Sentrifugo

Import Format Guide

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How to Download Import format

a. Click on Human Resources in the top menu
b. Click on Employees submenu on the left side panel
c. Click on Import Format link above the employee details grid on the right hand side
d. For further guidance, click on Help link

Refer to Figure 1

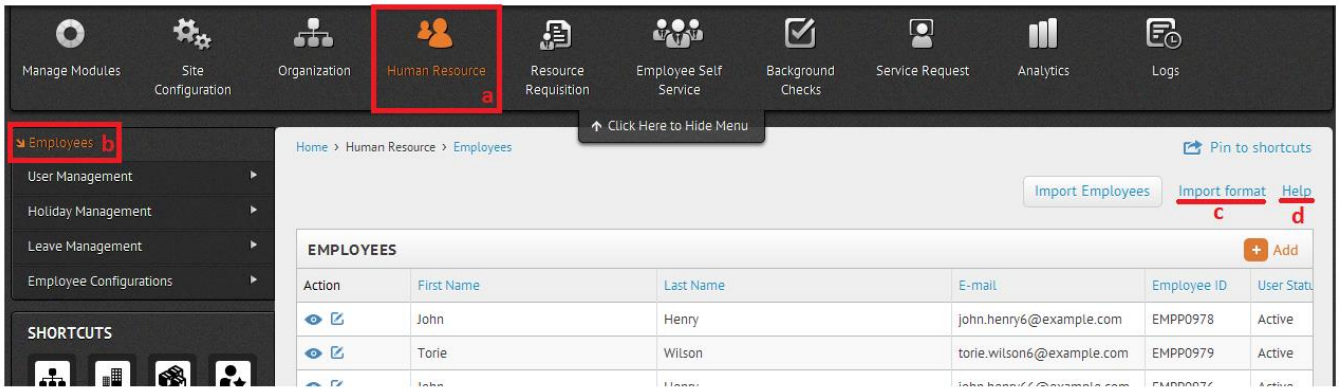

Figure 1

You should be able to download an excel sheet which defines the import format to add employees

Refer Figure 2 for the import format

Figure 2

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From where do I pick the Import format details

a. Prefix

I. Click on Site configurations in the top menu
II. Click on General submenu on the left side panel
III. Click on Prefixes link
IV. Add the required prefix by clicking on Add button
V. Use the Prefix to enter in the import excel

Refer Figure 3

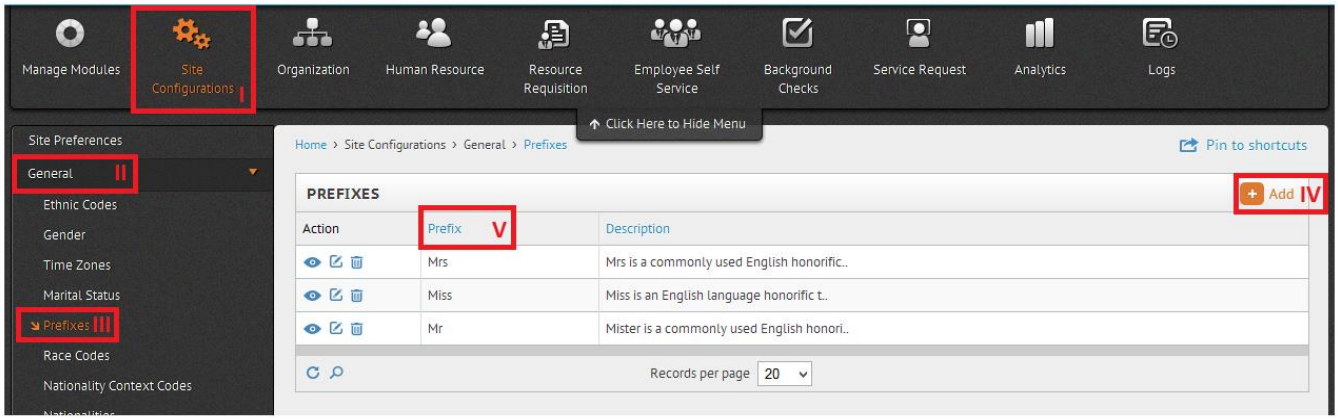

Figure 3

Note: You can only enter prefixes that are existing in the application.

b. Enter the First and Last Name of the employee

I. These fields are mandatory and accept only alphabetic characters

Refer Figure 4

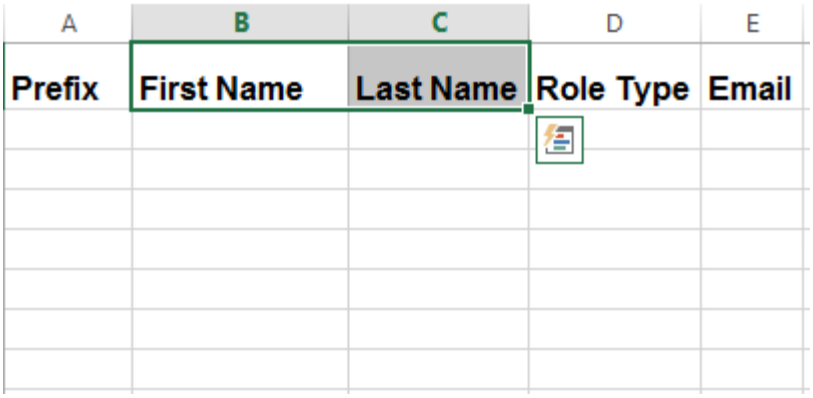

Figure 4

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c. Role Type

I. Click on Human Resource in the top menu
II. Click on User Management submenu on the left side panel
III. Click on Roles & Privileges link
IV. Add the required roles and provide privileges to the role by clicking Add button
V. Use the Role Type to enter in the import excel

Refer Figure 5

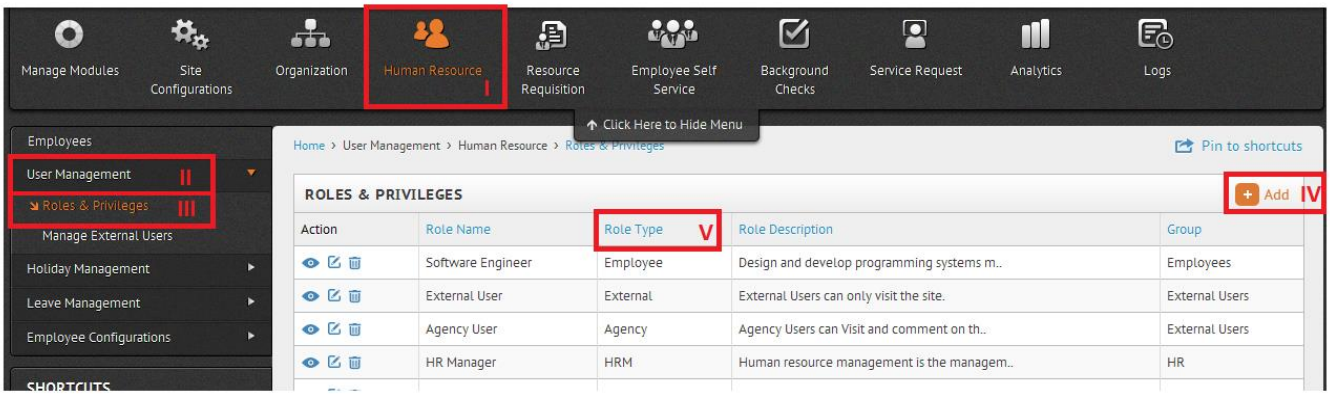

Figure 5

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

d. Enter the email of the employee

I. Email address should unique and of a valid format
II. Email field is mandatory

Refer figure 6

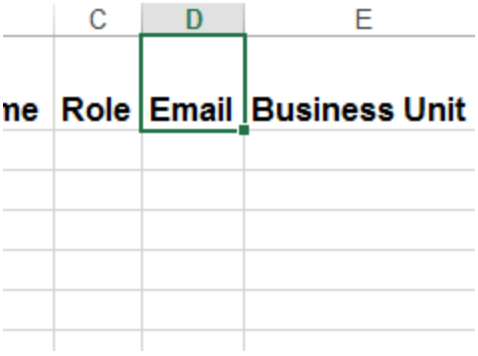

Figure 6

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e. Business Unit

I. Click on Organization in the top menu
II. Click on Business Units in the left side panel
III. Click on Add button to add the desired business unit
IV. Use the Code to enter in the import excel

Refer Figure 7

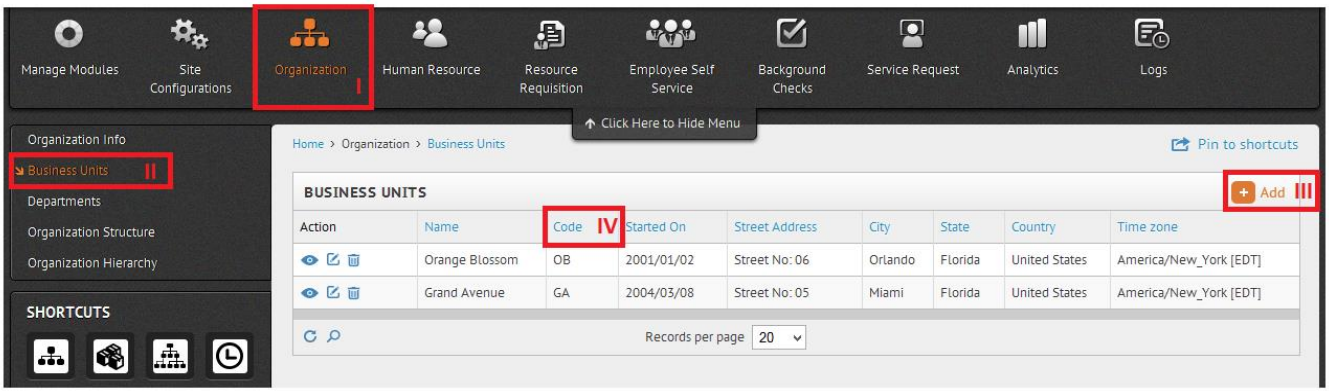

Figure 7

Note: You can only enter business units that are existing in the application

f. Departments

I. Click on Organization in the top menu
II. Click on Departments in the left side panel
III. Click on Add button to add the desired department
IV. Use the Code to enter in the import excel
V. Please make sure that Department should fall under the Business Unit entered in import excel

Refer Figure 8

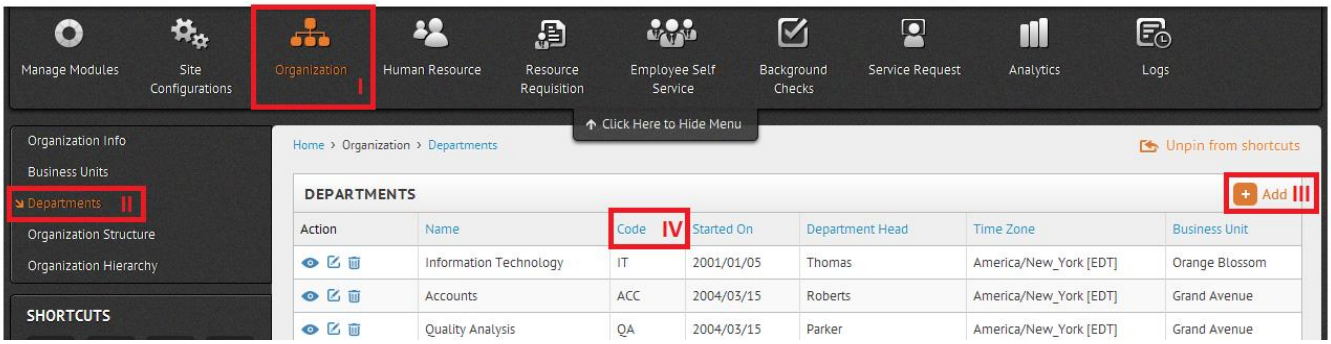

Figure 8

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

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g. Enter the Reporting Manager employee id

h. Job Title

I. Click on Human Resource in the top menu
II. Click on Employee Configurations in the left side panel
III. Click on Job Titles link
IV. Click on Add button to add the desired job title
V. Use the Job Title Code to enter in the import excel

Refer Figure 9

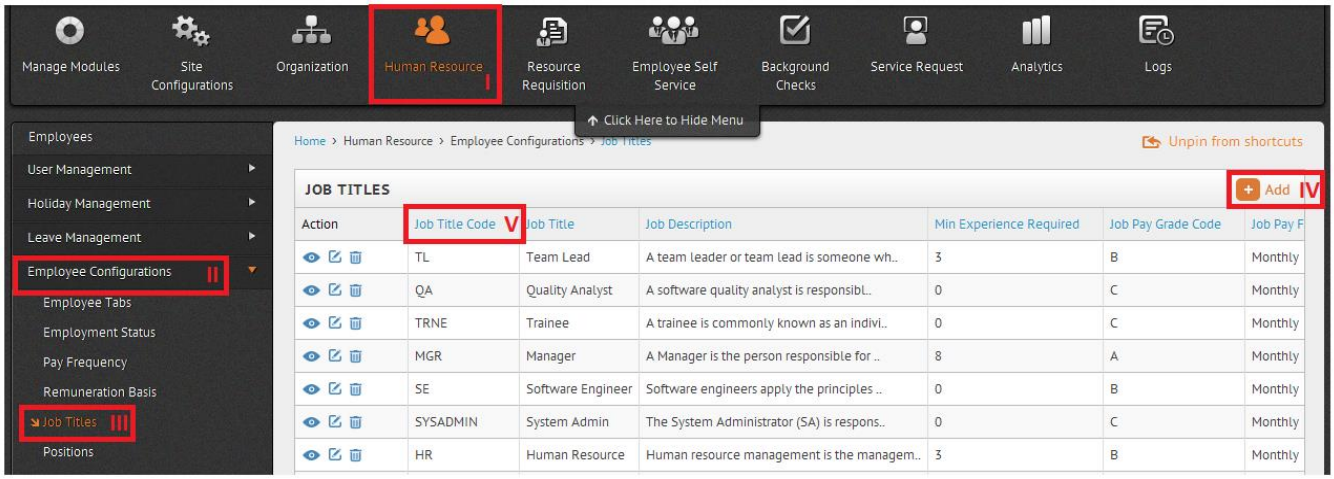

Figure 9

Note: You can only enter job titles that are existing in the application

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i. Position

I. Click on Human Resource in the top menu
II. Click on Employee Configurations in the left side panel
III. Click on Positions link
IV. Click on Add button to add the desired position
V. Use the Position to fill in the import excel
VI. Please make sure that Position should fall under the Job Titles entered in import excel

Refer Figure 10

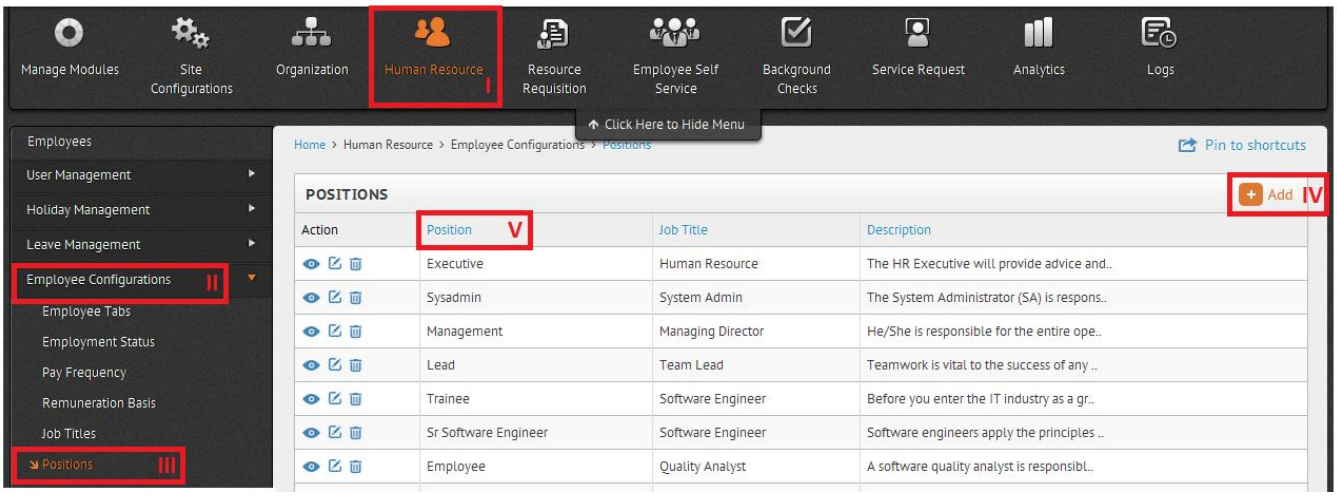

Figure 10

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

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j. Employment Status

I. Click on Human Resource in the top menu
II. Click on Employee Configurations in the left side panel
III. Click on Employment Status
IV. Click on Add button to add the desired status
V. Use the Work Short Code to enter in the import excel

Refer Figure 11

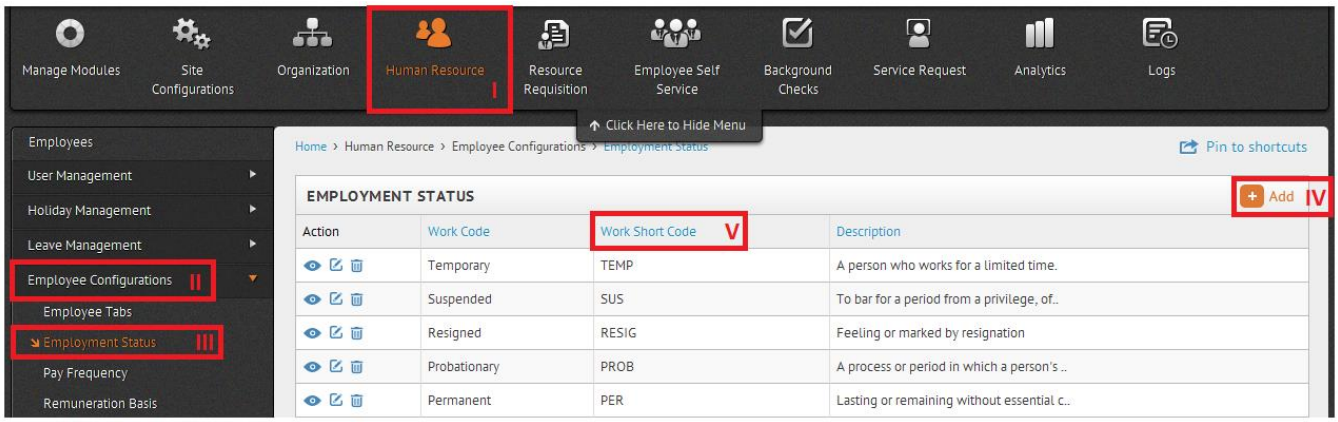

Figure 11

Note: You can only enter work short codes that are existing in the application

k. Enter the employee Date of Joining in "Day, month and four digit year with dashes" format

I. This is a mandatory field

Refer Figure 12 for guidance

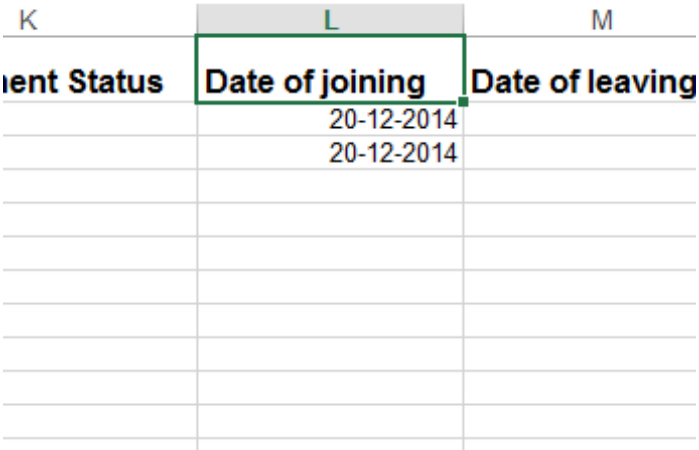

Figure 12

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l. Enter the employee Date of Leaving

I. Date of Leaving column can be left empty unless the employee Employment status is “Left”, “Suspended”, or “Resigned”

II. Date of Leaving must be greater than the Date of Joining

Refer Figure 13

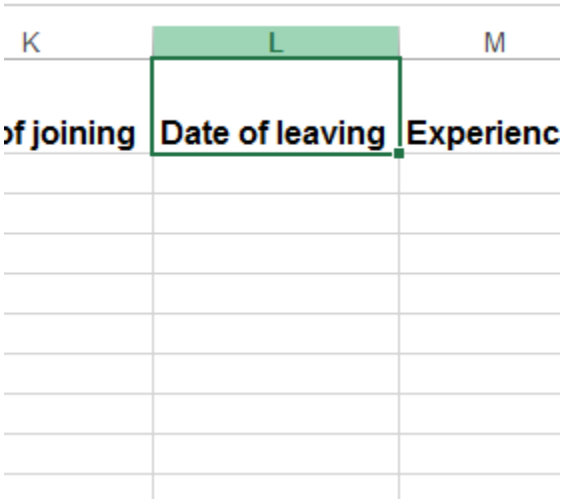

Figure 13

m. Enter the employee Experience

I. This field is not mandatory

Refer Figure 14

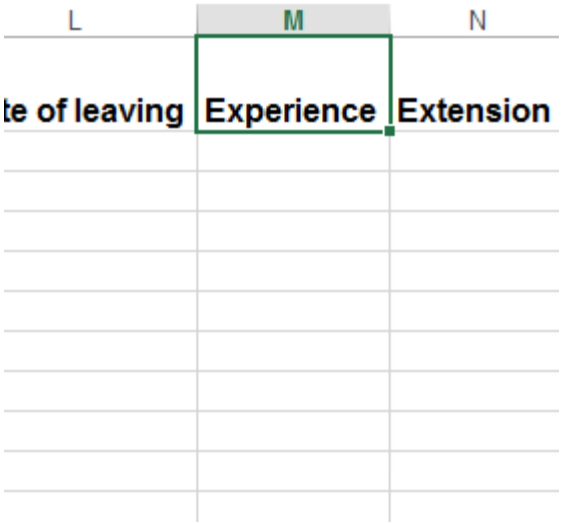

Figure 14

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n. **Enter the employee Extension**
   I. This field is not mandatory

Refer Figure 15

Figure 15

o. **Enter the employee Work Telephone Number**
   I. This field is not mandatory

Refer Figure 16

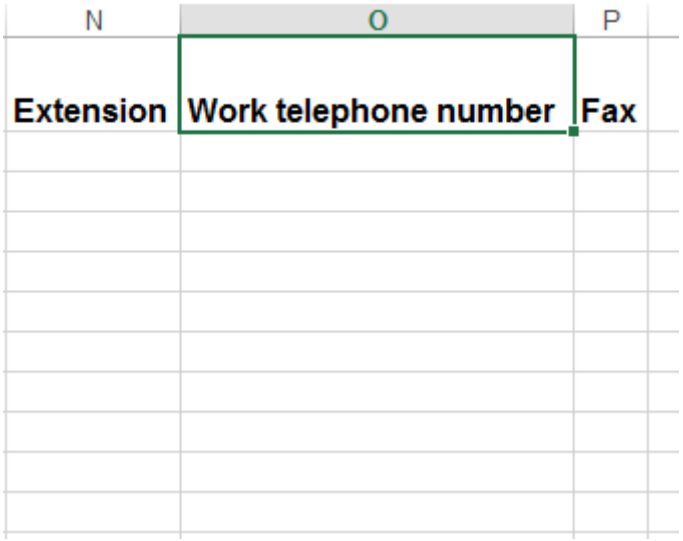

Figure 16

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p. Enter the employee Fax

I. This field is not mandatory

Refer Figure 17

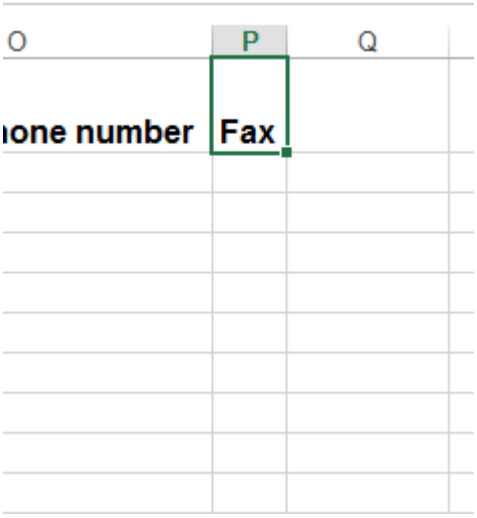

Figure 17

q. Salary Currency

I. Click on Site Configurations in the top menu
II. Click on Currency in the left side panel
III. Click on Currencies
IV. Click on Add button to add the desired status
V. Use the Currency Code to enter in the import excel

Refer Figure 18

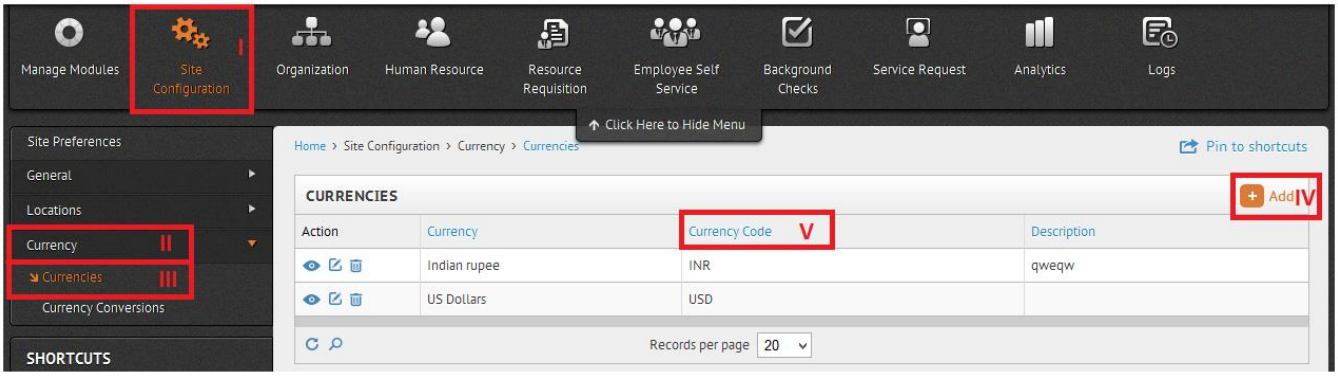

Figure 18

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

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r. Pay Frequency

I. Click on Human Resource in the top menu
II. Click on Employee Configurations in the left side panel
III. Click on Payment Frequency
IV. Click on Add button to add the desired status
V. Use the Short Code to enter in the import excel

Refer Figure 19

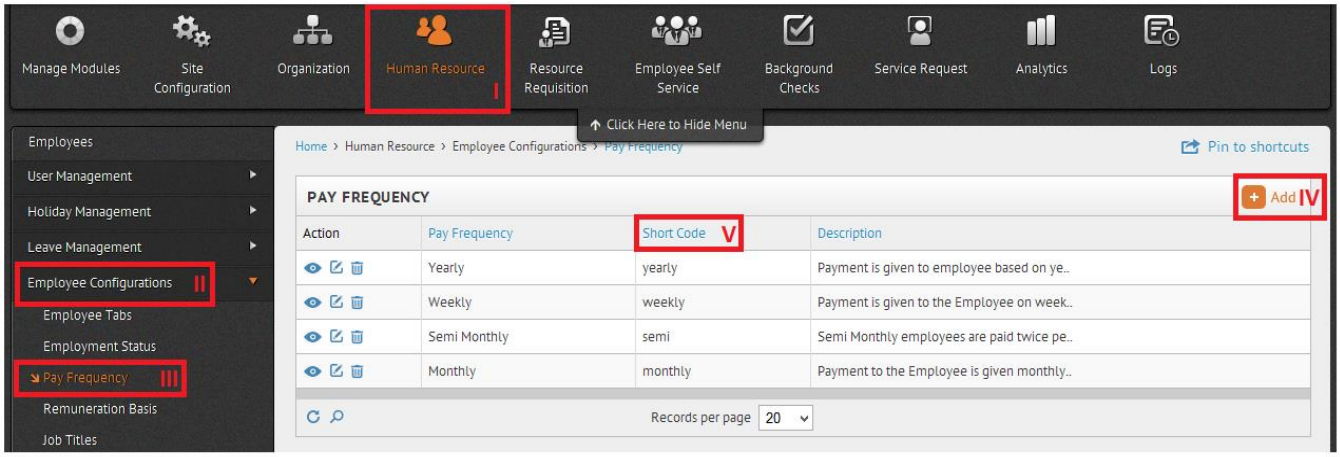

Figure 19

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

s. Enter the employee Salary

I. This field is not mandatory

Refer Figure 20

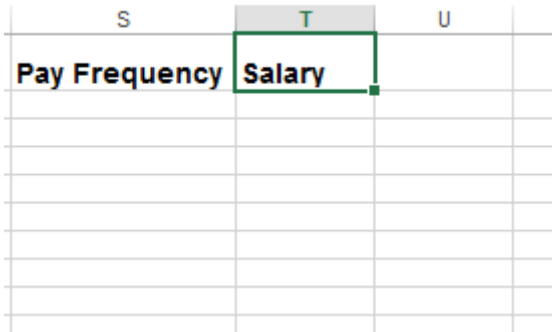

Figure 20

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