



Bulk Actions Data Loaders

In the Bulk Actions tab you have a 'Data Load' drop down. This contains a number of data loader tools you can utilise to add data into employee's records in bulk.

To locate this area:

1. Click the 'Bulk Actions' tab
2. Select 'Data Loaders'

From here you will be presented with a list of each data load you can use. Please select the data loading tool you wish to use.

The screenshot shows the 'Bulk Actions' interface. On the left is a dark sidebar with navigation icons and labels: Cases, Authorisations (6), Expenses, Reports, Queries, Notifications (1), Training, ATS, Performance, Benefits, Org Chart, Bulk Actions (highlighted with a red box), Plugins, and Settings. The main content area has a header 'Bulk Actions' with a sub-header 'Select the type of action you wish to perform, then follow the steps to update multiple employee records at once.' Below this is a section titled 'Data Loaders' with the sub-header 'Manage Company's Bulk Uploads'. It contains a table with two columns: 'Action' and 'Description'. The table lists 12 different data upload actions, each with a description stating it uploads data from an Excel spreadsheet. Below the table are two expandable sections: 'Employee Settings' (Manage Employee Settings) and 'Salary' (Manage Salary details of Employees).

Action	Description
Bulk Employee Data Upload	Upload employee records from an Excel spreadsheet
LogBook Data Upload	Upload logbook data from an excel spreadsheet
Holiday Data Upload	Upload Holiday data records from an excel spreadsheet
Other Event Data Upload	Upload Other Event data records from an excel spreadsheet
Sickness Data Upload	Upload Sickness data records from an excel spreadsheet
Emergency Contact Data Upload	Upload Emergency Contact data records from an excel spreadsheet
Bank Detail Data Upload	Upload Bank Detail data records from an excel spreadsheet
Salary Data Upload	Upload Salary data records from an excel spreadsheet
Job Role History Data Upload	Upload Job Role History data records from an excel spreadsheet
Background Checks Data Upload	Upload Background Checks data records from an excel spreadsheet
Right To Work Data Upload	Upload Right To Work data records from an excel spreadsheet
Maternity/Paternity Data Upload	Upload Maternity/Paternity data records from an excel spreadsheet

Once you have selected the uploader too, use Table of Contents (next page) to click on the relative option for specific instructions on that tool.

In each area there are many pointers that are helpful to keep in mind when completing the data and so we do advise reading the full instructions for that specific loader before going forward.

We also advise testing with one employee before following through with the whole data load. This is to ensure you are comfortable and confident with how this works.

Please note: Once data has been uploaded, we will be unable to override this information in bulk, and therefore will be unable to rectify any errors. Please double check and ensure all information has been added correctly within the data sheet before uploading.

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Bulk Employee Data Upload

This tool is designed to **upload new employees** to the system in bulk directly from an excel spreadsheet. If you wish to update an existing employee's information in bulk, please see the below article on the People® Employee Data Updater Tool:

<http://help.peoplehr.com/integrations/people-employee-data-updater-tool>

Once you have clicked into the Bulk Employee Data Upload option, you will be presented with the below screen:

Employee Id	Title	First Name	Last Name	
14	Ms	Minesh	Linehan	
61	Ms	Poppy	Chan	
8	Mrs	Ashley	Smith	
24	Mr	Samuel	Houghton	
12	Mrs	Leah	Hunt	
11	Mrs	Lara	Pritchard	
18	Mr	Anna	Whitehouse	
21	Mr	Harley	Godfrey	
22	Mr	Andrew	Gallagher	
3	Mrs	Abigail	Singh	
17	Mr	Jaqueline	Iqbal	
9	Mrs	John	Ward	
PW15		John	Smithson	
PW14		Bertrum	Tally	
PW14		Bertrum	Tally	
PW13		Edward	Bailey	
23	Mr	Ash	Patel	
1	Miss	Tina	Book	tinabooktes
PW8		Timothy	Fields	

1. Download the data sheet template by clicking the blue linked text "Download "Bulk Employee Upload" Template":

Title	First Name	Last Name	
	Minesh	Linehan	
	Poppy	Chan	
	Ashley	Smith	

2. Fill in the information you wish to upload. When doing so, please note the following:

- First test with 1 test employee to ensure you're confident with this feature
- Each row creates a new employee record
- If uploading an employee with the same Employee ID as an existing employee, this **will override** the existing employee record (leavers included).
- This should to be saved as an **.xls** file
- Dates should be added in the DD/MM/YYYY format
- Please do not add, edit or remove columns from the templates.
- If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up.

Please Note! You can upload 200 employees per data load. If you are loading more than 200 records, you'll need to upload manager records first. This way, you can specify reporting lines for each employee record within the data load.

Employee Data			
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

Job Role Reason	Optional		
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 ensure the international dialing code is added. Eg. +44 (UK)	Dataload will fail if number does not begin with + and dialing code
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 leave reason

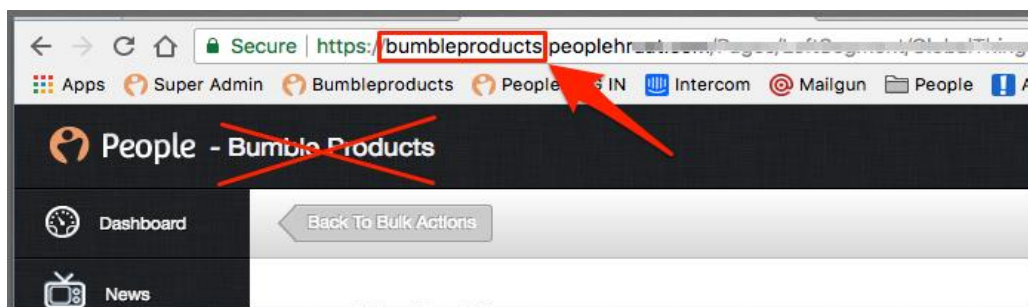
Other Names	Optional	Letters, numbers or both	Usually an employee's middle names
Known as	Optional	Letters, numbers or both	If employee is known by a different name
Probation End Date	Optional	Date format must be DD/MM/YYYY	
Notice Period	Optional	Letters, numbers or both	Enter the length of the time the employees notice must last for – 1 Month, 2 Month, etc....
Work Phone	Optional	Please ensure the international dialing code is added. Eg. +44 (UK)	Dataload will fail if number does not beginning with + and dialing code
Personal Email	Optional	Must be valid email address	
Mobile	Optional	Please ensure the international dialing code is added. Eg. +44 (UK)	Dataload will fail if number does not beginning with + and dialing code
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 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

3. Once the data sheet has been completed and you are ready to save, a small change needs to be made to the file name. It will download to your computer as:

SubDomain_EmployeeData.xls

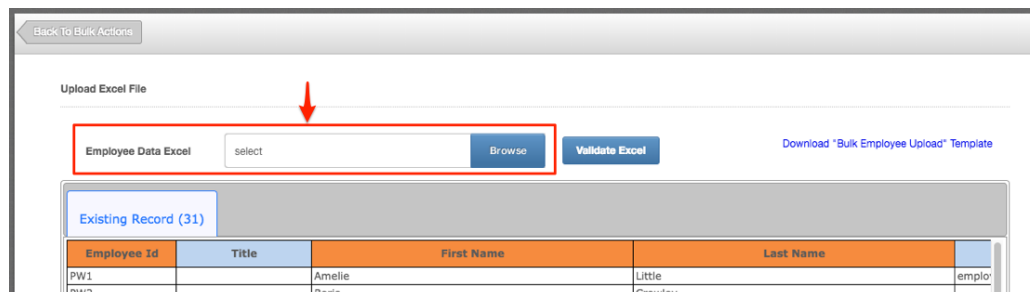
Please change the '**SubDomain**' text to your URL sub domain.

For example, if your URL is **bumbleproducts.peoplehr.net** your file should be saved as: **bumbleproducts_EmployeeData.xls**



Please note: The .xls at the end is the file type, you won't need to type this in the document name.

4. To upload your file, go back into the Bulk Actions area and select 'Browse':



Back To Bulk Actions

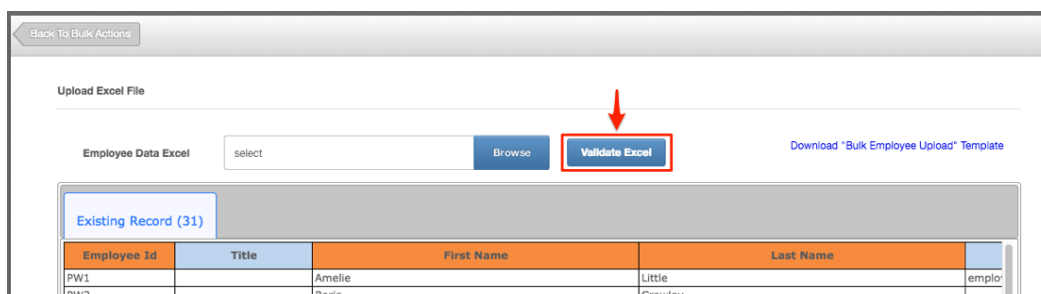
Upload Excel File

Employee Data Excel select Browse Validate Excel Download "Bulk Employee Upload" Template

Existing Record (31)

Employee Id	Title	First Name	Last Name	
PW1		Amelie	Little	emplo
PW2		Boris	Crowley	

5. Once uploaded, click 'Validate Excel':



Back To Bulk Actions

Upload Excel File

Employee Data Excel select Browse Validate Excel Download "Bulk Employee Upload" Template

Existing Record (31)

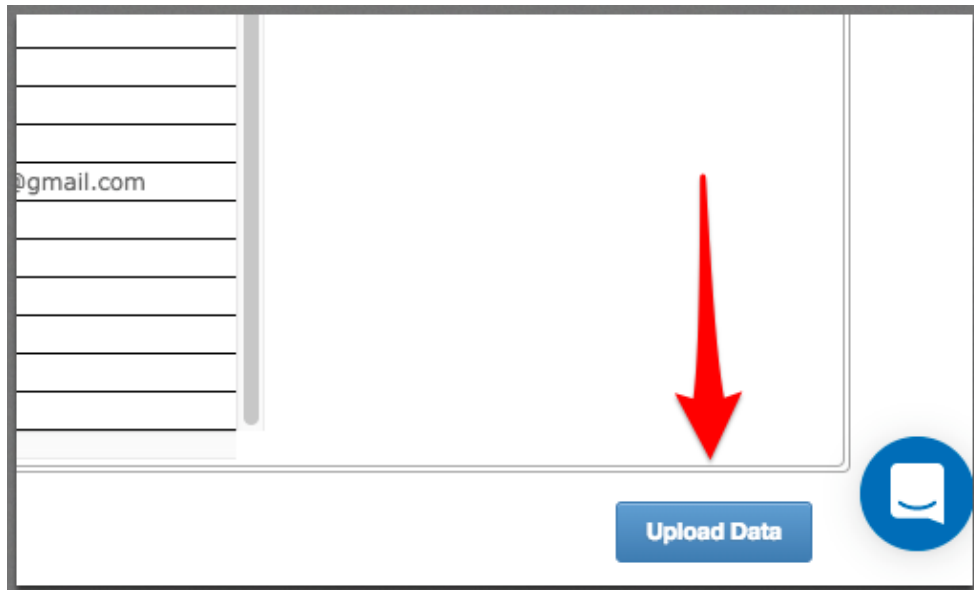
Employee Id	Title	First Name	Last Name	
PW1		Amelie	Little	emplo
PW2		Boris	Crowley	

This will review your file and provide you with any validation messages, errors etc.

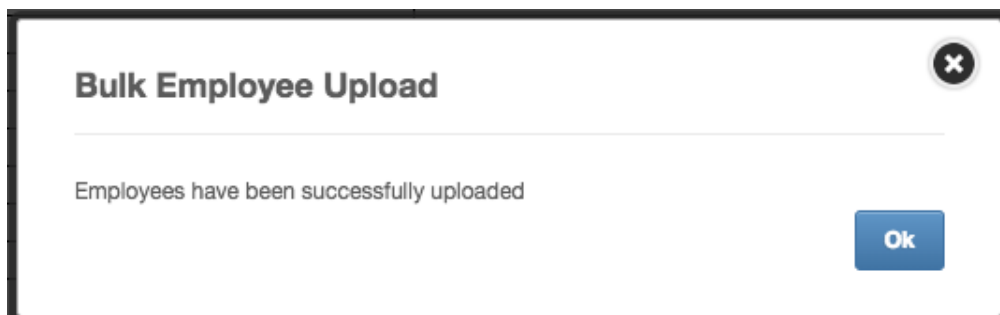
For a breakdown of what each validation/error message means, please see:
<https://www.peoplehr.com/includes/educate/Bulk Actions data loader errors.pdf>

6. If changes need to be made, you can simply edit the file saved to your computer, re-upload and select 'Validate' again.

7. Once you have reviewed the validation messages and made changes if necessary, select 'Upload Data' in the bottom right hand corner:



8. You will be shown a confirmation message:



Logbook Data Upload

This tool is designed to upload data to a specific logbook screen in bulk - this can be a logbook record to a number of employees and/or a number of logbook records to one employee. This tool will not override existing logbook data.

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.

1. Linked below is a zip file containing all data templates for pre-loaded logbooks as well as a template for your custom logbook.

Download this file to retrieve the template you require for your logbook data load:


https://www.peoplehr.com/includes/educate/data_sheets/Logbook_Data_sheet.zip

2. Fill in the information you wish to upload. When doing so, please note the following:

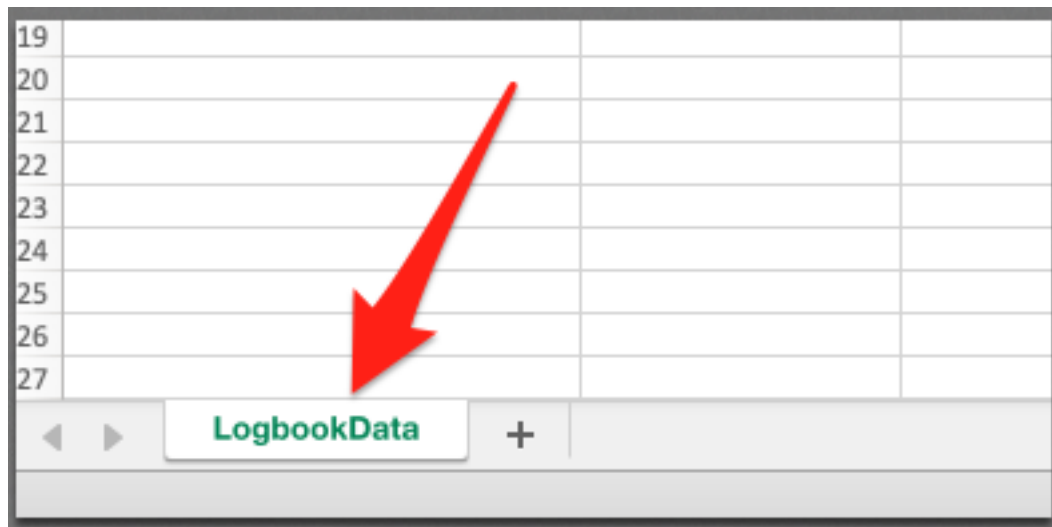
- Test with 1 test employee to ensure you're confident with this feature
- Each row creates a new logbook record
- Dates should be added in the DD/MM/YYYY format
- If using the Custom Field Template, remove the columns that you don't need
- Ensure that Employee ID and Name match
- This should to be saved as an **.xls** file
- Remove any examples from the template
- Each row creates a new logbook record for that screen - **data loads will not replace what is already in an employee record**

- If you wish to add additional fields to pre-loaded screens, please add this before the data load.
- Please ensure all columns on data sheets match those shown
- If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up.

The following table will assist when inputting data per field type:

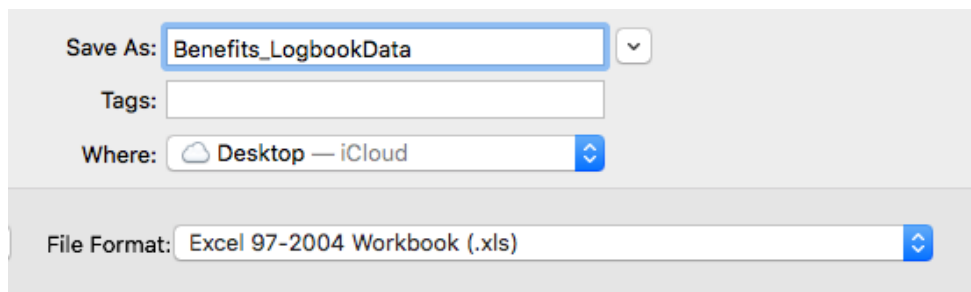
Logbooks	
Field type	Rules and tips
Text field	Text and numbers can be entered here. Note that this field is best used for no more than one line of text.
Date field	Enter the date in a format that is consistent with your system preferences ie. DD/MM/YY, MM/DD/YYYY etc.
Drop down	Type the option as shown 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.

3. Once the data sheet has been completed, ensure the Sheet name is named LogbookData (No Spaces/Case Sensitive):



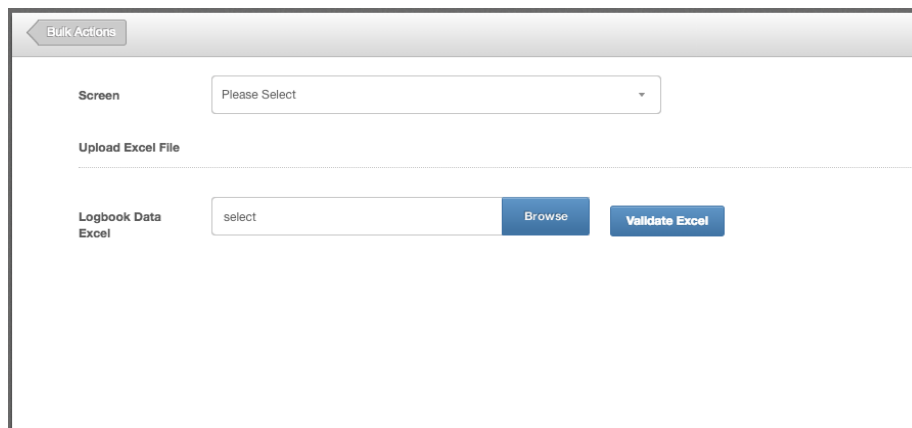
4. You can then save this file - please ensure that this is an .xls file, and is named as Logbookname_LogbookData - (Remove All Spaces / Case Sensitive):

Example: Benefits_LogbookData



5. Go back to PeopleHR Bulk Actions and click on the Logbook Data Upload option.

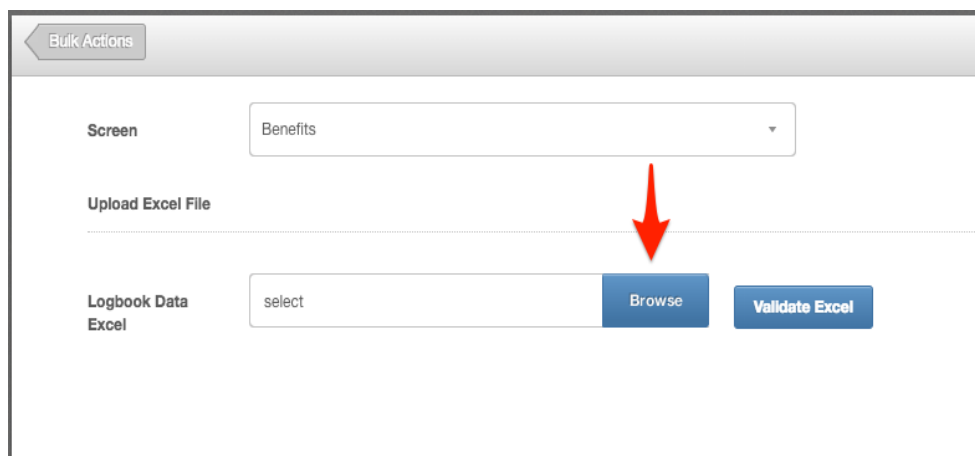
6. From here, you will be presented with the below screen:



The screenshot shows a web interface titled "Bulk Actions". It contains a "Screen" dropdown menu with "Please Select" as the current selection. Below this is a section labeled "Upload Excel File". Underneath, there is a "Logbook Data Excel" label, a text input field containing the word "select", and two blue buttons: "Browse" and "Validate Excel".

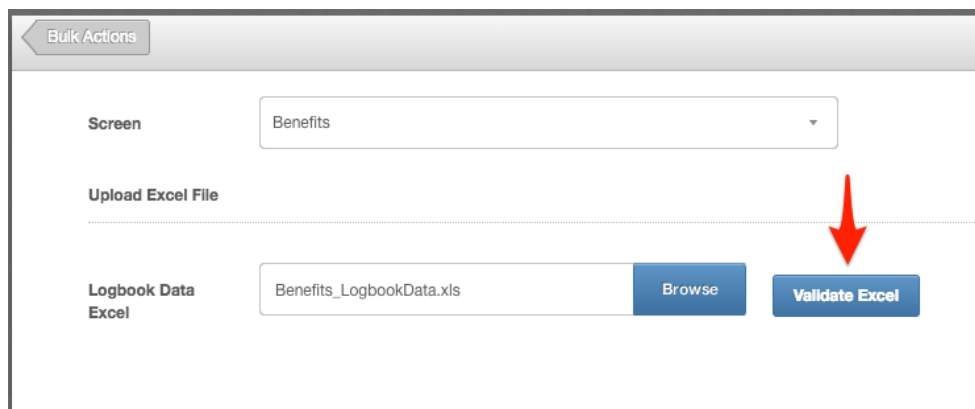
7. Use the drop-down box to select which logbook you will be loading data to.

8. To upload your file, select 'Browse':



This screenshot shows the same "Bulk Actions" interface. The "Screen" dropdown menu now displays "Benefits". A red arrow points down to the "Browse" button. The "Logbook Data Excel" input field still contains the word "select".

9. Once uploaded, click 'Validate Excel':



This screenshot shows the "Bulk Actions" interface after a file has been uploaded. The "Screen" dropdown menu remains set to "Benefits". The "Logbook Data Excel" input field now contains the filename "Benefits_LogbookData.xls". A red arrow points down to the "Validate Excel" button.

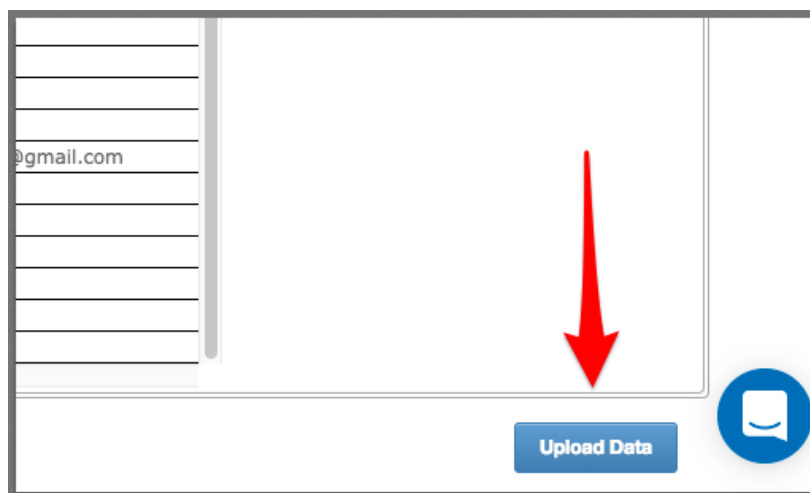
This will review your file and provide you with any validation messages, errors etc.

For a breakdown of what each validation/error message means, please see:

[https://www.peoplehr.com/includes/educate/Bulk Actions data loader errors.pdf](https://www.peoplehr.com/includes/educate/Bulk%20Actions%20data%20loader%20errors.pdf)

10. If changes need to be made, you can simply edit the file saved to your computer, re-upload and select 'Validate' again.

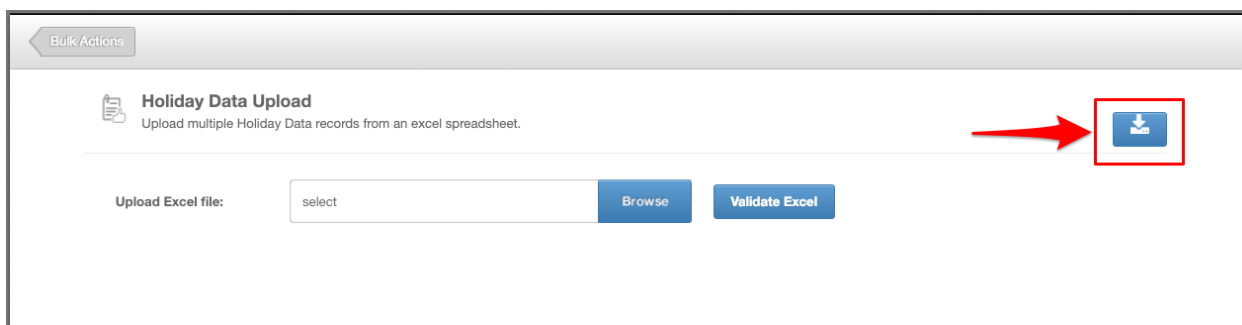
11. Once you have reviewed the validation messages and made changes if necessary, select 'Upload Data' in the bottom right hand corner:



Holiday Data Upload

This tool allows you to import your employee holiday records. Every row creates a new holiday record.

1. Once you have selected this option within the Bulk Action data load, select the icon as shown below to download the spreadsheet template:



The screenshot shows a web interface with a 'Bulk Actions' tab. Under this tab, there is a section titled 'Holiday Data Upload' with the subtitle 'Upload multiple Holiday Data records from an excel spreadsheet.' To the right of this section, there is a blue square button with a white download icon. A red arrow points to this button. Below the title, there is a form with the label 'Upload Excel file:' followed by a dropdown menu showing 'select', a 'Browse' button, and a 'Validate Excel' button.

2. Fill in the information you wish to upload. When doing so, please note the following:
 - First test with 1 test employee to ensure you're confident with this feature
 - Each row creates a new holiday record
 - Ensure all records have a duration - records with '0' will not be imported.
 - Please do not add, edit or remove columns from the templates.
 - If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up.

Holidays			
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

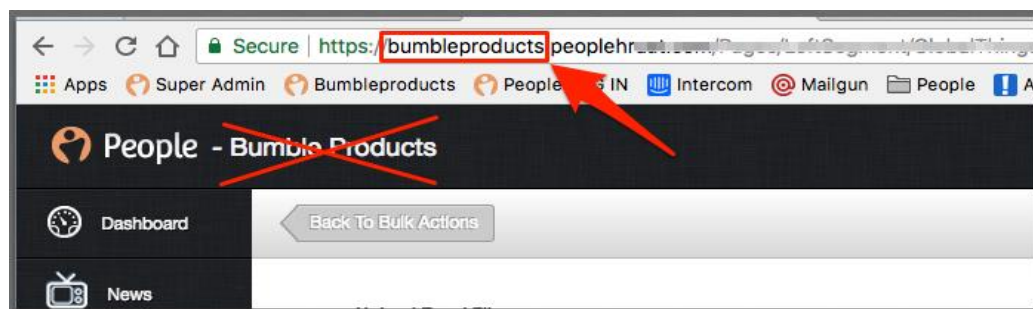
Duration	Mandatory	Numbers	<p>If holidays are measured in days, please enter durations such as 0.25, 0.5, 0.75, 1</p> <p>If holidays are measured in hours, please enter durations in decimals such as 0.25 = 15 mins 0.5 = 30 mins 0.75 = 45 mins 1 = 60 mins</p>
Days or Hours	Mandatory	Must be ' Days ' or ' 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	

- Once the data sheet has been completed and you are ready to save, a small change needs to be made to the file name. It will download to your computer as:

SubDomain_HolidayData.xls

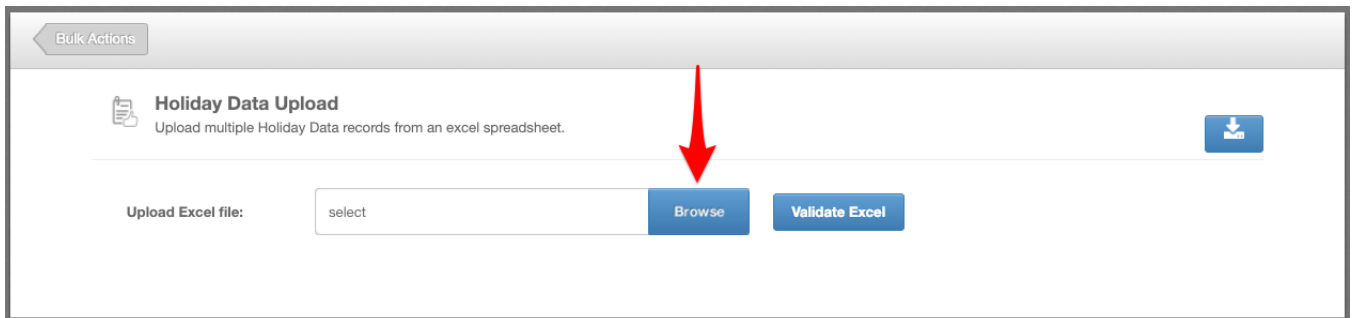
Please change the 'SubDomain' text to your PeopleHR URL sub domain.

For example, if your URL is **bumbleproducts.peoplehr.net** your file should be saved as: **bumbleproducts_HolidayData.xls**



Please note: The .xls at the end is the file type, you won't need to type this in the document name.

4. To upload your file, go back into the Bulk Actions and select 'Browse':



The screenshot shows a web interface with a 'Bulk Actions' header. Below it is a section titled 'Holiday Data Upload' with the instruction 'Upload multiple Holiday Data records from an excel spreadsheet.' and a download icon. Underneath, there is a label 'Upload Excel file:' followed by a text input field containing the word 'select'. To the right of the input field are two buttons: 'Browse' and 'Validate Excel'. A red arrow points directly to the 'Browse' button.

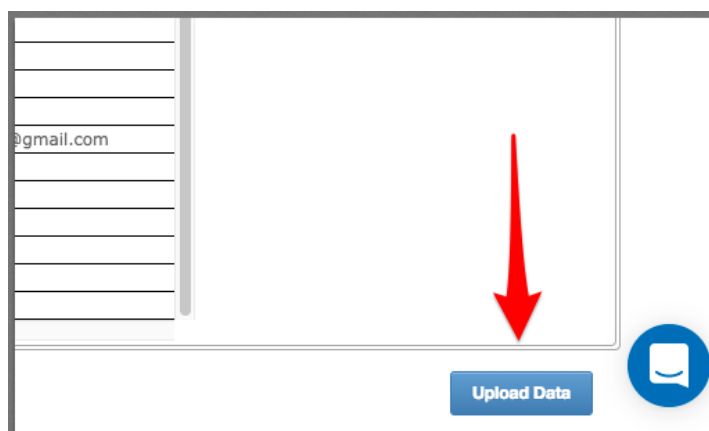
5. Once uploaded, click 'Validate Excel'.

This will review your file and provide you with any validation messages, errors etc.

For a breakdown of what each validation/error message means, please see:

[https://www.peoplehr.com/includes/educate/Bulk Actions data loader errors.pdf](https://www.peoplehr.com/includes/educate/Bulk%20Actions%20data%20loader%20errors.pdf)

6. If changes need to be made, you can simply edit the file saved to your computer, re-upload and select 'Validate' again.
7. Once you have reviewed the validation messages and made changes if necessary, select 'Upload Data' in the bottom right hand corner:



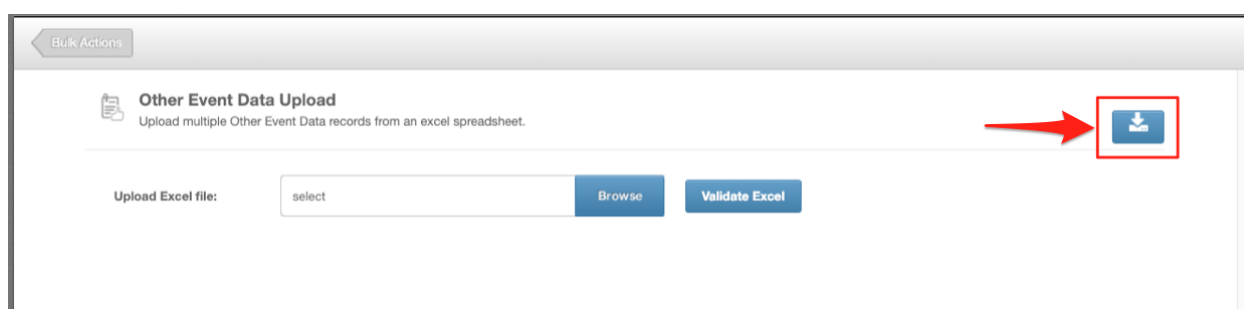
The screenshot shows the bottom right corner of the interface. It features a large, empty rectangular area. Below this area is a blue button labeled 'Upload Data'. To the right of the button is a circular chat icon with a speech bubble. A red arrow points to the 'Upload Data' button.

Other Event Data Upload

This tool 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, Study Leave, Dentist Appointments etc.

1. Once you have selected this option within the Bulk Action data load, select the icon as shown below to download the spreadsheet template:



2. Fill in the information you wish to upload. When doing so, please note the following:

- First test with 1 test employee to ensure you're confident with this feature
- Each row creates a new other event 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.
- Please do not add, edit or remove columns from the templates.
If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up.

See below the fields and some help text to assist you in completing this sheet.

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

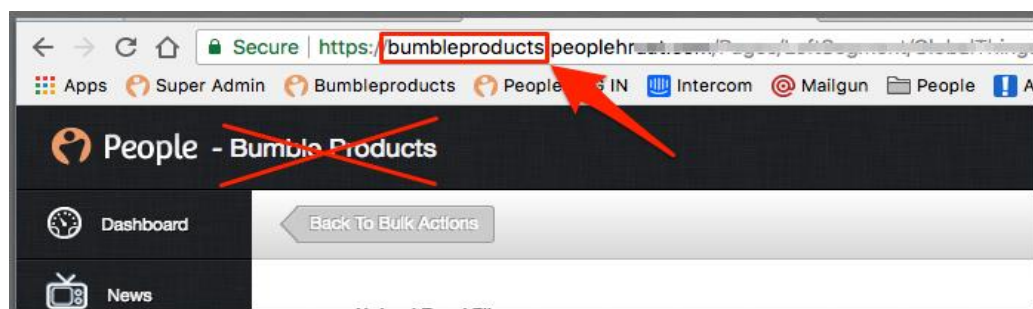
Start Date	Mandatory	Date format must be DD/MM/YYYY	The first date of the other event record
End Date	Mandatory	Date format must be DD/MM/YYYY	The last date of the other event record
Duration	Mandatory	Numbers only	If other event is measured in days, please enter durations such as 0.25, 0.5, 0.75, 1 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	

- Once the data sheet has been completed and you are ready to save, a small change needs to be made to the file name. It will download to your computer as:

SubDomain_OtherEventData.xls

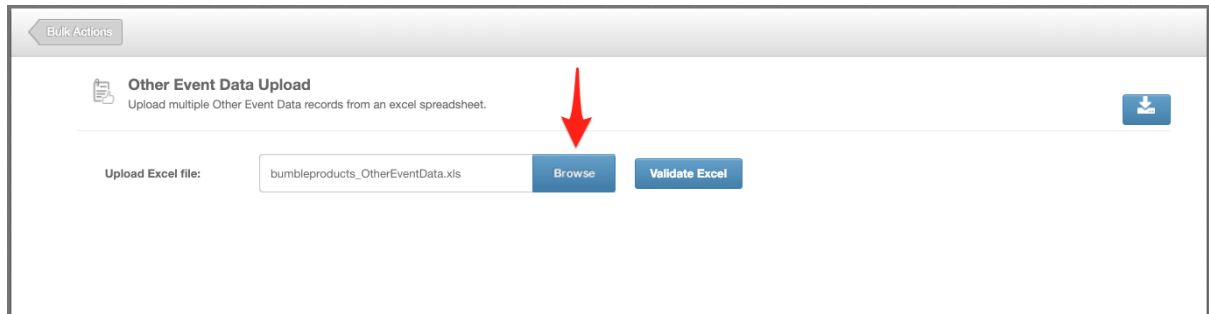
Please change the 'SubDomain' text to your PeopleHR URL sub domain.

For example, if your URL is **bumbleproducts.peoplehr.net** your file should be saved as: **bumbleproducts_OtherEventData.xls**

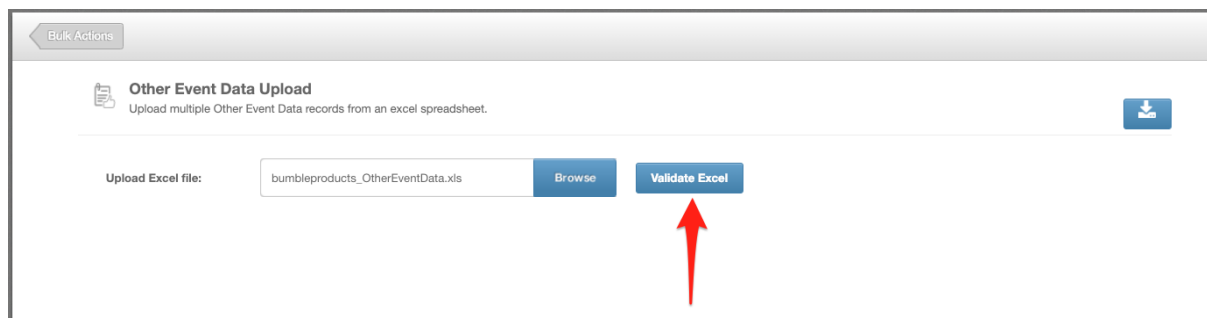


Please note: The .xls at the end is the file type, you won't need to type this in the document name.

4. To upload your file, go back into the Bulk Actions and select 'Browse':



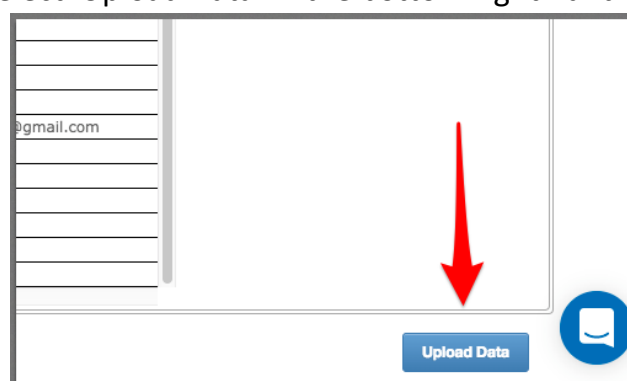
5. Once uploaded, click 'Validate Excel':



This will review your file and provide you with any validation messages, errors etc. **For a breakdown of what each validation/error message means, please see:** https://www.peoplehr.com/includes/educate/Bulk_Actions_data_loader_error_s.pdf

If changes need to be made, you can simply edit the file saved to your computer, re-upload and select 'Validate' again.

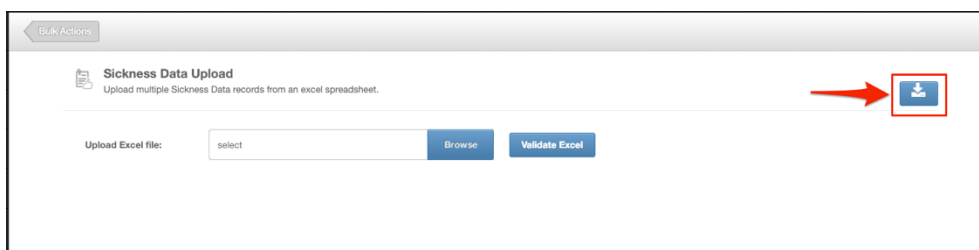
6. Once you have reviewed the validation messages and made changes if necessary, select 'Upload Data' in the bottom right hand corner:



Sickness Data Upload

This tool allows you to import your employee Absence (Sick) records.

1. Once you have selected this option within the Bulk Action data load, select the icon as shown below to download the spreadsheet template:



2. Fill in the information you wish to upload. When doing so, please note the following:
 - First test with 1 test employee to ensure you're confident with this feature
 - Each row creates a new sick 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.
 - Please do not add, edit or remove columns from the templates.
 - If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up.

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

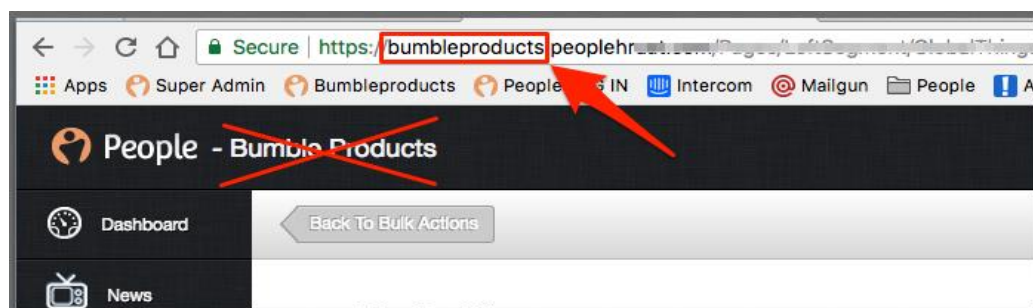
Duration	Mandatory	Numbers	Sickness is only measured in days, please enter durations such as 0.25, 0.5, 0.75, 1 If holidays are measured in hours, please enter durations in decimals such as 0.25 = 15 mins 0.5 = 30 mins 0.75 = 45 mins 1 = 60 mins
Reason	Mandatory	Letters, numbers or both	Please enter 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	

3. Once the data sheet has been completed and you are ready to save, a small change needs to be made to the file name. It will download to your computer as:

SubDomain_SicknessData.xls

Please change the 'SubDomain' text to your PeopleHR URL sub domain.

For example, if your URL is **bumbleproducts.peoplehr.net** your file should be saved as: **bumbleproducts_SicknessData.xls**

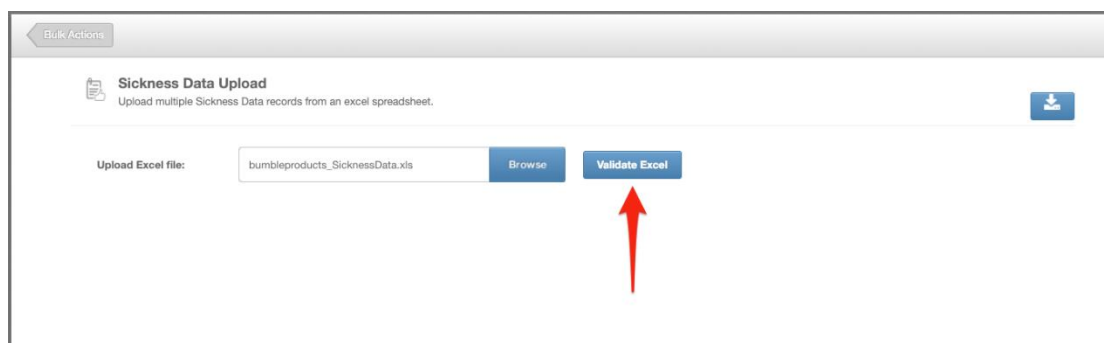


Please note: The .xls at the end is the file type, you won't need to type this in the document name.

4. To upload your file, go back into the Bulk Actions and select 'Browse':



5. Once uploaded, click 'Validate Excel':

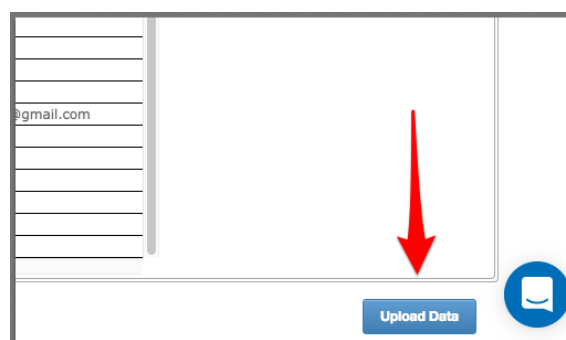


This will review your file and provide you with any validation messages, errors etc.

For a breakdown of what each validation/error message means, please see:

https://www.peoplehr.com/includes/educate/Bulk_Actions_data_loader_errors.pdf

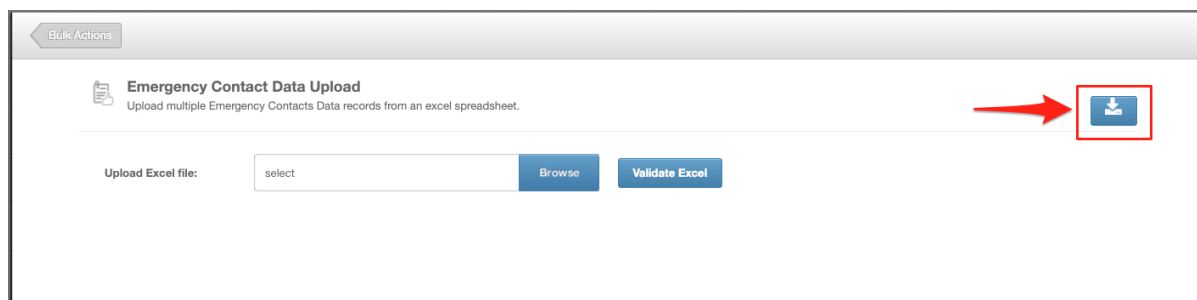
6. If changes need to be made, you can simply edit the file saved to your computer, re-upload and select 'Validate' again.
7. Once you have reviewed the validation messages and made changes if necessary, select 'Upload Data' in the bottom right hand corner:



Emergency Contact Data Upload

This tool is used to import employee emergency contacts.

1. Once you have selected this option within the Bulk Action data load, select the icon as shown below to download the spreadsheet template:



2. Fill in the information you wish to upload. When doing so, please note the following:
 - First test with 1 test employee to ensure you're confident with this feature
 - You can have multiple rows for each employee if they have several contacts
 - Please do not add, edit or remove columns from the templates.
 - If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up.

Please see below each field 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

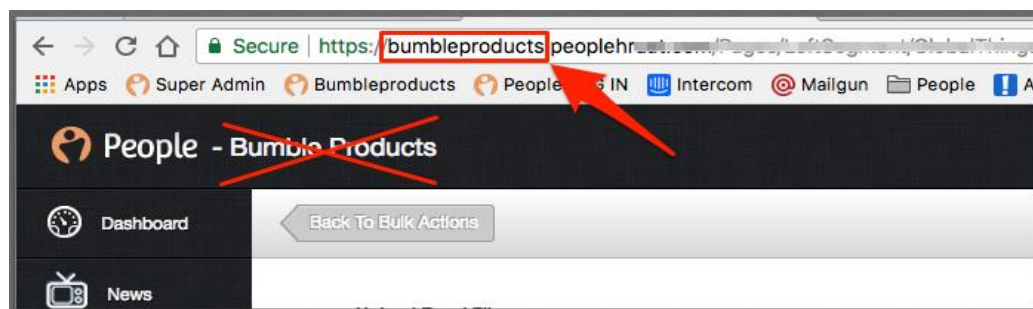
Country	Optional	Letters, numbers or both	Country of emergency contact address
Post Code	Optional	Letters, numbers or both	Postcode of emergency contact address
Telephone	Optional	Please ensure the international dialing code is added. Eg. +44 (UK)	Dataload will fail if number does not begin with + and dialing code
Mobile	Optional	Please ensure the international dialing code is added. Eg. +44 (UK)	Dataload will fail if number does not begin with + and dialing code
Comments	Optional	Letters, numbers or both	

3. Once the data sheet has been completed and you are ready to save, a small change needs to be made to the file name. It will download to your computer as:

SubDomain_EmergencyContactData.xls

Please change the 'SubDomain' text to your PeopleHR URL sub domain.

For example, if your URL is **bumbleproducts.peoplehr.net** your file should be saved as: **bumbleproducts_EmergencyContactData.xls**



Please note: The .xls at the end is the file type, you won't need to type this in the document name.

4. To upload your file, go back into the Bulk Actions and select 'Browse':

The screenshot shows a web interface titled "Bulk Actions" with a sub-header "Emergency Contact Data Upload". Below the header, it says "Upload multiple Emergency Contacts Data records from an excel spreadsheet." There is a "Download" icon in the top right. Under the "Upload Excel file:" label, there is a text input field containing "SubDomain_EmergencyContactData.xls". To the right of the input field are two buttons: "Browse" and "Validate Excel". A red arrow points to the "Browse" button.

5. Once uploaded, click 'Validate Excel':

This screenshot is identical to the previous one, showing the "Emergency Contact Data Upload" interface. A red arrow now points to the "Validate Excel" button.

This will review your file and provide you with any validation messages, errors etc.

For a breakdown of what each validation/error message means, please see:
https://www.peoplehr.com/includes/educate/Bulk_Actions_data_loader_errors.pdf

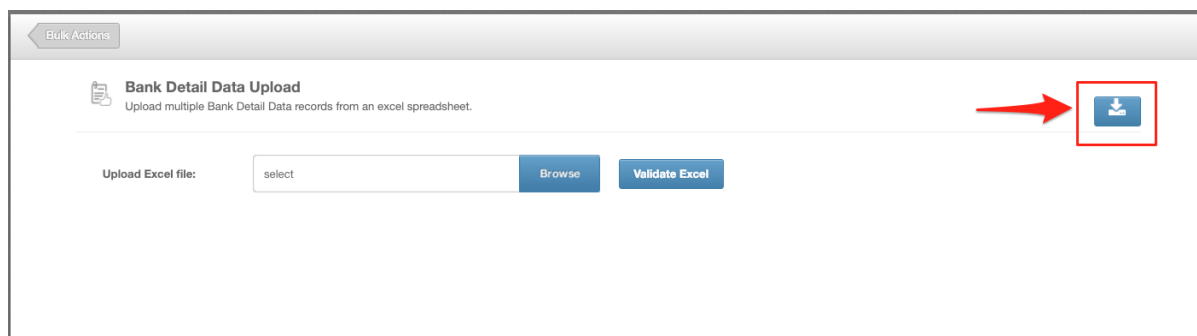
6. If changes need to be made, you can simply edit the file saved to your computer, re-upload and select 'Validate' again.
7. Once you have reviewed the validation messages and made changes if necessary, select 'Upload Data' in the bottom right hand corner:

The screenshot shows a close-up of the bottom right corner of the interface. It features a blue button labeled "Upload Data" and a blue circular icon with a white speech bubble. A red arrow points to the "Upload Data" button.

Bank Detail Data Upload

This tool is to import employee bank details. The employee will be able to populate this information via their login, they can also update it moving forwards.

1. Once you have selected this option within the Bulk Action data load, select the icon as shown below to download the spreadsheet template:



2. Fill in the information you wish to upload. When doing so, please note the following:

- First test with 1 test employee to ensure you're confident with this feature
- Only one record per employee is permitted.
- Please do not add, edit or remove columns from the templates.
- If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up.

Please see below each field and some help text to assist you in completing this sheet:

Bank Details			
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....

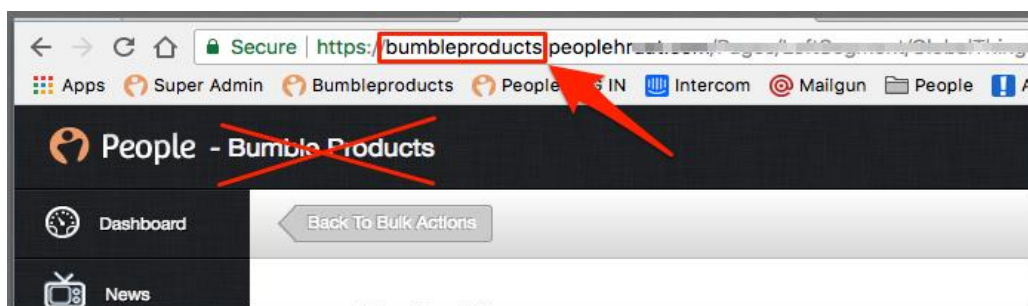
Bank Code	Optional	Letters, numbers or both	Please be careful of excel removing the leading '0', you may need to reformat the column as 'Text' and add 0 again manually
Account number	Optional	Letters, numbers or both	
Other account information	Optional	Letters, numbers or both	Roll number or other specific 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

- Once the data sheet has been completed and you are ready to save, a small change needs to be made to the file name. It will download to your computer as:

SubDomain_BankDetailData.xls

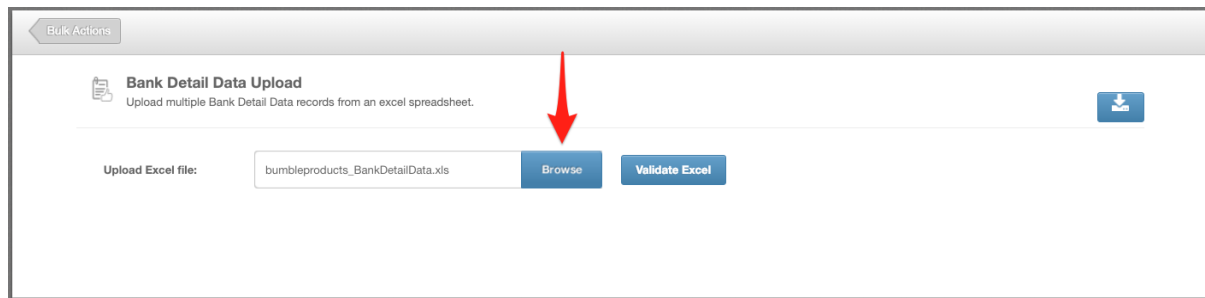
Please change the 'SubDomain' text to your PeopleHR URL sub domain.

For example, if your URL is **bumbleproducts.peoplehr.net** your file should be saved as: **bumbleproducts_BankDetailData.xls**

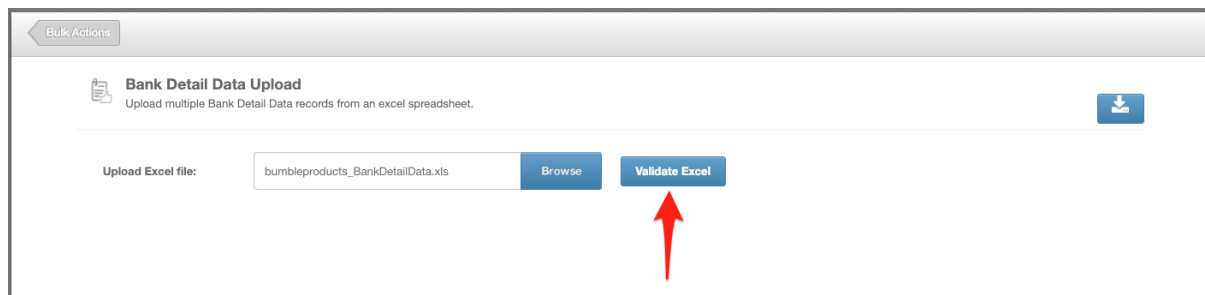


Please note: The .xls at the end is the file type, you won't need to type this in the document name.

4. To upload your file, go back into the Bulk Actions and select 'Browse':

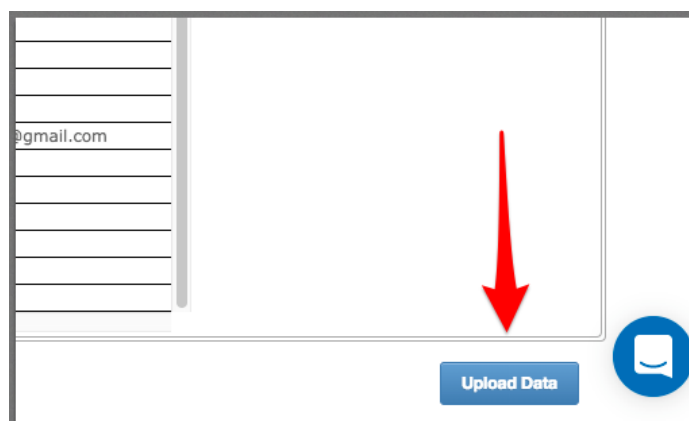


5. Once uploaded, click 'Validate Excel':



This will review your file and provide you with any validation messages, errors etc. **For a breakdown of what each validation/error message means, please see:** [https://www.peoplehr.com/includes/educate/Bulk Actions data loader errors.pdf](https://www.peoplehr.com/includes/educate/Bulk%20Actions%20data%20loader%20errors.pdf)

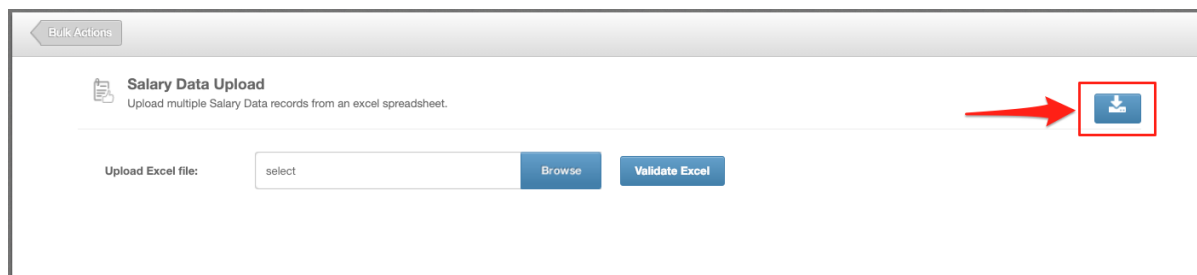
6. If changes need to be made, you can simply edit the file saved to your computer, re-upload and select 'Validate' again.
7. Once you have reviewed the validation messages and made changes if necessary, select 'Upload Data' in the bottom right hand corner:



Salary Data Upload


This tool is used to import employee salary history.

1. Once you have selected this option within the Bulk Action data load, select the icon as shown below to download the spreadsheet template:



2. Fill in the information you wish to upload. When doing so, please note the following:
 - First test with 1 test employee to ensure you're confident with this feature
 - You can insert history by creating several rows per employee.
 - The '**Currency Code**' and '**Reason**' 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.
 - Please do not add, edit or remove columns from the templates.
 - If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up.

See below each field and some help text to assist you in completing this sheet:

Salary Data			
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

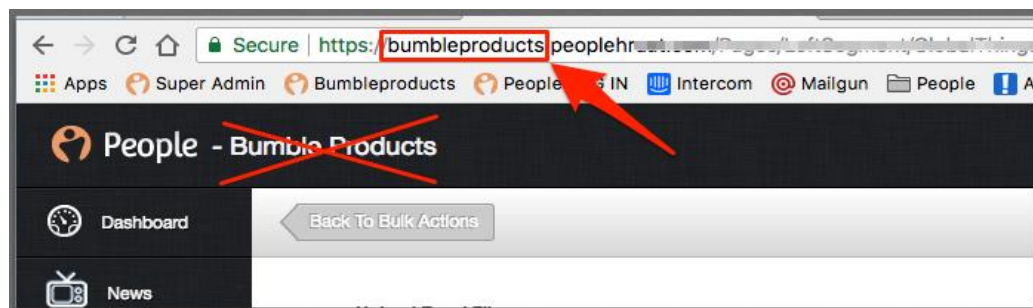
Currency Code	Optional	Max 3 characters	£, \$, €, etc.... can also use code GBP, USD, EUR if left blank the default will be '£'
Reason	Mandatory	Letters, numbers or both	E.g. Starting salary, promotion, performance etc....
Comments	Optional	Letters, numbers or both	
Payment Frequency	Mandatory	Must be one of the options stated in the next column	Choose from: Daily, Weekly, Two Weekly, Four Weekly or Monthly

- Once the data sheet has been completed and you are ready to save, a small change needs to be made to the file name. It will download to your computer as:

SubDomain_SalaryData.xls

Please change the 'SubDomain' text to your PeopleHR URL sub domain.

For example, if your URL is **bumbleproducts.peoplehr.net** your file should be saved as: **bumbleproducts_SalaryData.xls**



Please note: The .xls at the end is the file type, you won't need to type this in the document name.

- To upload your file, go back into the Bulk Actions and select 'Browse':

The screenshot shows a web interface titled "Salary Data Upload" under a "Bulk Actions" header. Below the title is a sub-header: "Upload multiple Salary Data records from an excel spreadsheet." On the right side of this header is a blue download icon. Below the header, there is a section labeled "Upload Excel file:" followed by a text input field containing the word "select". To the right of the input field are two blue buttons: "Browse" and "Validate Excel". A red arrow points directly to the "Browse" button.

5. Once uploaded, click 'Validate Excel':

This screenshot shows the same "Salary Data Upload" interface. The text input field now contains the filename "SubDomain_SalaryData.xls". The "Browse" button is still present. A red arrow points to the "Validate Excel" button.

This will review your file and provide you with any validation messages, errors etc.

For a breakdown of what each validation/error message means, please see:

https://www.peoplehr.com/includes/educate/Bulk_Actions_data_loader_errors.pdf

If changes need to be made, you can simply edit the file saved to your computer, re-upload and select 'Validate' again.

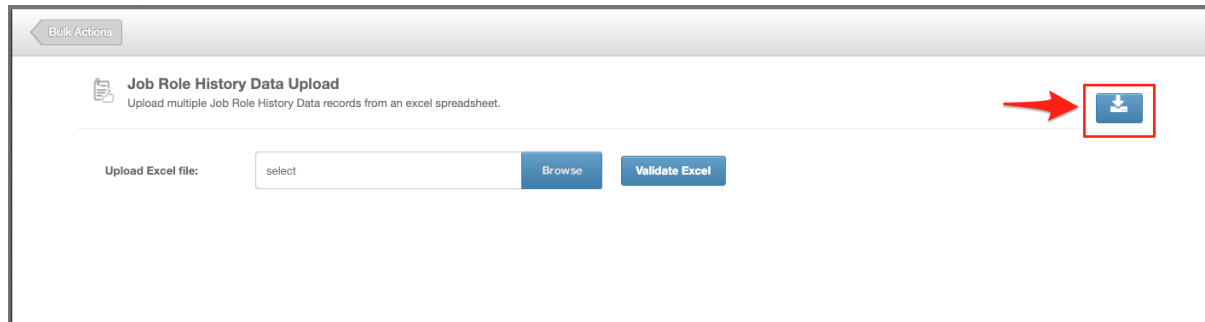
6. Once you have reviewed the validation messages and made changes if necessary, select 'Upload Data' in the bottom right hand corner:

The screenshot shows the bottom right corner of the interface. On the left, there is a vertical list of input fields, with the last one containing "@gmail.com". To the right of this list is a large, empty rectangular area. At the bottom right of the interface is a blue button labeled "Upload Data" and a blue circular icon with a white speech bubble. A red arrow points to the "Upload Data" button.

Job Role History Data Upload

This tool is to import just historical job records.

1. Once you have selected this option within the Bulk Action data load, select the icon as shown below to download the spreadsheet template:



2. Fill in the information you wish to upload. When doing so, please note the following:
 - First test with 1 test employee to ensure you're confident with this feature
 - Employees' current roles should be recorded on the EmployeeData sheet.
 - Every row creates a new historical record.
 - 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.
 - Please do not add, edit or remove columns from the templates.
 - If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up.

Please see below each field and some help text to assist you in completing this sheet

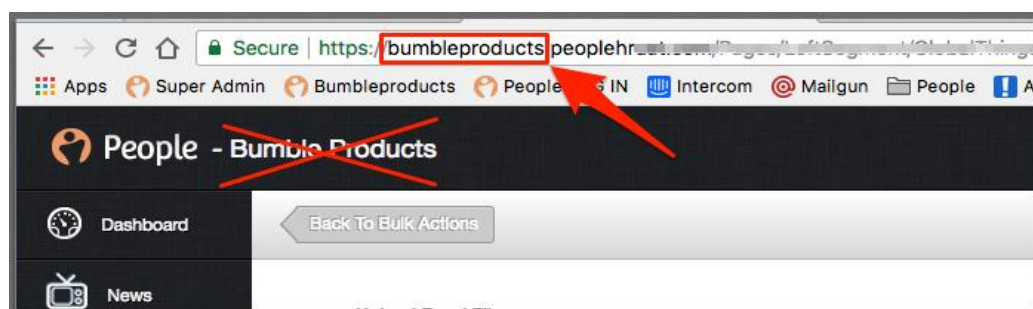
Field Name	Optional / Mandatory	Rules	Tips
Employee ID	Mandatory	Letters, numbers or both – Max 15 characters	This must match the ID on the EmployeeData sheet, if the employee has several records, please repeat their ID for each row
First name	Mandatory	Letters, numbers or both	Employees first name
Last 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....

- Once the data sheet has been completed and you are ready to save, a small change needs to be made to the file name. It will download to your computer as:

SubDomain_JobRoleHistoryData.xls

Please change the 'SubDomain' text to your PeopleHR URL sub domain.

For example, if your URL is **bumbleproducts.peoplehr.net** your file should be saved as: **bumbleproducts_JobRoleHistoryData.xls**



Please note: The .xls at the end is the file type, you won't need to type this in the document name.

- To upload your file, go back into the Bulk Actions and select 'Browse':

The screenshot shows a web interface for 'Job Role History Data Upload'. At the top, there's a 'Bulk Actions' tab. Below it, the title 'Job Role History Data Upload' is followed by the instruction 'Upload multiple Job Role History Data records from an excel spreadsheet.' On the right, there's a download icon. The main section has a label 'Upload Excel file:' followed by a text input field containing the word 'select'. To the right of the input field are two buttons: 'Browse' and 'Validate Excel'. A red arrow points directly to the 'Browse' button.

5. Once uploaded, click 'Validate Excel':

This screenshot shows the same interface as the previous one, but now the text input field contains the filename 'SubDomain_JobRoleHistoryData.xls'. The 'Browse' button is still present. A red arrow points to the 'Validate Excel' button.

This will review your file and provide you with any validation messages, errors etc.

For a breakdown of what each validation/error message means, please see:
[https://www.peoplehr.com/includes/educate/Bulk Actions data loader errors.pdf](https://www.peoplehr.com/includes/educate/Bulk%20Actions%20data%20loader%20errors.pdf)

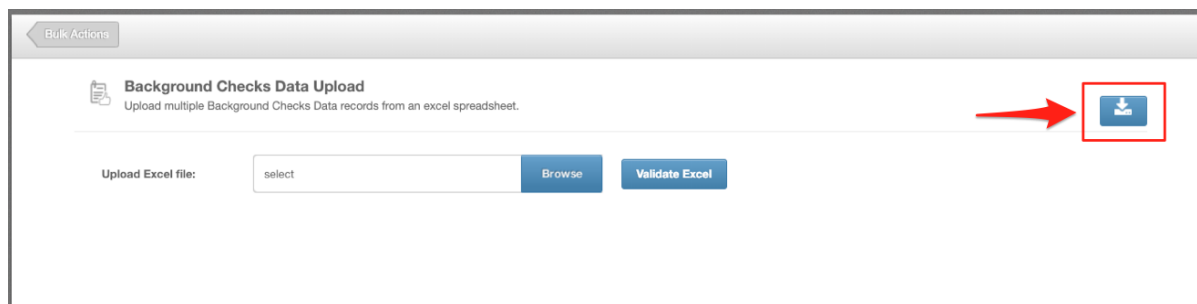
6. If changes need to be made, you can simply edit the file saved to your computer, re-upload and select 'Validate' again.
7. Once you have reviewed the validation messages and made changes if necessary, select 'Upload Data' in the bottom right hand corner:

The screenshot shows a close-up of the bottom right corner of the application window. On the left, there's a list of email addresses, with one partially visible as '@gmail.com'. In the bottom right corner, there is a blue button labeled 'Upload Data' and a blue circular icon with a white speech bubble. A red arrow points to the 'Upload Data' button.

Background Checks Data Upload

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

1. Once you have selected this option within the Bulk Action data load, select the icon as shown below to download the spreadsheet template:



2. Fill in the information you wish to upload. When doing so, please note the following:
 - First test with 1 test employee to ensure you're confident with this feature
 - Each row creates a new record
 - The 'Type of Check' column will populate a dropdown of options, to use in the future.
 - Please do not add, edit or remove columns from the templates.
 - If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up.

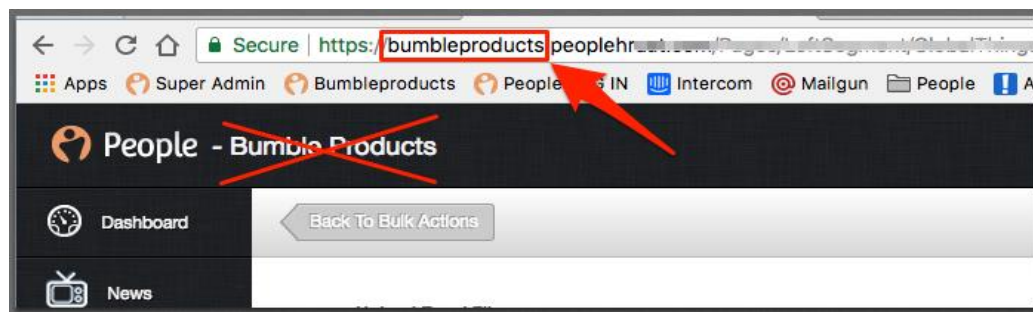
Field Name	Optional / Mandatory	Rules	Tips
Employee ID	Mandatory	Letters, numbers or both – Max 15 characters	This must match the ID on the EmployeeData sheet, if the employee has several records, please repeat their ID for each row
First name	Mandatory	Letters, numbers or both	Employees first name
Last 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	

3. Once the data sheet has been completed and you are ready to save, a small change needs to be made to the file name. It will download to your computer as:

SubDomain_BackgroundChecksData.xls

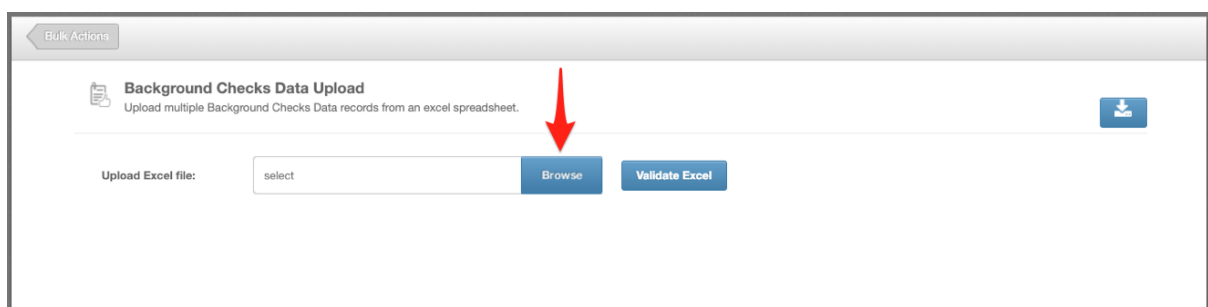
Please change the 'SubDomain' text to your PeopleHR URL sub domain.

For example, if your URL is **bumbleproducts.peoplehr.net** your file should be saved as: **bumbleproducts_BackgroundChecksData.xls**

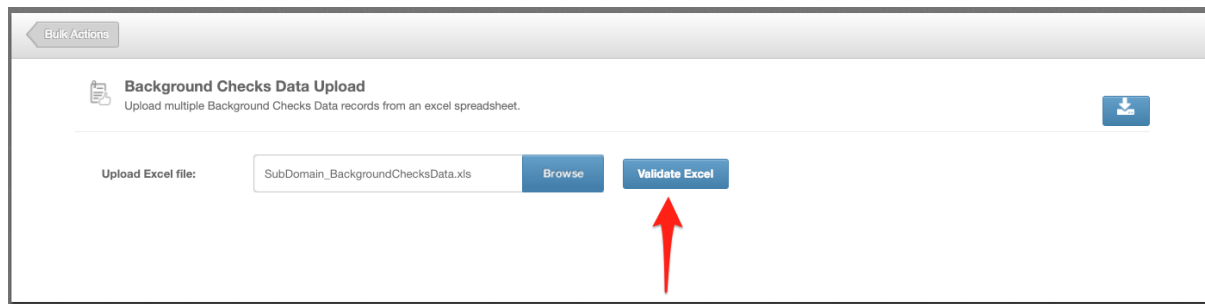


Please note: The .xls at the end is the file type, you won't need to type this in the document name.

4. To upload your file, go back into the Bulk Actions and select 'Browse':



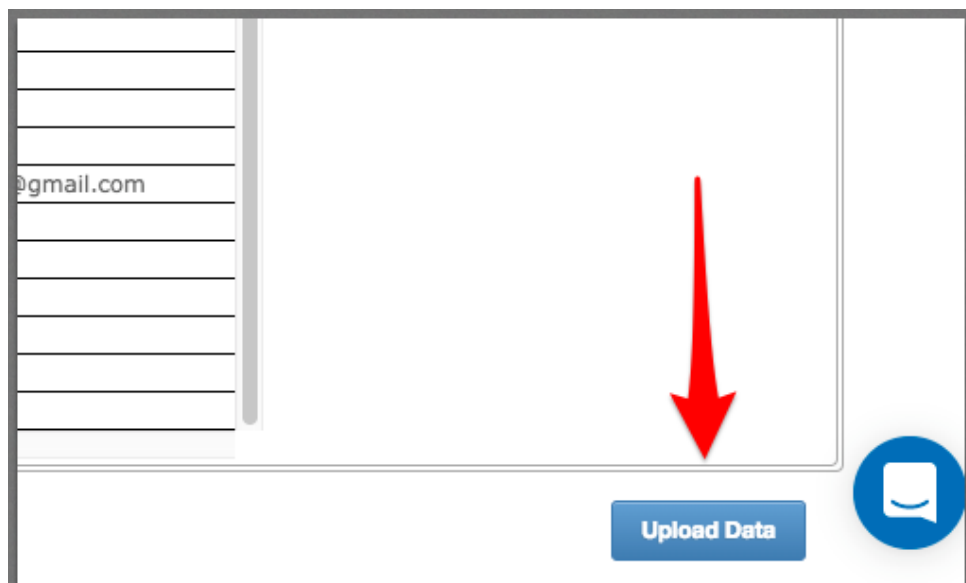
5. Once uploaded, click 'Validate Excel':



This will review your file and provide you with any validation messages, errors etc.

For a breakdown of what each validation/error message means, please see:
[https://www.peoplehr.com/includes/educate/Bulk Actions data loader errors.pdf](https://www.peoplehr.com/includes/educate/Bulk%20Actions%20data%20loader%20errors.pdf)

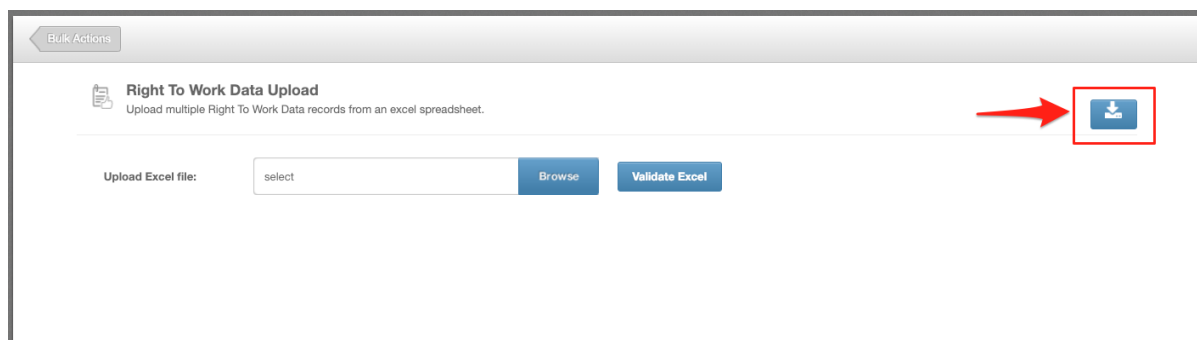
6. If changes need to be made, you can simply edit the file saved to your computer, re-upload and select 'Validate' again.
7. Once you have reviewed the validation messages and made changes if necessary, select 'Upload Data' in the bottom right hand corner:




Right To Work Data Upload

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

1. Once you have selected this option within the Bulk Action data load, select the icon as shown below to download the spreadsheet template:



2. Fill in the information you wish to upload. When doing so, please note the following:
 - First test with 1 test employee to ensure you're confident with this feature
 - Each row creates a new record
 - The Type of document column will populate a dropdown of options to use in the future.
 - Please do not add, edit or remove columns from the templates.
 - If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up.

Right to work			
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, Via, work permit, etc.... 

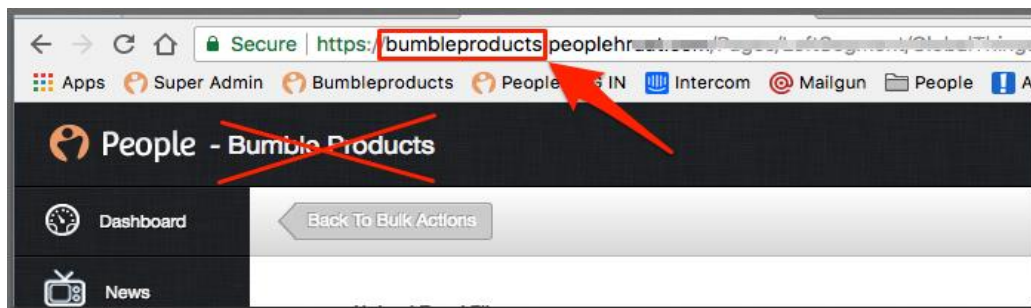
Document ID	Optional	Letters, numbers or both	Reference Number
Valid From	Optional	Date format must be DD/MM/YYYY	
Valid To	Optional	Date format must be DD/MM/YYYY	
Duration	Optional	Letters, numbers or both	Duration in days
Comments	Optional	Letters, numbers or both	

- Once the data sheet has been completed and you are ready to save, a small change needs to be made to the file name. It will download to your computer as:

SubDomain_RightToWorkData.xls

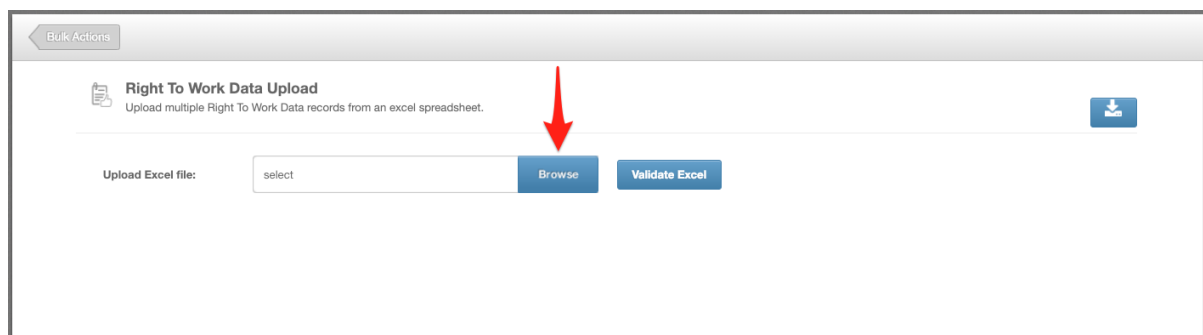
Please change the 'SubDomain' text to your PeopleHR URL sub domain.

For example, if your URL is **bumbleproducts.peoplehr.net** your file should be saved as: **bumbleproducts_RightToWorkData.xls**

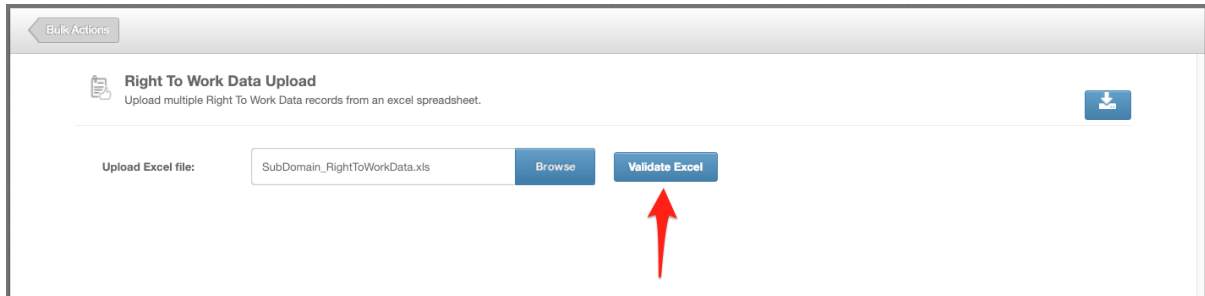


Please note: The .xls at the end is the file type, you won't need to type this in the document name.

- To upload your file, go back into the Bulk Actions and select 'Browse':



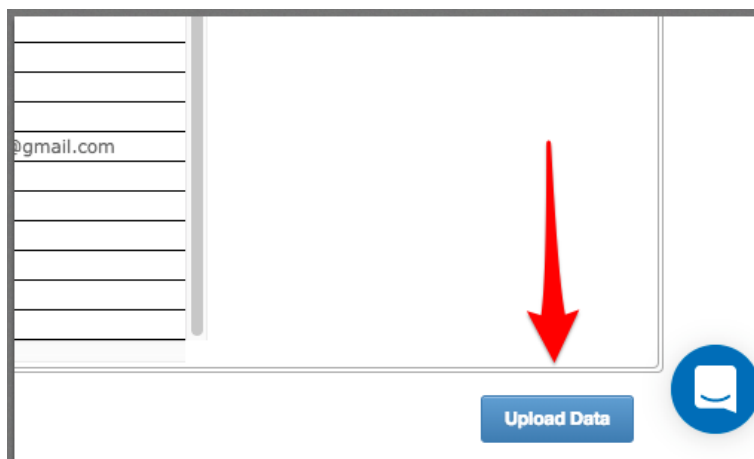
5. Once uploaded, click 'Validate Excel':



This will review your file and provide you with any validation messages, errors etc.

For a breakdown of what each validation/error message means, please see:
[https://www.peoplehr.com/includes/educate/Bulk Actions data loader errors.pdf](https://www.peoplehr.com/includes/educate/Bulk%20Actions%20data%20loader%20errors.pdf)

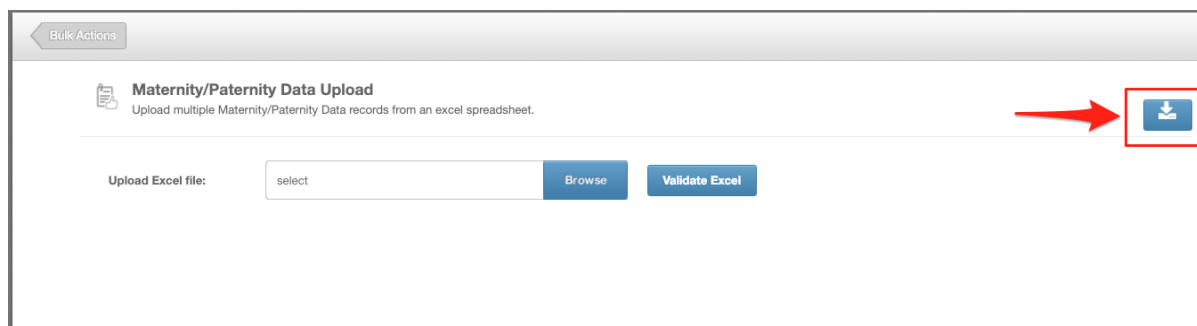
6. If changes need to be made, you can simply edit the file saved to your computer, re-upload and select 'Validate' again.
7. Once you have reviewed the validation messages and made changes if necessary, select 'Upload Data' in the bottom right hand corner:



Maternity/Paternity Data Upload

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

1. Once you have selected this option within the Bulk Action data load, select the icon as shown below to download the spreadsheet template:



The screenshot shows a web interface for uploading Maternity/Paternity data. At the top, there's a 'Bulk Actions' tab. Below it, the title 'Maternity/Paternity Data Upload' is followed by the instruction 'Upload multiple Maternity/Paternity Data records from an excel spreadsheet.' In the top right corner, there is a download icon (a blue square with a white download symbol) which is highlighted by a red arrow. Below the title, there is a section for uploading an Excel file, with a 'select' button, a 'Browse' button, and a 'Validate Excel' button.

2. Fill in the information you wish to upload. When doing so, please note the following:

- First test with 1 test employee to ensure you're confident with this feature
- Every row creates a new record.
- This sheet should not be used to record KIT days or pregnancy related absence, please use the Other Event/Sickness sheet for this.
- Please do not add, edit or remove columns from the templates.
- If employee IDs contain both numbers and letters, please change this column format to 'Text' to ensure all data is picked up.

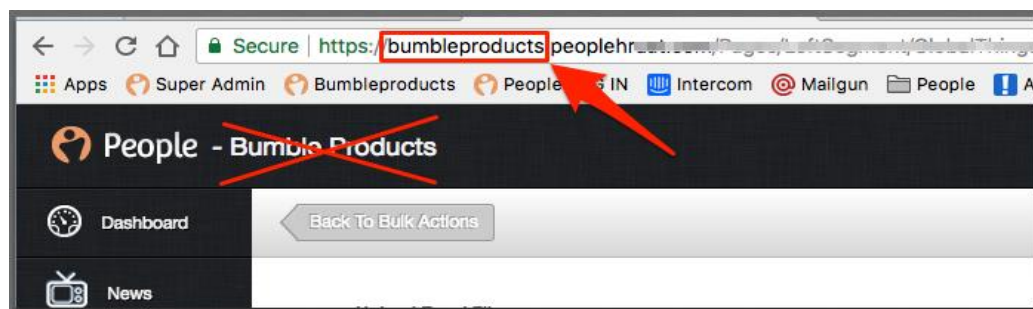
Maternity/paternity data			
Field Name	Optional / Mandatory	Rules	Tips
Employee ID	Mandatory	Letters, numbers or both – Max 15 characters	This must match the ID on the EmployeeData sheet, if the employee has several records, please repeat their ID for each row
First name	Mandatory	Letters, numbers or 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	

2. Once the data sheet has been completed and you are ready to save, a small change needs to be made to the file name. It will download to your computer as:

SubDomain_MaternityPaternityData.xls

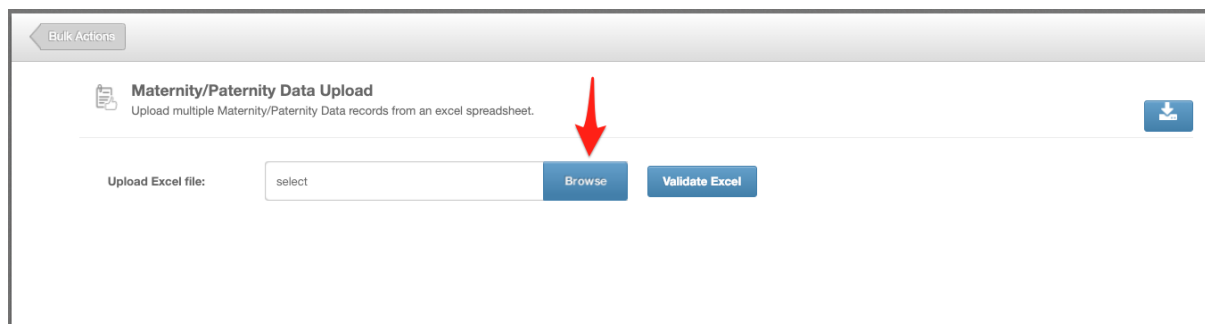
Please change the 'SubDomain' text to your PeopleHR URL sub domain.

For example, if your URL is **bumbleproducts.peoplehr.net** your file should be saved as: **bumbleproducts_MaternityPaternityData.xls**

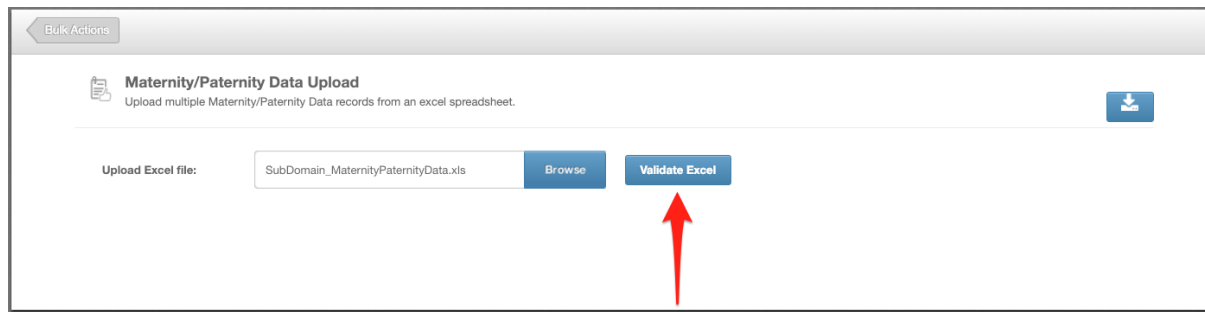


Please note: The .xls at the end is the file type, you won't need to type this in the document name.

3. To upload your file, go back into the Bulk Actions and select 'Browse':



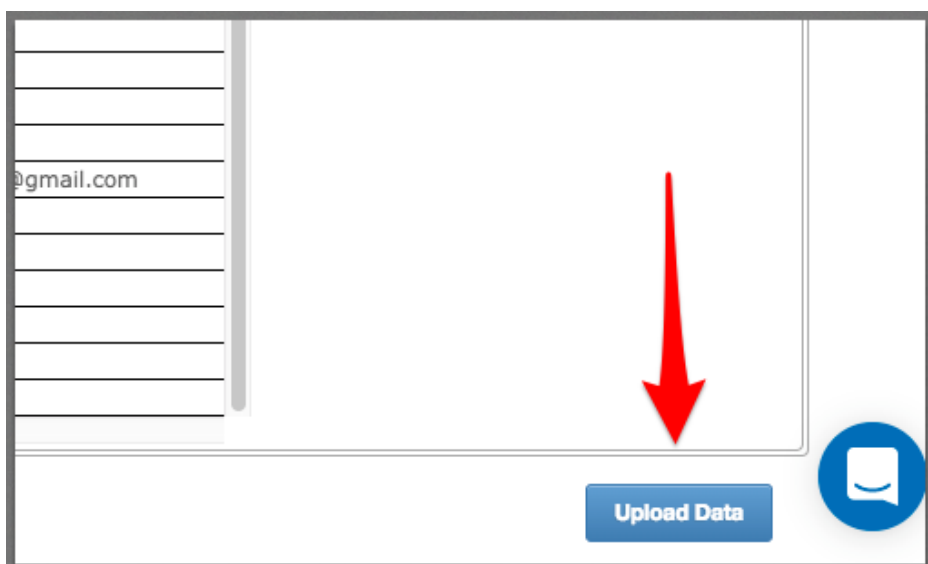
4. Once uploaded, click 'Validate Excel':



This will review your file and provide you with any validation messages, errors etc.

For a breakdown of what each validation/error message mean, please see: [https://www.peoplehr.com/includes/educate/Bulk Actions data loader errors.pdf](https://www.peoplehr.com/includes/educate/Bulk%20Actions%20data%20loader%20errors.pdf)

5. If changes need to be made, you can simply edit the file saved to your computer, re-upload and select 'Validate' again.
6. Once you have reviewed the validation messages and made changes if necessary, select 'Upload Data' in the bottom right hand corner:



Thanks,

Customer Services Team.