

Sentrifugo

Import Format Guide

Download the Import format

Please refer to Figure 1

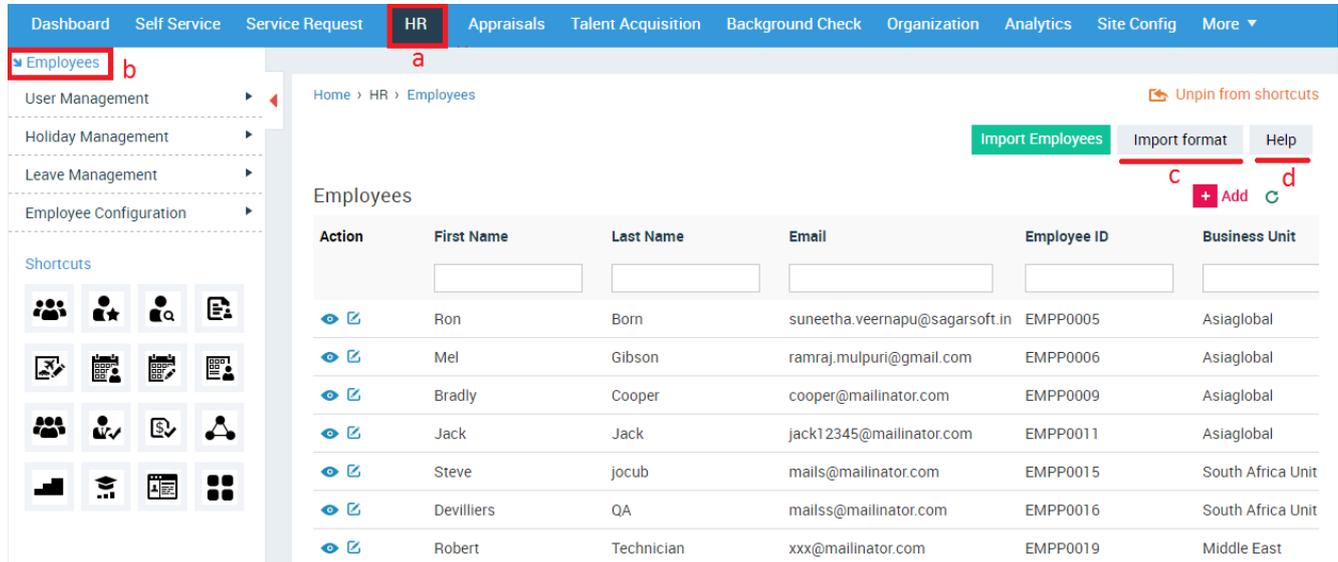


Figure 1

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

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

Please refer Figure 2 for the import format

Prefix	First Name	Last Name	Employee Id	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	Paj Frequency	Salary
Mr	Grama	Smith	411	manager	gsmith@example.com	BAU	EMPP0002		MGR	Manager	PERM	2011-09-01	2019-09-01	5	004	123456789	4012345678	INR	MNT	25000
Mr	Hansie	Oronje	359	employee	hronje@example.com	BAU	EMPP0002		EMP	Employee	PERM	2013-07-10	2019-07-07	2	004	923456789	4012345678	INR	MNT	32000

Figure 2

Select the Import format details

a. Prefix

Please refer Figure 3

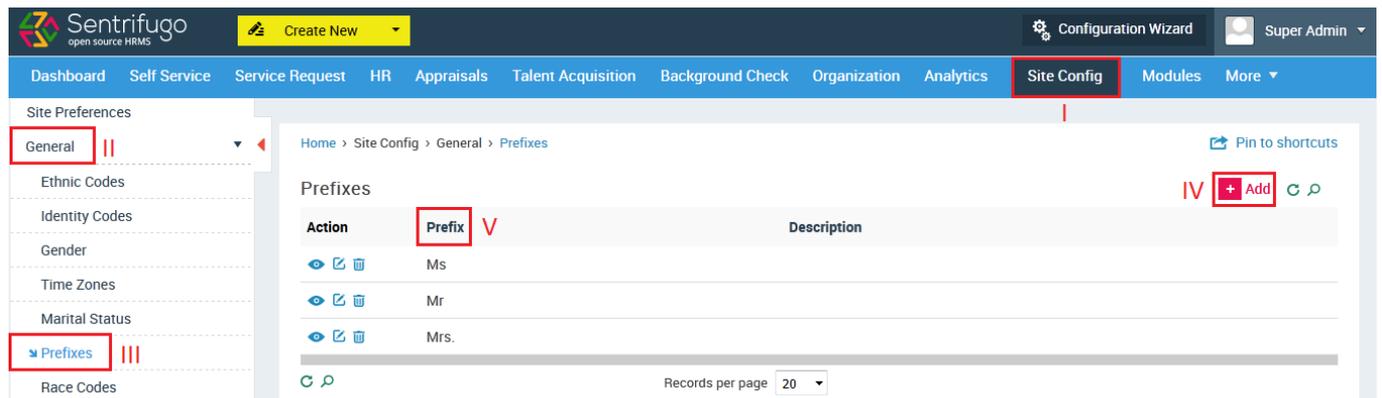


Figure 3

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

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

b. First and Last Name of the employee

Please refer Figure 4

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

Figure 4

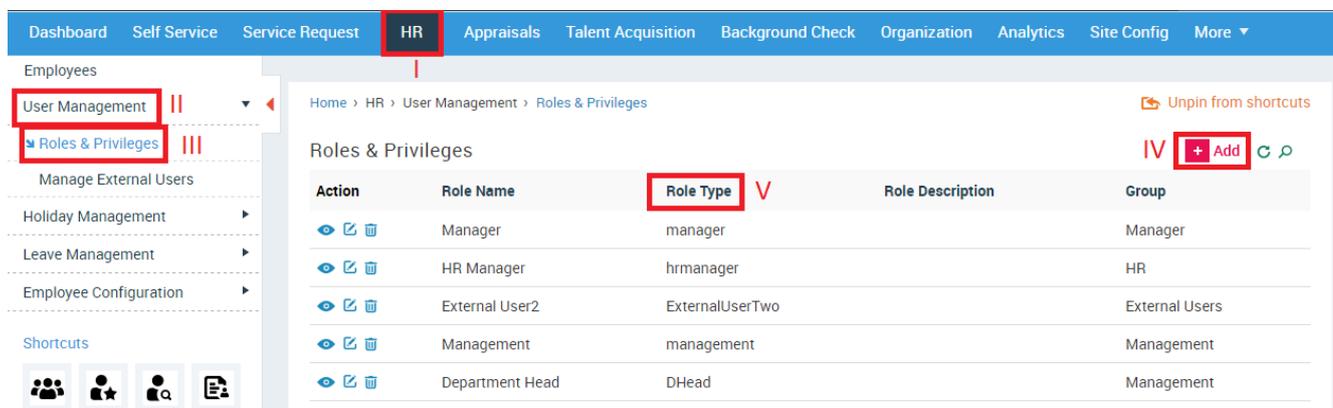
- These fields are mandatory and accept only alphabetic characters

c. Employee ID

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

d. Role Type

Please refer Figure 5



The screenshot shows the Sentrifugo HRMS interface. The top navigation bar includes 'Dashboard', 'Self Service', 'Service Request', 'HR', 'Appraisals', 'Talent Acquisition', 'Background Check', 'Organization', 'Analytics', 'Site Config', and 'More'. The left sidebar has 'Employees' as a main category, with sub-items: 'User Management', 'Roles & Privileges', 'Manage External Users', 'Holiday Management', 'Leave Management', and 'Employee Configuration'. The main content area is titled 'Roles & Privileges' and contains a table with the following data:

Action	Role Name	Role Type	Role Description	Group
  	Manager	manager		Manager
  	HR Manager	hrmanager		HR
  	External User2	ExternalUserTwo		External Users
  	Management	management		Management
  	Department Head	DHead		Management

Figure 5

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

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

e. Enter the email of the employee

Please refer figure 6

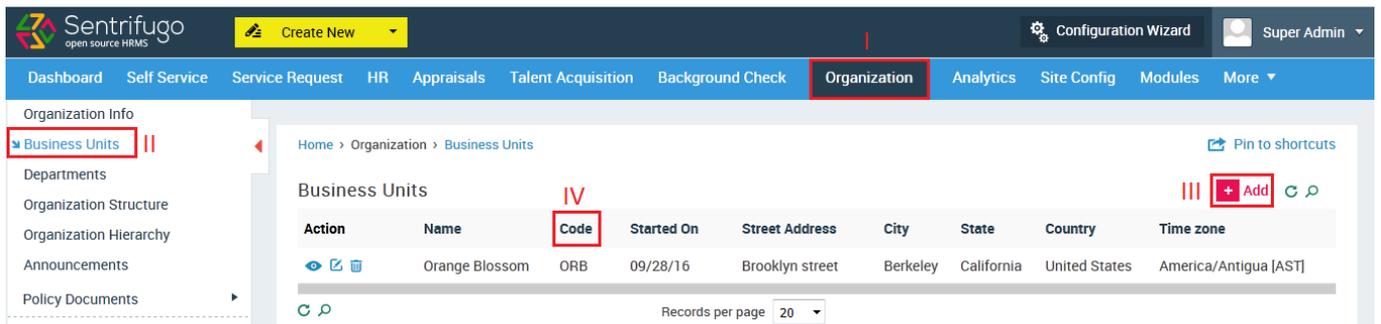
E	F	G
Role Type	Email	Business Unit

Figure 6

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

f. Business Unit

Please refer Figure 7



The screenshot shows the Sentrifugo web interface. The top navigation bar includes 'Organization' (highlighted with a red box). The left sidebar has 'Business Units' (highlighted with a red box). The main content area displays a table of Business Units with columns: Action, Name, Code (highlighted with a red box and labeled 'IV'), Started On, Street Address, City, State, Country, and Time zone. A table row shows 'Orange Blossom' with code 'ORB'. An '+ Add' button (highlighted with a red box) is visible in the top right of the table area.

Figure 7

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

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

g. Departments

Please refer Figure 8

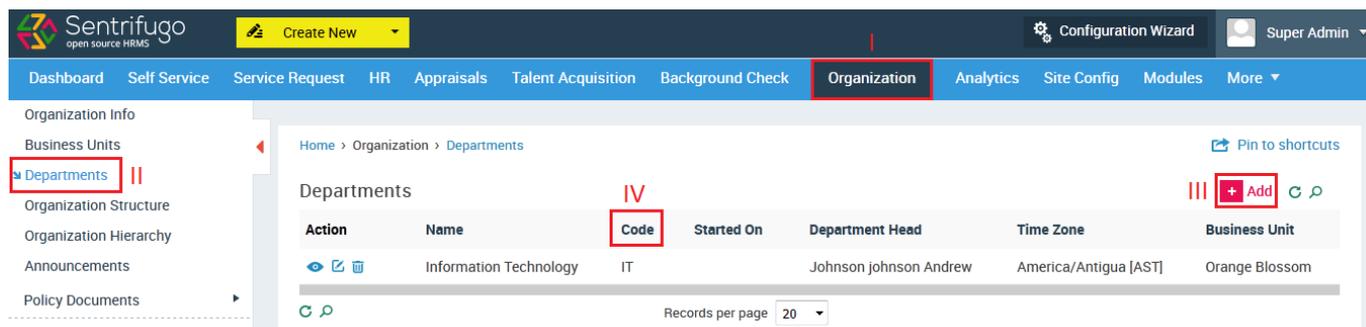


Figure 8

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

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

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

h. Enter the Reporting Manager's Employee ID

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

i. Job Title

Please refer Figure 9

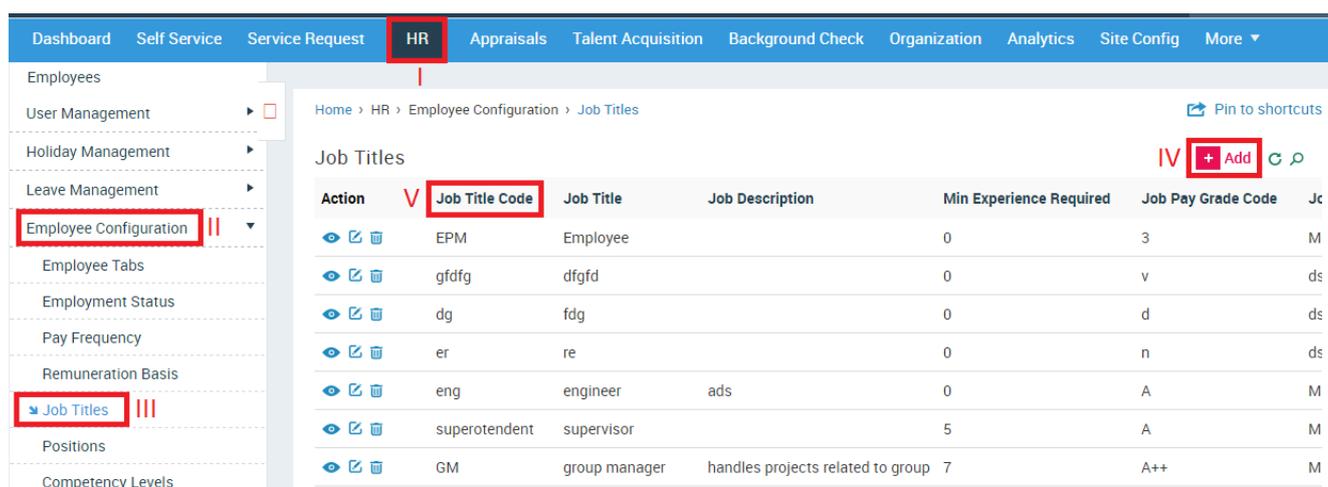


Figure 9

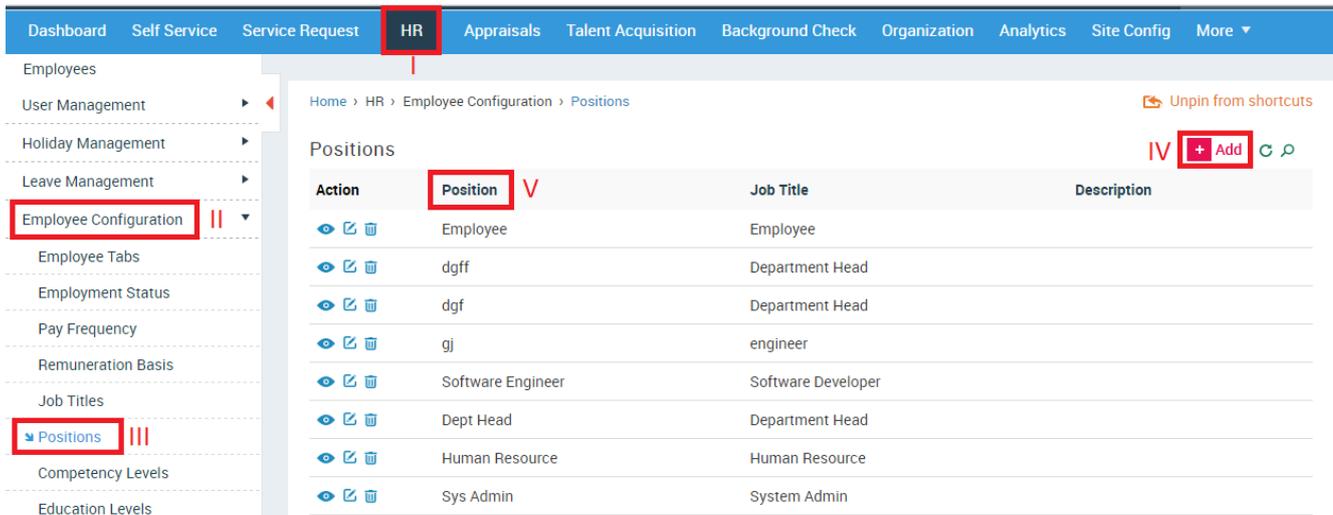
- Job Title is a mandatory field
 - I. Click **HR** in the top menu
 - II. Click **Employee Configuration** on the left menu panel

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

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

j. Position

Please refer Figure 10



Action	Position	Job Title	Description
	Employee	Employee	
	dgff	Department Head	
	dgf	Department Head	
	gj	engineer	
	Software Engineer	Software Developer	
	Dept Head	Department Head	
	Human Resource	Human Resource	
	Sys Admin	System Admin	

Figure 10

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

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

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

k. Employment Status

Please refer Figure 11

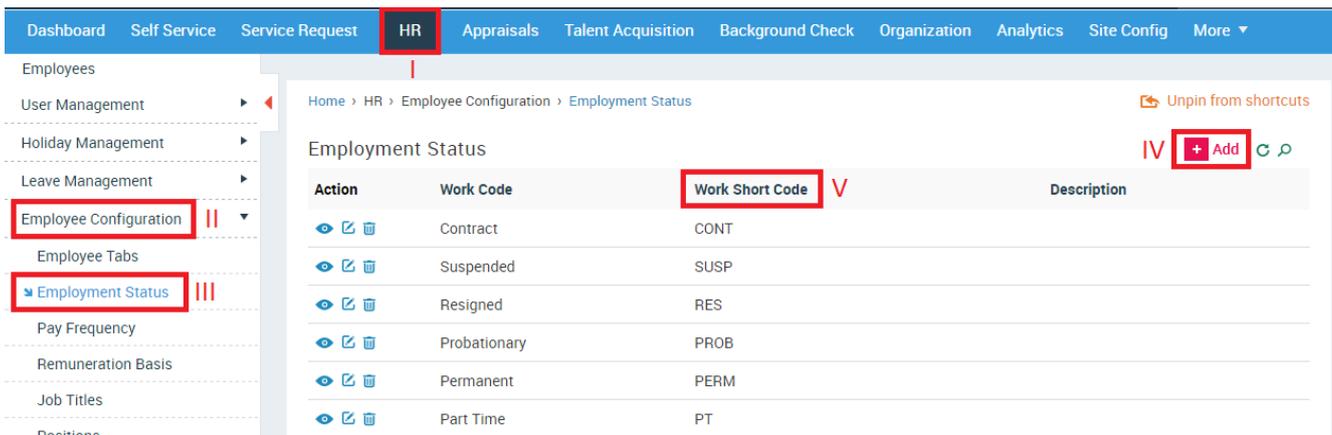


Figure 11

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

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

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

Please refer Figure 12

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

Figure 12

- This is a mandatory field

m. Date of Leaving

Please refer Figure 13

1	N	O
joining	Date of leaving	Experience

Figure 13

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

n. Experience

Please refer Figure 14

N	O	P
Date of leaving	Experience	Extension

Figure 14

- This field is not mandatory

o. Enter the employee Extension

Please refer Figure 15

O	P	C
erience	Extension Work teleph	

Figure 15

- This field is not mandatory

p. Enter the employee Work Telephone Number

Please refer Figure 16

P	Q	R
xtension	Work telephone number	Fax

Figure 16

- This field is not mandatory

q. Enter the employee Fax

Please refer Figure 17

	R	
number	Fax	Salary

Figure 17

- This field is not mandatory

r. Salary Currency

Please refer Figure 18

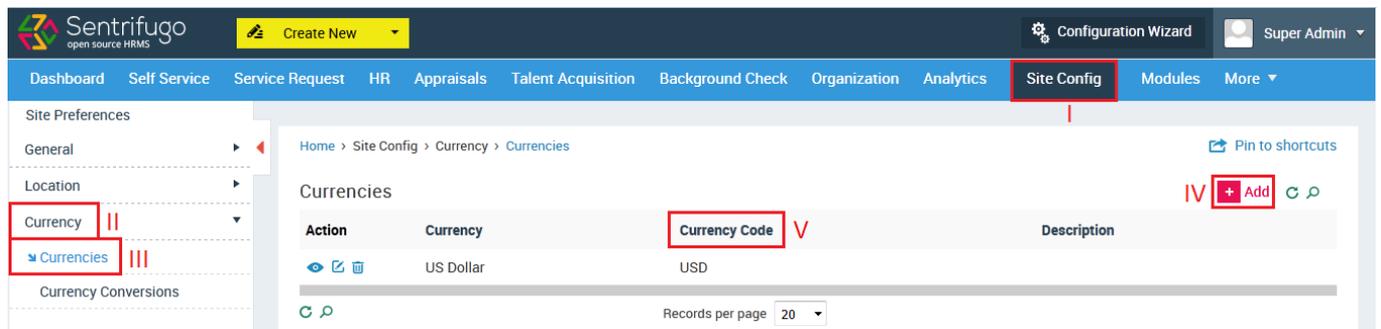


Figure 18

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

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

r. Pay Frequency

Please refer Figure 19

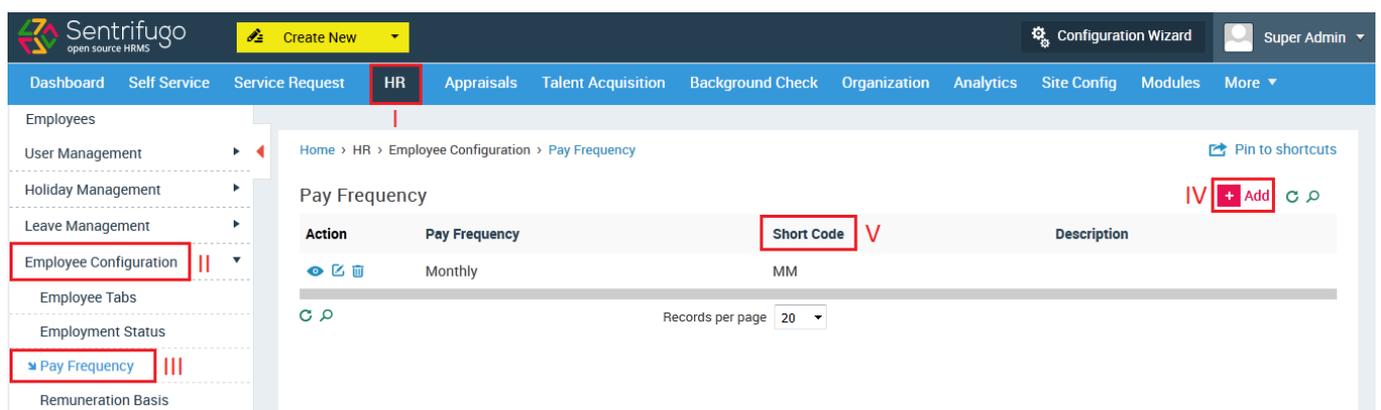


Figure 19

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

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

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

s. Enter the employee Salary

Please refer Figure 20

T	U
Pay Frequency	Salary

Figure 20

- This field is not mandatory