HRwize

Bulk Upload Guide

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Introduction

Bulk upload allows companies to quickly and easily upload multiple employees into the system without having to manually add the employees via the web interface. The process is facilitated via utilizing a CSV file which you can download to your computer, input your employee information and then upload via the main admin interface of HRWize.

Please Note – The "Employees" upload template cannot be used to modify existing employee's information as this is intended for uploading new employees to the system.

If you wish to modify existing information, you should use "Update employees" template instead.

We have available sample CSV files for you to download and we highly recommend you to use these files as the template for your CSV that you intend to upload (you should ensure to delete the sample data row that we have included in the file, but **THE HEADER ROW SHOULD REMAIN INTACT**.

While the process of uploading data via a CSV file is quick and easy, you should pay extra attention to the data you are inputting into the file as there is no validation when entering information into the CSV file.

As a result, we have implemented robust validation for the data when you try uploading the file to ensure that the data you entered is correct and is as we need to receive it. If you try to upload a file that does not meet the correct criteria as outlined below, the upload will fail. Therefore, please pay careful attention to the general notes below as well as the field specific notes to ensure that the process is as quick and simple as possible.

General Notes

1. The file should be saved as COMMA separated CSV file with a CSV extension.

2. The title row should be left in place and should not be changed.

3. Make sure there are no additional rows in the document by viewing in a text editor before uploading.

4. You should avoid entering data which includes a comma as this will cause an error – if you need to include a comma then the whole field should be enclosed in double quotes (" ").

5. When entering telephone numbers, if using a spreadsheet, ensure you set the field type to TEXT – otherwise most spreadsheets will remove the leading zero (0) so, for example, 01234567890 will become 1234567890. Alternatively, you can enter the number in quotes or include a space so it becomes 01234 567890 hence will no longer be viewed as a number.

6. When entering system determined values, please note where they are case sensitive – for example, *enabled* or *ENABLED* is not the same things as *Enabled*.

7. Ensure none of your data contains **"** or **'** or any other similar iteration as they will be escaped by the application to ensure data integrity. If you do try this, you will end up with a forward slash (\\) in front of the prohibited characters which is intentional on the part of the application.

8. You must fill in **ALL** mandatory columns – please see below for the columns which are mandatory.

9. Dates must be entered in the format **dd/mm/yyyy** regardless of your system setting for date formats.

10. The value in the National Insurance field (Social Insurance Number) is required and must be unique.

11. For **Manager**, **Job title, Job status, Site**, **Department**, **Sub Department** and **Leave Reason,** you must enter a valid value exactly as it appears in the system – for example, Sales manager and *Bob smith* is not the same as *Bob Smith*.

12. Additionally, for these fields, the values must be unique – for example, if you have two managers called Bob Smith then anyone reporting to that manager will fail due to **'Manager does not exist or is ambiguous'**.

13. You should ensure that you have pre-entered managers, job titles, job status and departments before attempting bulk upload as these are mandatory fields.

Please Note - If you want to make bulk upload easier, try organizing your CSV file in hierarchical order with the most senior person at the top, then their reports next and so on. This way, as you get to the "bottom" of the list, your managers will already exist.

If you do not wish to do this, you will either have to manually upload your managers first or a number or your employee uploads will fail due to 'Manager does not exist or is ambiguous'.

COMPANY STRUCTURE

COMPANY SITES

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
SITE REFERENCE	Reference number / code for this office location.	Can contain letters and/or numbers. *e.g. 001*	No	Mandatory
OFFICE NAME	The name of this office location.	Can contain letters and/or numbers. *e.g. Head office*	No	Mandatory
COMPANY NAME	The name of the company who resides at this site.	Can contain letters and/or numbers. *e.g. HRWize*	No	Optional
ADDRESS	Address line 1.	Can contain letters and/or numbers. *e.g. 1 Random Street*	No	Optional
ADDRESS 2	Address line 2.	Can contain letters and/or numbers.	No	Optional
TOWN	Town or City name	Can contain letters and/or numbers. *e.g. Pointe Claire*	No	Optional
COUNTY	County/state.	Can contain letters and/or numbers. *e.g. Randomshire*	No	Optional
POST CODE	Postal code or zip code.	Can contain letters and/or numbers. *e.g. H6T5T6*	No	Optional
COUNTRY	Country.	Please see below for valid list of countries. *e.g. Canada*	Yes	Mandatory
TELEPHONE	Telephone number for this site's location.	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeroes – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading. *e.g. 0123456789*	No	Optional
FAX	Fax number for this site's location.	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeroes – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading. *e.g. 0123456789*	No	Optional

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DEPARTMENTS

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
DEPARTMENT NAME	The name of the department.	Can contain letters and/or numbers. *e.g. Retail*	No	Mandatory
PARENT DEPARTMENT NAME	The name for the parent department if uploading a sub department – leave blank if uploading a parent department.	This should contain an existing department name that has been already defined in the system.	Yes	Optional

JOB ROLES

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
JOB TITLE	The job role title.	Can contain letters and/or numbers. *e.g. Accounting Manager*	No	Mandatory
DESCRIPTION	Description for the job role.	Can contain letters and/or numbers. *e.g. Accounting Manager's responsibilities include developing long-term relationship with assigned customers.*	No	Optional
RESPONSIBILITIES	Responsibilities for this job role.	Can contain letters and/or numbers. *e.g. Operate as the lead point of contact for any and all matters specific to your customers.*	No	Optional
QUALIFICATIONS	Required qualifications for this job role.	Can contain letters and/or numbers. *e.g. Bachelor of Commerce*	No	Optional
COMPETENCIES	Required competencies for this job role.	Can contain letters and/or numbers. *e.g. Customer Service*	No	Optional
EXPERIENCE	Required experience for this job role.	Can contain letters and/or numbers. *e.g. Three years experience in similar role.*	No	Optional
SALARY RANGE	Salary range for this job role.	Can contain letters/and or numbers. *e.g. $30000-$35000 Per annum*	No	Optional
BENEFITS	A list of any benefits that this job role is entitled to.	Can contain letters and/or numbers. *e.g. Car allowance*	No	Optional
REPORTS TO	The job role that this role reports to.	Can contain letters and/or numbers. *e.g. Accounts Director*	No	Optional
MANAGER	Denotes if this is a manager level job role or not.	This can contain only "Yes" for manager level or "No" for non-manager level. *e.g. Yes = employee in this role manage a team*	Yes	Mandatory
JOB LEVEL	The job role's job level.	Must be exactly as it is in the system. *e.g. High Management*	No	Optional

MIN SALARY	The job role's minimum salary range.	Must be only numerical values. *e.g. 23000*	No	Optional
MAX SALARY	The job role's maximum salary range.	Must be only numerical values. *e.g. 28000*	No	Optional
MIDPOINT SALARY	The job role's midpoint salary range.	Must be only numerical values. *e.g. 24250*	No	Optional
FTE SALARY	The job role's FTE salary.	Must be only numerical values. *e.g. 24250*	No	Optional

JOB STATUS

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
STATUS	The job status name.	Can contain letters and/or numbers. *e.g. Full Time*	No	Mandatory

JOB GRADES

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
JOB GRADE	The job grade name.	Can contain letters and/or numbers. *e.g. A1W1*	Yes	Mandatory
SALARY PERIOD	The salary for this job grade.	Can contain only numerical values. *e.g. 25000*	No	Mandatory
CURRENCY	The currency of this job grade.	Please see list of currencies. *e.g. CAD*	No	Mandatory
HOURS PER WEEK	The number of hours per week.	Can contain only numerical values. *e.g. 37.5*	No	Mandatory
ENTITLEMENT (DAYS)	The number of days entitled.	Can contain only numerical values. *e.g. 8 = 8 days*	No	Mandatory
ENTITLEMENT (HOURS)	The number of hours entitled.	Can contain only numerical values. *e.g. 10 = 10 hours*	No	Mandatory

BUSINESS UNITS

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
BUSINESS UNIT	The name of the Business unit that your employees will be assigned to.	Can contain letters and/or numbers. *e.g. Marketing*	Yes	Mandatory

COST CENTRES

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
COST CENTRE NAME	The name of the cost centre that your employees will be assigned to.	Can contain letters and/or numbers. *e.g. Marketing*	Yes	Mandatory

EMPLOYEES

EMPLOYEES

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
EMPLOYEE WORKS ID	Works or Employee ID / reference for employee in your company.	Can be made up of letters and/or numbers. *e.g. HRW456*	No	Recommended
TITLE	Employee title.	Can be made up of letters and/or numbers. *e.g. Mr, Mrs, Dr*	No	Optional
EMPLOYEE SURNAME	Employee's surname / last name.	Can be made up of letters and/or numbers. *e.g. Smith*	No	Mandatory
EMPLOYEE FIRST NAME	Employee's first name.	Can be made up of letters and/or numbers. *e.g. John*	No	Mandatory
EMPLOYEE MIDDLE NAME	Employee's middle name.	Can be made up of letters and/or numbers.	No	Optional
KNOWS AS	The name the employee is usually known as.	Can be made up of letters and/or numbers.	No	Optional
GENDER	Employee's gender.	*Male, Female* or *Not disclosed* are the only valid options. If not specified, use Not disclosed.	Yes	Mandatory
DOB (DD/MM/YYYY)	Employee's date of birth.	The format will need to be dd/mm/yyyy regardless of your localisation settings. If not specified, it will default to 01/01/Current year. *e.g. 15/03/1995 = 15th March 1995*	No	Mandatory
NATIONAL INSURANCE NUMBER	Also known as Social Security Number.	Can be made up of letters and/or numbers but MUST BE UNIQUE WITHIN YOUR COMPANY – this field is not validated other than for uniqueness. If not specified, it will default to random 9-character string. *e.g. 012938365*	No	Mandatory
MANAGER	Name of the employee's manager exactly as it is stored in the system.	Entered as Firstname Surname (with a space in the middle) – if employee has no manager, you should enter None. *e.g. Troy Smith*	Yes	Mandatory
HEAD OF DEPARTMENT NAME	The name of the head of this employee's department.	The name of an existing employee, and should be entered as Firstname then Lastname. *e.g. Troy Smith*	Yes	Optional
EMPLOYMENT STATUS	Depicts if an employee is a current or a leaver.	Only valid entries are *Current* or *Archived*. If not specified this will default to *Current*. *e.g. Current*	Yes	Mandatory

	current or archived employee			
JOB TITLE NAME	Job title exactly as it is entered in the system.	Must be a valid job title as entered in the system. If not specified, this will default to TBC. *e.g. Accountant*	Yes	Mandatory
JOB STATUS NAME	Job status exactly as it is entered in the system – job status is typically used for things like Full time, Permanent, Temporary etc.	This will need to be an existing job status entered in the system. If not specified, this will default to TBC. *e.g. Full Time*	Yes	Mandatory
HEADCOUNT CLASSIFICATION	Headcount classification exactly as it is entered into the system.	Can contain letters and/or numbers – this field can be used purely as a label for employees.	Yes	Optional
EMPLOYEE STATUS	Depicts if employee is on leave, maternity leave, etc.	If not specified this will be left blank. *e.g. On leave*	Yes	Optional
SOC GROUP	Employee's SOC group.	Must be a valid SOC group as entered in the system.	Yes	Optional
SOC CLASSIFICATION	Employee's SOC classification.	Must be a valid SOC classification as entered in the system.	Yes	Optional
START DATE (DD/MM/YYYY)	Employee's start date.	The format must be dd/mm/yyyy regardless of your localisation settings. If not specified, this will default to 01/01/Current year. *e.g. 20/02/2020 = February 20th 2020*	No	Mandatory
HOLIDAYS PER YEAR	Number of holidays employee is entitled to per year.	Must be numeric and consists of 3 or less digits. If not specified, this will default to 0. *e.g. 15 = 15 days holiday per year*	No	Optional
DEPARTMENT NAME	Department name exactly as it is entered in the system.	Must be an existing department as entered in the system. If not specified, this will default to TBC. *e.g. Sales*	Yes	Mandatory
SUB DEPARTMENT NAME	Sub department name exactly as it is entered in the system.	Must be an existing sub-department of the department entered under Department. *e.g. Retail*	Yes	Optional
DIVISION	Division exactly as it is entered in the system.	Can contain letters and/or numbers. This acts as a label against this employee. *e.g. Operations*	Yes	Optional
COMPANY	Company exactly as it is entered in the system.	Can contain letters and/or numbers. This acts as a label against this employee. *e.g. HRWize*	Yes	Optional
SITE NAME	Site office name exactly as it is entered in the system.	Looks for the value entered into the OFFICE NAME field. If not specified and only one site exists, this will default to that site.	Yes	Optional

		e.g. Corporate Office		
REGION	Region exactly as it is entered in the system.	Can contain letters and/or numbers. This acts as a label against employees. *e.g. Montreal*	Yes	Optional
APPROVER	Name of the employee's approver exactly as it is stored in the system.	Must be entered as First name then Surname (with a space in the middle). *e.g. Jess Harley*	Yes	Optional
SUPER APPROVER	Name of the employee's super approver.	Must be entered as First name then Surname (with a space in the middle). *e.g. Jess Smith*	Yes	Optional
MARITAL STATUS	Marital status of the employee.	Only valid options are *Married, Single, Widowed, Divorced, Living with partner, Separated* and *Not specified*.	Yes	Optional
ETHNICITY	Employee's ethnicity – not applicable.	Non applicable in Canada.	Yes	N/A
NATIONALITY	Employee's nationality – not applicable.	Non applicable in Canada.	Yes	N/A
SEXUALITY	Employee's sexuality – not applicable.	Non applicable in Canada.	Yes	N/A
RELIGION	Employee's religion – not applicable.	Non applicable in Canada.	Yes	N/A
CONSIDERED SELF-DISABLED?	Does the employee consider themselves as disabled?	Valid options include: 0 = No 1 = Yes 2 = Prefer not to say *e.g. 0 = Not considered disabled*	No	Optional
REGISTERED DISABLED?	Is the employee registered as disabled?	Valid options include: 0 = No 1 = Yes 2 = Prefer not to say *e.g. 0 = Not considered disabled*	No	Optional
ADDRESS	Employee's home address line 1.	Can contain letters and/or numbers. *e.g. 181 Hymus*	No	Optional
ADDRESS2	Employee's home address line 2.	Can contain letters and/or numbers. *e.g. 181 Hymus*	No	Optional
TOWN	Employee's town.	Can contain letters and/or numbers. *e.g. Random Town*	No	Optional
COUNTY	Employee's county or state.	Can contain letters and/or numbers. *e.g. Randomshire*	No	Optional
POSTCODE	Employee's postal code.	Can contain letters and/or numbers. *e.g. 1A4 3E4*	No	Optional
COUNTRY	Employee's country.	Please see below for valid list of countries.	Yes	Optional

		e.g. Canada		
HOME TELEPHONE	Employee's home telephone number.	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeros – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading. *e.g. 0123456789*	No	Optional
HOME MOBILE	Employee's home mobile / cellular number.	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeros – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading. *e.g. 0123456789*	No	Optional
HOME EMAIL	Employee's home email.	No validation. *e.g. support@hrwize.com*	No	Optional
WORK TELEPHONE	Employee's work telephone number.	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeros – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading. *e.g. 0123456789*	No	Optional
WORK MOBILE	Employee's work mobile / cellular number.	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeros – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading. *e.g. 0123456789*	No	Optional
WORK EMAIL	Employee's work email.	No validation. *e.g. support@hrwize.com*	No	Recommended
SLACK	Employee's slack account name.	Can contain letters and/or numbers.	No	Optional
SKYPE	Skype username.	Can contain letters and/or numbers. *e.g. john.smith*	No	Optional
CURRENCY	Salary currency.	Please see below for valid list of currencies. *e.g. CAD*	No	Recommended
SALARY	Employee's salary.	Can contain numbers only with no commas or currency symbols. *e.g. 35000*	No	Recommended
SALARY PERIOD		Valid options are per annum, per hour, per day, per week and per month. If salary is specified and period is not specified will default to Per annum. *e.g. Per Annum*	Yes	Mandatory if salary entered
BANK ACCOUNT NAME	Employee's bank account name.	Can contain letters and/or numbers.	Yes	Optional

SORT CODE	Employee's sort code.	Non applicable in Canada.	No	N/A
ACCOUNT NUMBER	Employee's account number.	Only numerical values.	Yes	Optional
BANK NAME	Employee's bank name.	Can contain letters and/or numbers.	Yes	Optional
BUILDING SOCIETY REFERENCE	Employee's building society reference.	Can contain letters and/or numbers.	Yes	Optional
BANK ADDRESS	Employee's bank address.	Can contain letters and/or numbers.	Yes	Optional
NOTICE PERIOD	Employee's required notice period.	No validation. *e.g. 6 months*	No	Optional
PROBATIONARY PERIOD END DATE	Date that the employee will end their probationary period.	The format will need to be dd/mm/yyyy regardless of your localisation settings. *e.g. 01/06/2020 = June 1st 2020.*	No	Optional
HOURS PER WEEK	Number of hours per week the employee works.	Must be numeric and can have maximum of 6 digits including a decimal point if required – do not enter commas or any other separators. *e.g. 37.5*	No	Optional
FTE	Employee's FTE	Must be numeric and can have up to 9 decimal places. *e.g. 1*	No	Optional
CONTRACT END DATE	Date the employee's contract ends.	Must be in the format dd/mm/yyyy regardless of your localization settings. *e.g. 22/03/2020 = March 22nd 2020*	No	Optional
LEAVE DATE	Date the employee left the company.	Must be in the format dd/mm/yyyy regardless of your localization settings – must be blank if the employee status is set to current. *e.g. 01/06/2020 = June 1st 2020*	No	Optional
LEAVE REASON NAME	The reason why the employee left exactly as it is entered in the system.	Must be a valid Leave reason as entered in the system if leave date is specified, employee status is set to Archived and Leave reason is not specified will default to TBC. *e.g. Resignation*	Yes	Mandatory if Leave date entered
WORKING DAYS	Normal working days for the employee.	Enter in numeric format where 1=Monday, 2=Tuesday, 3=Wednesday, 4=Thursday, 5=Friday, 6=Saturday, 7=Sunday. For example, to enter Monday to Friday you should enter 12345. Maximum length of 7 digits. *e.g. 12345 = Monday, Tuesday, Wednesday, Thursday, Friday.*	No	Optional
TIMEOFF METER	If employee timeoff is measured in hours or days.	Only valid options are "Days" or "Hours" – if left blank, this will default to "Days". *e.g. Days*	Yes	Optional
EMERGENCY CONTACT 1 NAME	Name of emergency contact 1.	Can contain letters and/or numbers. *e.g. Anne Smith*	No	Optional

EMERGENCY CONTACT 1 RELATIONSHIP	Relationship of emergency contact 1.	Can contain letters and/or numbers. *e.g. Mom*	No	Optional
EMERGENCY CONTACT 1 HOME TELEPHONE	Home telephone number for emergency contact 1.	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeros – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in the text editor before uploading. *e.g. 0123456789*	No	Optional
EMERGENCY CONTACT 1 TELEPHONE	Work telephone number for emergency contact 1.	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeros – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in the text editor before uploading. *e.g. 0123456789*	No	Optional
EMERGENCY CONTACT 1 MOBILE	Mobile/cellular number for emergency contact 1.	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeros – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in the text editor before uploading. *e.g. 0123456789*	No	Optional
EMERGENCY CONTACT 1 EMAIL	Email address for emergency contact 1.	No validation. *e.g. annasmith@hrwize.com*	No	Optional
EMERGENCY CONTACT 2 NAME	Name of emergency contact 2.	Can contain letters and/or numbers. e.g. Anna Smith	No	optional
EMERGENCY CONTACT 2 RELATIONSHIP	Relationship of emergency contact 2.	Can contain letters and/or numbers. *e.g. Mom*	No	Optional
EMERGENCY CONTACT 2 HOME TELEPHONE	Home telephone number for emergency contact 2.	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeros – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in the text editor before uploading. *e.g. 0123456789*	No	Optional
EMERGENCY CONTACT 2 TELEPHONE	Work telephone number for emergency contact 2.	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeros – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in the text editor before uploading. *e.g. 0123456789*	No	Optional
EMERGENCY CONTACT 2 MOBILE	Mobile/cellular number for emergency contact 2.	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeros – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in the text editor before uploading. *e.g. 0123456789*	No	Optional

EMERGENCY CONTACT 2 EMAIL	Email address for emergency contact 2.	No validation. *e.g. annasmith@hrwize.com*	No	Optional
COST CENTRE	Employee's cost centre.	Should contain an existing cost centre as it appears in the system. *e.g. Intern*	Yes	Optional
FINANCE ID	Employee's finance ID.	Can contain letters and/or numbers. *e.g. H4R54A*	Yes	Optional
BUSINESS UNIT	Employee's business unit.	Should contain an existing business unit as entered in the system. *e.g. Marketing*	Yes	Optional
JOB GRADE	Employee's job grade.	Can contain letters and/or numbers. *e.g. A1*	No	Optional
DESK	Employee's desk number.	Can contain letters and/or numbers. *e.g. A1*	No	Optional
FIRST AIDER	Whether the employee is a first aider.	Valid entries are "0" or "1". 0 = No 1 = Yes *e.g. 1 = First aider*	No	Optional
MENTAL HEALTH FIRST AIDER	Whether the employee is a mental health first aider.	Valid entries are "0" or "1". 0 = No 1 = Yes *e.g. 1 = Mental health first aider*	No	Optional
FIRE WARDEN	Whether the employee is a fire warden.	Valid entries are "0" or "1". 0 = No 1 = Yes *e.g. 1 = Fire warden*	No	Optional
KEY HOLDER	Whether the employee is a key holder.	Valid entries are "0" or "1". 0 = No 1 = Yes *e.g. 1 = Key holder*	No	Optional
DATA PROTECTION OFFICER	Whether the employee is a data protection officer.	Valid entries are "0" or "1". 0 = No 1 = Yes *e.g. 1 = Data protection officer*	No	Optional
HEAD OF HR	Whether the employee is a head of HR.	Valid entries are "0" or "1". 0 = No 1 = Yes *e.g. 1 = Head of HR*	No	Optional
HR BUSINESS PARTNER	Whether the employee is a HR business partner.	Valid entries are "0" or "1". 0 = No 1 = Yes *e.g. 1 = HR Business Partner*	No	Optional
LOGIN ID	If you wish to set up a Company User account	The entry in this field must be unique within HRWize and not just within your account. We	No	Optional

	for the employee so they can login and manage their own account, then you should enter a username (which can be their email address) in this box.	strongly recommend using the employee email address as their login name as it makes it easier for them to reset their password without needing to contact you as their administrator for support. *e.g. johnsmith@yourcompany.com*		
USERGROUP	If you have entered a login above, you must enter a user group.	Only valid options are Admin, HR, Manager, Employee, Finance, Recruiter, Facilities, Trainer and Approver. *e.g. Employee*	Yes	Mandatory if Login ID entered

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COMPANY USERS

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
EMPLOYEE ID	The employee you wish to assign the account to.	This can either be the name of the employee in format "Firstname" "Surname" (with space in between) or the unique numeric system identifier for the employee – if there is more than one employee using the entered name, you will get an error about the employee being ambiguous. As a result, you should use the system identifier. *e.g. John Smith*	No	Mandatory
LOGIN ID	If you wish to setup a Company User account for the employee so they can login and manage their own account, then you should enter a username (which can be their email address).	The entry in this field must be unique within HRWize and not just within your account We strongly recommend using the employee email address as their login name as it makes it easier for them to reset their password without needing to contact you as their administrator for support. *e.g. john.smith@yourcompany.com*	No	Mandatory
PASSWORD	If you have entered a login above, then you must enter a password.	Password will be checked to ensure it is suitable before allowing to proceed to prevent use of common insecure passwords. *e.g. SecurePassEx@mple*	No	Mandatory
PIN	If you have entered a login above, then you must enter a PIN.	Must be six digits long (no letters etc.) and will be checked to ensure it is suitable before allowing to proceed to prevent use 111111, 222222, 123456 etc. *e.g. 987654*	No	Optional
LOGIN ENABLED	If the employee account is to be enabled immediately – if you have entered a login above, you must enter a login enabled value.	Set "1" for enabled and "0" for disabled. *e.g. 1 = Account is enabled and ready to use*	No	If left blank will default to disabled (0)
USERGROUP	If you have entered a login above, you must enter a user group then.	Only valid options include: Admin, HR, Manager, Employee, Finance, Recruiter, Trainer and Approver. *e.g. Employee*	Yes	Mandatory
SECONDARY USERGROUP	If employee will be a member of a secondary user group.	Only valid options include: Admin, HR, Manager, Employee, Finance, Recruiter, Trainer and Approver. *e.g. Trainer*	Yes	Optional
PASSWORD CHANGE ON LOGIN	If you want your employees to change their password on next login.	Set "1" to require them to change their password on login or "0" for them not to have to. *e.g. 1 = User is forced to change their password upon Login.*	No	If left blank, this will default to forcely change on next login

SEND EMAIL CONFIRMATION	If you want to send an email to your employees notifying them that you have setup their account with their account with their username, password and PIN number.	Set "1" to send the email or "0" not to – please note you must have provided a work email address and set login enabled to 1 for this to work. *e.g. 2 emails are sent to the user automatically – one containing the login name and the other containing the provided password.*	No	Optional

UPDATE EMPLOYEES

The above fields refer to the "Employees" Upload section that can be located in the Bulk Upload module; this file is intended to upload employees to the system who have not already been entered. If you are looking to make adjustments to existing employee's information you should use the "Update employees" template in the Bulk Upload module rather than "Employees".

In the "Update employees" template, all fields except the "Employee ID" are **optional** where you should only complete columns that you wish to hange and leave all other blank to preserve existing information.

In this template, if you complete the employee ID column for an employee – you will need to enter some information in the same row to change, otherwise, the upload will fail.

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
EMPLOYEE ID	Used to identify the employee who these changes apply to.	Employee's name, Works ID or System ID should be entered EXACTLY as it appears in the system. For example, Chris and Christopher will not be the same person. *e.g. John Smith*	Yes	Mandatory
MANAGER	Name of the employee's manager exactly as it is stored in the system.	entered as Firstname Surname (with a space in the middle) – if employee has no manager, you should enter as None. This can also be entered as the System identifier in the event of manager name being ambiguous or duplicated. If not specified, this will default to person at the top of hierarchy. *e.g. Anne Smith*	Yes	Optional
HEAD OF DEPARTMENT NAME	The name of the head of this employee's department.	The name of an existing employee and must be entered as "Firstname" "Surname". *e.g. Steven Smith*	Yes	Optional
APPROVER NAME	Name of the employee's approver exactly as it is stored in the system.	Entered as "Firstname" "Surname" with a spave in the middle. *e.g. Lee Smith*	Yes	Optional

SUPER APPROVER	The name of the employee's super approver.	Entered as "Firstname" "Surname". This option is only used within custom approval workflows. *e.g. Paul Smith*	Yes	Optional
JOB TITLE NAME	Job titl exactly as it is entered in the system.	An existing job title entered in the system. If not specified, this will default to TBC. *e.g. Account Manager*	Yes	Optional
JOB STATUS	Job status exactly as it is entered in the system.	Job status is typically used for things like Full time, Permanent, Temporary, etc. If not specified, this will default to TBC. *e.g. Full Time*	Yes	Optional
HEADCOUNT CLASSIFICATION	Headcount classification exactly as it is entered in the system.	Can contain letters and/or numbers – this field can be used purely as a label for employees.	Yes	Optional
DEPARTMENT NAME	Department name exactly as it is entered in the system.	An existing department as entered in the system. If not specified, this will default to TBC. *e.g. Sales*	Yes	Optional
SUB DEPARTMENT NAME	Sub department name exactly as it is entered in the system.	An existing sub department of the department entered under "Department". *e.g. Retail*	Yes	Optional
DIVISION	Division exactly as it is entered in the system.	Can contain letters and/or numbers. This acts as a label against this employee. *e.g. Operations*	Yes	Optional
COMPANY	Company exactly as it is entered in the system.	Can contain letters and/or numbers. This acts as a label against this employee. *e.g. HRWize*	Yes	Optional
SITE NAME	Site office name exactly as it is entered in the system.	Looks for the value entered into the OFFICE NAME field. If not specified and only one site exists, this will default to the said site. *e.g. Head Office*	Yes	Optional
REGION	Region exactly as it is entered in the system.	Can contain letters and/or numbers. This acts as a label against this employee. *e.g. Montreal*	Yes	Optional
COST CENTRE	Employee's cost centre.	An existing cost centre as entered in the system. *e.g. Marketing*	Yes	Optional
FINANCE ID	Employee's finance ID.	Can contain letters and/or numbers. *e.g. H5RT67*	Yes	Optional
BUSINESS UNIT	Employee's business unit.	An existing Business unit as entered in the system. *e.g. Marketing*	Yes	Optional
JOB GRADE	Employee's job grade.	Can contain letters and/or numbers. *e.g. A1*	No	Optional
DESK	Employee's desk.	Can contain letters and/or numbers. *e.g. A1*	No	Optional

START DATE (DD/MM/YYYY)	Employee's start date.	This should be entered as dd/mm/yyyy regardless of your localisation settings. If not specified, this will default to 01/01/Current year. *e.g. 05/06/2020 = June 5th 2020*	No	Optional
PROBATIONARY DATE	Date the employee will end their probationary period.	This should be entered as dd/mm/yyyy regardless of your localisation settings. *e.g. 01/06/2020 = June 1st 2020*	No	Optional
NOTICE PERIOD	Employee's required notice period.	No validation.	No	Optional
SALARY	Employee's salary.	Enter only numbers with no commas or currency symbols. *e.g. 35000*	No	Optional
CURRENCY	Salary currency.	Please see below for valid list of currencies. *e.g. CAD*	No	Optional
SALARY PERIOD		Only valid options are per annum, per hour, per day, per week and per month. If salary is specified and period is not specified, this will default to Per annum. *e.g. Per Annum*	Yes	Optional
HOURS PER WEEK	Number of hours per week the employee works.	Must be numeric and can have maximum of 6 digits including a decimal point if required – do not enter commas or any other separators. *e.g. 37.5*	No	Optional
WORKING DAYS	Normal working days for the employee.	Enter in numeric format where 1=Monday, 2=Tuesday, 3=Wednesday, 4=Thursday, 5=Friday, 6=Saturday, 7=Sunday. For example, to enter Monday to Friday you should enter 12345. Maximum length of 7 digits. *e.g. 12345 = Monday, Tuesday, Wednesday, Thursday, Friday.*	No	Optional
WORKING HOURS	Normal working hours for the employee.	You must enter with a "|" to separate the hours per day. *e.g. 8|8|8|8|8*	No	Optional
FTE	Employee's FTE.	Must be numeric and can have up to 9 decimal places. *e.g. 1*	No	Optional
WORK EMAIL	Employee's work email.	No validation. *e.g. support@hrwize.com*	No	Optional
WORK PHONE	Employee's work phone.	Must be numeric and can have up to 9 decimal places. *e.g. 1*	No	Optional
WORK MOBILE	Employee's work telephone number.	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeros – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading.	No	Optional

		e.g. 0123456789		
SKYPE	Skype username.	Can contain letters and/or numbers. *e.g. john.smith*	No	Optional
SURNAME	Employee's surname / last name.	Can be made up of letters and/or numbers. *e.g. Smith*	No	Optional
FIRST NAME	Employee's first name.	Can be made up of letters and/or numbers. *e.g. John*	No	Optional
MIDDLE NAME (S)	Employee's middle name.	Can be made up of letters and/or numbers.	No	Optional
KNOWS AS	The name the employee is usually known as.	Can be made up of letters and/or numbers.	No	Optional
TITLE	Employee title.	Can be made up of letters and/or numbers. *e.g. Mr, Mrs, Dr*	No	Optional
ADDRESS	Employee's home address line 1.	Can contain letters and/or numbers. *e.g. 181 Hymus*	No	Optional
ADDRESS2	Employee's home address line 2.	Can contain letters and/or numbers. *e.g. 181 Hymus*	No	Optional
TOWN	Employee's town.	Can contain letters and/or numbers. *e.g. Random Town*	No	Optional
COUNTY	Employee's country or state.	Can contain letters and/or numbers. *e.g. Randomshire*	No	Optional
POSTCODE	Employee's postal code.	Can contain letters and/or numbers. *e.g. 1A4 3E4*	No	Optional
COUNTRY	Employee's country.	Please see below for valid list of countries. *e.g. Canada*	Yes	Optional
HOME TELEPHONE	Employee's home telephone number.	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeros – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading. *e.g. 0123456789*	No	Optional
HOME MOBILE	Employee's home mobile / cellular number.	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeros – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading. *e.g. 0123456789*	No	Optional
HOME EMAIL	Employee's home email.	No validation. *e.g. support@hrwize.com*	No	Optional
MARITAL STATUS	Employee home address line 2.	Only valid options are *Married, Single, Widowed, Divorced, Living with partner, Separated* and *Not specified.*	Yes	Optional

ETHNICITY	Employee's ethnicity.	Non applicable in Canada.	Yes	N/A
NATIONALITY	Employee's nationality.	Non applicable in Canada.	Yes	N/A
SEXUALITY	Employee's sexuality.	Non applicable in Canada.	Yes	N/A
RELIGION	Employee's religion.	Non applicable in Canada.	Yes	N/A
CONSIDERED SELF-DISABLED?	Does the employee consider themselves aas disabled?	Valid options include: 0 = No 1 = Yes 2 = Prefer not to say *e.g. 0 = Not considered disabled*	No	Optional
REGISTERED DISABLED?	Is the employee registered as disabled?	Valid options include: 0 = No 1 = Yes 2 = Prefer not to say *e.g. 0 = Not considered disabled*	No	Optional
FIRST AIDER	Whether the employee is a first aider.	Valid entries are "0" or "1". 0 = No 1 = Yes *e.g. 1 = First aider*	No	Optional
FIRE WARDEN	Whether the employee is a fire warden.	Valid entries are "0" or "1". 0 = No 1 = Yes *e.g. 1 = Fire warden*	No	Optional
IS HEAD OF DEPARTMENT?	Whether the employee is a head of department.	Options include "0" or "1". 0 = No 1 = Yes *e.g. 1 = This person is a valid head of department.*	No	Optional
IS SUPER APPROVER	Whether the employee is a Super Approver.	Options include "0" or "1". 0 = No 1 = Yes *e.g. 1 = This person is a valid Super Approver.*	No	Optional
CONTRACT END DATE	The contract end date for this employee.	Should be entered as dd/mm/yyyy format. *e.g. 01/06/2020 = June 1st 2020*	No	Optional
WORKS ID	The employee's Works ID number.	Can contain letters and/or numbers. *e.g. HRW123*	Yes	Optional
SOC GROUP		Non applicable in Canada.	No	Optional
SOC CLASSIFICATION		Non applicable in Canada.	No	Optional
DOB	Employee's date of birth.	Should be entered as dd/mm/yyyy format. *e.g. 01/06/2020 = June 1st 2020*	No	Optional
GENDER	Employee's gender	*Male, Female* or *Not disclosed* are the only valid options. If not specified, use Not disclosed.	Yes	Optional

NI NUMBER	Also known as Social Security Number	Can be made up of letters and/or numbers but MUST BE UNIQUE WITHIN YOUR COMPANY – this field is not validated other than for uniqueness. If not specified, it will default to random 9-character string. *e.g. 012938365*	No	Optional
MENTAL HEALTH FIRST AIDER	Whether the employee is a mental health first aider.	Valid entries are "0" or "1". 0 = No 1 = Yes *e.g. 1 = Mental Health First Aider*	No	Optional
DATA PROTECTION OFFICER	Whether the employee is a data protection officer.	Valid entries are "0" or "1". 0 = No 1 = Yes *e.g. 1 = Data Protection Officer*	No	Optional
KEY HOLDER	Whether the employee is a key officer.	Valid entries are "0" or "1". 0 = No 1 = Yes *e.g. 1 = Key officer*	No	Optional
SLACK	Employee's slack account name.	Can contain letters and/or numbers.	No	Optional
EMPLOYEE STATUS	Depicts if employee is on leave, maternity leave, etc.	If not specified this will be left blank. *e.g. On leave*	Yes	Optional
IS HEAD OF HR?	Depicts if employee is a head of HR.	If not specified this will be left blank. 0 = No 1 = Yes *e.g. 1 = Head of HR*	No	Optional
IS HR BUSINESS PARTNER?	Depicts if employee is a HR Business Partner.	If not specified this will be left blank. 0 = No 1 = Yes *e.g. 1 = HR Business Partner*	No	Optional
HEAD OF HR	Employee's Head of HR	Must be a specific employee who is a Head of HR.	No	Optional
HR BUSINESS PARTNER	Employee's HR Business Partner.	Must be a specific employee who is HR Business Partner.	No	Optional
CHANGE DATE	The date on which the change is due to take place.	Should be entered as dd/mm/yyyy format. *e.g. 01/06/2020 = June 1st 2020*	No	Optional
CHANGE REASON	The reason for this information change taking place.	Change reasons should be entered as they appear in the system. *e.g. Promotion*	Yes	Optional

TIME AND ATTENDANCE

TIME OFF

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
EMPLOYEE ID	The system ID, employee name or Works ID for the employee you wish to assign the account to.	This can either be the name of the employee in format "Firstname" "Surname" (with space in between) or the unique numeric system identifier for the employee – if there is more than one employee using the entered name, you will then get an error and you should use the system identifier. *e.g. John Smith*	No	Mandatory
TIME OFF TYPE	Time off type exactly as it is entered in the system.	This should be an existing time off type as entered in the system. *e.g. Vacation*	Yes	Mandatory
START DATE	The date this time off instance begins.	Should be in the format dd/mm/yyyy. *e.g.05/04/2020 = April 5th 2020*	No	Mandatory
END DATE	The date this time off instance ends.	Should be in the format dd/mm/yyyy. *e.g.05/04/2020 = April 5th 2020*	No	Mandatory
DURATION	Duration of the request – system will not calculate the duration if entered via bulk upload.	Must be numeric, may include decimals. *e.g. 1 = 1 day*	No	Mandatory
METER	If the employee timeoff is measured in hours or days.	Should contain "Days" or "Hours". *e.g. Days*	Yes	Mandatory
AM/PM	If the employee's time off is less than 0, they can specify if this time off is AM or PM.	Should contain only "am" or "pm". *e.g. am = Time off only in the morning*	No	Optional
EMPLOYEE COMMENTS	Any comments submitted by the employee.	Open text. *e.g. I will be attending an event.*	No	Optional
MANAGER COMMENTS	Any comments submitted by the manager/approver.	Open text. *e.g. Enjoy!*	No	Optional
APPROVED	Status of the request.	If the request is pending set to 0, if the approved set to 1 and if declined set to 2. *e.g. 1 = Request approved*	No	Mandatory

TIME OFF ALLOWANCES

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
EMPLOYEE ID	Used to indentify the employee who these changes apply to.	Employee's name, Works ID or System ID must be exactly as it appears in the system.	Yes	Mandatory
TIME OFF TYPE	The name of this time off type that this allowance is linked to.	This must be exactly the same as the existing time off types in the system. *e.g. Annual Leave*	Yes	Mandatory
ENTITLEMENT	The amount of days or hours that this employee is entitled to.	Can contain only Numeric values. *e.g. 25*	No	Mandatory
METER	Whether this entitlement is recorded is days or hours.	Can contain either "Days" or "Hours". *e.g. Days*	Yes	Mandatory

TIME OFF TYPES

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
TYPE NAME	The name of the time off type that you would like to enter.	Can contain letters and/or numbers. *e.g. Annual Leave*	Yes	Mandatory
DEDUCTING	Does this time off type have an allowance against it?	Can only contain numbers 1-5. Valid options are: 1 – Pool 2 – Individual 3 – Length of service 4 – Limited allowance 5 – Length of service alternate *e.g. 2 = Individual allowance*	Yes	Optional
AUTHORISED	Should this leave be authorized?	This should be entered as "0" or "1". 1 = Yes 0 = No *e.g. 1 = Autorisé*	No	Optional
PAID	Is this leave paid?	This should be entered as "0" or "1". 1 = Yes 0 = No *e.g. 1 = Paid*	No	Optional
BOOKABLE	Is this type of leave available for employees to request?	This should be entered as "0" or "1". 1 = Yes 0 = No *e.g. 1 = Bookable*	No	Optional
RTW	Is a Return to work form required when an instance of this absence is submitted?	This should be entered as "0" or "1". 1 = Yes 0 = No *e.g. 1 = Return to work form is required*	No	Optional

PUBLIC CALENDAR	How much detail would you like to display on the Public calendar for this time off type?	Must contain 1,2 or 3. 1 = Yes fully visible *e.g. John Smith, Annual Leave* 2 = Yes, but no reason shown *e.g. John Smith* 3 = No, not visible	No	Optional
DEFAULT DEDUCTING	Would you like your list of mandatory holidays to be deducted from this allowance?	This should be entered as "0" or "1". 1 = Yes 0 = No *e.g. 1 = Mandatory holidays are deducted*	No	Optional
PARENT	Is this time off type part of an existing time off type? i.e. – "Cold and flu" would require a parent of "Sickness".	Must contain the name of time off type that already exists in the upload sheet exactly as it appear in the "Type name" column. *e.g. Sickness*	Yes	Optional
COLOUR	Hex code of the colour that will display in the public calendar.	Must contain a valid 6-digit Hex colour code. *e.g. 000000 = Black*	No	Optional

TIMESHEETS

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
EMPLOYEE ID	Used to indentify the employee who these changes apply to.	Employee's name, Works ID or System ID must be exactly as it appears in the system.	Yes	Mandatory
WEEK BEGINNING	The date of the first day of the week for this timesheet entry.	This should be entered in dd/mm/yyyy format. *e.g. 22/03/2020 = Match 22nd 2020*	No	Mandatory
DATE	The date of the daily entry for this timesheet.	This should be entered in dd/mm/yyyy format. *e.g. 22/03/2020 = Match 22nd 2020*	No	Mandatory
START	The start time of this timesheet entry.	This should be entered in "hhmm" format *e.g. 2:00PM = 1400*	No	Optional
END	The end time of this timesheet entry.	This should be entered in "hhmm" format *e.g. 2:00PM = 1400*	No	Optional
BREAKS	The amount of time that has been taken as a break on this day.	Total amount of breaks entered in minutes. *e.g. 30 = 30 minute break*	No	Mandatory
REFERENCE 0	The reference that this timesheet relates to.	Must contain an existing reference exactly as it appears in the system.	Yes	Mandatory if have References
REFERENCE 1	The reference that this timesheet relates to.	Must contain an existing reference exactly as it appears in the system.	Yes	Mandatory if have References

REFERENCE 2	The reference that this timesheet relates to.	Must contain an existing reference exactly as it appears in the system.	Yes	Mandatory if have References
TASK	The task that this timesheet relates to.	Must contain an existing task exactly as it appears in the system	Yes	Mandatory if have Tasks
BILLABLE	Is this timesheet billable?	This should be entered as "0" or "1". 1 = Yes 0 = No	No	Mandatory if you Billable is set in your environment
TOTAL	The total amount of time that has been worked on this day. Only required if not entering a start time, end time and breaks duration.	Total mount of times worked in minutes. *e.g. 240 = 4 hours worked*	Yes	Mandatory
COMMENTS	Any additional comments relating to this timesheet entry.	Can contain letters and/or numbers.	Yes	Optional

TIME TRACKING

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
EMPLOYEE	The name of the employee that this timesheet relates to.	This field should contain the name of the employee exactly as it appears in the system or the employee's system ID number.	Yes	Mandatory
DATE	The date for this time and attendance record.	This should be entered in dd/mm/yyyy format. *e.g. 22/03/2020 = Match 22nd 2020*	Yes	Mandatory
TIME IN	The start time for this time and attendance record.	This should be entered in hh:mm:ss format *e.g. 09:00:00 = 9AM*	No	Mandatory
TIME OUT	The end time for this time and attendance record.	This should be entered in "hhmm" format *e.g. 17:00:00 = 5pm*	Yes	Mandatory
TOTAL (HOURS)	The total hours of this time tracking.	This should be only numerical values. *e.g. 7.75*	No	Mandatory

CARRYOVER VALUES

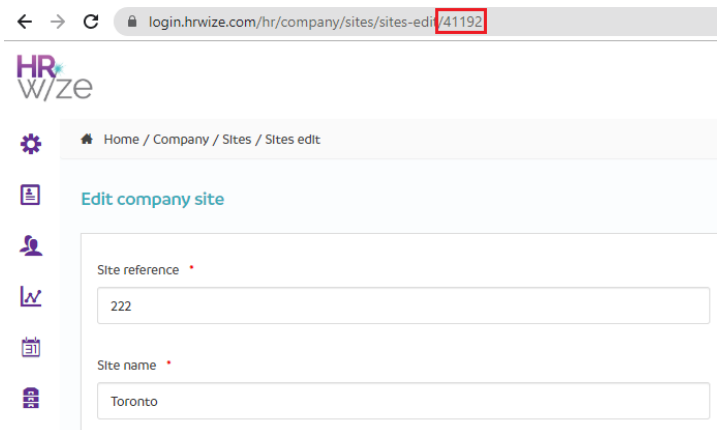| FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
EMPLOYEE NAME	Used to identify the employee who these changes apply to.	Employee's name, Works ID or System ID must be exactly as it appears in the system.	Yes	Mandatory
VALUE	The carryover entitlement for this employee.	Numeric values only. *e.g. 5*	Yes	Mandatory

TOIL VALUES

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
EMPLOYEE NAME	Used to identify the employee who these changes apply to.	Employee's name, Works ID or System ID must be exactly as it appears in the system.	Yes	Mandatory
VALUE	The Time off in Lieu entitlement for this employee.	Numeric values only. *e.g. 3*	Yes	Mandatory
START DATE (OPTIONAL)	The start date of this TOIL.	This should be entered in dd/mm/yyyy format. *e.g. 22/03/2020 = Match 22nd 2020*	No	Optional
END DATE (OPTIONAL)	The end date of this TOIL.	This should be entered in dd/mm/yyyy format. *e.g. 22/03/2020 = Match 22nd 2020*	No	Optional

COMPANY HOLIDAYS

If you are restricting a company holiday to only apply to certain Sites, Departments or Cost Centres, the bulk upload template requires the system ID number rather than the name of each of these.

To find these ID numbers, you should go and edit the relevant site in your system where you will find the ID number at the end of the URL.

If you are restricting by multiple Sites, Departments or Cost Centres, you should enter these in the relevant column separated by commas.

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
DATE	The date of the company holiday.	This should be entered in dd/mm/yyyy format. *e.g. 22/03/2020 = March 22th 2020*	Yes	Mandatory
HOLIDAY NAME	The name of the company holiday.	Can contain letters and/or numbers. *e.g. New Year*	Yes	Mandatory
SITES	This sites that this company holiday relates to.	This should contain the system ID number for the site – Not the name of the site. *e.g. if the ID number for head office is 31328, this field should contain 31328.*	Yes	Optional
DEPARTMENTS	The departments that this company holiday relates to.	This should contain the system ID number for the department – Not the name of the department. *e.g. if the ID number for Sales is 31328, this field should contain 31328.*	Yes	Optional
COST CENTRES	The cost centres that this company relates to.	This should contain the system ID number for the cost centre – Not the name of the cost centre. *e.g. if the ID number for Marketing is 31328, this field should contain 31328.*	Yes	Optional

OTHER DATA

EMPLOYEE MEDICAL

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
EMPLOYEE	Used to identify the employee who these changes apply to.	Employee's name or System ID must be exactly as it appears in the system.	Yes	Mandatory
CATEGORY	The category for this medical information.	This should any of the following exactly as listed: • Allergy • Medical • Medication • Other	Yes	Mandatory
TYPE	The type of medical information that is being entered.	This field should contain an existing Medical condition exactly as it appears in the system. *e.g. Inhaler*	Yes	Mandatory
COMMENTS	Additional notes or comments relating to this condition.	Can contain letters, numbers and special characters. *e.g. Blue Inhaler – top desk drawer*	Yes	Optional
CRITICAL	Is this a critical condition?	Valid options include: 1 = Yes 0 = No *e.g. 1 = Critical*	Yes	Optional

TRAINING RECORDS

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
EMPLOYEE ID	The system ID, employee name or Works ID for the employee you wish to assign the training to.	This can either be the name of the employee in format "Firstname" "Surname" (with space in between) or the unique numeric system identifier for the employee – if there is more than one employee using the entered name, you will then get an error and you should use the system identifier.	No	Mandatory
TRAINING TITLE	The title of the training course.	Can contain letters and/or numbers. *e.g. First Aid*	Yes	Mandatory
CATEGORY	The category the training record belongs to.	Can contain letters and/or numbers. *e.g. IT courses*	No	Optional
TRAINING DESCRIPTION	A description of the content for this training.	Can contain letters and/or numbers.	No	Optional
TRAINING DATE	The date this training course took place.	Should be entered in the format dd/mm/yyyy. *e.g. 23/04/2020 = April 23th 2020*	No	Mandatory

MANDATORY	Denotes if this is a mandatory training course.	Set to "0" for No, set to "1" for yes. *e.g. 1 = Mandatory*	No	Optional – will default to No (0) if left blank
NUMBER OF DAYS	Duration of the training.	Must be a numeric value. *e.g. 3 = This course lasts 3 days*	Yes	Mandatory
LEARNING HOURS	Learning hours of this training.	Must be a numerical value. *e.g. 240 = This course has 240 of learning hours*	Yes	Optional
INTERNAL	Denotes if the training is internal or external training.	Only valid values are "Internal" and "External". *e.g. Internal*	No	Mandatory
PROVIDER	Name of the training provider.	Can contain letters and/or numbers. *e.g. First Aid training Inc.*	No	Optional
LOCATION	Location where the training is held.	Can contain letters and/or numbers. *e.g. Meeting Room 1*	No	Mandatory
COST	Cost of the training.	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators. *e.g. 250*	Yes	Mandatory
COST UNIT	Unit linked to the above cost.	Only valid values are Complete, Hour, Day, Half Day, Delegate and Week – complete indicates this is the total cost of the course. *e.g. Per delegate*	No	Mandatory
RESULT	The result of this training course.	Only valid values are Passed, Failed and Completed. *e.g. Passed*	No	Mandatory
EXPIRY DATE	The expiry date of this training course.	Should be entered in the format dd/mm/yyyy. *e.g. 23/04/2020 = April 23th 2020*	No	Optional

MEETINGS

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
EMPLOYEE ID	Used to identify the employee who these changes apply to.	Employee's name or System ID must be exactly as it appears in the system.	Yes	Mandatory
TYPE	The type of meeting that is occurring. For example, a one-monthly meeting, annual meeting, etc.	Can contain any of the following options: 1 = Monthly meeting 3 = 3 monthly meeting 6 = 6 montthly meeting 12 = Annual meeting 99 = General meeting 121 = One to one meeting *e.g. 12 = Annual meeting*	Yes	Mandatory
MEETING WITH	The name of the person who is meeting with the employee.	Should contain the name of another active employee exactly as it appears in the system.	Yes	Mandatory

DATE	The date of this meeting.	This should be entered in dd/mm/yyyy format. *e.g. 22/03/2020 = March 22th 2020*	No	Mandatory
TIME	The start time of this meeting.	Times should be entered in "hhmm" format. *e.g. 1400 = 2pm*	Yes	Mandatory
LOCATION	The location of this meeting.	Can contain letters and/or numbers. *e.g. Meeting Room 1*	Yes	Optional
COMMENTS	General comments relating to this meeting.	Can contain letters and/or numbers.	Yes	Optional

BENEFITS

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
EMPLOYEE ID	The system ID, employe's name or Works ID for the employee you wish to assign the account to.	This must be the unique numeric system identifier for the employee – you cannot enter the employee name in this field. *e.g. John Smith*	No	Mandatory
PENSION	Annual pension contribution figure.	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators. *e.g. 3%*	No	Optional
MEDICAL	Annual Medical benefit figure.	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators. *e.g. 500*	No	Optional
DENTAL	Annual Dental benefit figure.	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators. *e.g. 500*	No	Optional
LIFE ASSURANCE	Annual Life assurance benefit figure.	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators. *e.g. 500*	No	Optional
HEALTH INSURANCE	Annual Health insurance benefit figure.	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators. *e.g. 1500*	No	Optional
CRITICAL ILLNESS	Annual Critical illness benefit figure.	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators. *e.g. 2000*	No	Optional
EMPLOYEE ASSISTANCE	Annual Employee assistance benefit figure.	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators. *e.g. 3000*	No	Optional

GYM	Annual Gym benefit figure.	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators. *e.g. 500*	No	Optional
CHILDCARE	Annual Childcare benefit figure.	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators. *e.g. 500*	No	Optional
COMPANY CAR	Annual Company car benefit figure.	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators. *e.g. 500*	No	Optional
CAR ALLOWANCE	Annual Car allowance benefit figure.	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators. *e.g. 500*	No	Optional
FUEL CARD	Annual Fuel card benefit figure.	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators. *e.g. 500*	No	Optional
MOBILE	Annual Mobile benefit figure.	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators. *e.g. 500*	No	Optional
COMMISSION	Annual Commission benefit figure.	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators. *e.g. 500*	No	Optional
OTHER BENEFIT	Use for any benefits not listed above.	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators. *e.g. 500*	No	Optional
CUSTOM BENEFIT 1-12	If using custom benefits will map to the benefit loaded under Custom benefit 1 to 12.	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators. *e.g. 500*	No	Optional

CUSTOM EMPLOYEE FIELDS

Custom employee fields will allow you to capture information about an employee that has not already been captured in the system.

You should ensure that you have created your custom fields in the system before uploading the information.

In this template, you are entering the values for each employee against these fields.

While creating your custom fields, it is worth taking note of which field names relate to the relevant number.

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
EMPLOYEE ID	Used to identify the employee who these changes apply to.	Employee's name or System ID must be exactly as it appears in the system.	Yes	Mandatory
CUSTOM 1-10	Values for each of these fields.	Can contain letters and/or numbers.	Yes	Mandatory
YES/NO DROPDOWN	A dropdown list pre-populated with Yes and No.	The first letter of either yes or no must be capitalized i.e. **Yes** or **No** (you will have data errors if the cases are not respected)	Yes	Optional

COMPETENCIES

The competencies upload template can be used for a variety of different combinations:

- Uploading a new current competency rating for each employee – For example, John Smith has a score of 3 for Sales
- Uploading required ratings for Job roles – For example, the required competency rating for an Account Manager is Sales of 3
- Uploading new competencies to the system
- Adjusting existing ratings for both employees and the required ratings for their job role – For example, changing John Smith's Sales score form a 3 ro a 4 or changing the required job role rating from a 3 to a 4.

Please note of the following rules when uploading competencies:

- In Column A (Employee OR Job title name), if this includes either the employee's system ID number or the employee's name, you must enter the Competency Name, Employee Score and Assigned Date
- If Column A contains the name of a Job title, the Required Score for job role (column E) must be completed
- If Updating existing employees' ratings or required job role ratings, this will override the current values
- If uploading a new list of competencies, only Collumn B (Competency name) is mandatory
- All scores and ratings must be within the parameters of the module – For example, if your company settings dictate that scores are between 1-5 uploading a rating of a 6 will cause the upload to fail.

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
EMPLOYEE OR JOB TITLE NAME	Used to identify the information that these changes apply to.	Employee's name, System ID or Job title name must be exactly as it appears in the system.	Yes	Mandatory *(If uploading or arjusting employee's or Job title rating)* Optional *(If uploading new competencies to the system)*
COMPETENCY NAME	The name of the competency in which you are making adjustment.	Can contain letters and/or numbers. *e.g. Sales skills*	Yes	Optional
COMPETENCY DESCRIPTION	the description of the competency in which you are making adjustment.	Can contain letters and/or numbers.	No	Optional

EMPLOYEE SCORE	The employee's rating for this competency.	Must be a numerical value in the parameters of the competency module. *e.g. 3 = 3 out of 5*	Yes	Mandatory *(If assigning a competency to an employee or adjusting an existing score)*
REQUIRED SCORE FOR JOB ROLE	The required score for the employee's job role.	Must be a numerical value in the parameters of the competency module. *e.g. 3 = 3 out of 5*	Yes	Mandatory *(If assigning a required rating for a job role or adjusting employee's required competency score)*
DATE ASSIGNED	The date that this rating is being assigned to the employee.	Assigned date should entered in dd/mm/yyyy format. *e.g. 22/03/2020 = March 22nd 2020*	Yes	Mandatory *(If assigned any score to an employee)*
COMMENTS	General comments related to this meeting.	Can contain letters and/or numbers.	No	Optional

LIBRARY GOALS

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
GOAL NAME	The title of the goal name.	Can contain letters and/or numbers. *e.g. Calls per day*	Yes	Mandatory
GOALS DESCRIPTION	A description of the content for this goal.	Open text. *e.g. Achieve 10 calls per day*	No	Optional
GOAL TYPE	Is this a company goal or an individual goal for the employee?	Can only contain "Company" or "Individual. *e.g. Individual*	No	Optional
GOAL CATEGORY	Denotes if this is a goal for the employee's career development or a KPI.	Can only contain "Development" or "KPI". *e.g. KPI*	No	Optional
GOAL OPTIONS	This option defines how the responses to this goal will be recorded.	Can contain: Default 5 10 Percentage Target At this point, "List" is not supported in the bulk upload file. *e.g. 10 = a one to ten dropdown list*	Yes	Optional

EMPLOYEE GOALS

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
EMPLOYEE NAME	The system ID, employee name or Works ID for the employee you wish to assign the training to.	This can either be the name of the employee in format "Firstname" "Surname" (with space in between) or the unique numeric system identifier for the employee – if there is more than one employee using the entered name, you will then get an error and you should use the system identifier. *e.g. John Smith*	No	Mandatory
GOAL NAME	The title of goal name.	Can contain letters and/or numbers. *e.g. Call per day*	Yes	Mandatory
GOALS DESCRIPTION	A description of the content for this goal.	Open text. *e.g. Achieve 10 calls per day*	No	Optional
GOAL TYPE	Is this a company goal or an individual goal for the employee?	Can only contain "Company" or "Individual. *e.g. Individual*	No	Mandatory
GOAL CATEGORY	Denotes if this is a goal for the employee's career development or a KPI.	Can only contain "Development" or "KPI". *e.g. KPI*	No	Mandatory
GOAL OPTIONS	This option defines how the responses to this goal will be recorded.	Can contain: Default 5 10 Percentage Target At this point, "List" is not supported in the bulk upload file. *e.g. 10 = a one to ten dropdown list*	Yes	Optional
TARGET	The target figure that the employees should be achieving.	Can only contain numerical figures. *e.g. 10000 = a target amount of 10000*	Yes	Mandatory if Goal option contains "Target"
STATUS	The current status or achieved progress towards this goal.	For Goal options, 5, 10, Percentage and Target, the status must contain any numerical value. For Default Goal options, the only valid options are: Behind On track At risk Completed Inactive *e.g. On track*	Yes	Optional
DUE DATE	Due date of the goal.	Must be in the format dd/mm/yyyy regardless of your localisation settings. *e.g. 22/03/2020 = March 22nd 2020*	No	Mandatory

VISIBILITY	Denotes who can see this goal in your system.	Can only contain "Public" or "Private. If "Public" – Admin, HR, Manager and Employee If "Private" – Admin, HR, Manager *e.g. Private*	No	Optional
HOMESCREEN	Should this goal be visible in their homepage?	Can only contain "0" or "1". 0 = No 1 = Yes *e.g. 0 = Will not be shown on homescreen*	No	Optional

EMPLOYEE DEVELOPMENT RECORDS

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
EMPLOYEE NAME	The system ID, employee name or Works ID for the employee you wish to assign the development to.	This can either be the name of the employee in format "Firstname" "Surname" (with space in between) or the unique numeric system identifier for the employee – if there is more than one employee using the entered name, you will then get an error and you should use the system identifier. *e.g. John Smith*	No	Mandatory
ACHIEVEMENT NAME	The name of the achievement attained by this employee.	Can contain letters and/or numbers. *e.g. BA in Computer Science*	Yes	Mandatory
ACHIEVEMENT TYPE	Must contain an existing achievement type.	Can contain letters and/or numbers. *e.g. Qualification*	No	Mandatory
ACHIEVEMENT	The actual grade or achievement attained by this employee.	Can contain letters and/or numbers. *e.g. 2:1*	No	Optional
START DATE	The start date of this qualification.	Must be in the format dd/mm/yyyy regardless of your localisation settings. *e.g. 22/03/2020 = March 22nd 2020*	No	Mandatory
END DATE	The end date of this qualification.	Must be in the format dd/mm/yyyy regardless of your localisation settings. *e.g. 22/03/2020 = March 22nd 2020*	Yes	Optional
COMMENTS	General comments against this qualification.	Can contain letters and/or numbers. *e.g. Concordia University*	Yes	Optional

RECRUITMENT

CANDIDATES

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
TITLE	Candidate title (e.g. Mr, Mrs, Dr etc.).	Can contain letters and/or numbers. *e.g. MR*	No	Optional
SURNAME	Candidate surname/last name.	Can contain letters and/or numbers. *e.g. Smith*	No	Mandatory
FIRSTNAME	Candidate first name.	Can contain letters and/or numbers. *e.g. John*	No	Optional
OTHER NAMES	Candidate middle name or names.	Can contain letters and/or numbers. *e.g. Roy*	No	Optional
DOB	Candidate's date of birth.	Must be in the format dd/mm/yyyy regardless of your localisation settings. *e.g. 22/03/2020 = March 22nd 2020*	No	Optional
NATIONAL INSURANCE	Also known as Social Security number.	Can contain letters and/or numbers. *e.g. 2938472*	No	Optional
ADDRESS	Candidate home address line 1.	Can contain letters and/or numbers. *e.g. 1 Random Street*	No	Optional
ADDRESS2	Candidate home address line 2.	Can contain letters and/or numbers.	No	Optional
TOWN	Candidate town.	Can contain letters and/or numbers. *e.g. Random Town*	No	Optional
COUNTY	Candidate county or state.	Can contain letters and/or numbers. *e.g. Random Shire*	No	Optional
POSTCODE	Candidate postal code or zip code.	Can contain letters and/or numbers. *e.g. 1E4R3E*	No	Optional
COUNTRY	Candidate country.	Can contain letters and/or numbers. *e.g. Canada*	Yes	Optional
HOME TELEPHONE	Candidate home telephone number.	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeros – e.g. 01234 will become 1234 Alternatively, you can check the CSV file in a text editor before uploading. *e.g. 0123456789*	No	Optional
MOBILE	Candidate home mobile/cellular number.	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeros – e.g. 01234 will become 1234 Alternatively, you can check the CSV file in a text editor before uploading. *e.g. 0123456789*	No	Optional
EMAIL	Candidate home email.	No validation *e.g. john.smith@email.com*	No	Optional

POST REFERENCE	Your internal unique post reference identifying the role applied for.	This can only contain an existing reference in the system relating to a requisition in HRWize – if you wish to upload a candidate who has not applied for a specific role, you can then use "Not" – no other value is accepted. *e.g. AccManager1*	Yes	Mandatory
DATE RECEIVED	Date the application was received.	Should be entered in the format dd/mm/yyyy regardless of your localisation settings – if left blank, this will default to the date of the upload. *e.g. 22/03/2020 = March 22ⁿᵈ 2020*	No	Optional
STAGE	If you wish to set the candidate to a specific stage.	Stage name exactly as it is exists in HRWize. *e.g. First telephone interview*	Yes	Optional
STARRED	If you wish to star the candidate in HRWize.	Only "1" for Yes and "0" for No. *e.g. 1 = Starred employee*	No	Optional
COMMENTS	Any comments you wish to enter about the candidate.	Open text.	No	Optional

NON CORE DATA

VEHICLES

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
EMPLOYEE	Used to identify the employee who these changes apply to.	Employee's name or System ID must be exactly as it appears in the system.	Yes	Mandatory
VEHICLE TYPE	The type of vehicles: For example: car, van, motorbike.	Can contain letters and/or numbers. *e.g. Car*	Yes	Optional
MAKE	The Make of the vehicle.	Can contain letters and/or numbers. *e.g. Toyota*	Yes	Mandatory
MODEL	The Model of the vehicle.	Can contain letters and/or numbers. *e.g. Fiesta*	Yes	Optional
REG NO	The registration number of the vehicle.	Can contain letters and/or numbers. *e.g. ABS123*	Yes	Optional
COLOUR	The colour of the vehicle.	Can contain letters and/or numbers. *e.g. Purple*	Yes	Optional
FUEL TYPE	The fuel type of the vehicle.	Can contain letters and/or numbers. *e.g. Diesel*	Yes	Optional
ENGINE SIZE	The engine size of the vehicle.	Can contain letters and/or numbers. *e.g. 1200 CC*	Yes	Optional
MILEAGE	The mileage of the vehicle.	Can only contain numbers. *e.g. 50000*	Yes	Optional
COMPANY OWNED	Is this vehicle owned by the company?	Should be entered as either "0" or "1". 1 = Yes 0 = No *e.g. 1 = Company owned vehicle*	Yes	Optional
PRIMARY VEHICLE	Is this vehicle the employee's primary mode of transport?	Must contain either "0" or "1". 1 = Yes 0 = No *e.g. 1 = Primary Vehicle*	Yes	Optional
LEASE COMPANY	The name of the company who leases this vehicle.	Can contain letters and/or numbers. *e.g. Car Lease Company*	Yes	Optional
LEASE START	The start date for lease agreement.	Should be entered indd/mm/yyyy format. *e.g. 22/03/2020 = March 22nd 2020*	Yes	Optional
P11D	The p11d value of this vehicle.	Can contain numbers only. *e.g. 8000*	Yes	Optional

| COMMENTS | Any additional comments for this vehicle. | Can contain letters and/or numbers. | Yes | Optional |

EXPENSES

Bulk uploading Expenses should only be used for one employee at a time.

The name of the employee, Expenses report name and currency are defined on the bulk-upload page.

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
DATE	The date that this expense claim was incurred.	Should be entered in dd/mm/yyyy format. *e.g. 22/03/2020 = March 22nd 2020*	Yes	Mandatory
VENDOR	The vendor for this expense claim.	Can contain letters and/or numbers. *e.g. The Train Company*	No	Optional
VALUE	The value/cost of this expense.	This field can contain a numerical value up to 2 decimal places. *e.g. 50*	Yes	Mandatory

MILEAGE

Bulk uploading Mileage can only be used for one employee at a time.

The name of the employee, mileage report name and currency are defined on the bulk-upload page.

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
DATE	The date that this mileage claim was incurred.	Should be entered in dd/mm/yyyy format. *e.g. 22/03/2020 = March 22nd 2020*	Yes	Mandatory
FROM	The location that the journey began.	Can contain letters and/or numbers. *e.g. Montreal*	Yes	Mandatory
TO	The location that the journey ended.	Can contain letters and/or numbers. *e.g. Toronto*	Yes	Mandatory
DISTANCE	The overall distance of the journey.	Should contain a numerical value with a maximum of 2 decimal places. *e.g. 40*	Yes	Mandatory
COMMENTS	General comments related to this meeting.	Can contain letters and/or numbers.	No	Optional

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EMPLOYEE PAYMENTS

Bulk uploading Payments should only be used for one employee at a time.

The name of the employee, mileage report name and currency are defined on the bulk-upload page.

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
EMPLOYEE	Used to identify the employee who these changes apply to.	Employee's name or System ID must be exactly as it appears in the system.	Yes	Mandatory
PAYMENT TYPE	The payment type that this payment relates to.	Payment type should contain an xiting payment type (or payment reason) exactly as it appears in the system. *e.g. Commission*	Yes	Mandatory
PAYMENT TITLE	The title of the payment.	Can contain letters and/or numbers. *e.g. March 2019 Commission*	No	Mandatory
PAYMENT DESCRIPTION	the description of the payment.	Can contain letters and/or numbers.	No	Optional
PAYMENT VALUE	The numerical value of this payment.	This field should be entered as a numerical value up to a maximum of 2 decimal places. *e.g. 200*	Yes	Mandatory
PAYMENT CURRENCY	The currency that the payment will be made.	*e.g. CAD*	No	Optional
PAYMENT FROM DATE	The date that this payment starts.	This date should be entered in dd/mm/yyyy format. *e.g. 22/03/2020 = March 22nd 2020*	Yes	Mandatory
PAYMENT TO DATE	The date that this payment ends.	This date should be entered in dd/mm/yyyy format. *e.g. 22/03/2020 = March 22nd 2020*	Yes	Optional
PAYMENT FREQUENCY	The frequency of this payment.	Can contain letters and/or numbers. *e.g. Weekly*	No	Optional

REMINDERS

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
EMPLOYEE	Used to identify the employee who these changes apply to.	Employee's name or System ID must be exactly as it appears in the system.	Yes	Mandatory
TITLE	The title or name of this reminder.	Can contain letters and/or numbers. *e.g. Passport reminder*	No	Mandatory
DUE DATE	The date that this reminder is due.	Should be entered in dd/mm/yyyy format. *e.g. 22/03/2020 = March 22nd 2020*	Yes	Mandatory

SEND REMINDER DATE	The date for the system to send the reminder.	Should be entered in dd/mm/yyyy format. *e.g. 22/03/2020 = March 22nd 2020*	Yes	Mandatory
COMMENTS	General comments relating to this reminder.	Can contain letters and/or numbers.	No	Optional
ACCESS LEVEL	Defines who will receive the reminder.	Valid options include numerical values 1 to 9: 1 = Administrators only 2 = HR only 3 = Manager only 4 = Administrators and HR only 5 = Administrators and Manager only 6 = HR and Manager only 7 = Administrators, HR and Manager 8 = Finance users only 9 = Finance notification email only *e.g. 2 = Any HR users will receive this reminder notification*	Yes	Mandatory

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ASSETS

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
ASSET TYPE	The type of asset that is being uploaded.	Must contain an existing asset type exactly as it appears in the system. *e.g. Laptop*	Yes	Mandatory
ASSET NAME	The name of the asset that is being uploaded.	Can contain letters and/or numbers. *e.g. Laptop 1*	Yes	Mandatory
ASSET TAG	A tag or ID number for this asset.	Can contain letters and/or numbers. *e.g. 123ABC*	Yes	Optional
ASSET SERIAL NUMBER	A unique serial number for this asset.	Can contain letters and/or numbers. *e.g. ABC123*	Yes	Optional
ASSET WARANTY EXPIRY	Warranty expiry date for this asset.	Should be entered in dd/mm/yyyy format. *e.g. 22/03/2020 = March 22nd 2020*	Yes	Optional
ASSET SUPPLIER	The name of the supplier of this asset.	Can contain letters and/or numbers. *e.g. ABC Company*	Yes	Optional
ASSET PURCHASE PRICE	The purchase price of this asset.	Should be only numbers. *e.g. 600*	Yes	Optional
ASSET PO NUMBER	The purchase order number for this asset.	Can contain letters and/or numbers. *e.g. ABC123*	No	Optional
ASSET CONDITION	The current condition of this asset.	Can contain letters and/or numbers. *e.g. New, excellent*	No	Optional
ASSET LOCATION	The current location of this asset.	Can contain letters and/or numbers. *e.g. IT Store room*	No	Optional
ASSET OWNER	The current owner of this asset.	Can contain the name of an existing employee exactly as it appears in the system or "Company" if the asset is company-owned. *e.g. Company*	Yes	Optional
ASSET LOSS RISK	The risk of losing this asset.	Should be entered as a numerical value. *e.g. Low Risk*	Yes	Optional
ASSET LOSS IMPACT	The impact of losing this asset.	Should be entered as a numerical value. *e.g. Replacement*	Yes	Optional
ASSET LOSS PROBABILITY	The probability score of losing this probability.	Should be entered as a numerical value. *e.g. Medium*	Yes	Optional
ASSET STATUS	The current status of this asset.	Can contain "Current" or "Retired" *e.g. Current = active assets*	Yes	Optional
ASSET ASSIGNED TO	If assigned to an employee, the name of the employee who is currently using this asset.	Must contain the name of an existing employee exactly as it appears in the system.	Yes	Optional

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
ASSET ASSIGNED DATE	The date that this assigned was assigned to the employee.	Should be entered in dd/mm/yyyy format. *e.g. 22/03/2020 = March 22nd 2020*	Yes	Mandatory *(If assigned to an employee)* Optional *(If unassigned)*
ASSET ASSIGNED COMMENTS	Any general comments associated to this asset being assigned to the employee.	Can contain letters and/or numbers.	Yes	Optional

EMPLOYEE SYSTEMS

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
EMPLOYEE	Used to identify the employee who these changes apply to.	Employee's name or System ID must be exactly as it appears in the system.	Yes	Mandatory
SYSTEM NAME	The name of the system that this employee can access.	System name should contain existing system name exactly as it appears in the system. *e.g. CRM*	Yes	Mandatory
SYSTEM LEVEL	The access level for this employee.	Should contain an existing system level exactly as it appears in the system. *e.g. End user*	Yes	Mandatory
LOGIN NAME	The login name for this system.	The user name for this employee's system account. *e.g. johnsmith@yourcompany.com*	Yes	Mandatory
COMMENTS	General comments.	Can contain letters and/or numbers. *e.g. John has started access to the CRM system*	No	Optional
DATE	The date tha this login was added.	Should be entered in dd/mm/yyyy format. *e.g. 22/03/2020 = March 22nd 2020*	Yes	Mandatory

TIMESHEET REFERENCES

If you are restricting a timesheet reference so that only certain departments can access them, the bulk upload template requires the system ID number rather than the name of each of these.

To find these ID numbers, you should go and edit the relevant department in your system where you will find the ID number at the end of the URL.

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
REFERENCE	The name of the timesheet reference.	Can contain letters and/or numbers. *e.g. Project 1*	Yes	Mandatory
LEVEL	The level of this timesheet.	Valid options include 0,1,2, or 3. *e.g. 0 = highest level reference*	Yes	Mandatory
DEPARTMENT	The ID numbers of the department(s) that are able to use this reference.	Must contain the system ID numbers for each department that this relates to. If left blank, all departments will be able to submit timesheets using this reference. *e.g. 123*	Yes	Optional
ACTIVE	Is this reference enabled?	This option can only contain "0" or "1". 0 = Active 1 = Inactive *e.g. 1 = Active reference*	Yes	Mandatory

EXCHANGE RATES

Uploading exchange rates will allow you to define your own currency conversions in the system.

These will always relate to the Default Currency that has been entered in your Company Settings menu.

FIELD	DESCRIPTION	VALIDATION	CASE SENSITIVE	MANDATORY
DATE 1	The start date for this currency conversion.	Should be entered in dd/mm/yyyy format. *e.g. 22/03/2020 = March 22nd 2020*	Yes	Mandatory
DATE 2	The end date for this currency conversion.	Should be entered in dd/mm/yyyy format. *e.g. 22/03/2020 = March 22nd 2020*	Yes	Mandatory
CURRENCY	The currency that this rate relates to.	*e.g. CAD*	Yes	Mandatory
RATE	The exchange rate for this currency in relation to your default currency.	Rates should be entered as a numerical value up to 2 decimal places. *e.g. 1.12*	Yes	Mandatory

List of valid countries

- Afghanistan
- Aland Islands
- Albania
- Algeria
- American Samoa
- Andorra
- Angola
- Anguilla
- Antarctica
- Antigua and Barbuda
- Argentina
- Armenia
- Aruba
- Australia
- Austria
- Azerbaijan
- Bahamas
- Bahrain
- Bangladesh
- Barbados
- Belarus
- Belgium
- Belize
- Benin
- Bermuda
- Bhutan
- Bolivia Plurinational State of
- Bonaire Sint Eustatius and Saba
- Bosnia and Herzegovina
- Botswana
- Bouvet Island
- Brazil
- British Indian Ocean Territory
- Brunei Darussalam
- Bulgaria
- Burkina Faso
- Burundi
- Cambodia
- Cameroon
- Canada
- Cape Verde
- Cayman Islands
- Central African Republic
- Chad
- Chile
- China
- Christmas Island
- Cocos (Keeling) Islands
- Colombia
- Comoros
- Congo
- Congo The Democratic Republic of the
- Cook Islands
- Costa Rica
- Cote d'Ivoire
- Croatia
- Cuba
- Curacao
- Cyprus
- Czech Republic
- Denmark
- Djibouti
- Dominica
- Dominican Republic
- Ecuador
- Egypt
- El Salvador
- Equatorial Guinea
- Eritrea
- Estonia
- Ethiopia
- Falkland Islands (Malvinas)
- Faroe Islands
- Fiji
- Finland
- France
- French Guiana
- French Polynesia
- French Southern Territories
- Gabon
- Gambia
- Georgia
- Germany
- Ghana
- Gibraltar
- Greece
- Greenland
- Grenada
- Guadeloupe
- Guam
- Guatemala
- Guernsey
- Guinea
- Guinea-Bissau
- Guyana
- Haiti
- Heard Island and McDonald Islands
- Holy See (Vatican City State)
- Honduras
- Hong Kong
- Hungary
- Iceland
- India
- Indonesia
- Iran Islamic Republic of
- Iraq
- Ireland
- Isle of Man
- Israel
- Italy
- Jamaica
- Japan
- Jersey
- Jordan
- Kazakhstan
- Kenya
- Kiribati
- Korea Democratic People's Republic of
- Korea Republic of
- Kuwait
- Kyrgyzstan
- Lao People's Democratic Republic
- Latvia
- Lebanon
- Lesotho
- Liberia
- Libyan Arab Jamahiriya
- Liechtenstein
- Lithuania
- Luxembourg
- Macao
- Macedonia The Former Yugoslav Republic of

- Madagascar
- Malawi
- Malaysia
- Maldives
- Mali
- Malta
- Marshall Islands
- Martinique
- Mauritania
- Mauritius
- Mayotte
- Mexico
- Micronesia Federated States of
- Moldova Republic of
- Monaco
- Mongolia
- Montenegro
- Montserrat
- Morocco
- Mozambique
- Myanmar
- Namibia
- Nauru
- Nepal
- Netherlands
- New Caledonia
- New Zealand
- Nicaragua
- Niger
- Nigeria
- Niue
- Norfolk Island
- Northern Mariana Islands
- Norway
- Occupied Palestinian Territory
- Oman
- Pakistan
- Palau
- Panama
- Papua New Guinea
- Paraguay
- Peru
- Philippines
- Pitcairn
- Poland
- Portugal
- Puerto Rico
- Qatar
- Reunion
- Romania
- Russian Federation
- Rwanda
- Saint Barthelemy
- Saint Helena Ascension and Tristan da Cunha
- Saint Kitts and Nevis
- Saint Lucia
- Saint Martin (French part)
- Saint Pierre and Miquelon
- Saint Vincent and The Grenadines
- Samoa
- San Marino
- Sao Tome and Principe
- Saudi Arabia
- Senegal
- Serbia
- Seychelles
- Sierra Leone
- Singapore
- Sint Maarten (Dutch part)
- Slovakia
  - Slovenia
  - Solomon Islands
  - Somalia
- South Africa
- South Georgia and the South Sandwich Islands
- South Sudan
- Spain
- Sri Lanka
- Sudan
- Suriname
- Svalbard and Jan Mayen
- Swaziland
- Sweden
- Switzerland
- Syrian Arab Republic
- Taiwan Province of China
- Tajikistan
- Tanzania United Republic of
- Thailand
- Timor-Leste
- Togo
- Tokelau
- Tonga
- Trinidad and Tobago
- Tunisia
- Turkey
- Turkmenistan
- Turks and Caicos Islands
- Tuvalu
- Uganda
- Ukraine
- United Arab Emirates
- United Kingdom
- United States
- United States Minor Outlying Islands
- Uruguay
- Uzbekistan
- Vanuatu
- Venezuela Bolivarian Republic of
- Viet Nam
- Virgin Islands British
- Virgin Islands U.S.
  - Wallis and Futuna
  - Western Sahara
- Yemen
- Zambia
- Zimbabwe

List of valid currencies

Must be entered EXACTLY as shown

- GBP
- EUR
- USD
- JPY
- AUD
- CAD
- ZAR
- SGD
- AED
- INR
- THB
- HKD
- PHP
- IDR
- FJD
- KES
- BWP
- BGN
- SAR
- DKK
- MYR
- CHF
- CZK
- CNY
- NZD
- BHD
- EGP
- OMR
- SAR
- XOF
- GTQ
- COP
- SEK
- MXN
- YEN