

Import Employee Data - the different activities you need to perform, as well as the imports required to complete each activity and a description of each one.

### Step 1: Create User Accounts

	Run this import	Notes
	Basic Import	The first import that must be performed. When you run a Basic Import, user accounts are created for all users whose data is to be uploaded. This is a required import.
	Extended Import	Additional information stored by the system related to user accounts. This is optional and can be done later.
	Background Import	Additional information stored by the system related to user accounts. This is optional and can be done later.

### Step 2: Create 'Persons' in the system

	Run this import	Notes
	Biographical Information Import	Once the user accounts are ready, each user account must be populated with biographical information. When this is done 'persons' are created in the system. This is a required import.

### Step 3: Upload Employment Information

	Run this import	Notes
	Employment Details Import	Run this import to upload employment information. This is a required import.
	Work Eligibility	Run this import to upload information about employee work eligibility. This includes information like the employee's passport details and citizenship. This is optional and can be done later.

#### Step 4: Upload Job Information

Run this import	Notes
Job History Import	The Job History template includes information about the current role as well, so this is a required step. This is a required import.
Job Relationships	This import uploads information about the employee's managers. This is optional and can be done later.

#### Step 5: Upload Compensation Information

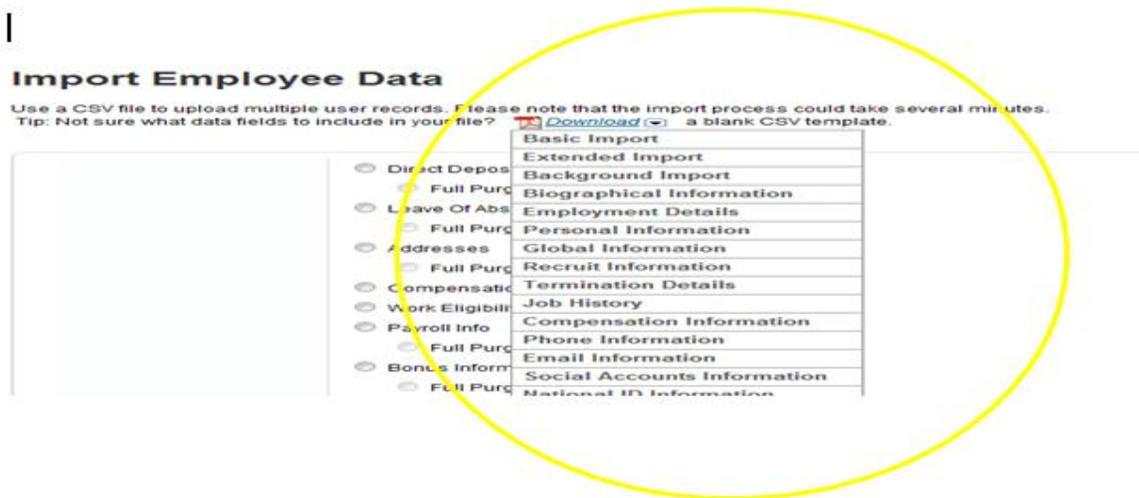
Run this import	Notes
Compensation Info Import	Run this import to upload information about the employee's salary. Note that this must be done before any of the "Pay Component" imports are done. This is because the recurring import is dependent on the Compensation Info Import. While this import can be done later, it is recommended that this import be done to ensure employee information uploaded is complete.
Pay Component Recurring Import	An essential import to complete the information stored by the Compensation Info Import. Uploads information about the recurring part of the employee's pay. This must be done. To complete the Compensation Info Import, this is a required import.
Pay Component Non Recurring Import	Uploads information about the non-recurring part of the employee's pay. This is optional and can be done later.

#### Step 6: Upload Personal Information

Run this import	Notes
Personal Information Import	Must be done. This upload adds basic personal information about the employee. This is a required import.
Global Information Import	Run this import to upload country-specific information about the employees. This is optional and can be done later.
Phone Information Import	Run this import to upload information about the employee's contact phone numbers. This is optional and can be done later.
Email Information Import	Run this import to upload information about the employee's email IDs. This is optional and can be done later.
Social Accounts Information	Run this import to upload information about the employee's social accounts like Facebook and LinkedIn. This is optional and can be done later.
National Id Information	Run this import to upload information about an employee's national identification number. Every country provides a unique identification number to its citizens. For example, in the US, the Social Security Number is used as a unique identification. In India, the PAN Card is used as a unique identification document and in China, it's the Resident Identity Card. This is optional and can be done later.
Direct Deposit	Run this import to upload information about the employee's bank account to which the salary will be credited. This is optional and can be done later.
Addresses	Run this import to upload information about an employee's addresses. This is optional and can be done later.
Emergency Contact	Run this import to upload information about an employee's emergency contacts. This is optional and can be done later.

Some key points to be aware of when Importing Employee Data:

- If you haven't already downloaded the **Import template**, you can then download it by clicking the Download dropdown menu and clicking the name of the template to download. This is an important step as it will give you the necessary and correct template format for a subsequent successful import with your own data.



- Specify whether the upload should **overwrite existing records or add to existing records**. You do this by choosing between Full Purge and Incremental Load.

When a file is uploaded in the **Full Purge mode**, all existing records in the system are overwritten with the records in the file uploaded.

When a file is uploaded using the **Incremental Load option**, the records in the file being uploaded are added to the records already in the system. The Incremental Load also supports a **Partial Import**, where only some fields of the record are updated. Only certain import routines support this feature.

- Click **Validate Import File Data** to check the file for errors. You should receive an email informing you if the import was successful or not and a record count. If you encounter errors refer to the file attached to the email as a reason for failure should be listed against each failed row. Fix the errors and then validate again.

## Import Employee Data

Use a CSV file to upload multiple user records. Please note that the import process could take several minutes.  
Tip: Not sure what data fields to include in your file? [Download](#) a blank CSV template.

The screenshot displays a web interface for importing employee data. It features a list of data categories on the left, each with a radio button to select the import method. The categories and their options are:

- Direct Deposit
  - Full Purge
  - Incremental Load
- Leave Of Absence History
  - Full Purge
  - Incremental Load
- Addresses
  - Full Purge
  - Incremental Load
- Compensation Adjustment
- Work Eligibility
- Payroll Info
  - Full Purge
  - Incremental Load
- Bonus Information
  - Full Purge
  - Incremental Load
- Emergency Contact
  - Full Purge
  - Incremental Load
- Work Permit Info

At the bottom right of the interface, there are three buttons: "Cancel", "Validate Import File Data", and "Import". A yellow arrow points to the "Validate Import File Data" button. The "Full Purge" option for "Bonus Information" is circled in yellow.