR	EMPP0003	Employee	HR	Full	2013-01-01	2013-01-01	2	524	12345678	4012345678	USD	Monthly	1000

Figure 2

# Select the Import format details

## a. Prefix

Please refer Figure 3



Figure 3

- Prefix is not a mandatory field.
  - I. Click **Site Config** in the top menu
  - II. Click **General** on the left menu panel
  - III. Select **Prefixes** in the submenu.
  - IV. Click **+Add** button
  - V. Use the 'Prefix' to enter in the import excel sheet

Note: You can only enter **Prefixes** into the excel sheet that are existing in the application.

## b. First and Last Name of the employee

Please refer Figure 4

A	B	C	D	E	
Prefix	First Name	Last Name	Employee Id	Role Type	Email

Figure 4

- These fields are mandatory and accept only alphabetic characters

### c. Employee ID

- You can enter any Employee ID number, but please ensure that you follow the same employee code configured in Site Config > General > Identity Codes. For example: EMP0003, EMP0091, EMP0546.
- This field is mandatory

### d. Role Type

Please refer Figure 5



Figure 5

- Role Type is a mandatory field.
  - I. Click **HR** in the top menu
  - II. Click **User Management** on the left menu panel
  - III. Click **Roles & Privileges** in the submenu
  - IV. Click **+Add** button
  - V. Use the 'Role Type' to enter in the import excel sheet

Note: You can only enter **Role Types** into the excel sheet that are existing in the application

### e. Enter the email of the employee

Please refer figure 6

E	F	G
Role Type	Email	Business Unit

Figure 6

- Email address should be unique and of a valid format
- Email field is mandatory

#### f. Business Unit

Please refer Figure 7



Figure 7

- Business Unit is a mandatory field.
- I. Click **Organization** in the top menu
  - II. Click **Business Units** on the left menu panel
  - III. Click **+Add** button
  - IV. Use 'Code' to enter in the import excel

Note: You can only enter **Business Units** into the excel sheet that are existing in the application.

## g. Departments

Please refer Figure 8



Figure 8

- Departments is a mandatory field
  - Click **Organization** in the top menu
  - Click **Departments** on the left menu panel
  - Click **+Add** button
  - Use the 'Code' to enter in the import excel sheet

Note: Please ensure that the **Department** should fall under the **Business Unit** entered in the import excel sheet.

Note: You can only enter **Departments** into the excel sheet that are existing in the application

## h. Enter the Reporting Manager's Employee ID

- Reporting Manger's Employee ID is a mandatory field. For example: EMP0003.

## i. Job Title

Please refer Figure 9

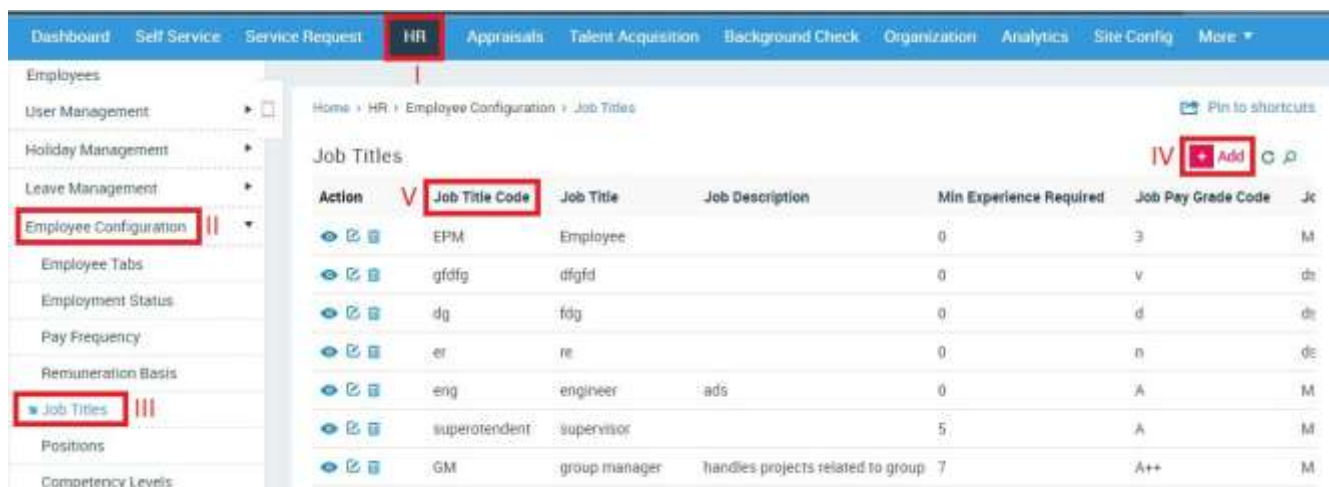


Figure 9

- Job Title is a mandatory field
  - Click **HR** in the top menu
  - Click **Employee Configuration** on the left menu panel

- III. Click **Job Titles** in the submenu
- IV. Click **+Add** button
- V. Use the 'Job Title Code' to enter in the import excel sheet

Note: You can only enter **Job Titles** that are existing in the application

#### j. Position

Please refer Figure 10

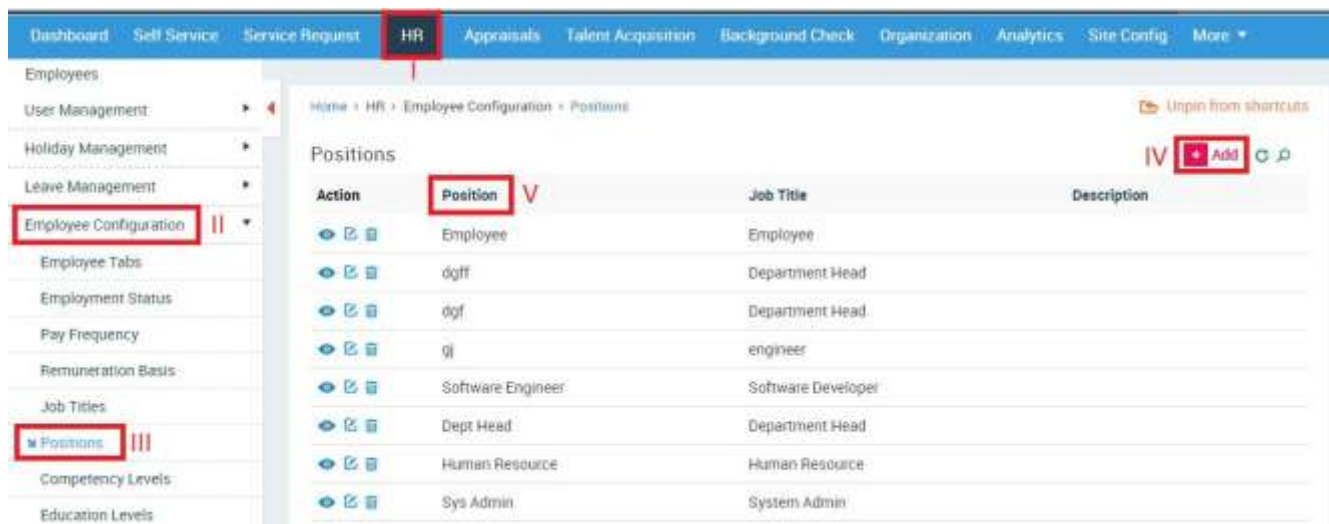


Figure 10

- Position is a mandatory field
  - I. Click **HR** in the top menu
  - II. Click **Employee Configuration** on the left menu panel
  - III. Click **Positions** in the submenu
  - IV. Click **+Add** button
  - V. Use the 'Position' to enter in the import excel sheet

Note: Please ensure that the **Position** should fall under the Job Titles entered in import excel

Note: You can only enter **Positions** into the excel sheet that are existing in the application

## k. Employment Status

Please refer Figure 11

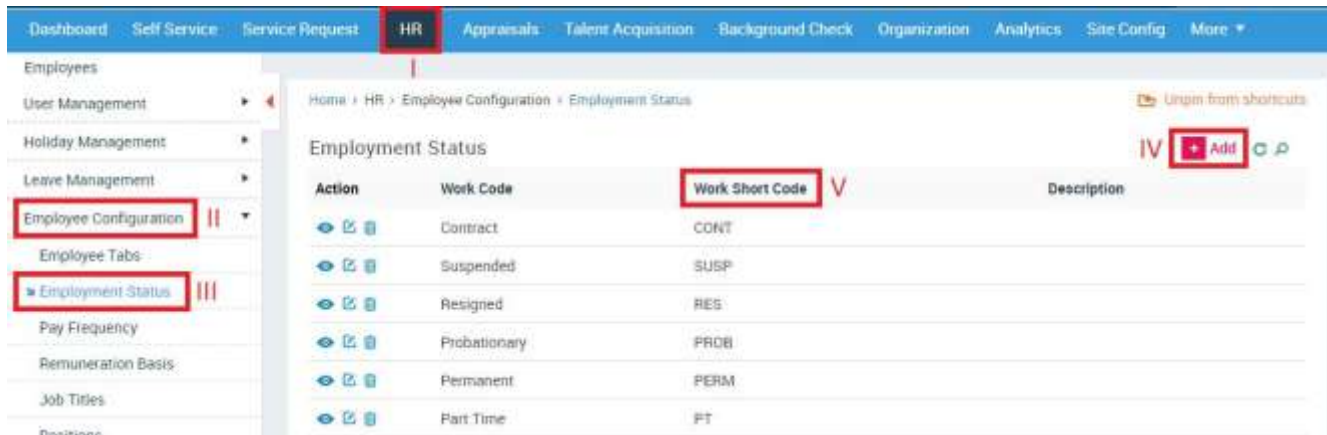


Figure 11

- Employment Status is a mandatory field.
  - I. Click **HR** in the top menu
  - II. Click **Employee Configuration** on the left menu panel III. Click **Employment Status** in the submenu
  - IV. Click **+Add** button
  - V. Use the 'Work Short Code' to enter in the import excel sheet

Note: You can only enter **Work Short Codes** that are existing in the application

### I. Date of Joining in “Day, month and four digit year with dashes” format

Please refer Figure 12

	M	N
nt Status	Date of joining	Date of leaving
	2011-06-01	
	2013-07-10	

Figure 12



- This is a mandatory

field **m. Date of Leaving**

*Please refer Figure 13*

1	N	O
joining	Date of leaving	Experience

Figure 13

- Date of Leaving column can be left empty unless the employee's Employment status is Left/Suspended/Resigned
- Date of Leaving must be greater than the Date of Joining
- This field is not

mandatory **n. Experience**

*Please refer Figure 14*

N	O	P
Date of leaving	Experience	Extension

Figure 14

- This field is not mandatory

**o. Enter the employee Extension**

*Please refer Figure 15*

	P	
erience	Extension	Work teleph

Figure 15

- This field is not mandatory

**p. Enter the employee Work Telephone Number**

*Please refer Figure 16*

P	Q	R
Extension	Work telephone number	Fax

Figure 16

- This field is not mandatory

**q. Enter the employee Fax**

*Please refer Figure 17*

	R	
number	Fax	Salary

Figure 17

- This field is not mandatory

## r. Salary Currency

Please refer Figure 18

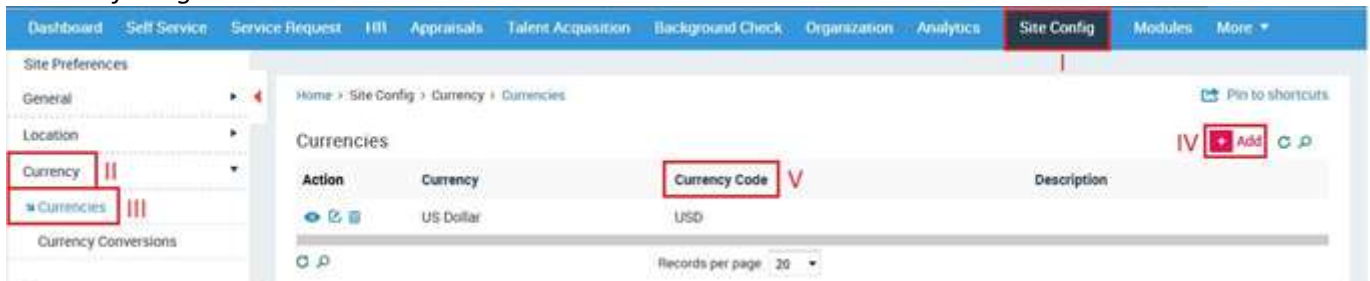


Figure 18

- This field is not mandatory
  - Click **Site Config** in the top menu
  - Click **Currency** on the left menu panel
  - Click **Currencies** in the submenu
  - Click **+Add** button
  - Use the 'Currency Code' to enter in the import excel sheet

Note: You can only enter **Currencies** that are existing in the application

## r. Pay Frequency

Please refer Figure 19

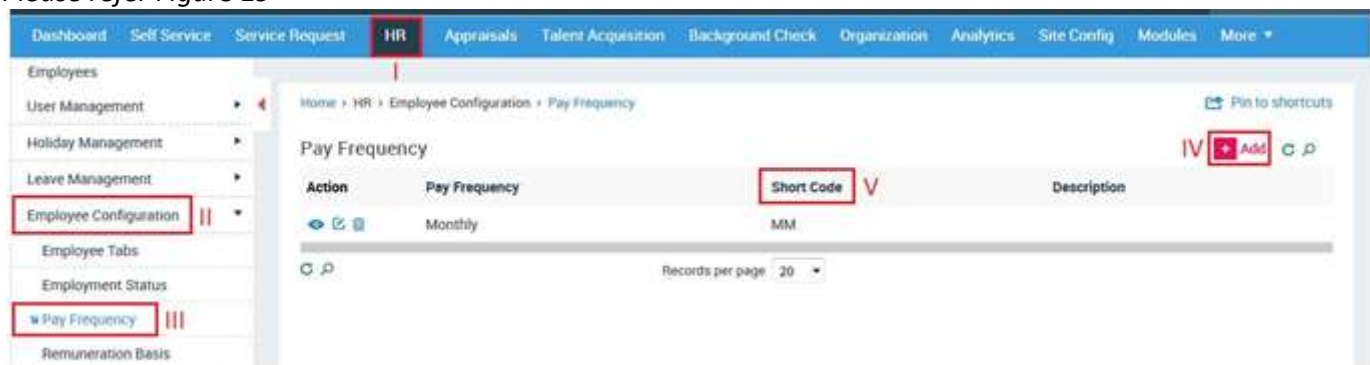


Figure 19

- This field is not mandatory
  - Click **HR** in the top menu
  - Click **Employee Configuration** on the left menu panel
  - Click **Pay Frequency** in the submenu

- IV. Click **+Add** button
- V. Use the 'Short Code' to enter in the import excel

Note: You can only enter **Pay Frequencies** that are existing in the application

**s. Enter the employee Salary**

*Please refer Figure 20*

T	U
Pay Frequency	Salary

Figure 20

- This field is not mandatory