Sentrifugo
Import Format Guide

Download the Import format

Please refer to Figure 1
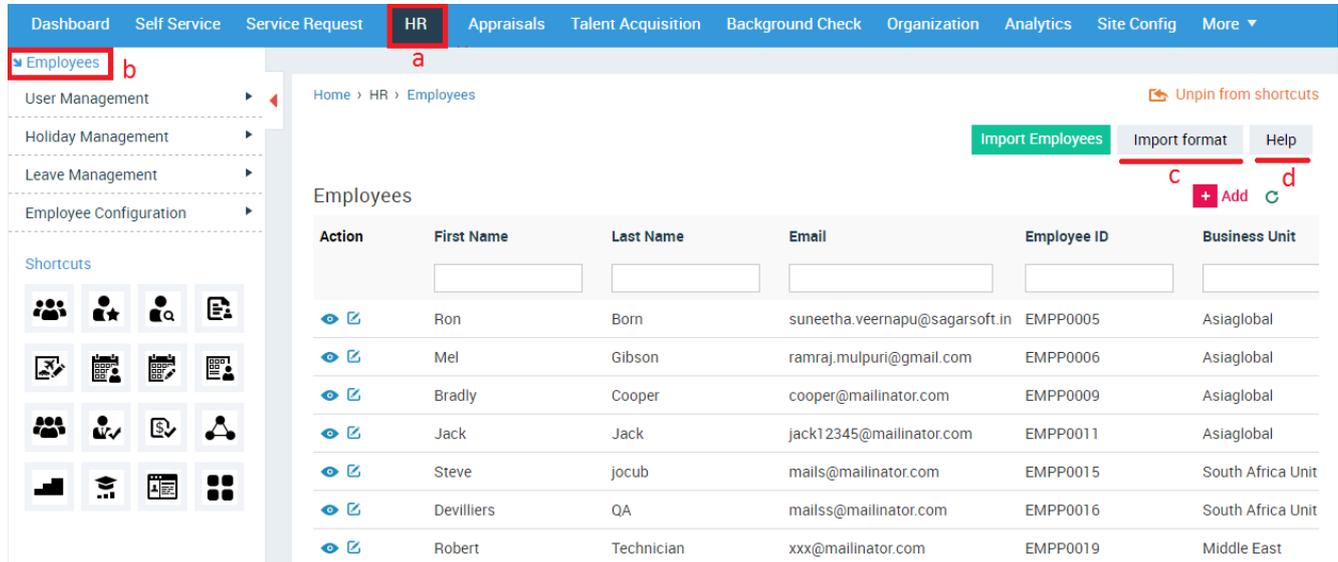
Figure 1

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
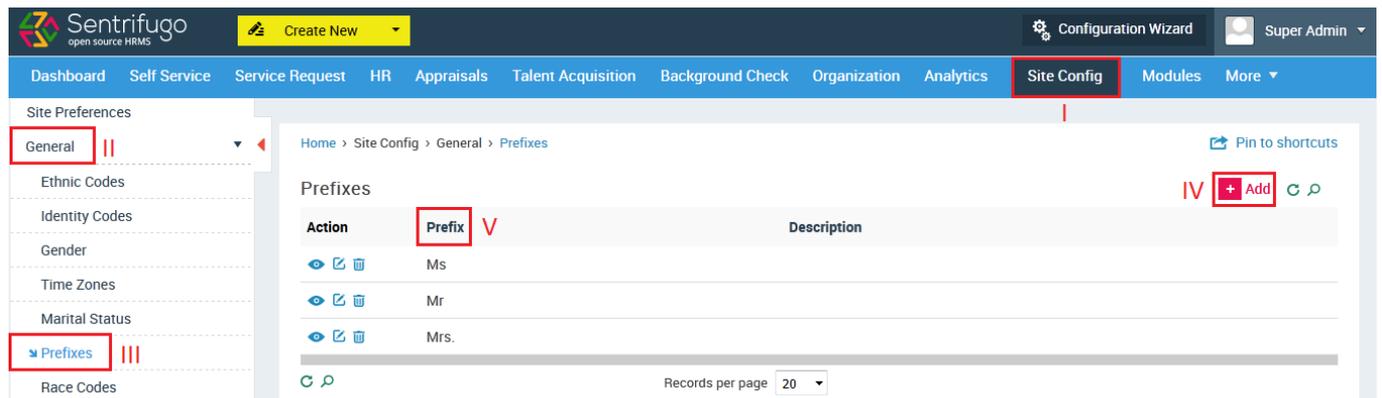
Figure 3

- 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

Please refer Figure 4

Figure 4

- 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

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

Please refer figure 6

Figure 6

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

f. Business Unit

Please refer Figure 7
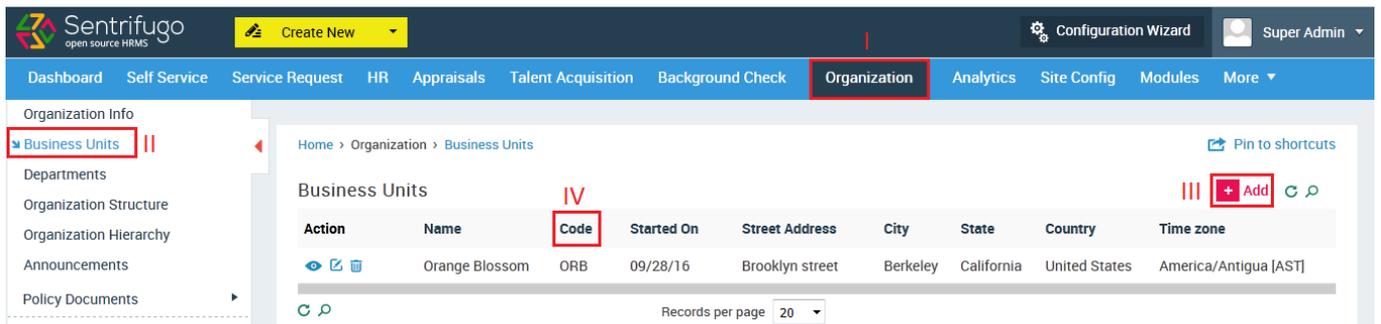
Figure 7

- 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

Please refer Figure 8
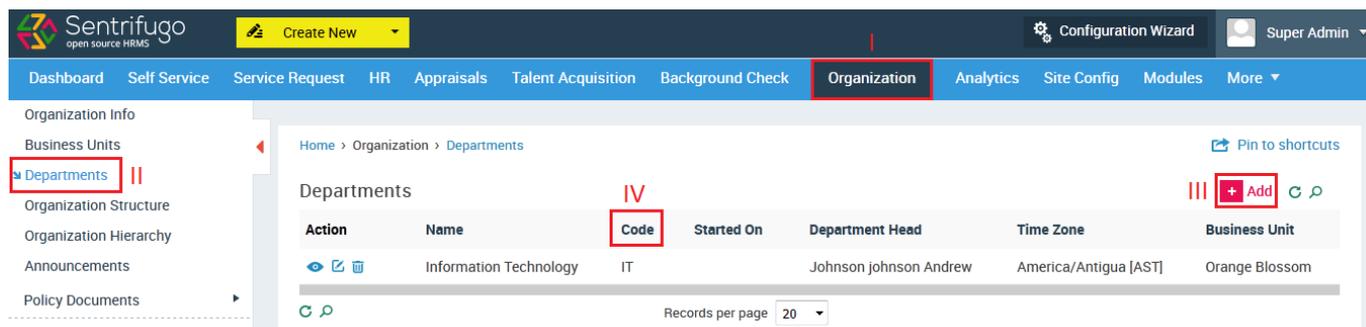
Figure 8

- 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 enter in 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

Please refer Figure 9
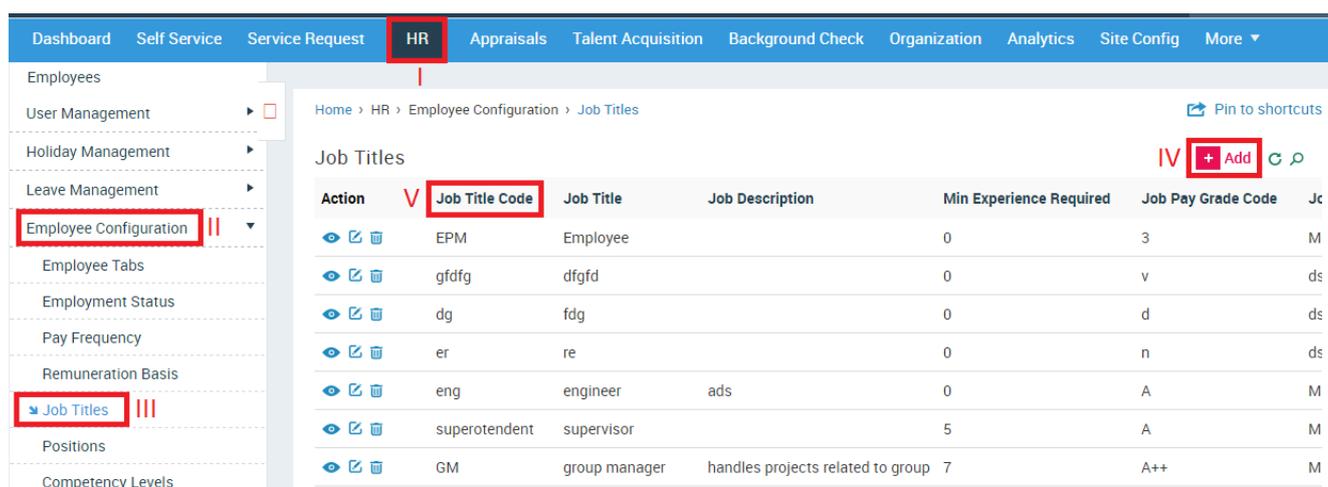
Figure 9

- 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
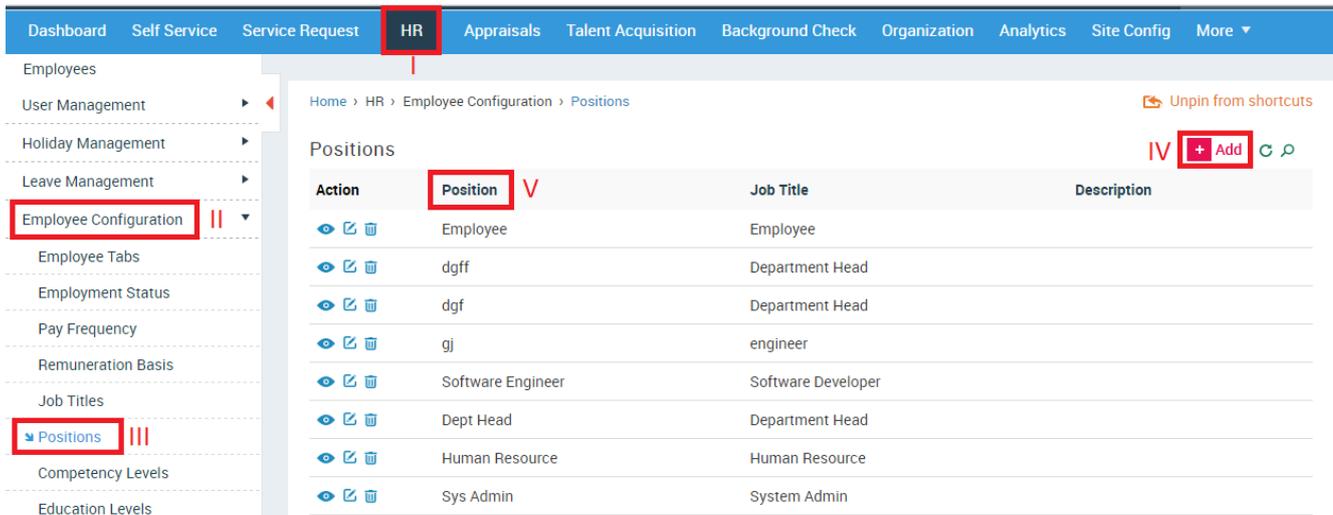
Figure 10

- 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
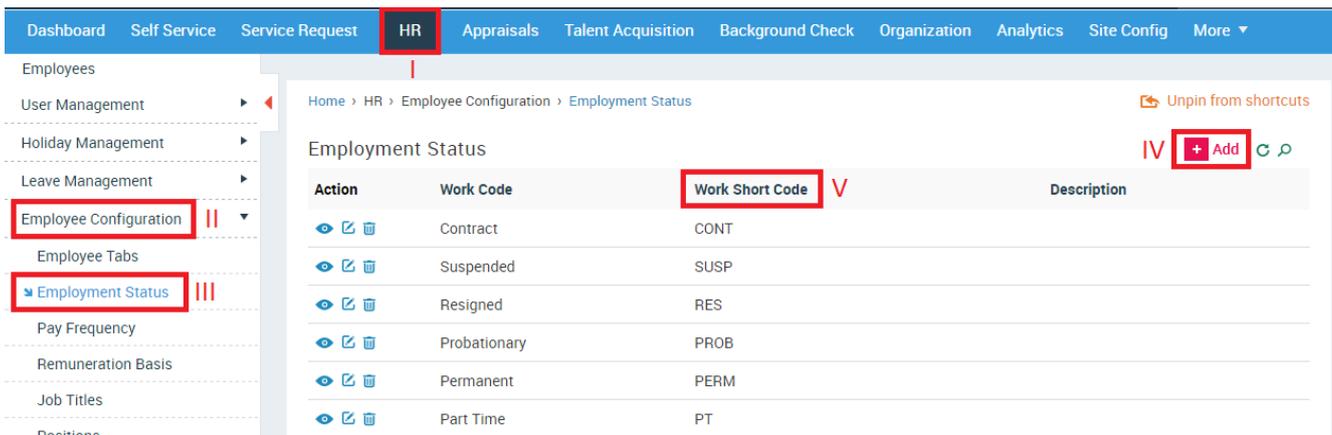
Figure 11

- 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

Figure 12

- This is a mandatory field

m. Date of Leaving

Please refer Figure 13

Figure 13

- 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

Figure 14

- This field is not mandatory

o. Enter the employee Extension

Please refer Figure 15

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
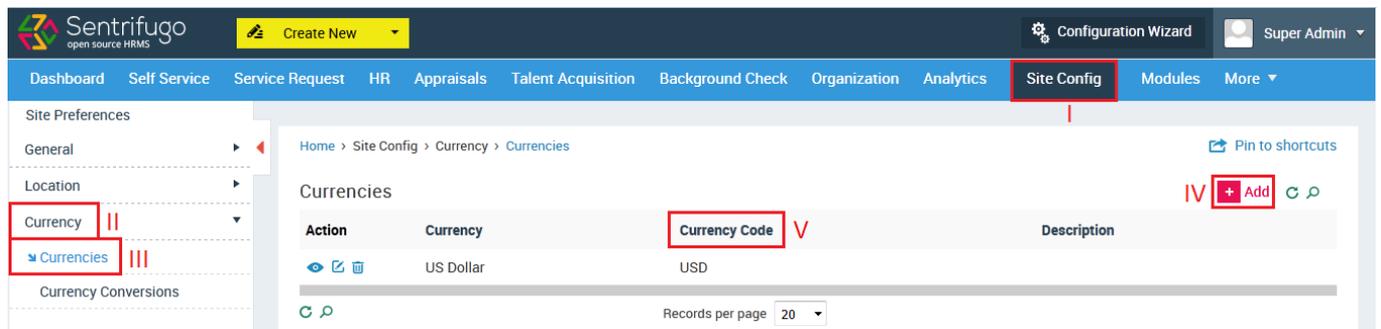
Figure 18

- 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

Please refer Figure 19
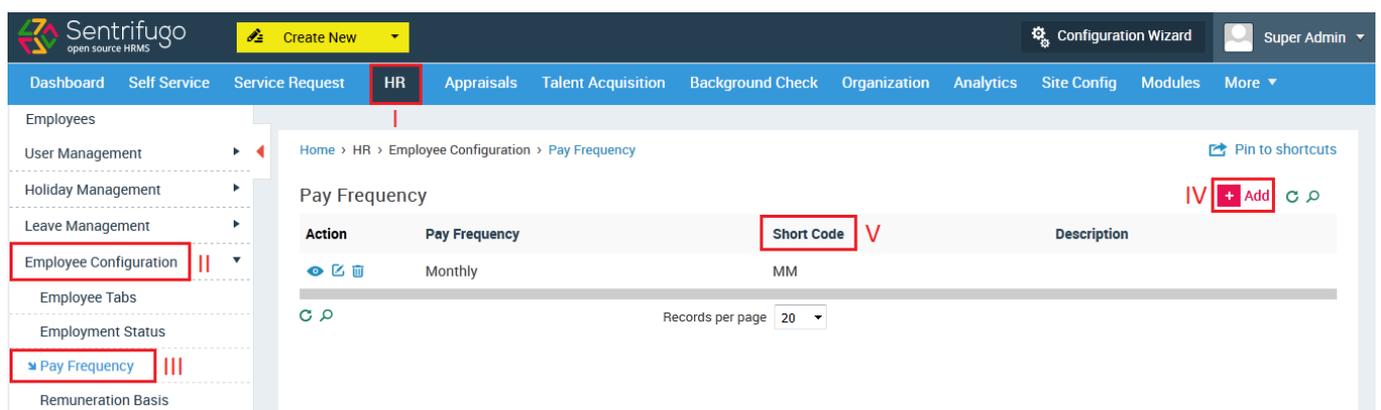
Figure 19

- 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

Figure 20

- This field is not mandatory