HRIS Import Guide

Instructions on how to use Trakstar's HRIS Import Tool.

TRAKSTAR

Introduction

Trakstar's HRIS Import feature allows administrators to import Trakstar data with a spreadsheet exported from another HRIS system or with a spreadsheet of your own. It is a useful tool to make bulk changes to your employees. This feature is a for-pay add on to any subscription. The below instructions will

You can accomplish 3 main actions with an HRIS Import:

1. Add users
2. Update current user data
3. Terminate users

An import is done using a .CSV or .XLS file containing your employee information. Documents in Excel, Numbers, or any other spreadsheet program can be easily saved in a .CSV or .XLS format.

This Guide Will Cover:

- Configuring Import Settings
- Importing HRIS Data from a spreadsheet

Configuring Import Settings

The first thing you should do before importing employee data is to make sure you've configured your import settings correctly. These settings will apply to all data imported until they are changed, so if you need to import a spreadsheet with different settings, make sure to update those first!

Step 1:

Login using your administrator account and navigate to the Settings > HRIS Import section of the site using the options in the navigation menu. Once under the HRIS Import section, you will see two actions at the top of the screen:

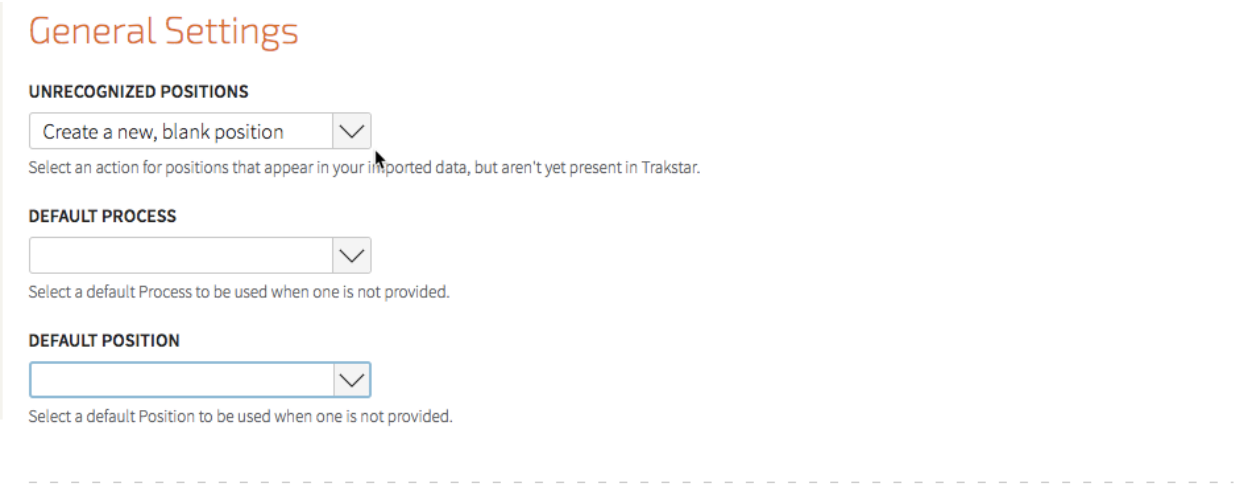
We will be going over the "Configure import settings" option in this section, so go ahead and click that option.

Step 2:

The bottom half of the screen will populate with all available import settings, and you'll be able to begin your selections. Three sections of this screen include General Settings, Spreadsheet Settings, and HRIS Integration Settings.

GENERAL SETTINGS

Under the General Settings section, there are three settings each with its own drop-down menu of options. Below we cover each option in detail.



Unrecognized Positions: This setting is asking what you'd like Trakstar to do if you are importing a position title which is not recognized (e.g. does not exist) in Trakstar. There are two options:

- ✧ Create a new, blank position: Use this option if you are importing new positions that you plan to manually add form content to later. If all positions in your organization have individualized form content, this would likely be a good option for you.

- Copy from an existing position: Use this option if you are importing new positions that you would like to be automatically filled with the same form content as another position. Selecting this option will provide a second drop-down where you will be able to select which position you'd like to copy.

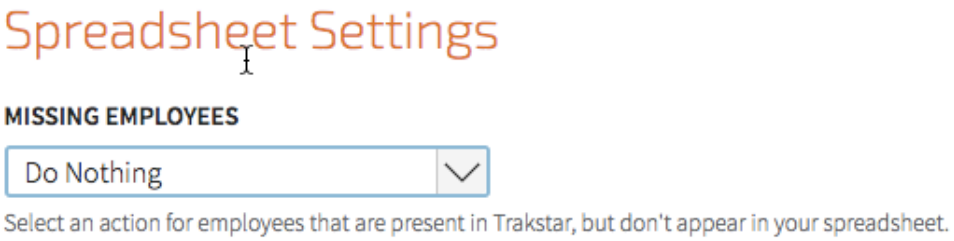
> FOR EXAMPLE:
>
> If you have an existing position called Outside Sales Representative, and you'd like to import a new position called Sr. Outside Sales Representative and both roles will be evaluated on the same criteria, you can choose the "Copy from existing position" option, and select the Outside Sales Representative position as the one to copy from! Likewise, if all positions at your organization are evaluated on the same criteria, you can always choose this option and copy any position.

Default Process: If you do not include an appraisal process in your import spreadsheet, the default process selected here will apply to that employee's appraisals.

Default Position: If you do not include a position title when importing employee information, the position selected here will be selected as that employee's position.

SPREADSHEET SETTINGS

Under the Spreadsheet settings section, there is just one drop-down menu, and this is the most important setting to check each and every time you use the import tool.



Missing Employees: This drop-down menu is asking what you'd like to do with employees who are missing from the spreadsheet you are about the import.

- Do Nothing: Use this option if you do not want to affect any changes upon employee accounts that do not appear on your list.
- Terminate: Use this option if you would like to import a current employee list and have all other accounts terminated from the system. This is a helpful option if you have not been able to keep up with terminations in Trakstar and you have many you need to complete at once. It also helps to make sure your site is as up-to-date as possible by removing any accounts that should no longer exist (e.g. that do not appear on your current employee import list).

HRIS INTEGRATION SETTINGS [OPTIONAL]

This section is only to be used if you have purchased the Trakstar-ADP integration add-on from the ADP Marketplace. If you are interested in this feature or have already purchased it, please reach out to Trakstar Support for more information at **support@trakstar.com**.

If you do have the Trakstar-ADP integration enabled and configured, please do not adjust the settings in this section without consulting with your IT team or administrator that configured the settings. You may still perform a manual employee import even if you have the integration configured.

IMPORTANT!

To avoid import mistakes, it is important to make sure you check your settings under "Configure import settings" EVERY time you use the HRIS Import tool!

Importing HRIS Data from a Spreadsheet

Now that you have configured your import settings, we are ready to begin setting up our import data.

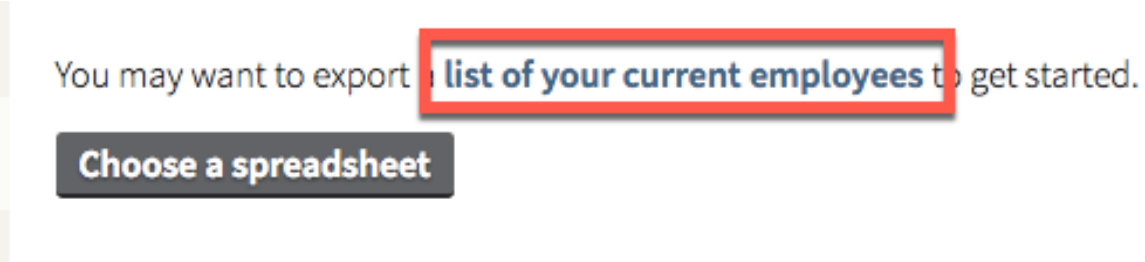
An import is done using a .CSV or Excel file containing your employee information. Documents in Excel, Numbers or any other spreadsheet program can be easily saved in a .CSV or Excel spreadsheet format.

To begin, you'll need either an export of your employee data from your HRIS system or you can export from Trakstar and make the necessary changes to your spreadsheet. We'll start with exporting existing employee data from Trakstar, but you may skip this step and export from your own HRIS system.

Step 1:

EXPORTING EMPLOYEES FROM TRAKSTAR

If you are already in Trakstar's HRIS Import tool, the easiest way to complete a Trakstar employee export is simply by clicking the link in the text, "You may want to export a list of your current employees to get started," as shown in the below screenshot:



This will download a .CSV file which you can open in Excel. The file will contain employee data for all active employees in Trakstar, and you can make any necessary updates to this file, including changing employee information or adding new rows for new employee accounts.

Alternately, there is always the option to export an employee list from the Employees section of your site at any time. Instructions on how to export from the Employee section can be found **here**.

> EXPORTING FROM YOUR HRIS SOFTWARE:
>
> This step will vary depending on which HRIS system your organization uses. However, make sure to include the Employee Number, Employee's Manager, and Position Name whenever possible.

Step 2:

CONFIGURING YOUR IMPORT SPREADSHEET

Now that you have exported a list of employees either from Trakstar or from your HRIS software, you will need to make updates to the data contained on the list. You can:

- Add users
- Edit user data
- Terminate users

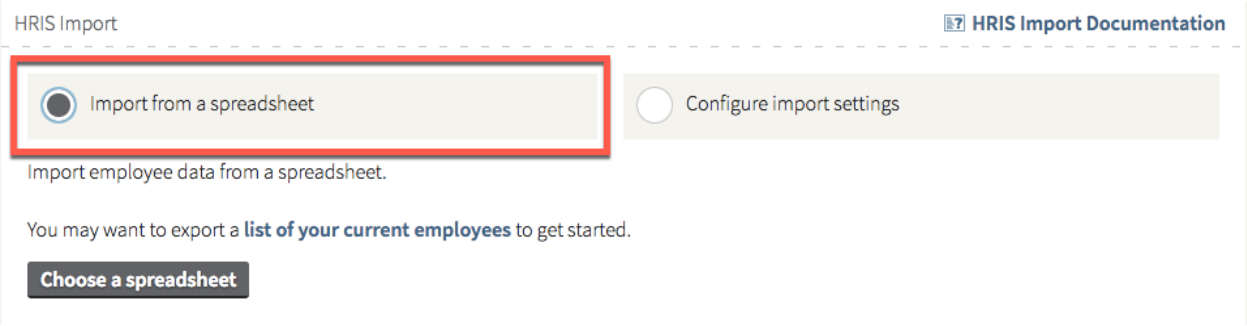
Add Users: Add users by inserting new rows with necessary employee data. The following columns are recognized by Trakstar as employee data fields which can be updated via import. The ones marked with an asterisk are required fields for all imports.

- *Employee Number: **Required.** Trakstar requires that each and every employee have a unique employee number. This can be a number from your HRIS system, or a random number assignment if you do not formally use employee numbers outside Trakstar.
- *First Name: **Required.** The employee's first name.
- *Last Name: **Required.** The employee's last name.
- Email Address: Typically the employee's work email address. This can be left blank if the employee does not have one.
- Username: The username the employee will use to access Trakstar. If you do not define a username, Trakstar will generate one for the employee using their first and last name.
- Password: You may enter a password for the employee, however Trakstar will generate a secure password for employees if this column is left blank.
- Manager Employee Number: Does this employee report directly to someone? Put their manager's employee number here. If they do not report to anyone, leave it blank.
- Position Name: Put the employee's position name here. If this column is left blank, the **Default Position** you identified in your import settings will be used for the employee.
- *Date of Hire: **Required.** The employee's date of hire.
- *Next Appraisal Date: Next appraisal due date for the employee.

- Appraisal Process: If you have a specific process you'd like to assign to the employee, put the process name here. Otherwise, Trakstar will automatically assign the **Default Process** you identified in your import settings will be used for the employee.

Edit User Data: Employee data can be edited within any of the above columns in your spreadsheet for existing accounts. Update the data under each column where necessary, and save your spreadsheet in order to import the changes.

Terminate Users: Trakstar's import feature allows you to import a current list of employees and have the system automatically terminate anyone who does appear on the list. Simply delete all the rows which contain a terminated employee from your spreadsheet, and make sure that your import settings are configured to terminate missing employees. Please refer to the section on **Configuring Import Settings** within this document, under the **Spreadsheet Settings** header, for steps on how to configure this.



Step 3:

IMPORTING YOUR SPREADSHEET

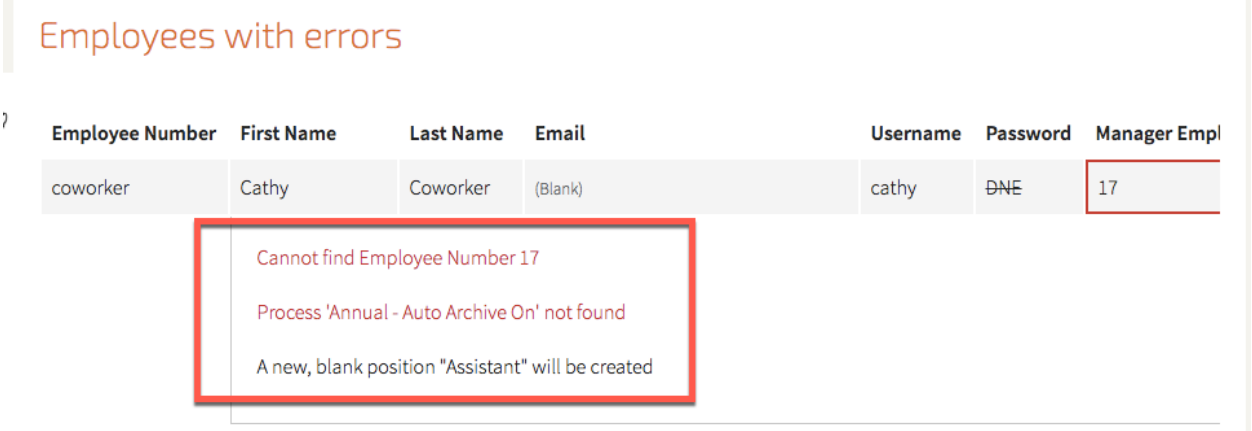
When you have finishing adding, removing, or editing rows within your employee data spreadsheet, you will need to save that file as a .CSV or Excel file.

Then, return to your Trakstar browser where, under the HRIS Import tool, you will select **Import from a spreadsheet** at the top:

Next, click on the **Choose a spreadsheet** button. This will open a window where you will be able to browse for the file you've just updated and saved. Locate your file, select it, and click Open to begin the import.

FIXING SPREADSHEET ERRORS

The system will begin importing your file, and will also check for errors as it validates the data. If your spreadsheet contains any inconsistencies or errors, Trakstar will tell you, as shown in red text in the screenshot below:



A couple common errors and their fixes are outlined below, but this is not an exhaustive list. If you have trouble fixing your import errors, you can always reach out to **support@trakstar.com** for assistance.

Example 1: In the above screenshot where it says "Cannot find Employee Number 17," Trakstar is letting us know that we have assigned Manager Number 17 to Cathy, but that number does not correspond to any existing employee.

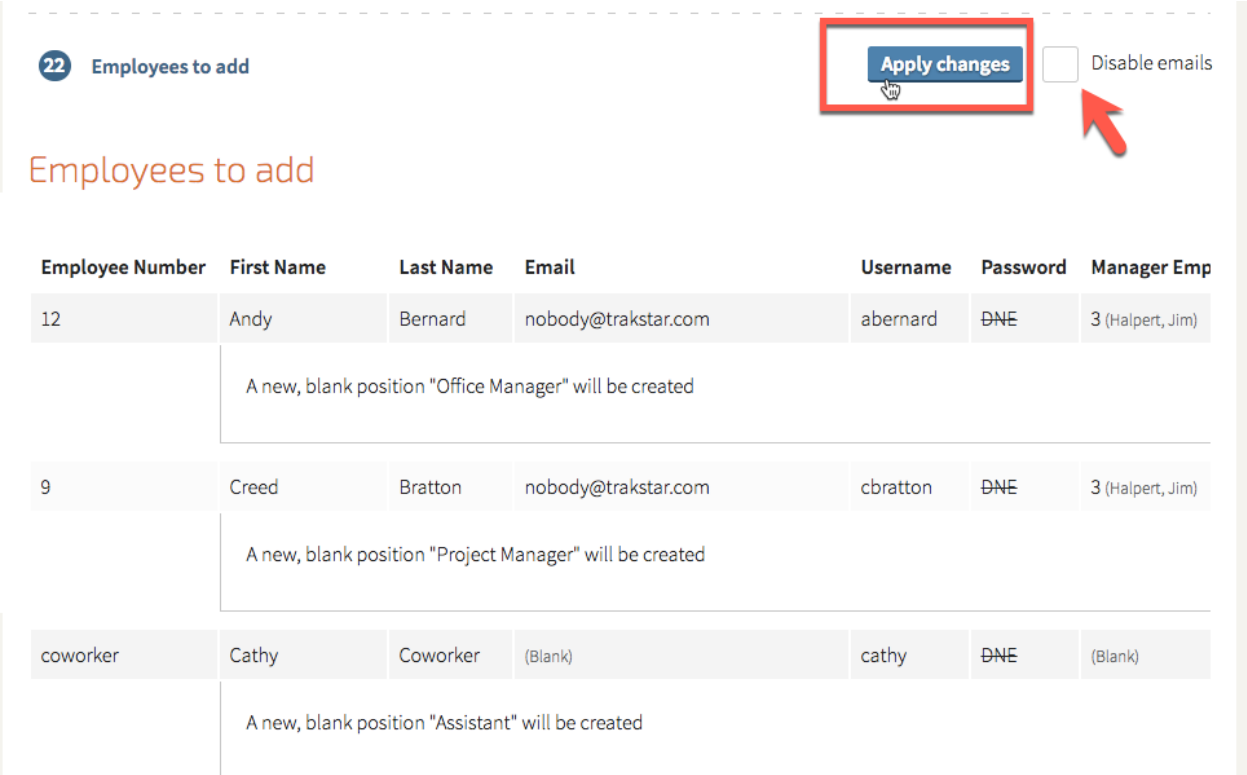
- To fix this error, you would either need to change the Manager Number to correspond to an existing manager, or add a new row in your document for the manager whose number is 17.

Example 2: Additionally, we see that the process we are trying to assign to Cathy cannot be found in Trakstar by the message "Process 'Annual - Auto Archive On' not found."

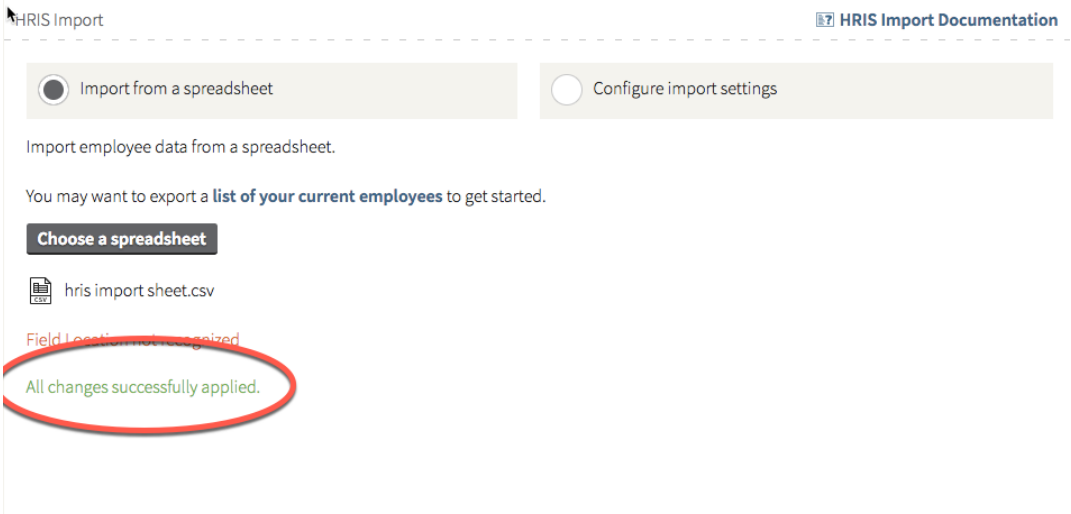
- To fix this error, you will need to create that process ("Annual - Auto Archive On") before you can import employees to be assigned to it, or you will need to assign an existing process to Cathy instead.

COMPLETING THE IMPORT

Once you have fixed all errors, you will be able to complete the import and update of data. As shown in the screenshot below, Trakstar will present you with a summary of the changes on the page, listing how many employees you are adding, updating, and terminating (if any).



If you have Trakstar email notifications Enabled and you do not want employees to be notified of the changes you are making, make sure to check the box to Disable Emails that appears next to the Apply Changes button. After reviewing the changes, click the button to Apply Changes to continue.

YOU'RE DONE!

When complete, you will see the below message: