

Sentrifugo

Import Format Guide

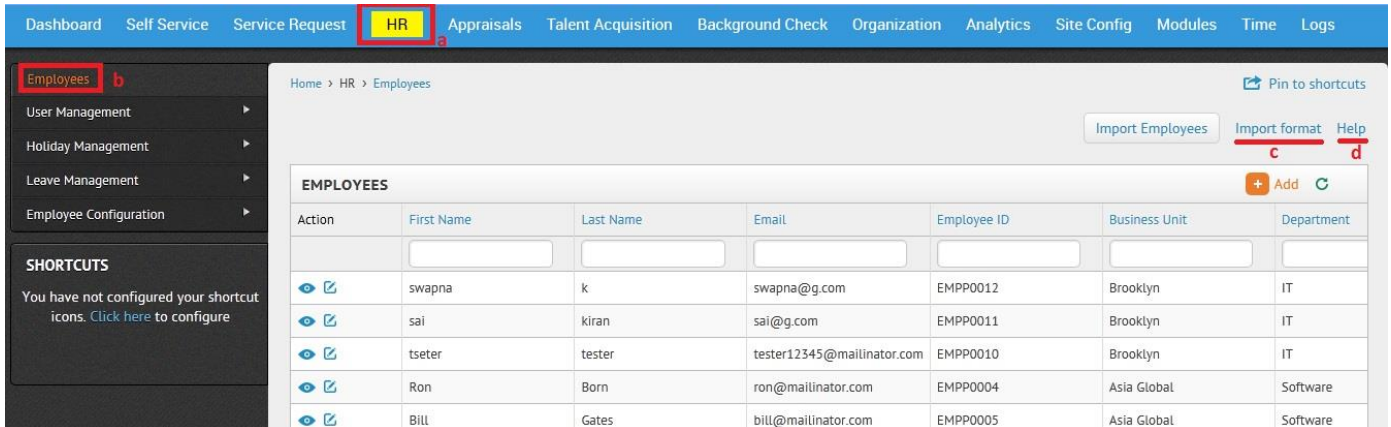
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Download the Import format

- Go to **HR** in the top menu
- Select the option **Employees** in the submenu on the left side panel
- Click on the **Import format** link placed above the grid on the top right corner
- For further guidance, click on the **Help** link

Refer to Figure 1



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR' (highlighted with a red box and label 'a'), 'Appraisals', 'Talent Acquisition', 'Background Check', 'Organization', 'Analytics', 'Site Config', 'Modules', 'Time', and 'Logs'. The left sidebar contains 'Employees' (highlighted with a red box and label 'b'), 'User Management', 'Holiday Management', 'Leave Management', and 'Employee Configuration'. The main content area shows the 'EMPLOYEES' grid with columns: Action, First Name, Last Name, Email, Employee ID, Business Unit, and Department. Above the grid, there are links for 'Import Employees', 'Import format' (highlighted with a red box and label 'c'), and 'Help' (highlighted with a red box and label 'd').

Figure 1

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

Refer Figure 2 for the import format



Prefix	First Name	Last Name	Role Type	Email	Business Unit	Department	Reporting manager employee ID	Job Title	Position	Employment Status	Date of joining	Date of leaving	Experience	Extension	Work telephone number	Fax	Salary	Currency	Pay Frequency	Salary
Mrs	Torie	Wilson	Employee	torie.wilson@example.com	GA	ACC	EM03	SE	Trainee	PROB	20-12-2015									

Figure 2

Select the Import format details

a. Prefix

- I. Go to **Site Config** in the top menu
- II. Select the option **General** in the submenu on the left side panel
- III. Select the option **Prefixes** in the child menu.
- IV. Add the required prefix by clicking on the **+ Add** button
- V. Use the **Prefix** to enter in the import excel sheet

Refer Figure 3

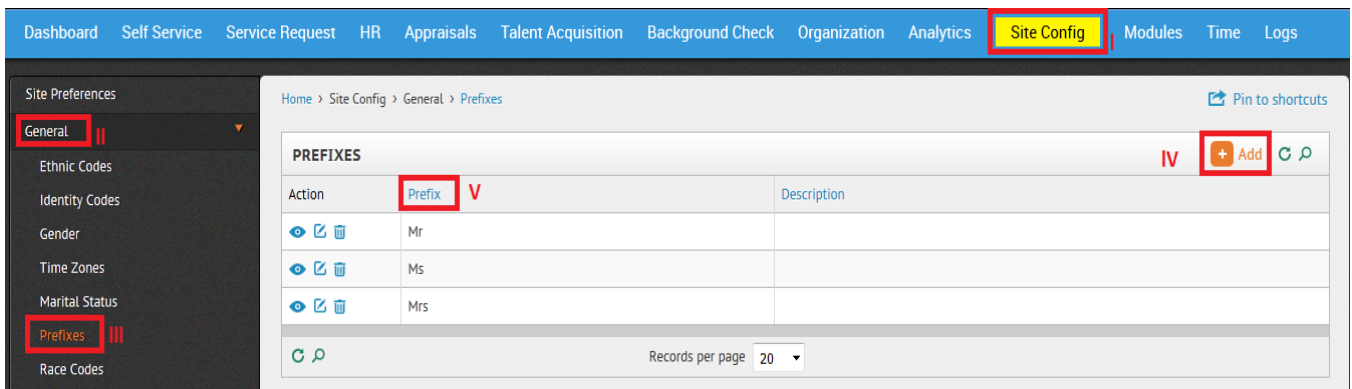


Figure 3

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

b. Enter the First and Last Name of the employee

- These fields are mandatory and accept only alphabetic characters

Refer Figure 4


A	B	C	D	E
Prefix	First Name	Last Name	Role Type	Email
				

Figure 4

c. Role Type

- I. Click on **HR** in the top menu
- II. Select the option **User Management** in the submenu on the left side panel
- III. Select the option **Roles & Privileges** in the child menu
- IV. Add the required roles and provide privileges to them by clicking on **+ Add** button
- V. Use the **Role Type** to enter in the import excel sheet

Refer Figure 5

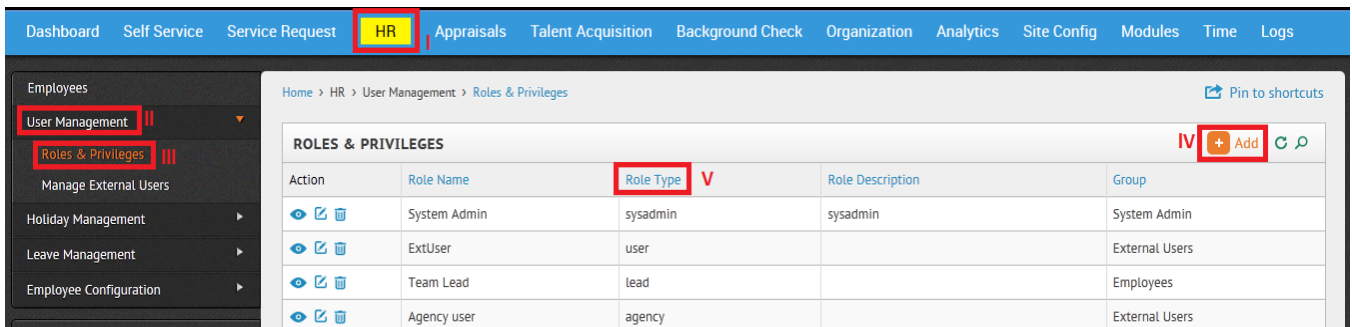


Figure 5

Note: You can only enter **Role Types** that are existing in the application

d. Enter the email of the employee

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

Refer figure 6

	C	D	E
ne	Role	Email	Business Unit

Figure 6

e. Business Unit

- I. Click on **Organization** in the top menu
- II. Select the option **Business Units** in the submenu on the left side panel
- III. Click on the **+ Add** button to add a business unit
- IV. Use the **Code** to enter in the import excel

Refer Figure 7

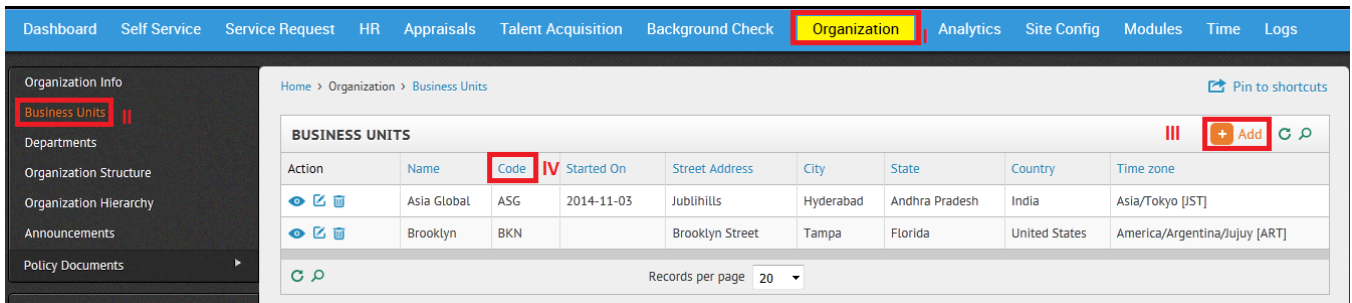


Figure 7

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

f. Departments

- I. Click on **Organization** in the top menu
- II. Select the option **Departments** in the submenu on the left side panel
- III. Click on the **+ Add** button to add the department
- 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.

Refer Figure 8

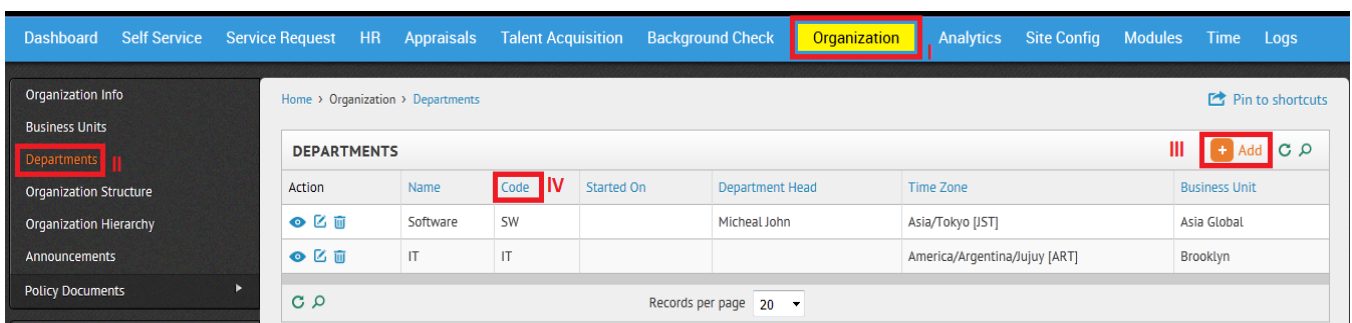


Figure 8

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

g. Enter the Reporting Manager's Employee ID

h. Job Title

- I. Go to **HR** in the top menu
- II. Select the option **Employee Configuration** in the submenu on the left side panel
- III. Select the option **Job Titles** in the child menu
- IV. Click on the **+ Add** button to add the desired job title
- V. Use the **Job Title Code** to enter in the import excel sheet

Refer Figure 9

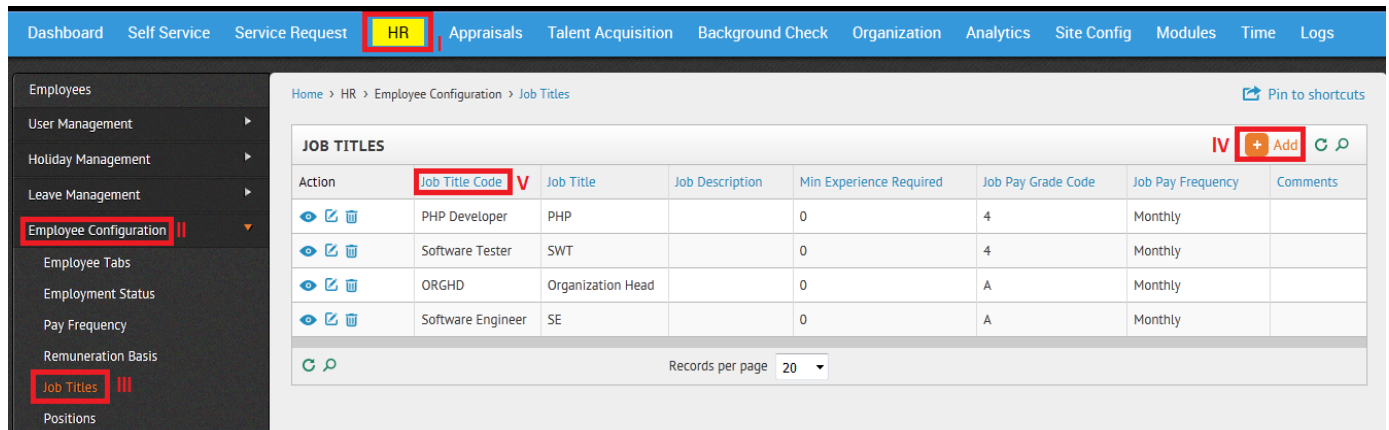


Figure 9

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

i. Position

- I. Go to **HR** in the top menu
- II. Select the option **Employee Configuration** in the submenu on the left side panel
- III. Select the option **Positions** in the child menu
- IV. Click on the **+ Add** button to add the desired position
- V. Use the **Position** to fill in the import excel

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

Refer Figure 10

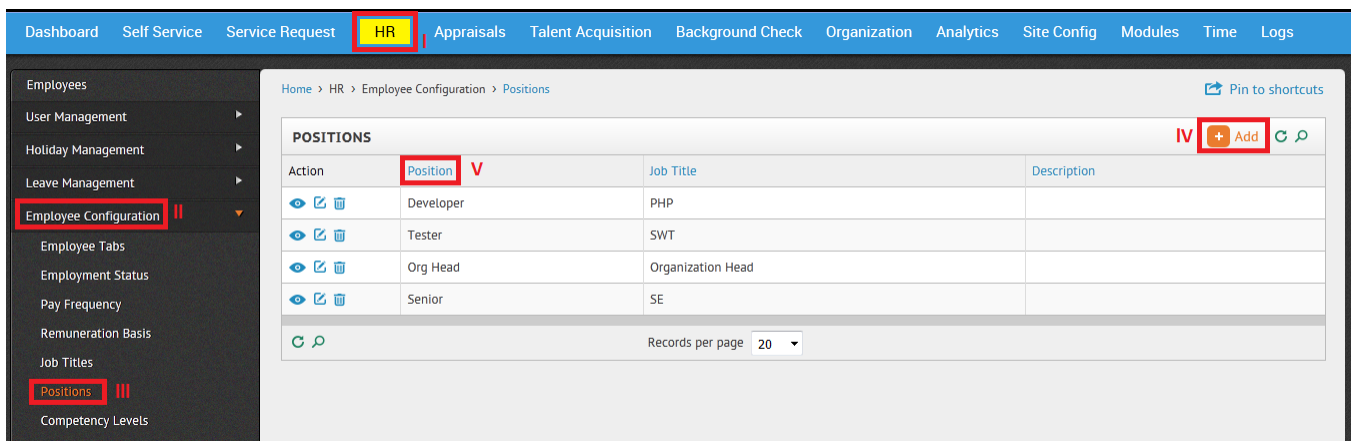


Figure 10

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

j. Employment Status

- I. Go to **HR** in the top menu
- II. Select the option **Employee Configuration** in the submenu on the left side panel
- III. Select the option **Employment Status** in the child menu
- IV. Click on the **+ Add** button to add the desired status
- V. Use the **Work Short Code** to enter in the import excel sheet

Refer Figure 11

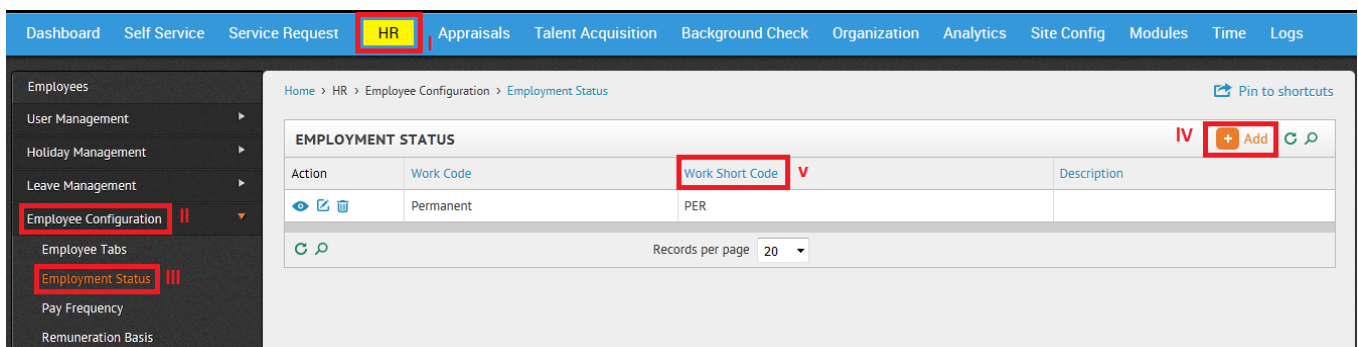


Figure 11

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

k. Enter the employee Date of Joining in “Day, month and four digit year with dashes” format

- This is a mandatory field

Refer Figure 12

K	L	M
ent Status	Date of joining	Date of leaving
	20-12-2014	
	20-12-2014	

Figure 12

I. Enter the employee Date of Leaving

- Date of Leaving column can be left empty unless the employee Employment status is Left/Suspended/Resigned
- Date of Leaving must be greater than the Date of Joining

Refer Figure 13

K	L	M
of joining	Date of leaving	Experienc

Figure 13

m. Enter the employee's experience

- This field is not mandatory

Refer Figure 14

L	M	N
Date of leaving	Experience	Extension

Figure 14

n. Enter the employee Extension

- This field is not mandatory

Refer Figure 15

M	N	
Experience	Extension	Work tele

Figure 15

o. Enter the employee Work Telephone Number

- This field is not mandatory

Refer Figure 16

N	O	P
Extension	Work telephone number	Fax

Figure 16

p. Enter the employee Fax

- I. This field is not mandatory

Refer Figure 17

O	P	Q
Phone number	Fax	

Figure 17

q. Salary Currency

- I. Go to **Site Config** in the top menu
- II. Select the option **Currency** in the submenu on the left side panel
- III. Select the option **Currencies** in the child menu
- IV. Click on the **+ Add** button to add the desired currency
- V. Use the **Currency Code** to enter in the import excel sheet

Refer Figure 18

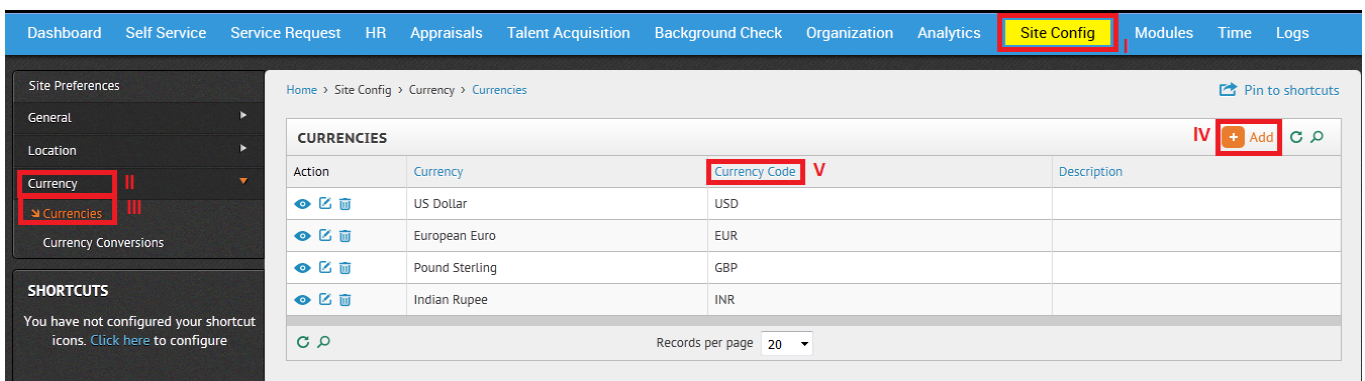


Figure 18

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

r. Pay Frequency

- I. Go to **HR** in the top menu
- II. Select the option **Employee Configuration** in the submenu on the left side panel
- III. Click on **Pay Frequency**
- IV. Click on Add button to add the desired status
- V. Use the Short Code to enter in the import excel

Refer Figure 19

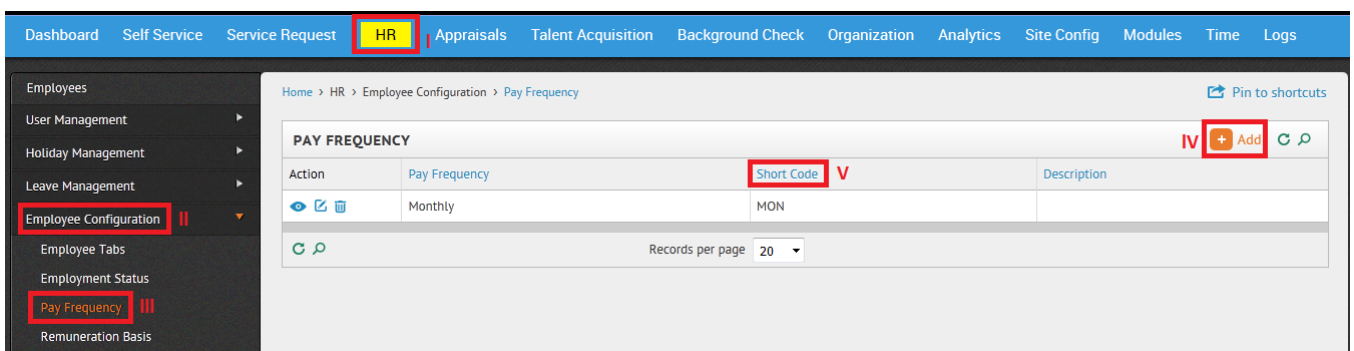


Figure 19

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

- s. **Enter the employee Salary**
 - I. This field is not mandatory

Refer Figure 20

S	T	U
Pay Frequency	Salary	

Figure 20