



Data Load Instructions

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Author: Abbi Melville
E: Customerservices@peoplehr.com

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Please read these instructions before you begin your data load. We also advise referring to these instructions whilst you prepare your data.

As part of your implementation we offer a complimentary data load. We have a full range of data sheets to make sure we can migrate your information onto People. The data sheets can be found as .zip files on the People Help Site: <http://help.peoplehr.com/setup/setup/data-load-instructions>

The general rules for all data sheets are:

RED columns are mandatory and must contain the correct data in the cells below

BLUE columns are optional, and can be completed once the data is loaded, if you wish

The column headings are very important so please do not add any new headings or remove existing headings.

List of Standard Templates

- EmployeeData
- HolidayData
- SicknessData
- OtherEventData
- EmergencyContactData
- SalaryData

List of Additional Templates

- BackgroundChecksData
- BankDetailData
- JobRoleHistoryData
- MaternityPaternityData
- RighttoWorkData

EmployeeData

The '**EmployeeData**' sheet is the main sheet that we use to import employee records into your People HR site.

This data sheet allows us to import a mass of employee information. Every row creates a new employee record.

Field Name	Optional / Mandatory	Rules	Tips
Employee ID	Mandatory	Letters, numbers or both – Max 15 characters	This must match the ID on the EmployeeData sheet, if the employee has several records, please repeat their ID for each row
Title	Optional	Letters, numbers or both	Mr. Mrs. Dr. etc.
First name	Mandatory	Letters, numbers or both	Employees first name
Last name	Mandatory	Letters, numbers or both	Employees last name
Work Email	Mandatory	Letters, numbers or both	Employees email address – needs to be valid
Gender	Optional	Either Male or Female	Please enter correct spelling
Date of Birth	Optional	Date format must be DD/MM/YYYY	
Start Date	Mandatory	Date format must be DD/MM/YYYY	
Reports to	Optional	Managers email address – manager must be present on sheet	
Job Role	Mandatory	Letters, numbers or both	The current employees job role
Job Role Effective Date	Mandatory	Date format must be DD/MM/YYYY	Date the employee changed job role. If no change, enter their start date
Company	Optional	Letters, numbers or both	Company employee works for
Location	Mandatory	Letters, numbers or both	Head office, London, etc....
Department	Mandatory	Letters, numbers or both	Finance, Sales, etc....
National Insurance Number	Optional	Letters, numbers or both	Please double check this data is correct
Nationality	Optional	Letters, numbers or both	Employees nationality

Employment Type	Optional	Letters, numbers or both	Full time, part time, Contractor, etc....
Entitlement This Year	Optional	Numbers only	At present, please include any carryover, if employee started part way through the year please enter their pro rata balance
Entitlement Next Year	Optional	Numbers only	Employees full year entitlement for next year
Entitlement Type	Optional	Either Days or Hours	This determines how the employee's entitlement is measured in the system
Address Line 1	Optional	Letters, numbers or both	First line of employee home address
Address Line 2	Optional	Letters, numbers or both	Second line of employee home address
Address Line 3	Optional	Letters, numbers or both	Third line of employee home address
State	Optional	Letters, numbers or both	State of employee home address
Country	Optional	Letters, numbers or both	Country of employee home address
Post Code	Optional	Letters, numbers or both	Postcode of employee home address
Personal Phone Number	Optional	Please add the international dialing code, +44 (UK) <input type="text"/>	Enter the Personal Phone Number of the employee
Leaving Date	Optional	Date format must be DD/MM/YYYY	Employees with a leaving date in past will move into the Leavers section
Leave Reason	Optional	Letters, numbers or both	If leaving date is populated, you must enter a leaver reason
Other Names	Optional	Letters, numbers or both	Usually an employee's middle names
Known as	Optional	Letters, numbers or both	If employee is known by a different name
Probation End Date	Optional	Date format must be DD/MM/YYYY	
Notice Period	Optional	Letters, numbers or both	Enter the length of the time the employees notice must last for – 1 Month, 2 Month, etc....
Work Phone	Optional	Please add the international dialing code, eg +44 (UK)	Enter the employee work phone number

Personal Email	Optional	Must be valid email address	
Mobile	Optional	Please add the international dialing code, eg +44 for the UK.	Enter the employee mobile phone number
Continuous Service Date	Optional	Date format must be DD/MM/YYYY	Must be before or equal to Start Date.
Next Review Date	Optional	Date format must be DD/MM/YYYY	
Fixed Term End Date	Optional	Date format must be DD/MM/YYYY	If the employee is temporary/fixed term.
Method of Recruitment	Optional	Letters, numbers or both	How employee was recruited
Recruitment Cost	Optional	Numbers only	The cost of the employee's recruitment

Please note!

If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up.

The following columns will create a drop-down selection on the site with all of the unique values, so this is a good opportunity to cleanse all of your data:


- Title
- Job Role
- Company
- Location
- Department
- Nationality
- Employment Type
- Leave Reason
- Notice Period

LogbookData

You can upload logbook information to pre-loaded logbook screens or create your own custom logbook screen. On how to create your own custom logbook, please see:

<http://help.peoplehr.com/en/articles/3167606-customise-the-logbook>

Please note: If loading a data for a custom logbook, the screen will have to be created before loading any data. The following table will assist when inputting data per field type:

Logbooks	
Field type	Rules and tips
Text field	Text and numbers can be entered here. Note that this field is best used for no more than one line of text.
Date field	Enter the date in a format that is consistent with your system preferences ie. DD/MM/YY, MM/DD/YYYY etc.
Drop down	Type the option as shown in the logbook dropdown - case sensitive. If you enter an option that isn't currently there, it will create a new option in the logbook drop down.
Text box	Text and numbers can be entered here.
Check box	Enter 'Yes' to be shown as ticked in the logbook record, and 'No' to be left un-ticked.
Employee dropdown	Instead of typing the employee's name, please enter their email address (consistent with the one found in their Personal tab.)
Turn Off/On	Enter 'On' to be turned on, and 'Off' to be turned off.
Audio files/ Video files	This does not need to be included as a column in your logbook data sheet.
Signature fields	This does not need to be included as a column in your logbook data sheet.
Format Validator	Enter information in a format that is consistent with your regular expression rule. 
Section Heading	This does not need to be included as a column in your logbook data sheet.
Slider Control	Enter the number in which the slider should land on.
Progress bar	Enter the percentage that should be shown on the progress bar. Multiples of 5 (10, 15, 20, 25 etc.) Please do not include the % sign.

Please note!

If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up.

HolidayData

The 'HolidayData' sheet allows you to import your employee holiday records Every row creates a new holiday record.

Please make sure all records have a duration as records with '0' will not be imported. See below the fields and some help text to assist you in completing this sheet.

Field Name	Optional / Mandatory	Rules	Tips
Employee ID	Mandatory	Letters, numbers or both – Max 15 characters	This must match the ID on the EmployeeData sheet, if the employee has several records, please repeat their ID for each row
First name	Mandatory	Letters, numbers or both	Employees first name
Last name	Mandatory	Letters, numbers or both	Employees last name
Start Date	Mandatory	Date format must be DD/MM/YYYY	The first date of the holiday record
End Date	Mandatory	Date format must be DD/MM/YYYY	The last date of the holiday record
Duration	Mandatory	Numbers	<p>If holidays are measured in days, please enter durations such as 0.25, 0.5, 0.75, 1</p> <p>If holidays are measured in hours, please enter durations in decimals such as 0.25 = 15 mins 0.5 = 30 mins 0.75 = 45 mins 1 = 60 mins</p>
Days or Hours	Mandatory	Must be ' Days ' or ' Hours '	This must match the way the employee's entitlement is measured
Part of the day AM/PM	Optional	Must be ' AM ' or ' PM '	If the holiday is a full day, please leave blank
Comments	Optional	Letters, numbers or both	

Please note!

If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up.

SicknessData

The 'SicknessData' sheet allows you to import your employee Absence (Sick) records Every row creates a new sickness record.

The reason column will create a dropdown list of reasons to use in the future, so this is a good opportunity to cleanse your data.

Please see below the fields and some help text to assist you in completing this sheet -

Sickness			
Field Name	Optional / Mandatory	Rules	Tips
Employee ID	Mandatory	Letters, numbers or both – Max 15 characters	This must match the ID on the EmployeeData sheet, if the employee has several records, please repeat their ID for each row
First name	Mandatory	Letters, numbers or both	Employees first name
Last name	Mandatory	Letters, numbers or both	Employees last name
Start Date	Mandatory	Date format must be DD/MM/YYYY	The first date of the sickness record
End Date	Mandatory	Date format must be DD/MM/YYYY	The last date of the sickness record
Duration	Mandatory	Numbers	Sickness is only measured in days, please enter durations such as 0.25, 0.5, 0.75, 1
Reason	Mandatory	Letters, numbers or both	Please enter the employees' reason for sickness, e.g. Cold, flu, headache, etc...
Part of the day AM/PM	Optional	Must be ' AM ' or ' PM '	If the sickness is a full day, please leave blank
Comments	Optional	Letters, numbers or both	

Please note!

If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up.

OtherEventData

The '**OtherEventData**' sheet allows you to import your employee Other Event records.

Other events are for attendance that does not reduce an employee's balance or impact on sickness – generally this section is used to record Companionate Leave, Jury Duty, Dentist Appointments etc.

Every row creates a new record. The 'Reason' column will create a dropdown list of reasons to use in the future, so this may be a good opportunity to cleanse your data.

Other events			
Field Name	Optional / Mandatory	Rules	Tips
Employee ID	Mandatory	Letters, numbers or both – Max 15 characters	This must match the ID on the EmployeeData sheet, if the employee has several records, please repeat their ID for each row
First name	Mandatory	Letters, numbers or both	Employees first name
Last name	Mandatory	Letters, numbers or both	Employees last name
Start Date	Mandatory	Date format must be DD/MM/YYYY	The first date of the other event record
End Date	Mandatory	Date format must be DD/MM/YYYY	The last date of the other event record
Duration	Mandatory	Numbers only	If less than a day, the other event should be entered in hours. If hours, please enter durations in decimals such as 0.25 = 15 mins 0.5 = 30 mins 0.75 = 45 mins 1 = 60 mins
Reason	Mandatory	Letters, numbers or both	Please enter the reason for other event, e.g. Study Leave, Jury Duty, appointment, etc...
Days or Hours	Optional	Must be ' Days ' or ' Hours '	
Comments	Optional	Letters, numbers or both	

Please note!

If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up

EmergencyContactData

The 'EmergencyContactData' sheet is used to import employee emergency contacts. You can have multiple rows for each employee if they have several contacts.

Every row creates a new employee record.

Employees can also populate/update this info when they log into their record.

Please see below the fields and some help text to assist you in completing this sheet -

Emergency Contact			
Field Name	Optional / Mandatory	Rules	Tips
Employee ID	Mandatory	Letters, numbers or both – Max 15 characters	This must match the ID on the EmployeeData sheet, if the employee has several records, please repeat their ID for each row
Full name	Mandatory	Letters, numbers or both	Full name of emergency contact
Relationship	Optional	Letters, numbers or both	Full name of emergency contact
Address Line 1	Optional	Letters, numbers or both	First line of emergency contact address
Address Line 2	Optional	Letters, numbers or both	Second line of emergency contact address
Address Line 3	Optional	Letters, numbers or both	Third line of emergency contact address
State	Optional	Letters, numbers or both	State of employee home address
Country	Optional	Letters, numbers or both	Country of emergency contact address
Post Code	Optional	Letters, numbers or both	Postcode of emergency contact address
Telephone	Optional	Please add the international dialing code, eg +44 for the UK.	Enter landline phone number for other contact
Mobile	Optional	Please add the international dialing code, eg +44 for the UK.	Enter the mobile number of other contact
Comments	Optional	Letters, numbers or both	

Please note!

If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up.

SalaryData

The 'SalaryData' sheet is used to import employee salary history. You can insert history by creating several rows per employee.

The following columns will create a drop-down selection on the site with all of the unique values, so this is a good opportunity to cleanse all of your data -

- **Currency Code**
- **Reason**

Please see below the fields and some help text to assist you in completing this sheet -

Field Name	Optional / Mandatory	Rules	Tips
Employee ID	Mandatory	Letters, numbers or both – Max 15 characters	This must match the ID on the EmployeeData sheet, if the employee has several records, please repeat their ID for each row
First name	Mandatory	Letters, numbers or both	Employees first name
Last name	Mandatory	Letters, numbers or both	Employees last name
Effective From	Mandatory	Date format must be DD/MM/YYYY	The date that the salary started from
Salary Type	Mandatory	Must be ' Annual ' or ' Hourly '	Please state if the employee is paid on hourly rate or annually.
Salary Amount	Mandatory	Numbers only	Please enter the amount the employee gets paid
Currency Code	Optional	Max 3 characters	£, \$, €, etc.... can also use code GBP, USD, EUR if left blank the default will be '£'
Reason	Mandatory	Letters, numbers or both	E.g. Starting salary, promotion, performance etc....
Comments	Optional	Letters, numbers or both	
Payment Frequency	Mandatory	Must be one of the options stated in the next column	Choose from: Daily, Weekly, Two Weekly, Four Weekly or Monthly

Please note!

If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up.

BackgroundChecksData

The 'BackgroundChecksData' sheet is to import multiple Background Check records.

Every row creates a new record.

The 'Type of Check' column will populate a dropdown of options, to use in the future. Please see below the fields and some help text to assist you in completing this sheet -

Field Name	Optional / Mandatory	Rules	Tips
Employee ID	Mandatory	Letters, numbers or both – Max 15 characters	This must match the ID on the EmployeeData sheet, if the employee has several records, please repeat their ID for each row
First name	Mandatory	Letters, numbers or both	Employees first name
Last name	Mandatory	Letters, numbers or both	Employees last name
Type of check	Mandatory	Letters, numbers or both	DBC, reference, etc.
Date completed	Optional	Date format must be DD/MM/YYYY	Date the check was actioned
Expiry Date	Optional	Date format must be DD/MM/YYYY	Date the check document expires
Comments	Optional	Letters, numbers or both	

Please note!

If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up.

BankDetailData

The 'BankDetailData' sheet is to import employee bank details Only one record per employee is permitted.

The employee will be able to populate this information via their login, they can also update it moving forwards.

Please see below the fields and some help text to assist you in completing this sheet –

Field Name	Optional / Mandatory	Rules	Tips
Employee ID	Mandatory	Letters, numbers or both – Max 15 characters	This must match the ID on the EmployeeData sheet, if the employee has several records, please repeat their ID for each row
First name	Mandatory	Letters, numbers or both	Employees first name
Last name	Mandatory	Letters, numbers or both	Employees last name
Bank Name	Optional	Letters, numbers or both	Lloyds, Barclays, etc....
Bank Code	Optional	Letters, numbers or both	Please be careful of excel removing the leading '0', you may need to reformat the column as 'Text' and add 0 again manually
Account number	Optional	Letters, numbers or both	
Other account information	Optional	Letters, numbers or both	Roll number or other specific details
Account Name	Optional	Letters, numbers or both	Employees name as shown on bank card
Address	Optional	Complete address in one column	You may need to use concatenate formula in excel if your address details are in several cells

Please note!

If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up.

JobRoleHistoryData

The 'JobRoleHistoryData' sheet is to import just historical job records, their current role should be recorded on the EmployeeData sheet.

Every row creates a new historical record

Please see below the fields and some help text to assist you in completing this sheet –

Field Name	Optional / Mandatory	Rules	Tips
Employee ID	Mandatory	Letters, numbers or both – Max 15 characters	This must match the ID on the EmployeeData sheet, if the employee has several records, please repeat their ID for each row
First name	Mandatory	Letters, numbers or both	Employees first name
Last name	Mandatory	Letters, numbers or both	Employees last name
Effective From	Mandatory	Date format must be DD/MM/YYYY	Date job role changed (if employee has not changed job role this would be their start date)
Job Role	Mandatory	Letters, numbers or both	Employees job role
Reason	Mandatory	Letters, numbers or both	E.g. Promotion, Starting Position, etc....

Please note!

If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up.

The 'Job role' column will create a drop-down box with all unique values, so this may be a good opportunity to cleanse your data.

MaternityPaternityData

The 'MaternityPaternityData' sheet allows you to import your employees Maternity/Paternity records

This sheet should not be used to record KIT days or pregnancy related absence, please use the Other Event/Sickness sheet for this.

Every row creates a new record.

Please see below the fields and some help text to assist you in completing this sheet -

Field Name	Optional / Mandatory	Rules	Tips
Employee ID	Mandatory	Letters, numbers or both – Max 15 characters	This must match the ID on the EmployeeData sheet, if the employee has several records, please repeat their ID for each row
First name	Mandatory	Letters, numbers or both	Employees first name
Last name	Mandatory	Letters, numbers or both	Employees last name
Start Date	Mandatory	Date format must be DD/MM/YYYY	Start date of Maternity Leave
End Date	Mandatory	Date format must be DD/MM/YYYY	End date of Maternity Leave
Comments	Optional	Letters, numbers or both	

Please note!

If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up.

RightToWorkData

The 'RightToWorkData' sheet is to import multiple Right to work records.

Every row creates a new record.

Please see below the fields and some help text to assist you in completing this sheet –

Field Name	Optional / Mandatory	Rules	Tips
Employee ID	Mandatory	Letters, numbers or both – Max 15 characters	This must match the ID on the EmployeeData sheet, if the employee has several records, please repeat their ID for each row
First name	Mandatory	Letters, numbers or both	Employees first name
Last name	Mandatory	Letters, numbers or both	Employees last name
Type of document	Mandatory	Letters, numbers or both	E.g. Passport, Visa, work permit, etc....
Document ID	Optional	Letters, numbers or both	Reference Number
Valid From	Optional	Date format must be DD/MM/YYYY	
Valid To	Optional	Date format must be DD/MM/YYYY	
Duration	Optional	Letters, numbers or both	Duration in days
Comments	Optional	Letters, numbers or both	

Please note!

If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up.

The Type of document column will populate a dropdown of options to use in the future.