

# CSMS Bulk Employee Upload Guide

## For HRO (Human Resource Officers)

This guide explains how to add multiple employees to CSMS using an offline Excel/CSV file.

### Overview

Instead of manually entering each employee one-by-one through the web interface, you can:

1. Download an Excel/CSV template
2. Fill in employee details offline
3. Upload the completed file to CSMS
4. The system will process and validate all entries

### Step-by-Step Instructions

#### Step 1: Download the Template

##### Option A: Download from CSMS

- Login to CSMS at <https://csms.zanajira.go.tz>
- Go to Dashboard → Add Employee → Bulk Upload
- Click "Download Template" button

##### Option B: Direct Download

- Visit: [https://csms.zanajira.go.tz/templates/CSMS\\_Employee\\_Bulk\\_Upload\\_Template.csv](https://csms.zanajira.go.tz/templates/CSMS_Employee_Bulk_Upload_Template.csv)
- Save the file to your computer

#### Step 2: Fill in Employee Data

Open the template in Microsoft Excel, Google Sheets, or LibreOffice Calc.

##### Required Fields (Must be filled) - Marked with \*

Field Name	Format	Example	Notes
<b>Name*</b>	Text	John Doe	Full employee name
<b>Gender*</b>	Male/Female	Male	Only "Male" or "Female"
<b>ZanID*</b>	Numbers	19901234567	Must be unique
<b>Date of Birth*</b>	YYYY-MM-DD	1990-01-15	Format: Year-Month-Day
<b>ZSSF Number*</b>	Text/Numbers	ZSSF123456	Must be unique
<b>Payroll Number*</b>	Text/Numbers	PR001	Must be unique
<b>Cadre*</b>	Text	Nurse	Job title/position



Field Name	Format	Example	Notes
<b>Ministry*</b>	Text	Ministry of Health	Full ministry name
<b>Department*</b>	Text	Pediatrics	Department name
<b>Employment Date*</b>	YYYY-MM-DD	2018-01-10	Date employee started

## Optional Fields



Field Name	Format	Example	Notes
Place of Birth	Text	Zanzibar	City/town of birth
Region	Text	Unguja	Region name
Country of Birth	Text	Tanzania	Country name
Phone Number	10 digits (0XXXXXXXX)	0773101012	Must start with 0
Contact Address	Text	Vuga Road Zanzibar	Full address
Salary Scale	Text	PGSS 6	Pay scale
Appointment Type	Text	Permanent	Type of appointment
Contract Type	Text	Full-time	Contract details
Recent Title Date	YYYY-MM-DD	2020-01-01	Date of recent promotion
Current Reporting Office	Text	HR Department	Office location
Current Workplace	Text	Zanzibar Hospital	Workplace name
Confirmation Date	YYYY-MM-DD	2019-01-10	Date confirmed
Retirement Date	YYYY-MM-DD	2055-01-15	Expected retirement
Status	Text	On Probation	Options: "On Probation", "Confirmed", "Retired", "On Leave", "Suspended"

## Step 3: Important Validation Rules

### Date Format

- **MUST** use format: YYYY-MM-DD
-  Correct: 1990-01-15
-  Wrong: 15/01/1990, 01-15-1990, 15-Jan-1990

### Phone Number

- **MUST** be exactly 10 digits starting with 0
-  Correct: 0773101012
-  Wrong: +255773101012, 773101012, 0773-101-012

### Unique Fields (No Duplicates)

These fields must be unique across ALL employees:

- ZaniID
- ZSSF Number
- Payroll Number

If any duplicates are found, those rows will be rejected.

### Gender

- Only two values allowed: "Male" or "Female"
- Case-sensitive

### Status

- If left blank, defaults to "On Probation"
- Valid options: "On Probation", "Confirmed", "Retired", "On Leave", "Suspended"

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## Step 4: Sample Data

The template includes 2 sample rows to show correct formatting:



Row 1: John Doe - Male employee with all fields filled  
Row 2: Jane Smith - Female employee with all fields filled

**IMPORTANT:** Delete the sample rows before adding your real employee data!

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## Step 5: Upload to CSMS

1. Save your completed Excel/CSV file
2. Login to CSMS at <https://csms.zanajira.go.tz>
3. Go to Dashboard → Add Employee → Bulk Upload
4. Click "Choose File" and select your CSV file

5. Click "Upload and Validate"
  6. Review the validation results:
    -  Valid rows will be highlighted in green
    -  Invalid rows will be highlighted in red with error messages
  7. If all validations pass, click "Confirm and Submit"
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## Upload Process

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### What Happens During Upload?

#### 1. File Validation

- Check if file is CSV format
- Verify all required columns exist
- Check for empty required fields

#### 2. Data Validation (for each row)

- Required fields are filled
- Date formats are correct
- Phone numbers are valid format
- No duplicate ZanID, ZSSF, or Payroll numbers
- Gender values are valid
- Status values are valid

#### 3. Database Check

- Check if ZanID already exists in system
- Check if ZSSF Number already exists in system
- Check if Payroll Number already exists in system

#### 4. Bulk Insert

- All valid employees are created
  - Invalid rows are reported with specific error messages
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## Error Messages and Solutions

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### Common Errors

Error Message	Solution
"ZanID is required"	Fill in the ZanID column
"An employee with this ZanID already exists"	Use a different ZanID (this one is taken)
"Phone number must be 10 digits starting with 0"	Fix format: 0XXXXXXXXX
"Invalid date format"	Use YYYY-MM-DD format

Error Message	Solution
"Gender must be Male or Female"	Check spelling and capitalization
"Cadre is required"	Fill in the Cadre (job title)
"Employment Date is required"	Fill in the employment start date

## Tips for Success

### Before Upload

1.  Remove sample data rows
2.  Double-check all required fields have values
3.  Verify date formats (YYYY-MM-DD)
4.  Verify phone numbers start with 0
5.  Check for duplicate ZanIDs, ZSSF Numbers, Payroll Numbers
6.  Save file as CSV (Comma-separated values)

### During Data Entry

1. Copy-paste from existing databases when possible
2. Use Excel's data validation features to prevent errors
3. Sort by ZanID to easily spot duplicates
4. Keep a backup copy of your original data

### After Upload

1. Review the success/error report carefully
2. For failed rows, fix the errors and re-upload
3. Verify employees appear in the employee list
4. Check that employee profiles are correct

## File Format Requirements

### Supported Formats

- CSV (Comma-separated values) - **Recommended**
- Excel files (.xlsx, .xls) may need to be saved as CSV

### Encoding

- UTF-8 encoding (default for most modern applications)

## Size Limits

- Maximum 1000 employees per upload
- Maximum file size: 5MB

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## Security Notes

- Only HRO (Human Resource Officers) with manual entry permission can upload
- Your institution must have manual entry enabled
- Upload must be within the permitted time window
- All uploads are logged and audited
- Employees created via bulk upload will have dataSource: "MANUAL\_ENTRY"

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## Support

If you encounter issues:

1. Check this guide first
2. Verify your CSV file format
3. Contact your CSMS administrator
4. Email: support@csms.zanajira.go.tz

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## Version History

- **v1.0** (2026-01-30) - Initial bulk upload feature
- Template location: `/public/templates/CSMS_Employee_Bulk_upload_Template.csv`
- API endpoint: `/api/employees/bulk-upload`

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## Appendix: Excel Tips

### How to Save as CSV in Excel

1. File → Save As
2. Choose "CSV (Comma delimited) (\*.csv)"
3. Click Save
4. If prompted about features, click "Yes" to keep CSV format

### How to Check for Duplicates in Excel

1. Select the ZanID column
2. Home → Conditional Formatting → Highlight Cell Rules → Duplicate Values
3. Duplicates will be highlighted in red
4. Repeat for ZSSF Number and Payroll Number columns

# How to Format Dates in Excel

1. Select date columns
2. Right-click → Format Cells
3. Choose "Custom"
4. Enter format: yyyy-mm-dd
5. Click OK