

Payroll Pro HRM

Import Employees from Spreadsheets

User manual

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1. Functional Description

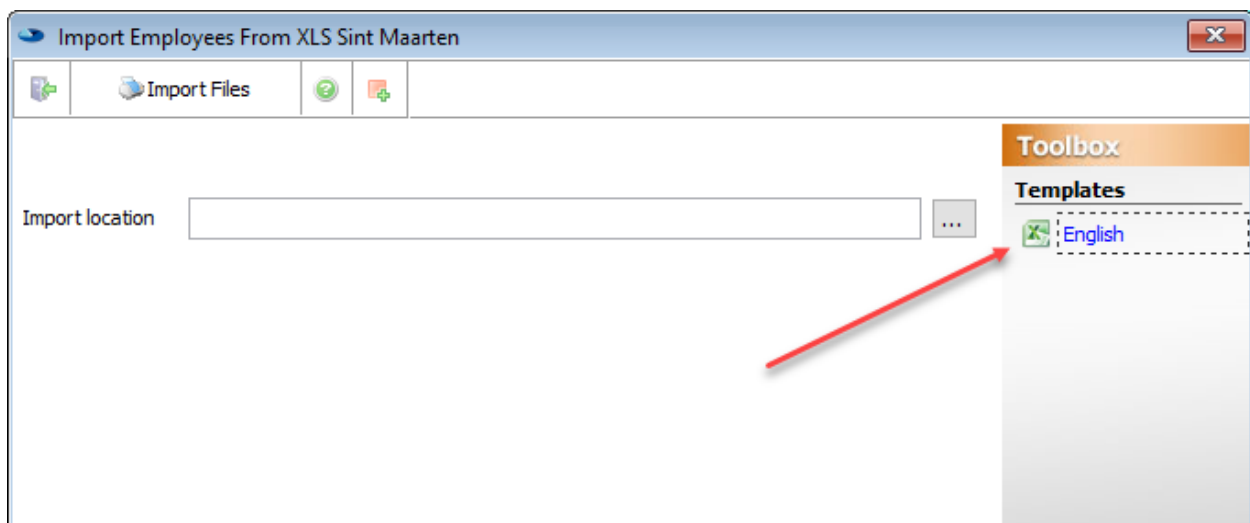
If the Import from XLS module is activated in Payroll Pro HRM, employees can be imported from spreadsheets.

2. Activation

The Import from XLS module must be available in the license of Payroll Pro HRM. Check in Reports > Interfaces > Import Interfaces > Import Employees XLS if the module is present. If not contact Antek to obtain this module.

3. Create import template

To create the import template, open the module at Reports > Interfaces > Import Interfaces > Import Employees XLS.



The template is created in English. Click the link to create the template.

Sample template:



Personnel information				
Name company	Company 1			
Employee's information				
<i>Note: enter dates mm-dd-yy! It will be displayed (eg.) 3-Jan-1950</i>				
Last name *				
First name *				
Date of Birth * / Identification Number * / Gender *				
Place of Birth/ Country of birth				
CRIB Number *				
Nationality				
Street Name / Number / City				
Telephone/ Email				
Work Permit Obligation				
Last Employer				
Bank/Account number/Type				
Civil status				
Single/ Married/ Divorced/ Widower *				
Spouse Last- and First Name				
Spouse Date of Birth and Identification Number				
Spouse CRIB Number				
Date of Marriage				
Date of Divorce				
Spouse Employer				
Children Last Name/ First Name/ DOB/ Gender/ Category				
Salary information to be submitted by the employer				
Date of Employment				
Function/ Department *				
Working Days per Week				
Vacation Days per Year	Days			
Gross Salary				
Pay Period				
13th Month and/or Bonus	No	ANG		
Vacation Pay	No	ANG	...% of gross yearly income	
Signature employee				

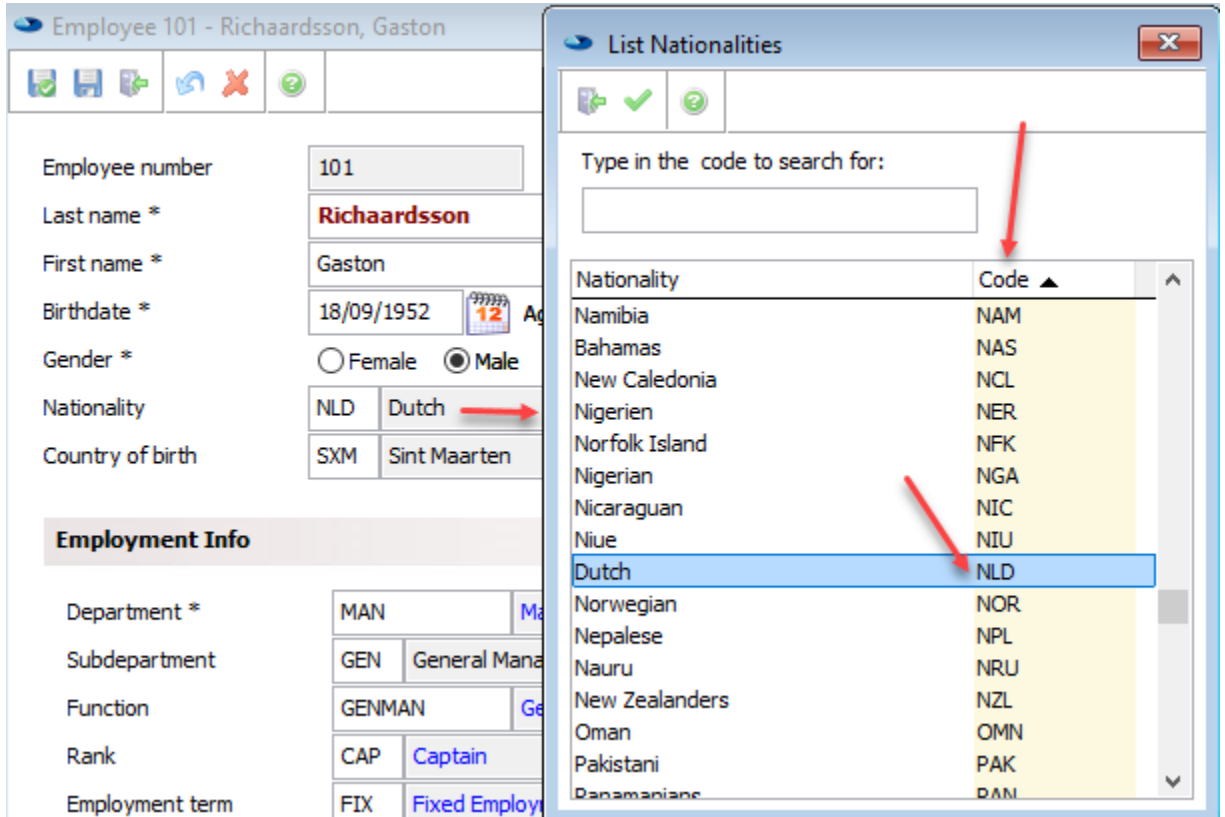
At least fields with an * must be completed for the template to import.

For every employee to import a .xlsx spreadsheet must be made. The file name of the spreadsheet is not so important, but using the employee name would be logical.

Complete the fields as required. Notes on the fields:

- Some fields have a dropdown menu, the arrow appears when the field is selected.
- **Dates** must be in the mm-dd-yyyy format, they will displayed as (e.g.) 3-jan-1950

- The 3 letter Nationality & Country of birth Codes must be used, check for the codes in Payroll Pro by selecting the list in an employee screen Nationality and/or Country of birth field.




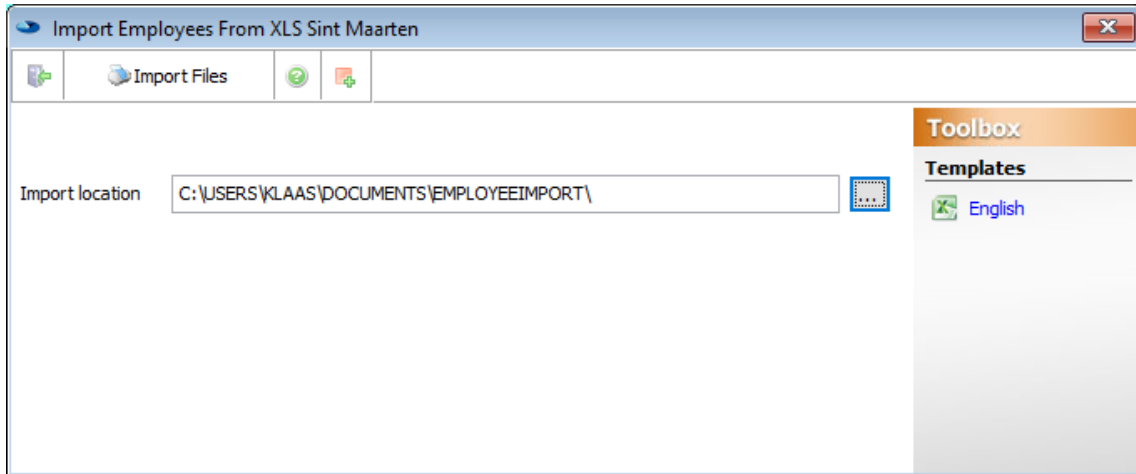
- The bank ID codes can be found in Payroll Pro, Reports > System Reports > Banks.
- An existing department code must be entered, not department name. The existing department codes can be found in Menu > Company Settings > Departments. If the department code has numbers only, Excel has a problem with it, add a symbol to avoid this issue, for example '123. Then Excel will convert the numbers to a string value.

When ready save the spreadsheet(s).

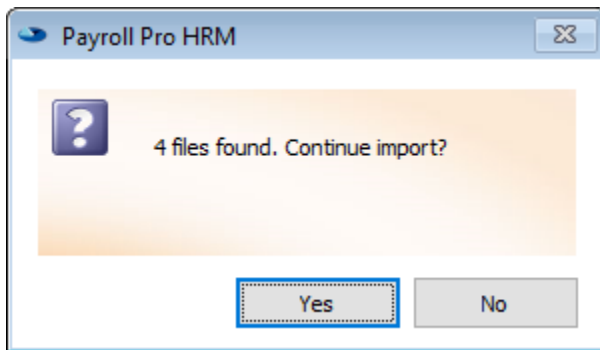
4. Importing employees

All spreadsheets, one for each employee, must be placed in one folder.

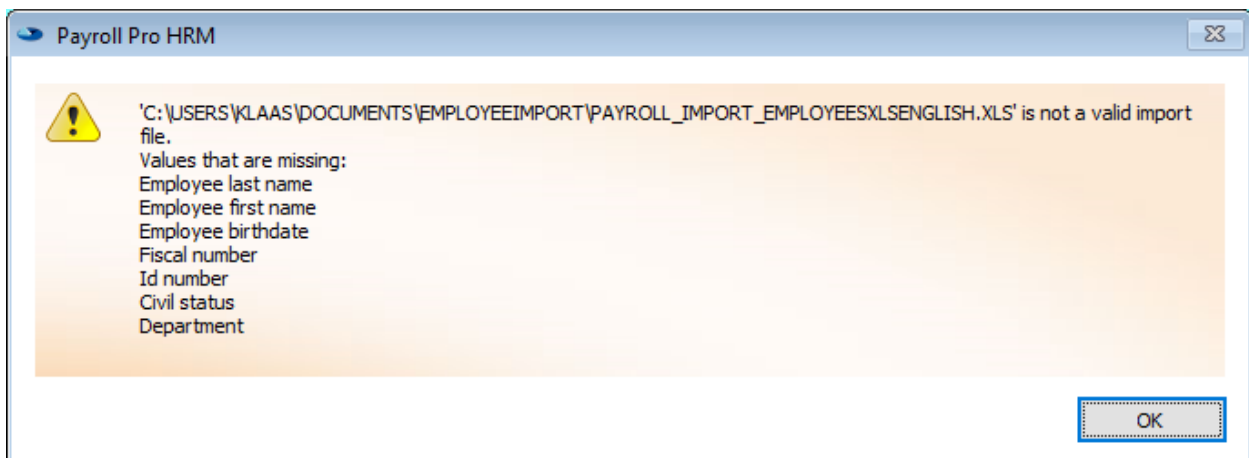
When ready to import open the import module and browse to the folder containing the spreadsheet(s), not to the individual spreadsheet. Then hit  **Import Files** to import.



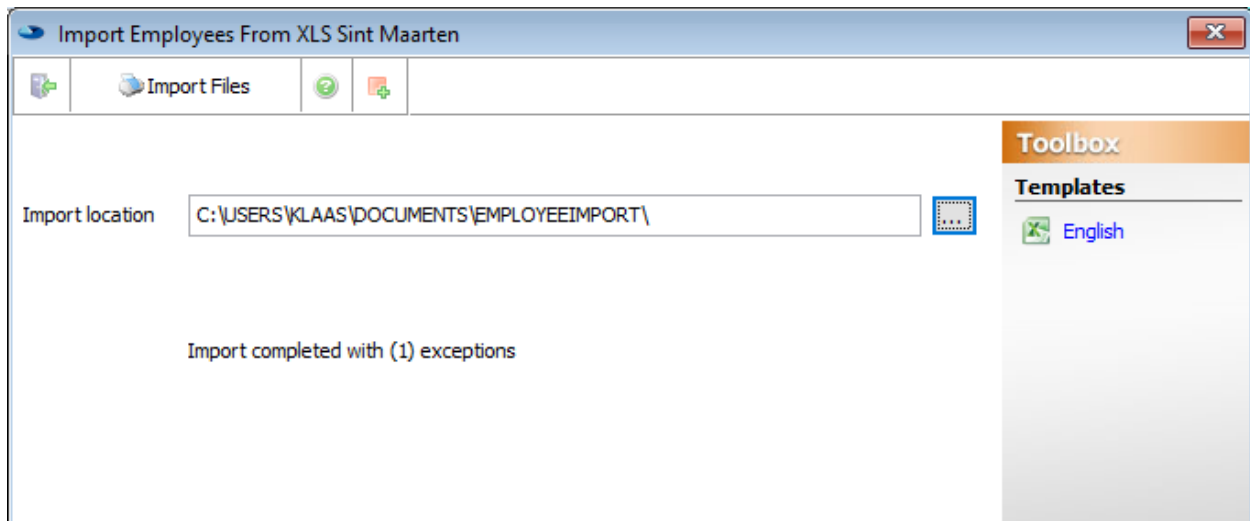
The number of spreadsheet(s) to import will be shown:



Errors on a spreadsheet(s) will be shown, in sequential order if more than one:



Once complete, the number of error spreadsheet(s) if there are errors, are shown as exceptions which are not imported.



5. Verifying imported data

Go to Menu > Employees > Manage Employees and open the new added employee(s).
Complete and/or update the data as required.

If you have any questions, please do not hesitate to contact us