

# Sentrifugo Import Format Guide



# Download the Import format

#### Please refer to Figure 1

Dashboard	Self Service	Service	e Request 🛛 I	HR Appraisals	Talent Acquisition	Background Check Organization	Analytics Sit	e Config More 🔻
Employees	b			а				
User Managen	ient	• •	Home > HR >	Employees				🔥 Unpin from shortcuts
Holiday Manag	ement	•				Im	port Employees	Import format Help
Leave Manage	ment	•						c d
Employee Cont	iguration	•	Employees	5				+ Add C
			Action	First Name	Last Name	Email	Employee ID	Business Unit
Shortcuts								
<u>به</u> به	<b>.</b> E		• 2	Ron	Born	suneetha.veernapu@sagarsoft	in EMPP0005	Asiaglobal
			• 🗹	Mel	Gibson	ramraj.mulpuri@gmail.com	EMPP0006	Asiaglobal
			• 🗹	Bradly	Cooper	cooper@mailinator.com	EMPP0009	Asiaglobal
<b>**</b> *⁄	s, 🕹	•	• 🗹	Jack	Jack	jack12345@mailinator.com	EMPP0011	Asiaglobal
		1	• 🗹	Steve	jocub	mails@mailinator.com	EMPP0015	South Africa Unit
			• 🗹	Devilliers	QA	mailss@mailinator.com	EMPP0016	South Africa Unit
			• 🗹	Robert	Technician	xxx@mailinator.com	EMPP0019	Middle East
					Ei aura	. 1		

Figure 1

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

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

#### Please refer Figure 2 for the import format



Figure 2



# Select the Import format details

#### a. Prefix

Please refer Figure 3

Sentrifugo	💪 Create New 🔹				🤹 Configura	ation Wizard 🛛 🛄 Super Admi	in 🔻
Dashboard Self Service S	Service Request HR	Appraisals Talent Acquisition	n Background Check Organization	Analytics	Site Config	Modules More 🔻	
Site Preferences							
General	Home > Site Con	fig > General > Prefixes				🖻 Pin to shortcuts	1
Ethnic Codes	Prefixes					V 🛨 Add C 🔎	
Identity Codes	Action	Prefix V	Description				
Gender	<b>•</b> 🛙 🕅	Ms					
Time Zones		110					
Marital Statue	••• 🕑 🖸	Mr					
≥ Prefixes	••• 💿 🖸 🗑	Mrs.					
Race Codes	0 P		Records per page 20 👻				
			<b>F</b> ' 0				



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

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

#### b. First and Last Name of the employee

Α	В	С	D	E	
Prefix	First Name	Last Name	Employee Id	Role Type	Email



• These fields are mandatory and accept only alphabetic characters

#### c. Employee ID

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

#### d. Role Type

#### Please refer Figure 5

Dashboard Self Service	Servic	e Request	HR	Appraisals	Talent Acquisition	Background Check	Organization	Analytics	Site Config	More 🔻
Employees										
User Management	• •	Home > HR	> User M	lanagement > Ro	oles & Privileges				🔁 Ur	pin from shortcuts
¥ Roles & Privileges		Roles &	Privile	ges					IV	+ Add C 🔎
Manage External Users		Action		Role Name	Role 1	Type V	Role Descriptio	n	Group	
Holiday Management	•	• 🖸 🔟	1	Manager	mana	ger			Manage	r
Leave Management		• 🖸 🔟	I	HR Manager	hrmar	nager			HR	
Employee Configuration	•	o 🗹 🗊	I	External User2	Exterr	nalUserTwo			External	Users
Shortcuts		💿 🗹 🗑	I	Management	mana	gement			Manage	ment
<b>4 . . .</b>		• 🗹 前	I	Department Hea	d DHead	d			Manage	ment

Figure 5

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

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

#### e. Enter the email of the employee



E	F	G
Role Type	Email	<b>Business Unit</b>

Figure 6

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

#### f. Business Unit

Please refer Figure 7

Sentrifugo	<u>A</u>	Create New	, <b>-</b>					l.		🏩 Configurati	on Wizard	Super Admin
Dashboard Self Service	Service	Request	HR	Appraisals	Talent Acquisition	n Backgro	ound Check	Organization	Analytics	Site Config	Modules	More 🔻
Organization Info												
Business Units	•	Home >	Organiz	ation > Business	Units							🖆 Pin to shortcuts
Departments		Pucin		aite								Add a o
Organization Structure		Busine	255 01	iits								+ Add C D
Organization Hierarchy		Action		Name	Code	Started On	Street Add	ress City	State	Country	Time zo	ne
Announcements		• 🖸	Ū	Orange Blos	som ORB	09/28/16	Brooklyn s	treet Berkele	y California	United States	s America	a/Antigua [AST]
Policy Documents	•	c o										
		0,0				Records	per page 20	•				
						Figure	<u>-</u> 7					

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

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

#### g. Departments



Sentrifugo	🦾 Creat	e New	•				1		🏩 Configurati	ion Wizard	Super Admin
Dashboard Self Service	Service Req	iest HR	Appraisals	Talent Acquisit	ion B	ackground Check	Organization	Analytics	Site Config	Modules	More 🔻
Organization Info											
Business Units	<b>4</b> Но	<mark>ne</mark> > Organi	zation > Departmo	ents							🖆 Pin to shortcuts
Departments	De	partmer	its		IV					Ш	+ Add C 🔎
Organization Hierarchy	A	tion	Name		Code	Started On	Department Head	т	ime Zone	E	Business Unit
Announcements	•	C 🗇	Information	Technology	IT		Johnson johnson A	ndrew A	merica/Antigua	[AST] (	Drange Blossom
Policy Documents	·	Q			R	lecords per page 20	-				



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

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

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

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

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

#### i. Job Title

Dashboard Self Service	Service	Request	HR Appraisals	Talent Acquisition	n Background Check Or	rganization Analytics	Site Config More 🔻	
Employees								
User Management	•	Home > HR >	Employee Configuratio	n→ Job Titles			📑 Pin to sho	ortcuts
Holiday Management	•	Job Titles	6				IV + Add C	; o
Leave Management	•	Action	V Job Title Code	Job Title	Job Description	Min Experience Require	ed Job Pay Grade Code	Jc
Employee Configuration	•	• 🖸 🗊	EPM	Employee		0	3	М
Employee Tabs		• 🖸 🗊	gfdfg	dfgfd		0	v	ds
Employment Status		• 🗹 🗊	dg	fdg		0	d	ds
Pay Frequency		• 🖸 前	er	re		0	n	ds
Remuneration Basis		• 🖸 🔟	eng	engineer	ads	0	A	м
≌ Job Titles		• 🖸 🗊	superotendent	supervisor		5	A	M
Positions		<b>•</b> 12 m	GM	droup mapager	handles projects related to or	oup 7	Δ++	м
Competency Levels			0.00	group manager	handles projects related to gr	oop ,		IVI

Figure 9

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



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

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

#### j. Position

Please refer Figure 10

Dashboard Self Service	Servic	e Request 🛛 🖁 H	R Appraisals	Talent Acquisition	Background Check	Organization	Analytics	Site Config	More 🔻
Employees									
User Management	+ 4	Home > HR > Er	mployee Configuration	Positions				🔥 Ur	pin from shortcuts
Holiday Management	•	Positions						IV	+ Add C 🔎
Leave Management	•	Action	Position V		Job Title			Description	
Employee Configuration	•	o 🖸 🗑	Employee		Employee				
Employee Tabs		o 🖸 🗊	dgff		Department Head				
Employment Status		💿 🖸 前	dgf		Department Head				
Pay Frequency		o 🖸 🗊	gj		engineer				
Remuneration Basis		o 🖸 🗊	Software Engine	er	Software Develop	er			
Job Titles		• 🖸 🗊	Dept Head		Department Head				
Competency Levels		• 🗹 🔟	Human Resource	e	Human Resource				
Education Levels		• 🖸 🗊	Sys Admin		System Admin				

Figure 10

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

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

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

k. Employment Status



#### Please refer Figure 11

Dashboard Self Service	Service Request	HR	Appraisals	Talent Acquisition	Background Check	Organization	Analytics	Site Config	More 🔻
Employees									
User Management	►	R > Employ	vee Configuration	→ Employment Status				🔁 Un	pin from shortcuts
Holiday Management	Employ	ment St	atus					IV	+ Add C 🔎
Leave Management	Action	١	Work Code	v	/ork Short Code 🛛 🗸		Desc	ription	
Employee Configuration	· • C 🗊		Contract	C	ONT				
Employee Tabs	• 🖸 🗊		Suspended	S	USP				
Sector Status	• 🖸 🗑	F	Resigned	R	ES				
Pay Frequency	• 🖸 🛈	F	Probationary	Р	ROB				
Remuneration Basis	•••••	F	Permanent	Ρ	ERM				
JOD LITIES	• 🖸 🗊	F	Part Time	Ρ	Т				

Figure 11

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

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

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

Please refer Figure 12

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

Figure 12



• This is a mandatory field

#### m. Date of Leaving

#### Please refer Figure 13

1	N	0
joining	Date of leaving	Experience



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

#### n. Experience

#### Please refer Figure 14

N	0	Р
Date of leaving	Experience	Extension

Figure 14

• This field is not mandatory

#### o. Enter the employee Extension



0	Р	(
erience	Extension	Work teleph

Figure 15

- This field is not mandatory
- p. Enter the employee Work Telephone Number

### Please refer Figure 16



Figure 16

• This field is not mandatory

#### q. Enter the employee Fax

## Please refer Figure 17



Figure 17

• This field is not mandatory



#### r. Salary Currency

#### Please refer Figure 18

Sentrifugo	A	Create New	, -						🌣 Configura	tion Wizard	Super Admin 🔻
Dashboard Self Service	Servic	e Request	HR	Appraisals	Talent Acquisition	Background Check	Organization	Analytics	Site Config	Modules	More 🔻
Site Preferences											
General	• •	Home >	Site Con	fig > Currency >	Currencies					1	Pin to shortcuts
Location	•	Curren	icies							IV	+ Add C 🔎
Currency	•	Action		Currency		Currency Code	V		Description		
Surrencies		• 🖸	Ū	US Dollar		USD					
Currency Conversions		<b>G</b> 0				Records per page 20					
		0,2				Records per page 20	•				
						Figure 18					

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

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

r. Pay Frequency

Sentrifugo	Ø2	Create New	•							🍫 Configurati	on Wizard	Super Admin
Dashboard Self Service	Servic	e Request	HR	Appraisals	Talent Acquisition	Background	Check	Organization	Analytics	Site Config	Modules	More 🔻
Employees												
User Management	• •	Home > HF	> Emplo	oyee Configuration	> Pay Frequency							🖆 Pin to shortcuts
Holiday Management	•	Pay Free	quency	/							IV	+ Add C 🔎
Leave Management	•	Action		Pay Frequency		:	Short Code	V		Description	I.	
Employee Configuration	•	• 🖸 🗊		Monthly			MM					
Employee Tabs		~ ~										
Employment Status		0,0			н	ecords per page	20 🔻					
¥ Pay Frequency ┃												
Remuneration Basis												



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



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

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

### s. Enter the employee Salary

Please refer Figure 20

Т	U
Pay Frequency	Salary

Figure 20

• This field is not mandatory