



Sage People

# Data Loading Guide

This guide sets out how to data load into different Objects within Sage People to help reduce errors and ensure that incorrect data is not loaded into the system. From the Contents page, click on the data load you are looking to complete and you will be directed to a full walk through of the steps to follow in order to complete the data load.

Sage

# Table of Contents

**Salesforce ID .....3**

How to create an 18-Character Salesforce ID field and why you need it .....3

**Enhanced Objectives .....4**

How to data load Enhanced Objectives using the Salesforce Data Import Wizard.....4

How to Data load **Tasks** for Enhanced Objectives .....7

**Salary and Bonus .....10**

How to data load Salary records .....10

How to data load Bonus records .....16

**Absence .....21**

How to data load Absence Adjustments .....21

How to data load Absence Accruals.....29

**PDFs .....35**

How to data load PDF documents into Manager Note .....35

**HR Requests .....43**

How to data load future dated HR Requests .....43

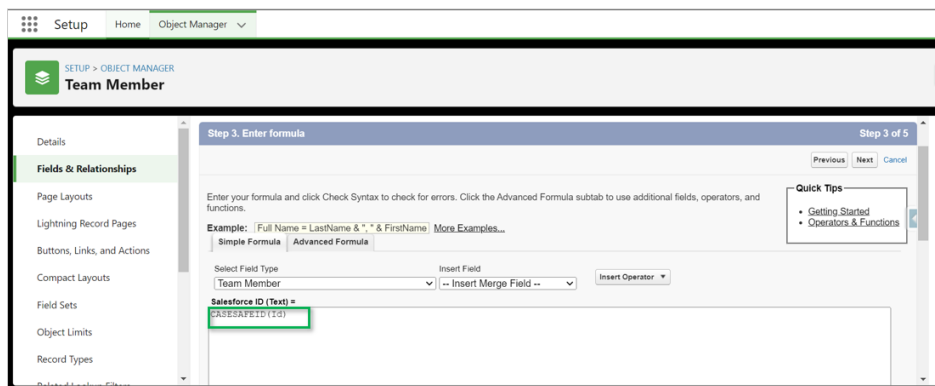
Considerations when data loading HR Requests .....49

# Salesforce ID

## How to create an 18-Character Salesforce ID field and why you need it

This field will be key when using the Salesforce Data Import Wizard, as it identifies the record the new or updated information will be linked to when the data load is completed.

1. Using setup, navigate to **Object Manager** and the relevant Object (i.e. Team Member, Employment etc.).
2. Select **Fields & Relationships** and click **New**.
3. Create a Formula Field:
  - Field Name: **Salesforce ID**
  - Data Type: **Text** > click **Next**
  - In the Formula section add **CASESAFEID(Id)** > click **Next** > You can choose to add this field the various Page Layouts that are listed, the default is checked or if you would prefer to keep the field in the background for reporting purposes only, remove the ticks, click **Next** > click **Save**

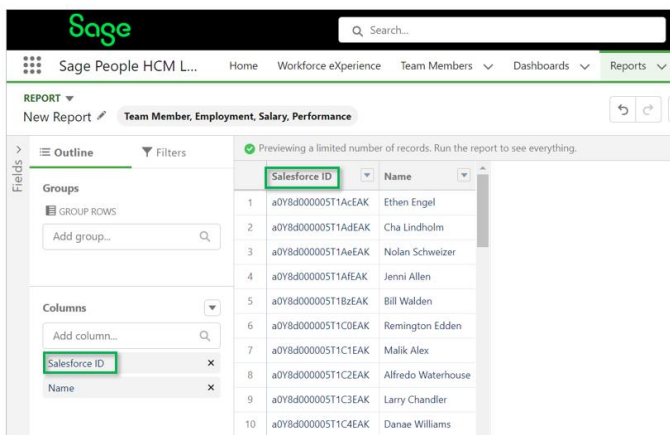


# Enhanced Objectives

## How to data load Enhanced Objectives using the Salesforce Data Import Wizard

There are 3 questions/steps to follow when using the Data Load Wizard:

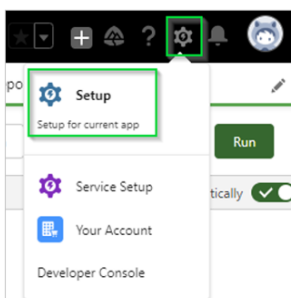
1. What kind of data are you importing? Choose the Object you want to load data into; you can only import data into one Object at a time.
  2. What do you want to do? You can add new records, update existing records, or add new records and update existing records at the same time.
  3. Where is your data located? Select the data file that you want to import.
1. Once you have created your 18-Character Salesforce ID field you need to run a report and export all the relevant ID's for your data load.



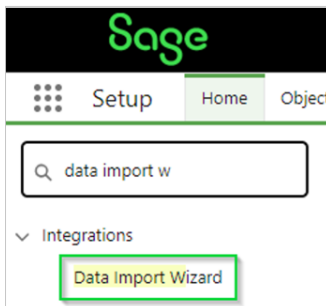
2. View the fields on Enhanced Objectives and then create an Excel spreadsheet template with the data you would like to upload into the relevant fields. Note: You must include the **Status** column with **Active** as the value in order for the Enhanced Objectives to be shown in WX.

| A                 | B                      | C        | D                 | E                                                | F          | G        | H           | I          | J      | K        |
|-------------------|------------------------|----------|-------------------|--------------------------------------------------|------------|----------|-------------|------------|--------|----------|
| Salesforce ID     | Title                  | Category | Company Objective | Description                                      | End Date   | Priority | Review Date | Start Date | Status | Weight % |
| a0Y8e00000dRpFEAU | Sage People: Data Load | Company  | Innovation        | Successfully data load in an enhanced objective. | 31/12/2023 | High     | 01/09/2023  | 01/07/2023 | Active | 10       |

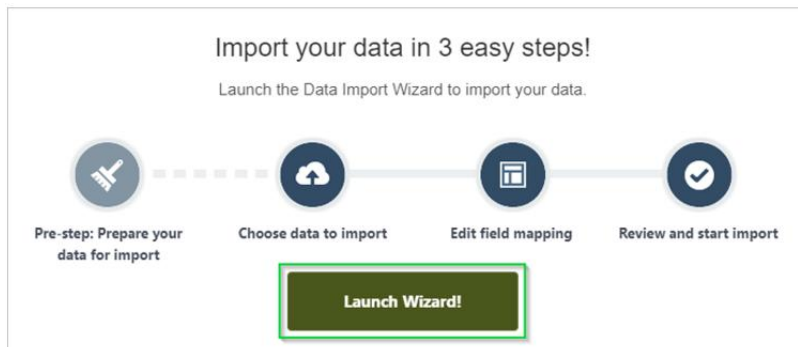
3. When you are ready to start your data load, navigate to Sage People and click **Setup**.



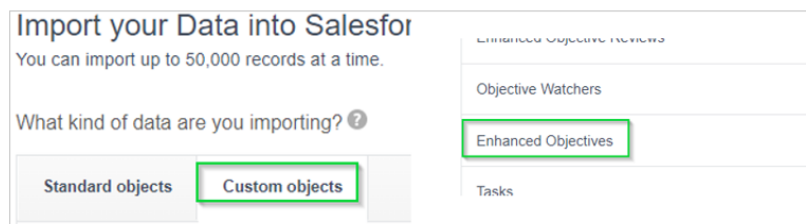
4. In the **Quick Find** box, search for and select **Data Import Wizard**.



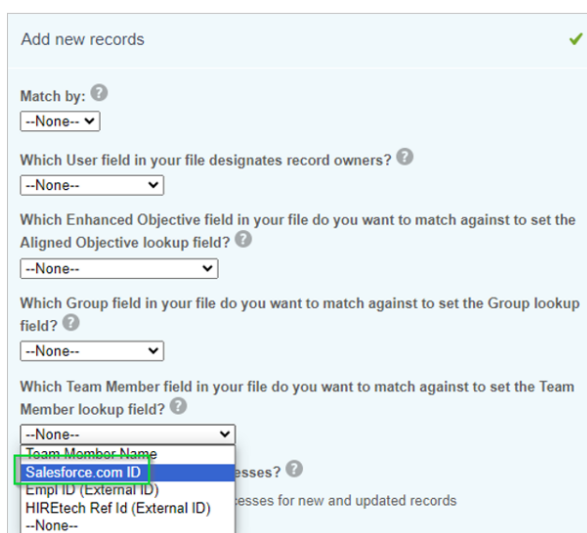
5. Select **Launch Wizard!**



6. Select **Custom objects**. Scroll to the bottom of the page and click **Enhanced Objectives**.



7. For this example, we want to add new Enhanced Objectives to Team Member records so click **Add new records**. For the question **Which Team Member field in your file do you want to match against to set the Team Member lookup field**, select **Salesforce.com ID**.



8. Now upload your file, ensure that the file has been saved as a **CSV UTF-8** file, select the character code **Unicode (UTF8)** and click **Next**.

Where is your data located? 

File

Data Load Template - Enhanced Objectives.csv

Character Code 

ISO-8859-1 (General US & Western European, ISO-LATIN-1) ▼

ISO-8859-1 (General US & Western European, ISO-LATIN-1)

Windows Japanese

Big5 Traditional Chinese

Japanese (Auto-Detect)

Unicode (UTF8)

Unicode (UTF16)

KS C 5601 Korean

GB2312 Simplified Chinese

Big5 Traditional Chinese (HKSCS)

Japanese (Shift\_JIS-2004)

9. The system will then map (where it can) the relevant headers in your template to the fields in Sage People. For each field that shows as **Unmapped** you will need to click on the **Map** link from the **Edit** column and then select the relevant field to map the CSV Header to e.g. for the purpose of this example you would map to the **Team Member** field. Click **Map**.

### Edit Field Mapping: Enhanced Objectives

Your file has been auto-mapped to existing Salesforce fields, but you can edit the mappings if you wish. Unmapped fields will not be imported.

| Edit                | Mapped Salesforce Object | CSV Header        | Example                                          |
|---------------------|--------------------------|-------------------|--------------------------------------------------|
| <a href="#">Map</a> | Unmapped                 | Salesforce ID     | a0YSe00000dRgFEAU                                |
| Change              | Title                    | Title             | Sage People: Data Load                           |
| Change              | Category                 | Category          | Company                                          |
| Change              | Company Objective        | Company Objective | Innovation                                       |
| Change              | Description              | Description       | Successfully data load in an enhanced objective. |
| Change              | End Date                 | End Date          | 31/12/2023                                       |

### Map your field: Salesforce ID

Select field

Team Members

Unmapped Field

Category

Closed Date

(Deprecated) Company Objective

Company Objective

Created Date

Cancel

Map

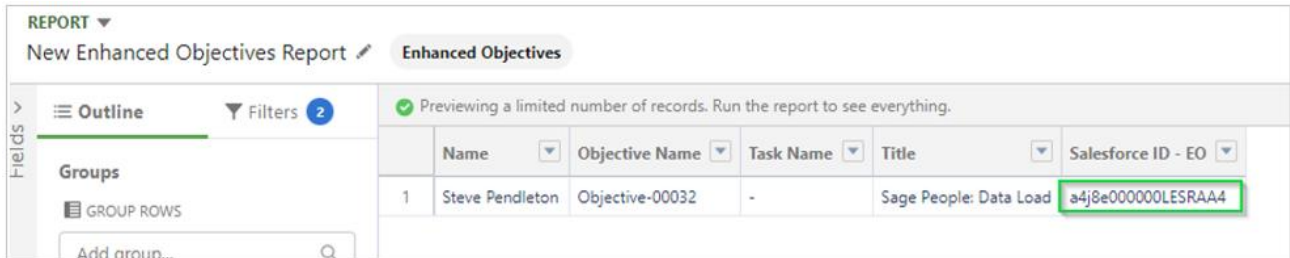
10. Once all fields have been mapped, click **Next** and **Start Import**.

Cancel Previous **Start Import**

11. You will now see the log screen that shows the status of the import. Once the import has completed the status will change to **Completed** and if there are any errors with the file, these will be displayed in the log; correct the errors as required. Spot check a few Team Member records to make sure you are happy with the data.

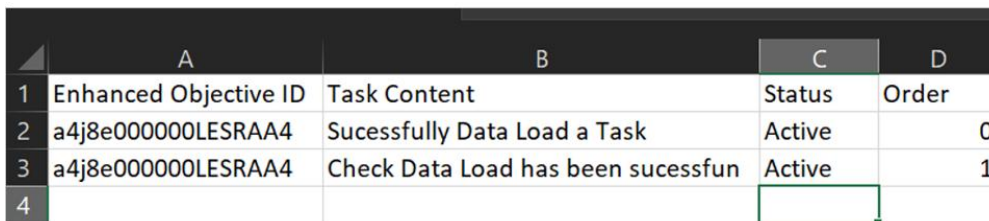
## How to Data load **Tasks** for Enhanced Objectives

1. Create the 18 Character Salesforce ID field on the Enhanced Objective object as set out above.
2. Run a report to pull the Enhanced Objectives 18-Character Salesforce ID reference you are looking to load into Tasks in Sage People.



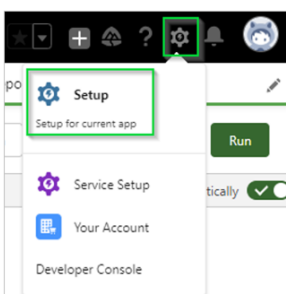
|   | Name            | Objective Name  | Task Name | Title                  | Salesforce ID - EO |
|---|-----------------|-----------------|-----------|------------------------|--------------------|
| 1 | Steve Pendleton | Objective-00032 | -         | Sage People: Data Load | a4j8e000000LESRAA4 |

3. Create an Excel template and include the Salesforce ID for the Enhanced Objectives you are looking to add a task to along with the content, status and order. The order is needed if you are adding more than one task under the same Objective; this enables the system to display them in the relevant order.

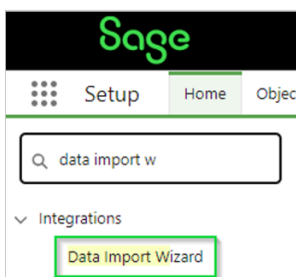


|   | A                     | B                                  | C      | D     |
|---|-----------------------|------------------------------------|--------|-------|
| 1 | Enhanced Objective ID | Task Content                       | Status | Order |
| 2 | a4j8e000000LESRAA4    | Sucessfully Data Load a Task       | Active | 0     |
| 3 | a4j8e000000LESRAA4    | Check Data Load has been sucessfun | Active | 1     |
| 4 |                       |                                    |        |       |

4. Save the template as a CSV UTF8 file.
5. When you are ready to start your data load, navigate to Sage People and click **Setup**.

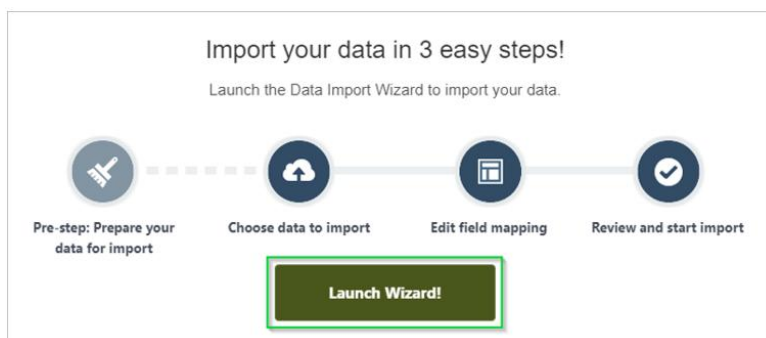


6. In the **Quick Find** box, search for and select **Data Import Wizard**.





7. Select **Launch Wizard!**



8. Select **Custom objects**. Scroll to the bottom of the page and click **Tasks**.

|                     |   |
|---------------------|---|
| Enhanced Objectives | > |
| Tasks               | ✓ |

9. For this example, we want to add/link new Tasks to the Enhanced Objective field so click **Add new records**. For the question, **Which Enhanced Objective field in your file specifies the Master/Detail relationship**, select **Salesforce.com ID**.

Add new records ✓

Match by: ?  
--None--

Which User field in your file designates record owners? ?  
--None--

Which Enhanced Objective field in your file specifies the Master/Detail relationship? ?  
**Salesforce.com ID**

10. Drag and drop your save CSV UTF8 file and select Character Code **Unicode (UTF8)** and click **Next**.

Where is your data located? ?

File  
Data Load Template - Tasks.csv

Character Code ?  
**Unicode (UTF8)**

Values Separated By  
Comma

11. The system will then map (where it can) the relevant headers in your template to the fields in Sage People. For each field that shows as **Unmapped** you will need to click on the **Map** link from the **Edit** column and then select the relevant field to map the CSV Header to e.g. for the purpose of this example you would map the **Enhanced Objective ID** field to the **Objective** field and the **Task Content** field to the **Content** field. Click **Map**.



| Edit   | Mapped Salesforce Object | CSV Header            |
|--------|--------------------------|-----------------------|
| Map    | Unmapped ⓘ               | Enhanced Objective ID |
| Map    | Unmapped ⓘ               | Task Content          |
| Change | Status                   | Status                |
| Change | Order                    | Order                 |



| Edit   | Mapped Salesforce Object | CSV Header            |
|--------|--------------------------|-----------------------|
| Change | Objective                | Enhanced Objective ID |
| Change | Content                  | Task Content          |
| Change | Status                   | Status                |
| Change | Order                    | Order                 |

12. Once all fields have been mapped, click **Next** and **Start Import**.

Cancel
Previous
Start Import

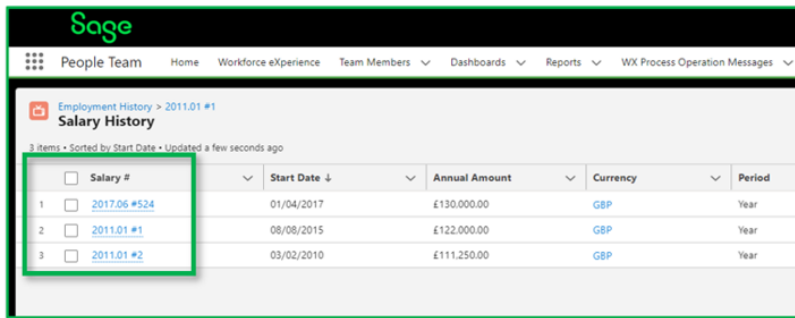
13. You will now see the log screen that shows the status of the import. Once the import has completed the status will change to **Completed** and if there are any errors with the file, these will be displayed in the log; correct the errors as required. Spot check a few Team Member records to make sure you are happy with the data.

# Salary and Bonus

## How to data load Salary records

If you need to mass update salary records i.e. due to an annual salary review in your organisation, you could complete this via a data load. This type of data load uses the **Sage People Data Loader**.

*Consideration: This could be done either via a mass data upload or via an HR Request data load.*



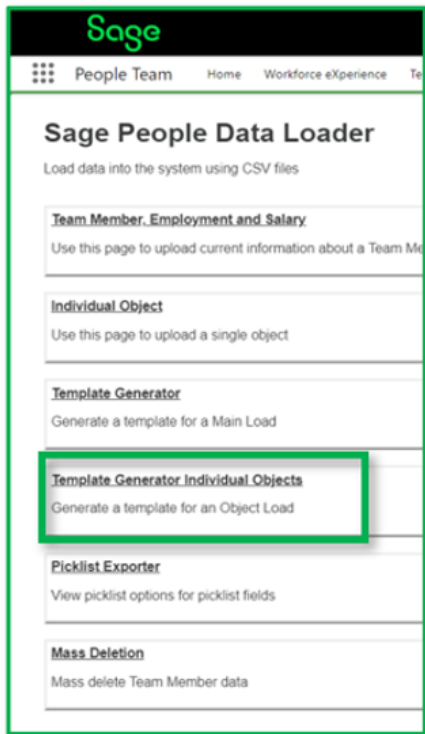
|   | Salary #                              | Start Date | Annual Amount | Currency | Period |
|---|---------------------------------------|------------|---------------|----------|--------|
| 1 | <input type="checkbox"/> 2017.06 #524 | 01/04/2017 | £130,000.00   | GBP      | Year   |
| 2 | <input type="checkbox"/> 2011.01 #1   | 08/08/2015 | £122,000.00   | GBP      | Year   |
| 3 | <input type="checkbox"/> 2011.01 #2   | 03/02/2010 | £111,250.00   | GBP      | Year   |

1. Create the data template for the new salaries to be loaded into Sage People. You should include the following fields in the template as a minimum:

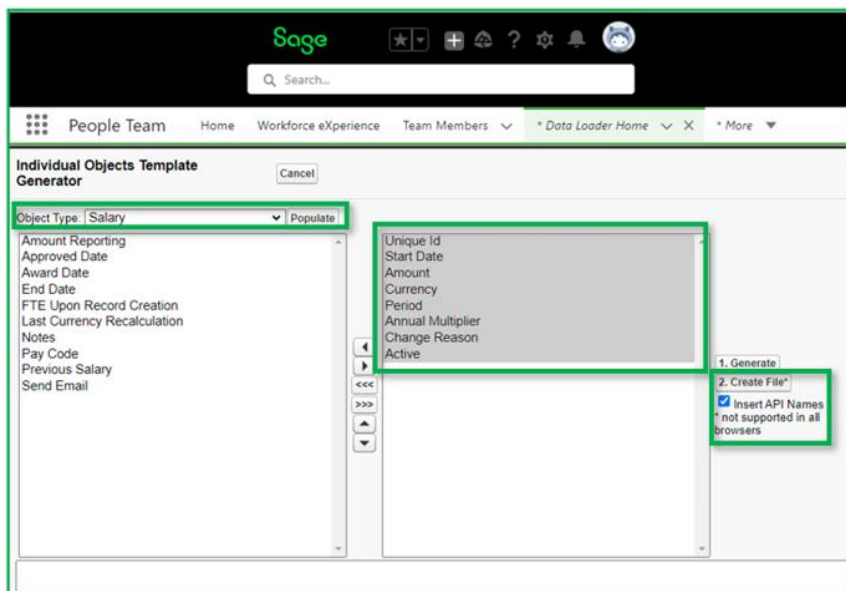
- Unique ID/Employee Number
- Start Date (Salary Effective Date)
- Change Reason
- Currency
- Amount
- Period
- Annual Multiplier
- Active
- Plus any other custom fields that you record on the Team Member Salary record

Note: You will also need to include the API field names for these fields; tick the checkbox when generating the template.

2. To generate the Salary data load template, from the App Launcher type in **Data Loader Home** and select **Template Generator Individual Objects**.



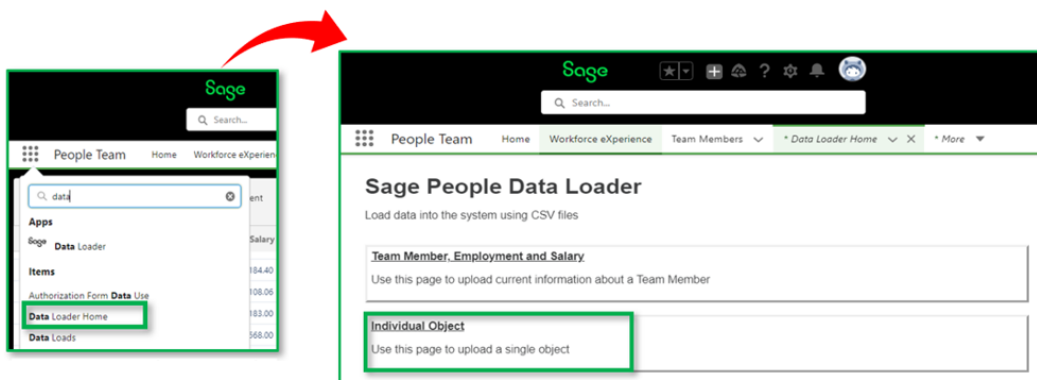
3. In the **Object Type** field, select **Salary** and select the relevant fields using the right arrow button (include the minimum requirement highlighted above). Once you have selected all of the required fields, click **1. Generate**. Tick the **Insert API Names** checkbox and click **2. Create File**.



4. You can then align the API field names with the data in your spreadsheet. We recommend that you test a sample file in your Sandbox first to make sure there are no errors.

|    | A                 | B                  | C              | D                | E              | F                         | G                     | H              |
|----|-------------------|--------------------|----------------|------------------|----------------|---------------------------|-----------------------|----------------|
| 1  | fhcm2_unique_id_c | fhcm2_Start_Date_c | fhcm2_Amount_c | fhcm2_Currency_c | fhcm2_Period_c | fhcm2_Annual_Multiplier_c | fhcm2_Change_Reason_c | fhcm2_Active_c |
| 2  | 111356            | 01/01/2023         | 74743.62       | GBP              | Year           |                           | 1 Merit Increase      | TRUE           |
| 3  | 111313            | 01/01/2023         | 530363.463     | SEK              | Year           |                           | 1 Merit Increase      | TRUE           |
| 4  | 111405            | 01/01/2023         | 48492.15       | GBP              | Year           |                           | 1 Merit Increase      | TRUE           |
| 5  | 111326            | 01/01/2023         | 54146.4        | GBP              | Year           |                           | 1 Merit Increase      | TRUE           |
| 6  | 111257            | 01/01/2023         | 57061.158      | EUR              | Year           |                           | 1 Merit Increase      | TRUE           |
| 7  | 111260            | 01/01/2023         | 80340.75       | GBP              | Year           |                           | 1 Merit Increase      | TRUE           |
| 8  | 111381            | 01/01/2023         | 61066.95       | GBP              | Year           |                           | 1 Merit Increase      | TRUE           |
| 9  | 111275            | 01/01/2023         | 79123.8        | GBP              | Year           |                           | 1 Merit Increase      | TRUE           |
| 10 | 111221            | 01/01/2023         | 55288.8        | GBP              | Year           |                           | 1 Merit Increase      | TRUE           |
| 11 | 111375            | 01/01/2023         | 54648.3        | GBP              | Year           |                           | 1 Merit Increase      | TRUE           |

5. To load the data template into Sage People, click on the App Launcher, type in **Data Loader Home** and select **Individual Object**. Note: The API field names generated in the Salary data load file are based on using the Individual Object Data Loader. If you were to use the Team Member, Employment and Salary data load option, the system would assume the Salary Start Date is the Employment Start Date which is not the case.



6. The file upload requirements are as follows:

- Object Type: Salary
- File: Click Choose file, find/click on the link of your csv. file
- Import Type: Insert
- Delimiter: Comma
- Date Format: DD/MM/YYYY
- Ignore Blanks: Checked
- Click **Upload**

Note: When loading in new Salary records you should always use the Import Type: **Insert** as you want to show the history by adding in a new row. You would use the Update option if you wanted to correct a current Salary record i.e. salary should be £35,000 instead of £30,000

Single Object Upload

File

Object Type: Salary

File: Choose file Salary Data Example.csv

Import Type: Insert

Key Fields (update only):

Delimiter: Comma

Date Format: dd/mm/yyyy

Ignore Blanks: ☒

Check Only: ☐

Upload Cancel

7. If there are no formatting errors, scroll down to the **File Details** section and click **Import**.

File Details

headers:

fhm2\_unique\_id\_c

fhm2\_start\_date\_c

fhm2\_amount\_c

fhm2\_currency\_c

fhm2\_period\_c

fhm2\_annual\_multiplier\_c

fhm2\_change\_reason\_c

fhm2\_active\_c

Number of rows: 1

Import Abort

8. You will be presented with the following screen where you can view the upload status; if you refresh the screen you will see the **Status** change i.e. will move from Checking to Committing to Completed.

Data Load

230804112838043

Details

Record Type: Object Load

Data Load Batch Id: 230804112838043

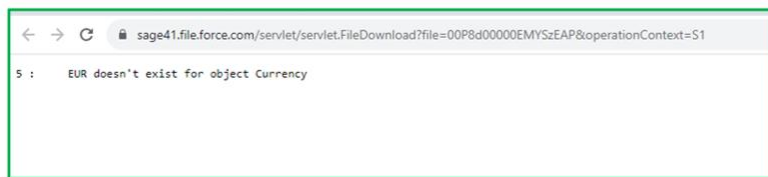
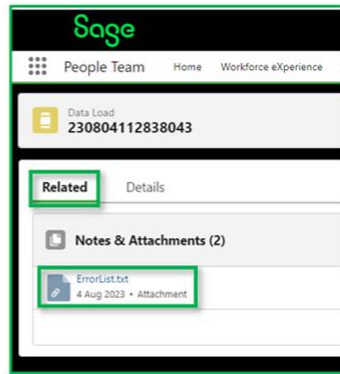
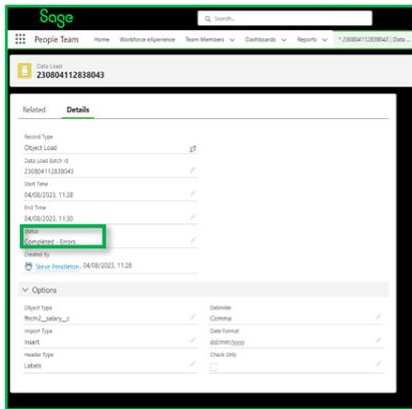
Start Time: 04/08/2023, 11:28

End Time: 04/08/2023, 11:28

Status: Checking

Created By: Steve Pendleton, 04/08/2023, 11:28

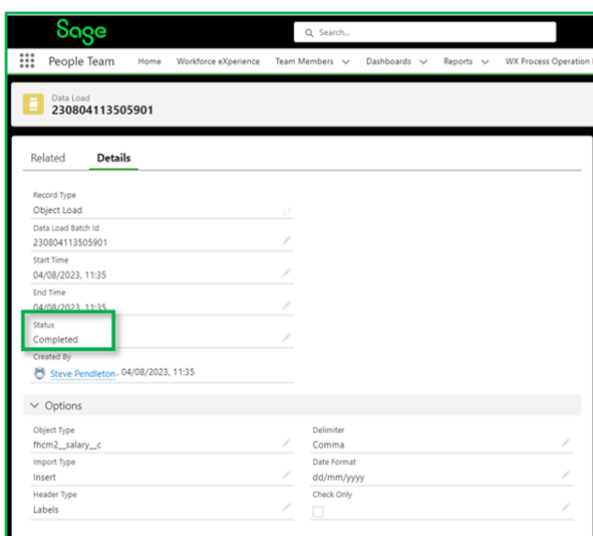
9. In the event that there are errors within the file, the error list can be found on the **Related** tab. You will need to correct the errors in the data load file and then start the import process again. Note: No changes will be applied to the org until all errors have been corrected and the upload Status shows as **Completed**.



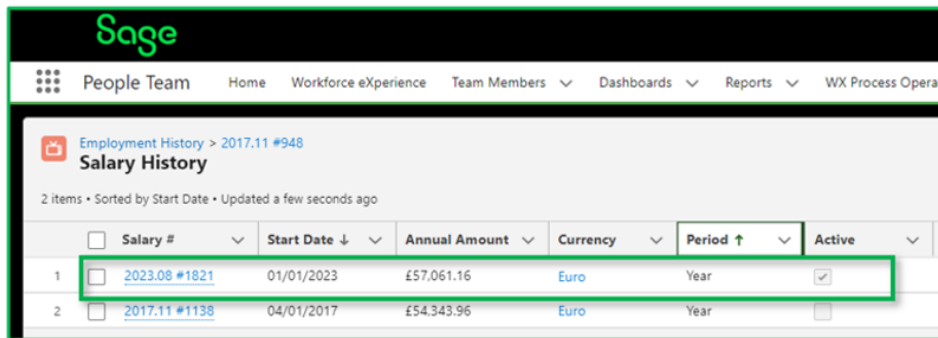
In this example you can see that the Currency Code **EUR** on row 5 of the data load file does not match the Currency Code in the Object. The Currency Code in the Object shows **Euro** so to correct this error you would need to change the Currency Code to **Euro** in the data load file and then re-import the corrected file.

|    | A                 | B                  | C              | D                | E              | F                         | G                     | H              |
|----|-------------------|--------------------|----------------|------------------|----------------|---------------------------|-----------------------|----------------|
|    | fHCM2_unique_id_c | fHCM2_Start_Date_c | fHCM2_Amount_c | fHCM2_Currency_c | fHCM2_Period_c | fHCM2_Annual_Multiplier_c | fHCM2_Change_Reason_c | fHCM2_Active_c |
| 1  | 111356            | 01/01/2023         | 74743.62       | GBP              | Year           |                           | 1 Merit Increase      | TRUE           |
| 2  | 111313            | 01/01/2023         | 530363.463     | SEK              | Year           |                           | 1 Merit Increase      | TRUE           |
| 3  | 111405            | 01/01/2023         | 48492.15       | GBP              | Year           |                           | 1 Merit Increase      | TRUE           |
| 4  | 111326            | 01/01/2023         | 54146.00       | EUR              | Year           |                           | 1 Merit Increase      | TRUE           |
| 5  | 111257            | 01/01/2023         | 57061.15       | Euro             | Year           |                           | 1 Merit Increase      | TRUE           |
| 6  | 111260            | 01/01/2023         | 80340.75       | GBP              | Year           |                           | 1 Merit Increase      | TRUE           |
| 7  | 111381            | 01/01/2023         | 61066.95       | GBP              | Year           |                           | 1 Merit Increase      | TRUE           |
| 8  | 111275            | 01/01/2023         | 79123.8        | GBP              | Year           |                           | 1 Merit Increase      | TRUE           |
| 9  | 111221            | 01/01/2023         | 55288.8        | GBP              | Year           |                           | 1 Merit Increase      | TRUE           |
| 10 | 111375            | 01/01/2023         | 54648.3        | GBP              | Year           |                           | 1 Merit Increase      | TRUE           |

10. Once all corrections have been made the **Details** tab will show the Status as **Completed**.



11. Spot check a few Team Member records to make sure you are happy with the data. You will see a new Salary record row has been added for all Team Member records included in the data load file and the previous record has now been deactivated with the latest record showing as Active.



**Sage**

People Team Home Workforce eXperience Team Members Dashboards Reports WX Process Operat

Employment History > 2017.11 #948

**Salary History**

2 items • Sorted by Start Date • Updated a few seconds ago

|   | <input type="checkbox"/> Salary #                      | Start Date ↓ | Annual Amount | Currency | Period ↑ | Active                              |
|---|--------------------------------------------------------|--------------|---------------|----------|----------|-------------------------------------|
| 1 | <input type="checkbox"/> <a href="#">2023.08 #1821</a> | 01/01/2023   | £57,061.16    | Euro     | Year     | <input checked="" type="checkbox"/> |
| 2 | <input type="checkbox"/> <a href="#">2017.11 #1138</a> | 04/01/2017   | £54,343.96    | Euro     | Year     | <input type="checkbox"/>            |



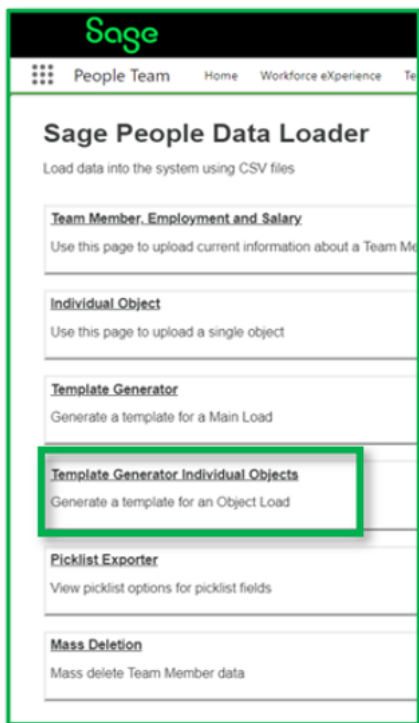
## How to data load Bonus records

You may issue annual or one-off spot Bonus payments to your employees and want to record this in the system for reporting purposes. This section of the guide will walk you through how to mass upload Bonus payments; this type of data load uses the **Sage People Data Loader**.

1. Create the data template for the new Bonus amounts to be loaded into Sage People. You should include the following fields in the template as a minimum:
  - Unique ID/Employee Number
  - Award Date
  - Paid Date
  - Currency
  - Amount
  - Reason
  - Plus any other custom fields that you record on the Bonus record

Note: You will also need to include the API field names for these fields; tick the checkbox when generating the template.

2. To generate the Bonus data load template, from the App launcher type in **Data Loader Home** and select **Template Generator Individual Objects**.

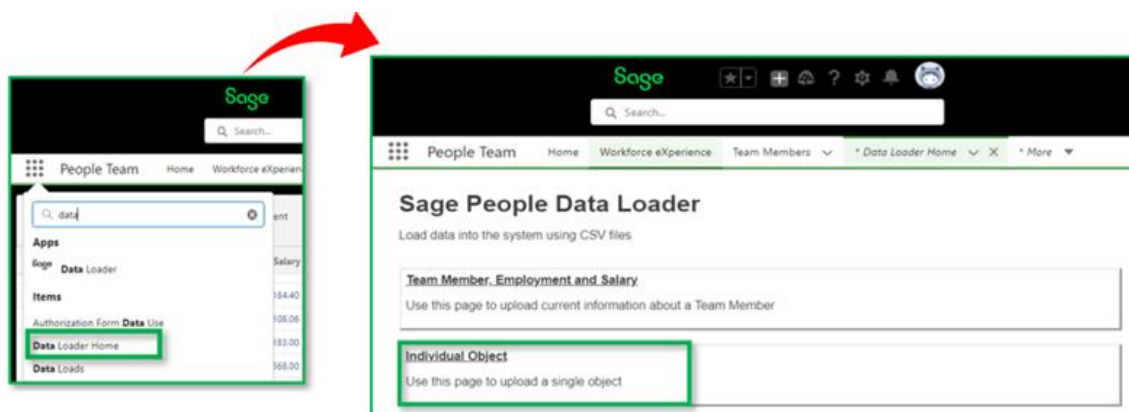


3. In the **Object Type** field, select **Bonus** and select the relevant fields using the right arrow button (include the minimum requirement highlighted above). Once you have selected all of the required fields, click **1. Generate**. Tick the **Insert API Names** checkbox and click **2. Create File**.

4. You can then align the API field names with the data in your spreadsheet. We recommend that you test a sample file in your Sandbox first to make sure there are no errors.

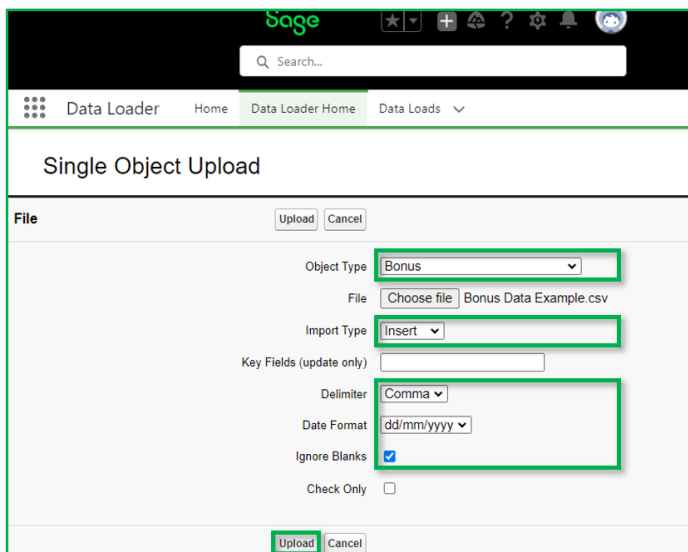
|    | A                 | B                  | C                 | D              | E                | F              |
|----|-------------------|--------------------|-------------------|----------------|------------------|----------------|
| 1  | fHCM2_unique_id_c | fHCM2_Award_Date_c | fHCM2_Paid_Date_c | fHCM2_Amount_c | fHCM2_Currency_c | fHCM2_Reason_c |
| 2  | 111356            | 01/07/2023         | 28/07/2023        | 3737.18 GBP    |                  | Performance    |
| 3  | 111313            | 01/07/2023         | 28/07/2023        | 26518.17 SEK   |                  | Performance    |
| 4  | 111405            | 01/07/2023         | 28/07/2023        | 2424.61 GBP    |                  | Performance    |
| 5  | 111326            | 01/07/2023         | 28/07/2023        | 2707.32 GBP    |                  | Performance    |
| 6  | 111257            | 01/07/2023         | 28/07/2023        | 2853.06 Euro   |                  | Performance    |
| 7  | 111260            | 01/07/2023         | 28/07/2023        | 4017.04 GBP    |                  | Performance    |
| 8  | 111381            | 01/07/2023         | 28/07/2023        | 3053.35 GBP    |                  | Performance    |
| 9  | 111275            | 01/07/2023         | 28/07/2023        | 3956.19 GBP    |                  | Performance    |
| 10 | 111221            | 01/07/2023         | 28/07/2023        | 2764.44 GBP    |                  | Performance    |
| 11 | 111375            | 01/07/2023         | 28/07/2023        | 2732.42 GBP    |                  | Performance    |

5. To load the data template into Sage People, click on the App Launcher, type in **Data Loader Home** and select **Individual Object**.

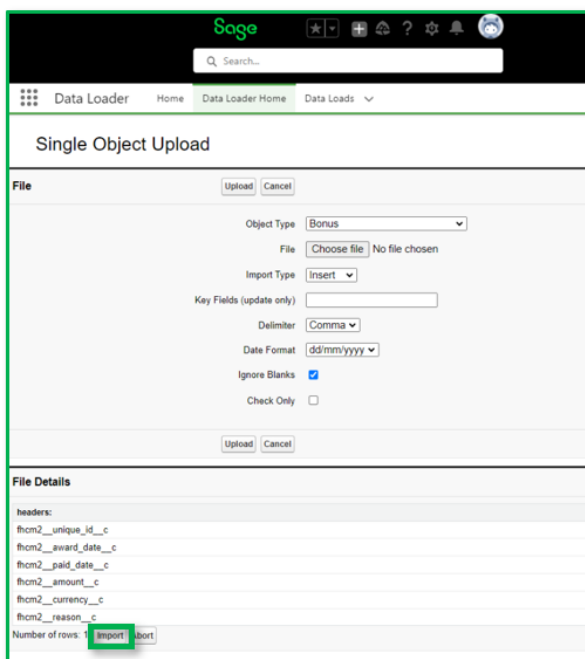


6. The file upload requirements are as follows:

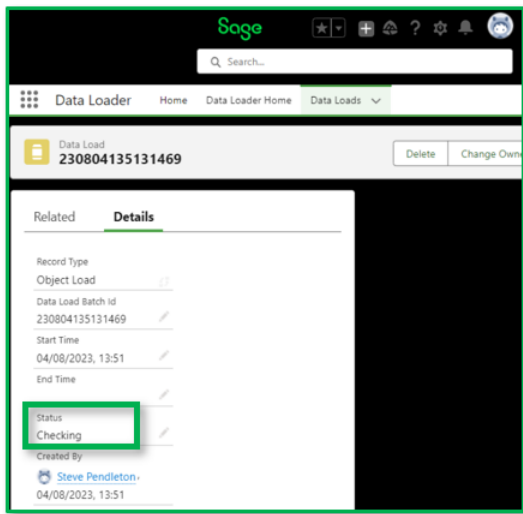
- Object Type: Bonus
- File: Click Choose file, find/click on the link of your csv. file
- Import Type: Insert
- Delimiter: Comma
- Date Format: DD/MM/YYYY
- Ignore Blanks: Checked
- Click **Upload**



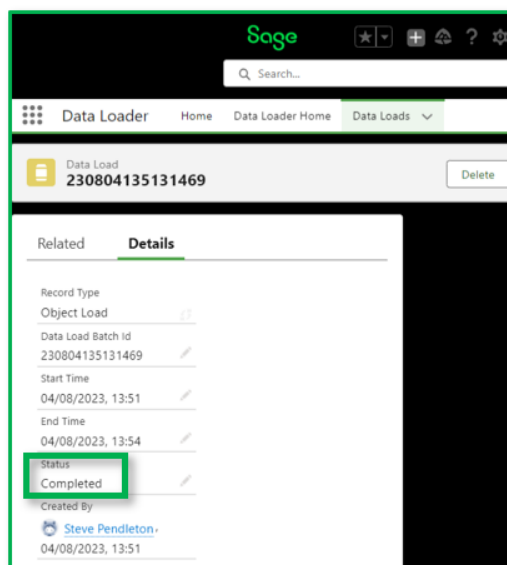
7. If there are no formatting errors, scroll down to the **File Details** section and click **Import**.



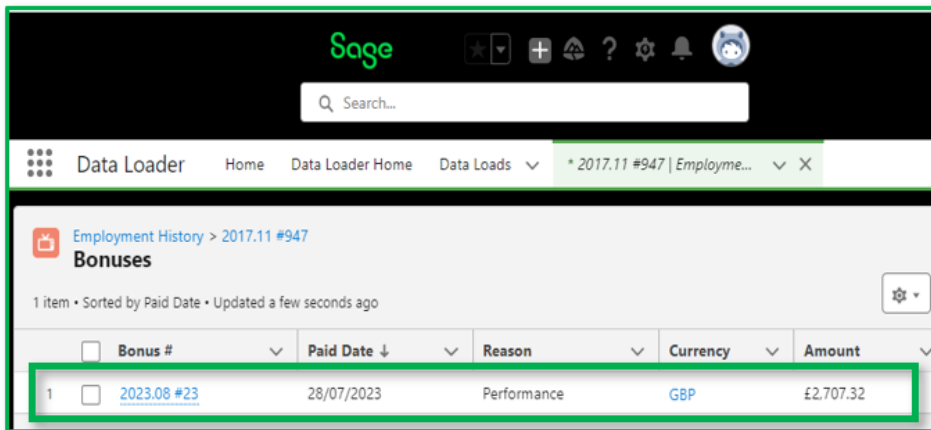
8. You will be presented with the following screen where you can view the upload status; if you refresh the screen you will see the **Status** change i.e. will move from Checking to Committing to Completed.



9. In the event that there are errors within the file, the error list can be found on the **Related** tab. You will need to correct the errors in the data load file and then start the import process again. Note: No changes will be applied to the org until all errors have been corrected and the upload Status shows as **Completed**.
10. Once all corrections have been made (if applicable), the **Details** tab will show the Status as **Completed**.



11. Spot check a few Team Member records to make sure you are happy with the data. You will see a new Bonus record row has been added for all Team Member records included in the data load file.



The screenshot shows the Sage Data Loader interface. The top navigation bar includes the Sage logo, a search bar, and several icons. Below the navigation bar, there's a breadcrumb trail: Data Loader > Home > Data Loader Home > Data Loads > \*2017.11 #947 | Employme... > X. The main content area is titled "Bonuses" and shows "1 item • Sorted by Paid Date • Updated a few seconds ago". A table with the following columns is displayed: Bonus #, Paid Date, Reason, Currency, and Amount. A single row is highlighted with a green border, showing a bonus of £2,707.32 for Performance on 28/07/2023.

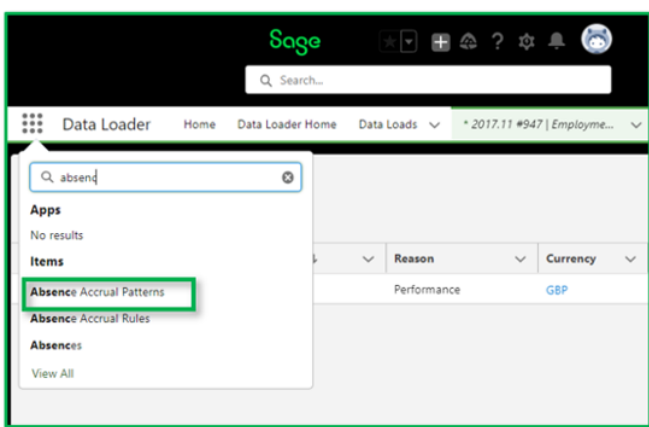
| Bonus # | Paid Date  | Reason      | Currency | Amount    |
|---------|------------|-------------|----------|-----------|
| 1       | 28/07/2023 | Performance | GBP      | £2,707.32 |

# Absence

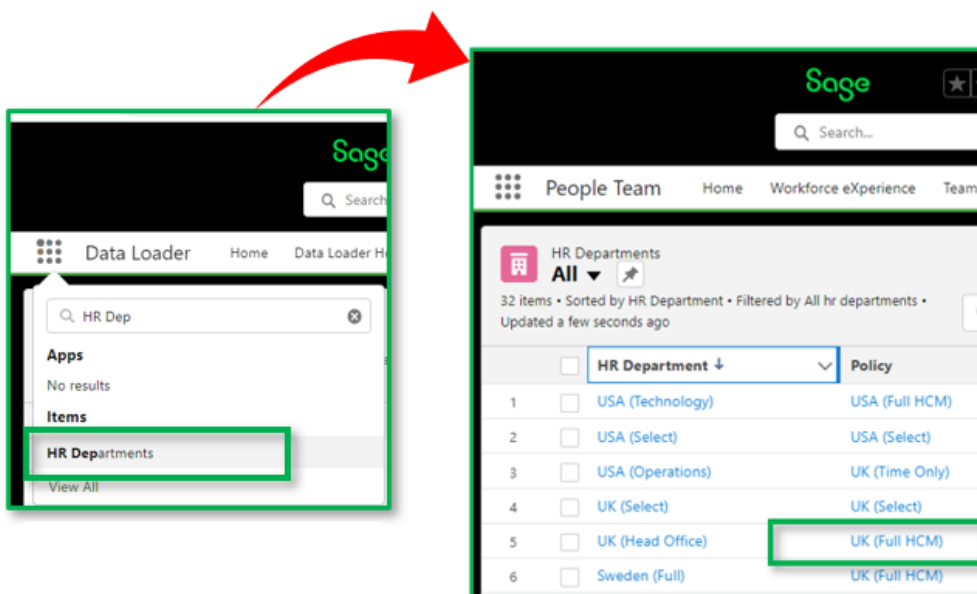
## How to data load Absence Adjustments

If you need to make ad-hoc changes to absence entitlements, you can do this by creating an Absence Adjustment. For example, you have decided to give all employees in the HR Department 'UK (Head Office)' an extra day of holiday for the current holiday year. This type of data load uses the **Sage People Data Loader**.

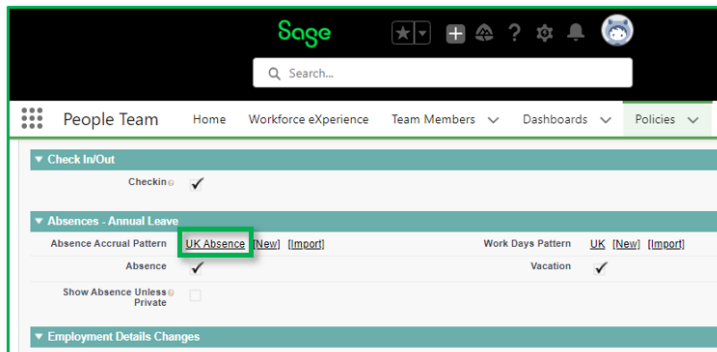
1. If you are data loading Absence Adjustment(s) you will need to identify the **Absence Accrual Rule Name** for the Absence Type that you are adjusting. From the App Launcher, type in **Absence Accrual Patterns**. Click on the **Absence Accrual Pattern** name link that relates to the Team Member records you want to update.



Note: If you are not sure what the Absence Accrual Pattern name is, you can find this by navigating to **HR Departments** and finding the linked Policy. In this example the UK (Head Office) HR Department is linked to Policy UK (Full HCM).

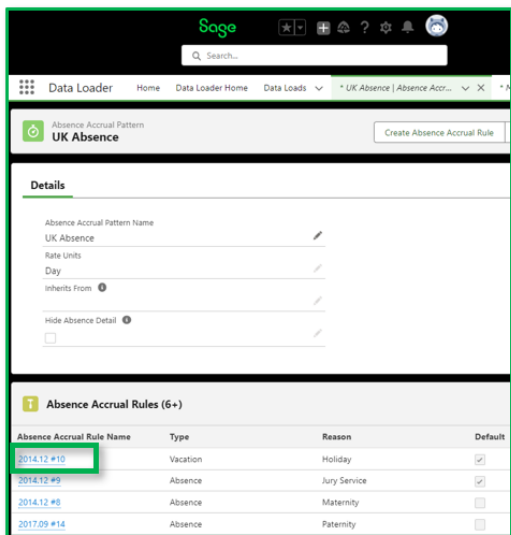


Click on the Policy link and scroll down to the **Absences – Annual Leave** section to find the default **Absence Accrual Pattern** name, for the purpose of this example it is called **UK Absence**. Note: Watch out for Team Members who may have a Policy Override on their Team Member record or an Absence Accrual Pattern override on their Employment record (you can report on both of these fields) as this will impact which Absence Pattern Rule name you reference.



Once you have located the relevant Absence Accrual Pattern, you need to confirm the **Absence Accrual Rule Name** for the Absence Type/Reason you want to adjust. For the purpose of this example, we want to grant all Team Members in the UK Absence Absence Accrual Pattern an extra days holiday so you would use the Absence Accrual Rule Name **2014.12#10**, Type: Vacation, Reason: Holiday in the Absence Adjustment data load template.

Note: If you are applying the Absence Adjustment to Team Members who are also eligible for this additional day of holiday who have a different Absence Accrual Rule Name i.e. they have a Policy override or an Absence Accrual Pattern override, you must also use the Absence Accrual Rule Name associated to their override Absence Accrual Pattern in the data load template.



- Now that you have identified the Absence Accrual Rule Name(s) you can start to prepare your data. Run a report for all current employees assigned to the HR Department UK (Head Office) and include the field **Unique ID**. Include the **Policy Override** and **Absence Accrual Pattern** fields so that you can identify employees who have a different Absence Accrual Pattern to UK Absence.

For the purpose of this example, all employees have a Policy Override to **UK (Full HCM)** which is the default Policy for the UK (Head Office) HR Department which means the default Absence Accrual Pattern is **UK Absence**; we have already identified the Absence Accrual Rule Name in the step above. You can see in the screenshot below that Kaiden Whitaker has an Absence Accrual Pattern override so you will need to confirm the Absence Accrual Rule Name for the **UK Absence (Hours)** Absence Accrual Pattern and use this instead when creating his record in the data load template.

| Empl ID | Team Member: Name | Current Employment: Employment Record # | Policy Override | Current Employment: Absence Accrual Pattern |
|---------|-------------------|-----------------------------------------|-----------------|---------------------------------------------|
| 111233  | Isai Gardner      | 2017.11 #920                            | UK (Full HCM)   | -                                           |
| 111304  | Ashton Clark      | 2017.11 #913                            | UK (Full HCM)   | -                                           |
| 111302  | Kaleigh Owens     | 2017.11 #909                            | UK (Full HCM)   | -                                           |
| 111389  | Eduardo Kapka     | 2017.11 #914                            | UK (Full HCM)   | -                                           |
| 111405  | Hadassah Greene   | 2017.11 #945                            | UK (Full HCM)   | -                                           |
| 111326  | Larry Petty       | 2017.11 #947                            | UK (Full HCM)   | -                                           |
| 111260  | Martin Page       | 2017.11 #949                            | UK (Full HCM)   | -                                           |
| 111381  | Bentley Vora      | 2017.11 #950                            | UK (Full HCM)   | -                                           |
| 111275  | Rigoberto King    | 2017.11 #951                            | UK (Full HCM)   | -                                           |
| 111221  | Jonathan Dodd     | 2017.11 #952                            | UK (Full HCM)   | -                                           |
| 111219  | Pedro Beck        | 2017.11 #993                            | UK (Full HCM)   | -                                           |
| 111401  | Noelle Elliot     | 2017.11 #1119                           | UK (Full HCM)   | -                                           |
| 539427  | Andrew Lemons     | 2011.01 #106                            | UK (Full HCM)   | -                                           |
| 996891  | Thomas Wilson     | 2011.01 #230                            | USA (Full HCM)  | -                                           |
| 111362  | Kirsten Jordan    | 2017.11 #994                            | UK (Full HCM)   | -                                           |
| 111406  | Cole Stewart      | 2017.11 #995                            | UK (Full HCM)   | -                                           |
| 111433  | Bentley Wilson    | 2017.11 #996                            | UK (Full HCM)   | -                                           |
| 111392  | Kaiden Whitaker   | 2017.11 #1122                           | UK (Full HCM)   | UK Absence (Hours)                          |

3. Create the data template for the Absence Adjustments to be loaded into Sage People. You should include the fields below. You will also need to include the API field names; tick the checkbox when generating the template:

- Unique ID/Employee Number
- Absence Accrual Rule Name
- Start Date
- End Date
- Rate Adjust
- Rate Rule
- Rationale

Note: Ensure the **Rate Adjust** field reflects the correct **Rate Units** for the Absence Accrual Pattern the employee is linked to i.e. if the employee books holiday in **hours**, you will need to enter the number of hours for the equivalent working day in the Rate Adjust field e.g. if a full working day is 7.5 hours, you would enter **7.5** whereas if an employee books holiday in **days**, you would enter **1** in the Rate Adjust field. If you want to check the Rate Units field, go to the Absence Accrual Pattern tab, click on the Absence Accrual Pattern name link and you can find this in the Details section, see screenshot example below:



Sage

Search...

Data Loader Home Data Loads

Absence Accrual Pattern  
**UK Absence**

**Details**

Absence Accrual Pattern Name  
UK Absence

**Rate Units**  
Day

Inherits From

Hide Absence Detail

The Start and End dates will be based on when you want the extra day to be added to the holiday entitlement. It will also vary depending on the **Rate Per** field on the Absence Accrual Rule itself. If you want to add just 1 day then you need to do it over the timeframe that matches the Rate Per. For example:

| Rate Per | Start Date | End Date   |
|----------|------------|------------|
| Week     | 01/01/2023 | 08/01/2023 |
| Month    | 01/01/2023 | 31/01/2023 |
| Year     | 01/01/2023 | 31/12/2023 |

For the purpose of this example, the **Rate Per** for the **Holiday** Absence Accrual Rule Name is shown as **Month** and the extra day is to be added to the entitlement from the start of the holiday year i.e. January therefore the dates for the data load template will be Start Date 01/01/2023 and End Date 31/01/2023.

Sage

People Team Home Workforce experience Team Members Dashboards

**1** Absence Accrual Rule  
**2014.12 #10**

Absence Accrual Pattern  
[UK Absence](#)

Absence Accrual Rule Name  
2014.12 #10

Default

Type  
Vacation

Reason  
Holiday

Base Date

Additional Fieldset

Is Paid

**Adjustment Rules**

Adjust Rate For FTE

Adjust Limits For FTE

Adjust Base For FTE

Adjust Carry Over For FTE

Adjust Minimum Accrual For FTE

Length Limit In Calendar Days

**Reset Rules**

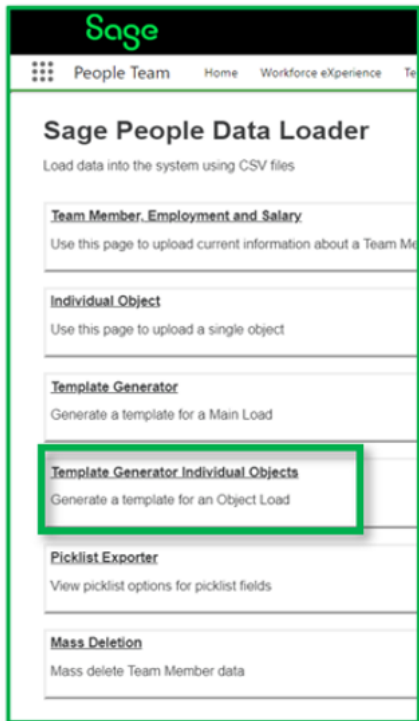
Reset Day  
1

Reset Month  
Jan

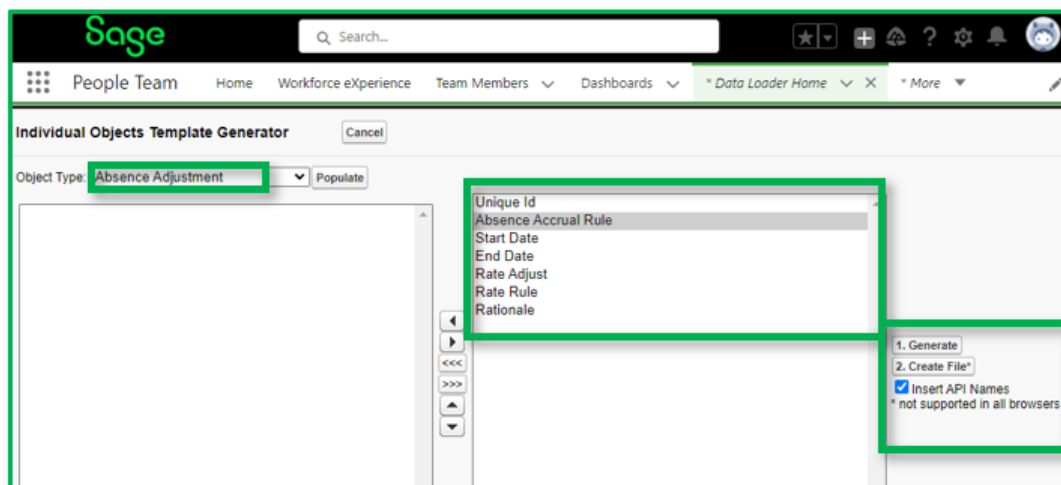
**Rate Per**  
Month

Note: If you are subtracting holiday from an employee, you cannot subtract more than they will accrue in that period e.g. if an employee has an annual holiday entitlement of 25 days, they will accrue 2.08 days a month. If you need to subtract 3 days, you would subtract 2 days from January and 1 day from February.

4. To generate the Absence Adjustment data load template, from the App launcher type in **Data Loader Home** and select **Template Generator Individual Objects**.



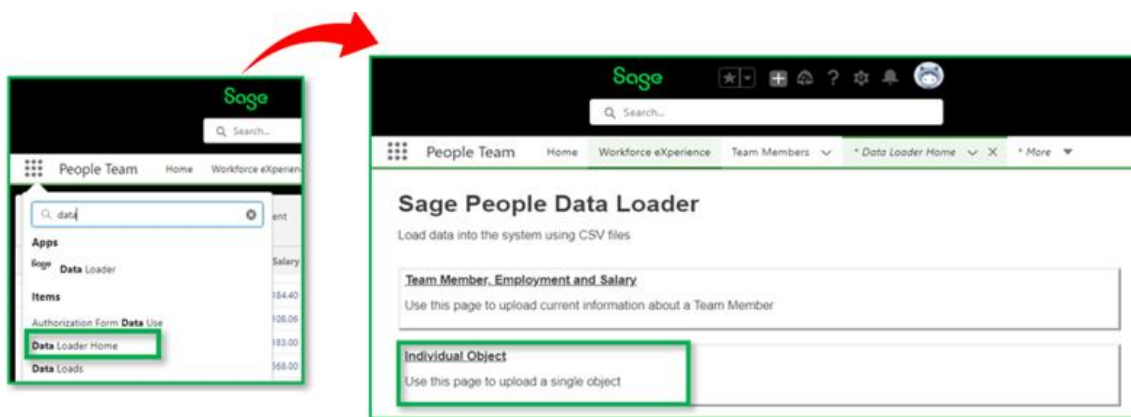
5. In the **Object Type** field, select **Absence Adjustment** and select the relevant fields using the right arrow button (include the minimum requirement highlighted above). Once you have selected all of the required fields, click **1. Generate**. Tick the **Insert API Names** checkbox and click **2. Create File**.



6. You can then align the API field names with the data in your spreadsheet. We recommend that you test a sample file in your Sandbox first to make sure there are no errors.

|    | A                 | B                            | C                  | D                | E                   | F                 | G                                    | H |
|----|-------------------|------------------------------|--------------------|------------------|---------------------|-------------------|--------------------------------------|---|
| 1  | fHCM2_unique_id_c | fHCM2_Absence_Accrual_Rule_c | fHCM2_Start_Date_c | fHCM2_End_Date_c | fHCM2_Rate_Adjust_c | fHCM2_Rate_Rule_c | fHCM2_Rationale_c                    |   |
| 2  | 111233            | 2014.12 #10                  | 01/01/2023         | 31/01/2023       | 1 Add               |                   | Adding 1 extra day holiday to all UK |   |
| 3  | 111304            | 2014.12 #10                  | 01/01/2023         | 31/01/2023       | 1 Add               |                   | Adding 1 extra day holiday to all UK |   |
| 4  | 111302            | 2014.12 #10                  | 01/01/2023         | 31/01/2023       | 1 Add               |                   | Adding 1 extra day holiday to all UK |   |
| 5  | 111389            | 2014.12 #10                  | 01/01/2023         | 31/01/2023       | 1 Add               |                   | Adding 1 extra day holiday to all UK |   |
| 6  | 111405            | 2014.12 #10                  | 01/01/2023         | 31/01/2023       | 1 Add               |                   | Adding 1 extra day holiday to all UK |   |
| 7  | 111326            | 2014.12 #10                  | 01/01/2023         | 31/01/2023       | 1 Add               |                   | Adding 1 extra day holiday to all UK |   |
| 8  | 111260            | 2014.12 #10                  | 01/01/2023         | 31/01/2023       | 1 Add               |                   | Adding 1 extra day holiday to all UK |   |
| 9  | 111381            | 2014.12 #10                  | 01/01/2023         | 31/01/2023       | 1 Add               |                   | Adding 1 extra day holiday to all UK |   |
| 10 | 111275            | 2014.12 #10                  | 01/01/2023         | 31/01/2023       | 1 Add               |                   | Adding 1 extra day holiday to all UK |   |
| 11 | 111221            | 2014.12 #10                  | 01/01/2023         | 31/01/2023       | 1 Add               |                   | Adding 1 extra day holiday to all UK |   |
| 12 | 111219            | 2014.12 #10                  | 01/01/2023         | 31/01/2023       | 1 Add               |                   | Adding 1 extra day holiday to all UK |   |
| 13 | 111401            | 2014.12 #10                  | 01/01/2023         | 31/01/2023       | 1 Add               |                   | Adding 1 extra day holiday to all UK |   |
| 14 | 539427            | 2014.12 #10                  | 01/01/2023         | 31/01/2023       | 1 Add               |                   | Adding 1 extra day holiday to all UK |   |
| 15 | 111362            | 2014.12 #10                  | 01/01/2023         | 31/01/2023       | 1 Add               |                   | Adding 1 extra day holiday to all UK |   |
| 16 | 111406            | 2014.12 #10                  | 01/01/2023         | 31/01/2023       | 1 Add               |                   | Adding 1 extra day holiday to all UK |   |
| 17 | 111433            | 2014.12 #10                  | 01/01/2023         | 31/01/2023       | 1 Add               |                   | Adding 1 extra day holiday to all UK |   |
| 18 | 111392            | 2018.06 #32                  | 01/01/2023         | 31/01/2023       | 1 Add               |                   | Adding 1 extra day holiday to all UK |   |

7. To load the data template into Sage People, click on the App Launcher, type in **Data Loader Home** and select **Individual Object**.



8. The file upload requirements are as follows:

- Object Type: Absence Adjustment
- File: Click Choose file, find/click on the link of your csv. file
- Import Type: Insert
- Delimiter: Comma
- Date Format: DD/MM/YYYY
- Ignore Blanks: Checked
- Click **Upload**

Object Upload

Upload Cancel

Object Type: Absence Adjustment

File: Choose file Absence Adj... Example.csv

Import Type: Insert

Key Fields (update only):

Delimiter: Comma

Date Format: dd/mm/yyyy

Ignore Blanks: ☒

Check Only: ☐

Upload Cancel

9. If there are no formatting errors, scroll down to the **File Details** section and click **Import**.

Single Object Upload

File: Upload Cancel

Object Type: Absence Adjustment

File: Choose file No file chosen

Import Type: Insert

Key Fields (update only):

Delimiter: Comma

Date Format: dd/mm/yyyy

Ignore Blanks: ☒

Check Only: ☐

Upload Cancel

File Details

headers:

fhcm2\_unique\_id\_\_c

fhcm2\_absence\_accrual\_rule\_\_c

fhcm2\_start\_date\_\_c

fhcm2\_end\_date\_\_c

fhcm2\_rate\_adjust\_\_c

fhcm2\_rate\_rule\_\_c

fhcm2\_rationale\_\_c

Number of rows: 1

Import Abort

10. You will be presented with the following screen where you can view the upload status; if you refresh the screen you will see the **Status** change i.e. will move from Checking to Committing to Completed.

Data Load

230804161432119

Related Details

Record Type

Object Load

Data Load Batch Id

230804161432119

Start Time

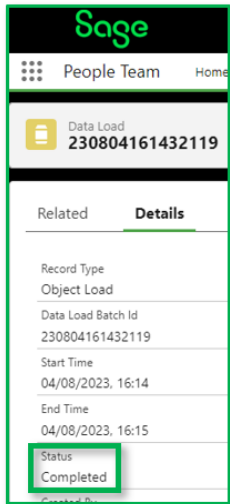
04/08/2023, 16:14

End Time

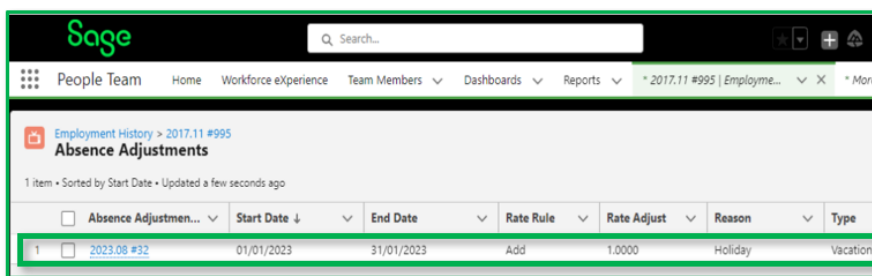
Status

Checking

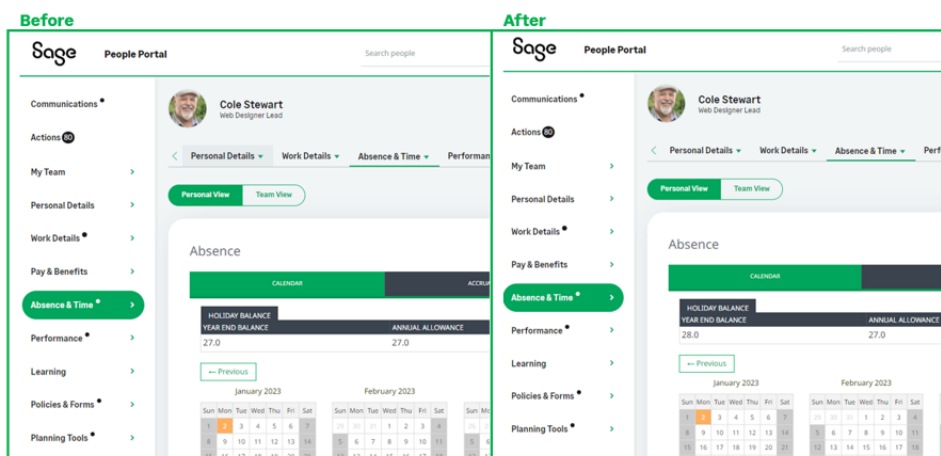
11. In the event that there are errors within the file, the error list can be found on the **Related** tab. You will need to correct the errors in the data load file and then start the import process again. Note: No changes will be applied to the org until all errors have been corrected and the upload Status shows as **Completed**.
12. Once all corrections have been made (if applicable), the **Details** tab will show the Status as **Completed**.



13. Spot check a few Team Member records to make sure you are happy with the data. You will see a new Absence Adjustment record has been added for all Team Member records included in the data load file, you can also check this in the Team Members Accrual Log.



The example below shows the employees WX Year End Balance before the extra holiday day was added and after. You will notice the Holiday Year End Balance started at 27 days before the Absence Adjustment and now shows as 28 days following the adjustment.

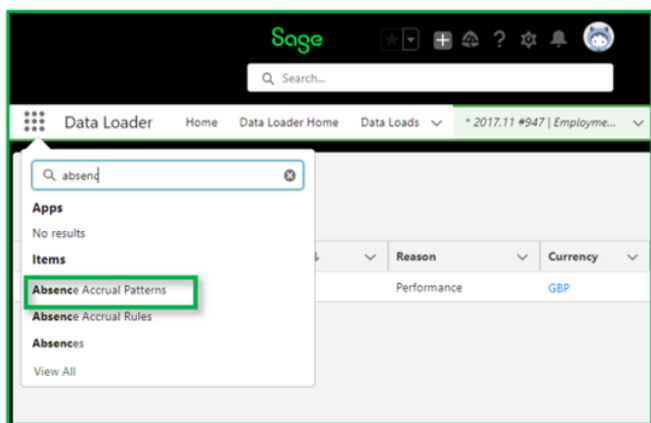


## How to data load Absence Accruals

Absence Accrual data loads are really useful. Essentially the functionality enables you to correct the Accrual baseline by 'drawing a line in the sand' with changes becoming effective from a specific date onwards, for example you would use this option if you wanted to amend the carryover balance from the previous holiday year at the individual Team Member level. You would also use this option if you wanted to change an employees Absence Accrual Pattern from a given point in time. This type of data load uses the **Sage People Data Loader**.

Note: Creating an Absence Accrual record means that you will only be able to view the Accrual history logs in the Team Member Accrual Log from the start date of the latest/new Absence Accrual record, you will no longer be able to see previous years' history.

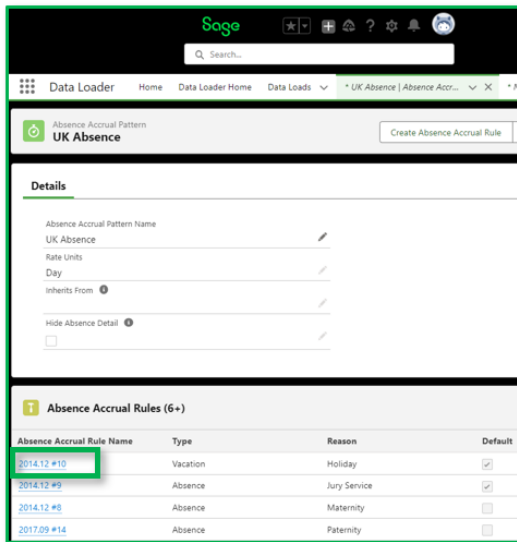
1. If you are data loading Absence Accruals you will need to identify the **Absence Accrual Rule Name** for the Absence Type that you want to add an Accrual record for. From the App Launcher, type in **Absence Accrual Patterns**. Click on the **Absence Accrual Pattern** name link that relates to the Team Member records you want to update.



Note: If you are not sure what the Absence Accrual Pattern name is, follow the steps outlined in step 1 [here](#).

2. Now that you have identified the Absence Accrual Rule Name(s) you can start to prepare your data. For the purpose of this example, the Absence Accrual Pattern the employees we will be adding an Absence Accrual for are assigned to the Absence Accrual Pattern **UK Absence**; we have already identified the Absence Accrual Rule Name to use in the Absence Accrual data load in the step above i.e. **2014.12#10**, Type: Vacation, Reason: Holiday.

Note: If you are applying an Absence Accrual to Team Members who have a different Absence Accrual Rule Name i.e. they have a Policy override or an Absence Accrual Pattern override, you must also use the Absence Accrual Rule Name associated to their override Absence Accrual Pattern in the data load template.



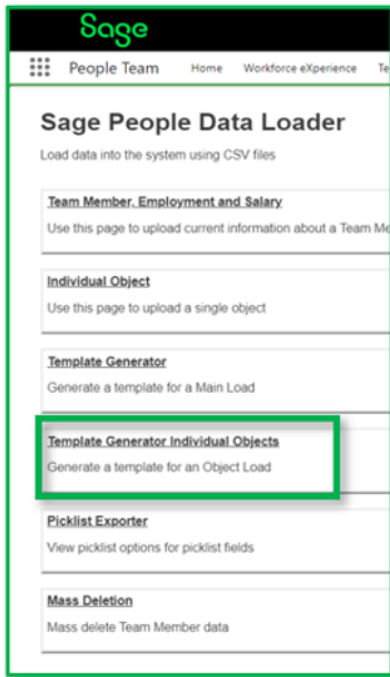
3. Run a report to identify the employees you want to include in the Absence Accrual data load, you will need their Unique ID for the data load. Follow the steps outlined in step 2 [here](#).
4. Create the data template for the Absence Accruals to be loaded into Sage People. You should include the fields below. You will also need to include the API field names; tick the checkbox when generating the template:
  - Unique ID/Employee Number
  - Absence Accrual Rule Name
  - Effective Date

Depending on what you are looking to adjust, you may also need:

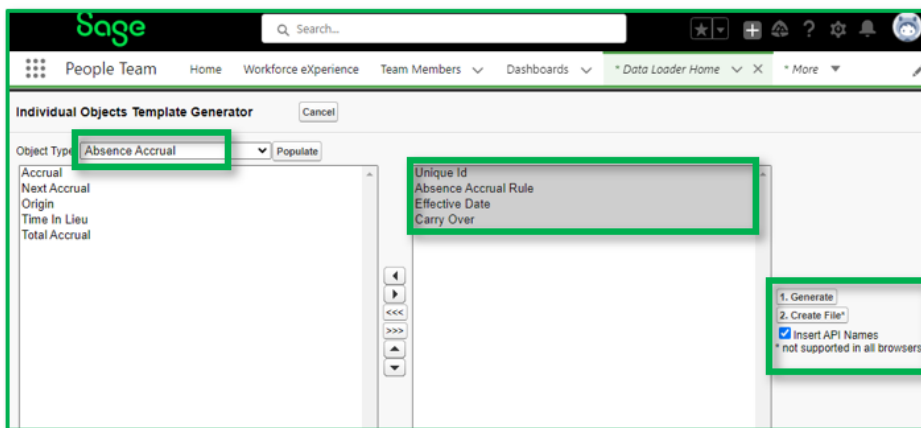
- Accrual
- Next Accrual
- Time in Lieu
- Carry Over
- Total Accrual

The Effective Date will be based on when you want the Absence Accrual to start from. For the purpose of this example, we are amending the holiday carryover balance carried over from the previous holiday year i.e. from 31 December 2022 to 1 January 2023 so the Effective Date will be 01/01/2023.

5. To generate the Absence Accrual data load template, from the App launcher type in **Data Loader Home** and select **Template Generator Individual Objects**.



6. In the **Object Type** field, select **Absence Accrual** and select the relevant fields using the right arrow button (include the minimum requirement highlighted above). Once you have selected all of the required fields, click **1. Generate**. Tick the **Insert API Names** checkbox and click **2. Create File**.

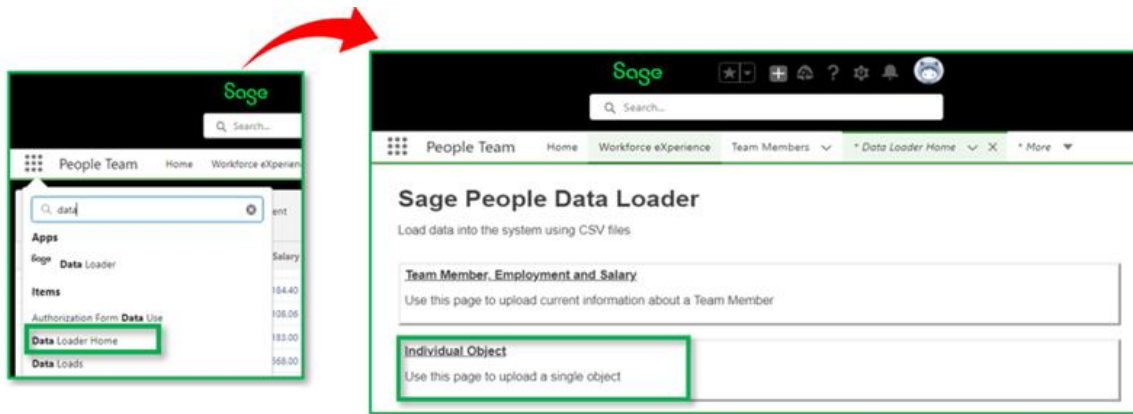


7. You can then align the API field names with the data in your spreadsheet. We recommend that you test a sample file in your Sandbox first to make sure there are no errors.

|    | A                  | B                            | C                      | D                  |
|----|--------------------|------------------------------|------------------------|--------------------|
| 1  | fHCM2_unique_id_c  | fHCM2_Absence_Accrual_Rule_c | fHCM2_Effective_Date_c | fHCM2_Carry_Over_c |
| 2  | 111233 2014.12 #10 |                              | 01/01/2023             | 10                 |
| 3  | 111304 2014.12 #10 |                              | 01/01/2023             | 10                 |
| 4  | 111302 2014.12 #10 |                              | 01/01/2023             | 10                 |
| 5  | 111389 2014.12 #10 |                              | 01/01/2023             | 10                 |
| 6  | 111405 2014.12 #10 |                              | 01/01/2023             | 10                 |
| 7  | 111326 2014.12 #10 |                              | 01/01/2023             | 10                 |
| 8  | 111260 2014.12 #10 |                              | 01/01/2023             | 10                 |
| 9  | 111381 2014.12 #10 |                              | 01/01/2023             | 10                 |
| 10 | 111275 2014.12 #10 |                              | 01/01/2023             | 10                 |
| 11 | 111221 2014.12 #10 |                              | 01/01/2023             | 10                 |
| 12 | 111219 2014.12 #10 |                              | 01/01/2023             | 10                 |
| 13 | 111401 2014.12 #10 |                              | 01/01/2023             | 10                 |
| 14 | 539427 2014.12 #10 |                              | 01/01/2023             | 10                 |
| 15 | 111362 2014.12 #10 |                              | 01/01/2023             | 10                 |
| 16 | 111406 2014.12 #10 |                              | 01/01/2023             | 10                 |
| 17 | 111433 2014.12 #10 |                              | 01/01/2023             | 10                 |
| 18 | 111392 2018.06 #32 |                              | 01/01/2023             | 10                 |



8. To load the data template into Sage People, click on the App Launcher, type in **Data Loader Home** and select **Individual Object**.



9. The file upload requirements are as follows:

- Object Type: Absence Accrual
- File: Click Choose file, find/click on the link of your csv. file
- Import Type: Insert
- Delimiter: Comma
- Date Format: DD/MM/YYYY
- Ignore Blanks: Checked
- Click **Upload**

The image shows a screenshot of the 'Single Object Upload' form in Sage People. The form has a header with 'Data Loader' and navigation links. The main content area has a section titled 'Single Object Upload'. It contains several fields: 'Object Type' (a dropdown menu with 'Absence Accrual' selected), 'File' (a button labeled 'Choose file' followed by the text 'Absence Ac... Example.csv'), 'Import Type' (a dropdown menu with 'Insert' selected), 'Key Fields (update only)' (a text input field), 'Delimiter' (a dropdown menu with 'Comma' selected), 'Date Format' (a dropdown menu with 'dd/mm/yyyy' selected), 'Ignore Blanks' (a checked checkbox), and 'Check Only' (an unchecked checkbox). There are 'Upload' and 'Cancel' buttons at the top and bottom of the form. The 'Upload' button at the bottom is highlighted with a green box.

10. If there are no formatting errors, scroll down to the **File Details** section and click **Import**.

11. You will be presented with the following screen where you can view the upload status; if you refresh the screen you will see the **Status** change i.e. will move from Checking to Committing to Completed.

12. In the event that there are errors within the file, the error list can be found on the **Related** tab. You will need to correct the errors in the data load file and then start the import process again. Note: No changes will be applied to the org until all errors have been corrected and the upload Status shows as **Completed**.
13. Once all corrections have been made (if applicable), the **Details** tab will show the Status as **Completed**.

**Sage** Data Loader

230804170245351

Related Details

Record Type  
Object Load  
Data Load Batch Id  
230804170245351  
Start Time  
04/08/2023, 17:02  
End Time  
04/08/2023, 17:02  
Status  
Completed  
Created By  
Steve Pendleton, 04/08/2023, 17:02

Options

Object Type  
fhcm2\_absence\_accrual\_c  
Delimiter  
Comma  
Import Type  
Insert  
Date Format  
dd/mm/yyyy  
Header Type  
Check Only  
Labels  
☐

14. Spot check a few Team Member Accrual Log records to make sure you are happy with the data. You will see a new Absence Accrual record has been added for all Team Member records included in the data load file and the starting carryover balance has been adjusted.

Totals for period: 01 Jan 2023 - 31 Dec 2023

Accrual: 26.62  
Carry Over: 3.00  
Time in Lieu: 0.00  
Total Taken: 0.00

Accrual Log: Before Absence Accrual

| Date        | Event Type | Amount | Time in Lieu | Carry Over         | Accrual | FTE  |
|-------------|------------|--------|--------------|--------------------|---------|------|
| 31 Dec 2023 | Accrue     | 1.16   | 0.00         | 3.00 (01 Jan 2024) | 26.62   | 1.07 |
| 14 Dec 2023 | Accrue     | 2.22   | 0.00         | 3.00 (01 Jan 2024) | 25.45   | 1.07 |
| 14 Nov 2023 | Accrue     | 2.22   | 0.00         | 3.00 (01 Jan 2024) | 23.23   | 1.07 |
| 14 Oct 2023 | Accrue     | 2.22   | 0.00         | 3.00 (01 Jan 2024) | 21.01   | 1.07 |
| 14 Sep 2023 | Accrue     | 2.22   | 0.00         | 3.00 (01 Jan 2024) | 18.79   | 1.07 |
| 14 Aug 2023 | Accrue     | 2.22   | 0.00         | 3.00 (01 Jan 2024) | 16.57   | 1.07 |
| 14 Jul 2023 | Accrue     | 2.22   | 0.00         | 3.00 (01 Jan 2024) | 14.34   | 1.07 |
| 14 Jun 2023 | Accrue     | 2.22   | 0.00         | 3.00 (01 Jan 2024) | 12.12   | 1.07 |
| 14 May 2023 | Accrue     | 2.22   | 0.00         | 3.00 (01 Jan 2024) | 9.90    | 1.07 |
| 14 Apr 2023 | Accrue     | 2.22   | 0.00         | 3.00 (01 Jan 2024) | 7.68    | 1.07 |
| 14 Mar 2023 | Accrue     | 2.22   | 0.00         | 3.00 (01 Jan 2024) | 5.45    | 1.07 |
| 14 Feb 2023 | Accrue     | 2.22   | 0.00         | 3.00 (01 Jan 2024) | 3.23    | 1.07 |
| 14 Jan 2023 | Accrue     | 1.01   | 0.00         | 3.00 (01 Jan 2024) | 1.01    | 1.07 |
| 01 Jan 2023 | Reset      | 0.00   | 0.00         | 3.00 (01 Jan 2024) | 0.00    |      |

Totals for period: 01 Jan 2023 - 31 Dec 2023

Accrual: 26.62  
Carry Over: 6.00  
Time in Lieu: 0.00  
Total Taken: 0.00

Accrual Log: After Absence Accrual

| Date        | Event Type | Amount | Time in Lieu | Carry Over         | Accrual | FTE  |
|-------------|------------|--------|--------------|--------------------|---------|------|
| 31 Dec 2023 | Accrue     | 1.16   | 0.00         | 6.00 (01 Jan 2024) | 26.62   | 1.07 |
| 14 Dec 2023 | Accrue     | 2.22   | 0.00         | 6.00 (01 Jan 2024) | 25.45   | 1.07 |
| 14 Nov 2023 | Accrue     | 2.22   | 0.00         | 6.00 (01 Jan 2024) | 23.23   | 1.07 |
| 14 Oct 2023 | Accrue     | 2.22   | 0.00         | 6.00 (01 Jan 2024) | 21.01   | 1.07 |
| 14 Sep 2023 | Accrue     | 2.22   | 0.00         | 6.00 (01 Jan 2024) | 18.79   | 1.07 |
| 14 Aug 2023 | Accrue     | 2.22   | 0.00         | 6.00 (01 Jan 2024) | 16.57   | 1.07 |
| 14 Jul 2023 | Accrue     | 2.22   | 0.00         | 6.00 (01 Jan 2024) | 14.34   | 1.07 |
| 14 Jun 2023 | Accrue     | 2.22   | 0.00         | 6.00 (01 Jan 2024) | 12.12   | 1.07 |
| 14 May 2023 | Accrue     | 2.22   | 0.00         | 6.00 (01 Jan 2024) | 9.90    | 1.07 |
| 14 Apr 2023 | Accrue     | 2.22   | 0.00         | 6.00 (01 Jan 2024) | 7.68    | 1.07 |
| 14 Mar 2023 | Accrue     | 2.22   | 0.00         | 6.00 (01 Jan 2024) | 5.45    | 1.07 |
| 14 Feb 2023 | Accrue     | 2.22   | 0.00         | 6.00 (01 Jan 2024) | 3.23    | 1.07 |
| 14 Jan 2023 | Accrue     | 1.01   | 0.00         | 6.00 (01 Jan 2024) | 1.01    | 1.07 |
| 01 Jan 2023 | Initial    | 0.00   | 0.00         | 6.00 (01 Jan 2024) | 0.00    |      |

Absence Accruals

New Absence Accrual

Absence Accrual #

2023010101

TEAM MEMBER VIEW: Craig Doyle

Personal Details Work Details Absence & Time

Absence

CALENDAR

HOLIDAY BALANCE

CARRY OVER YEAR END BALANCE

6.0 33.0

# PDFs

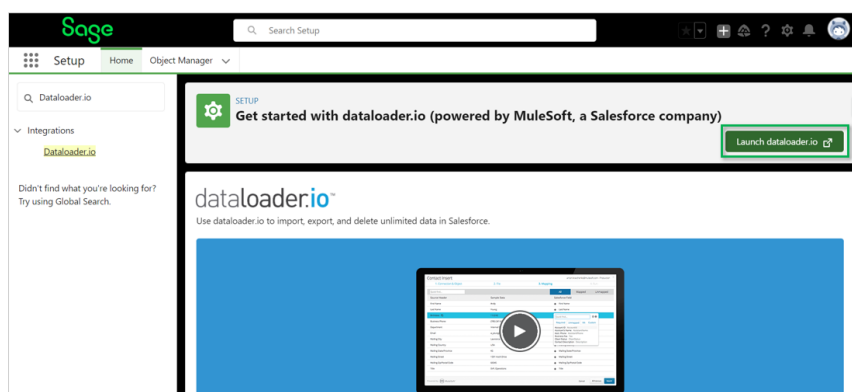
## How to data load PDF documents into Manager Note

These steps will walk you through how to data load PDF documents into **Manager Note** that can be made visible to both Managers and/or Team Members. This type of data load uses the **Salesforce dataloader.io**.

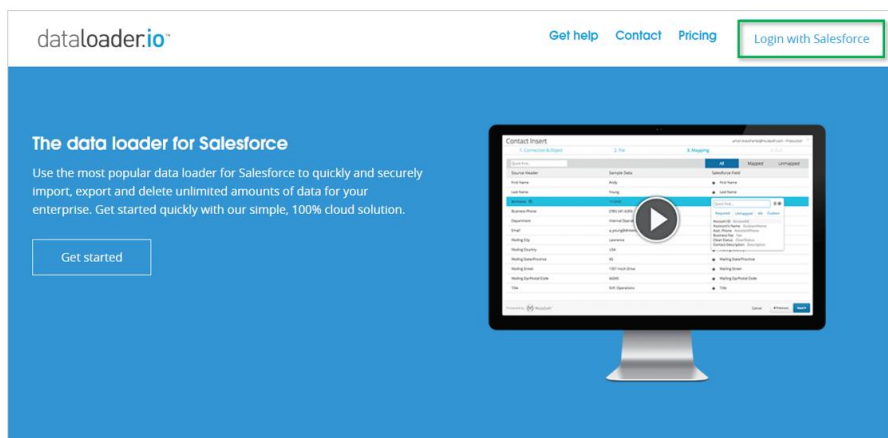
1. Open a new Excel template and add in the following fields as column headers:
  - **Salesforce ID**; This field needs to be set up in the **Employment** Object, if you need to set up this custom field, please refer to the steps [here](#)
  - **Comment**; this is a free text field so add in text to explain what the Manager Note is referencing e.g. Salary Increase
  - **Show Manager**; if you want Managers to be able to see the Manager Note then type **True** or else False; this will be visible as an attachment in WX
  - **Show Team Member**; if you want Team Members to be able to see the Manager Note then type **True** or else False; this will be visible as an attachment in WX

| Salesforce ID      | Comment         | Show Manager | Show Team Member |
|--------------------|-----------------|--------------|------------------|
| a0Y8d000005T1AcEAK | Salary Increase | TRUE         | TRUE             |

2. Once you have created the data load template, save the template as a .csv file format (Comma delimited).
3. Go to **Setup** and in the Quick Find box, type **Dataloader.io**. Click **Launch dataloader.io**; you will be asked to **Confirm redirect?** Click **Confirm**.



4. Click **Login with Salesforce**.



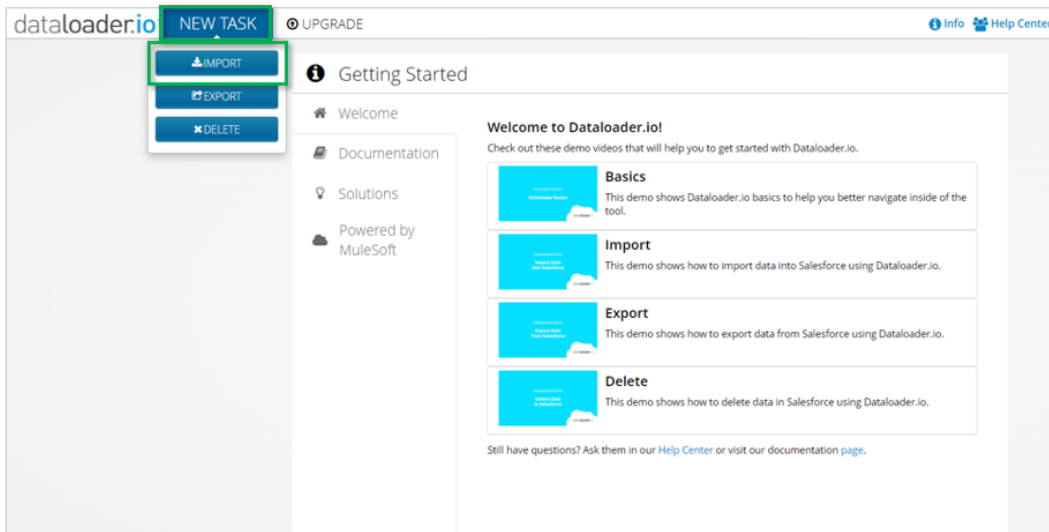
5. Choose the **Environment** you want to update the data in, the default is Production and click **Login**.

The screenshot shows the 'Login with Salesforce' form. At the top is the Salesforce logo and the text 'Login with Salesforce'. Below this is a checkbox labeled 'I have a custom Salesforce domain'. Underneath is a dropdown menu labeled 'Environment' with 'Production' selected. Below the dropdown is a checkbox labeled 'I agree to the Terms and Conditions' with a link to 'Privacy policy'. At the bottom are two buttons: 'Review us' and 'Login'. The 'Login' button is highlighted with a green rectangular box.

6. You will be prompted to **Allow Access?** Click **Allow**.

The screenshot shows the 'Allow Access?' dialog box. At the top is the dataloader.io logo. Below it is the text 'Allow Access?'. The main body of the dialog says 'dataloader.io\_v2 is asking to:' followed by a list of permissions: 'Access the identity URL service', 'Manage user data via APIs', 'Manage user data via Web browsers', and 'Access Connect REST API resources'. Below the list is the text 'Do you want to allow access for' followed by a blurred area and the text '? (Not you?)'. At the bottom are two buttons: 'Deny' and 'Allow'. The 'Allow' button is highlighted with a green rectangular box.

7. Click **NEW TASK** and then click **Import**.



8. A new window will open, select the following options:

- Operation: Insert
- Object: In the Quick find..., type in **Manager Note**, select **Manager Note** and click **Next**

Manager Note Insert

1. Connection & Object      2. File      3. Mapping

Connection

Production (d) +

Operation

Insert    Upsert    Update

Object

Manager Note

Manager Note    fHCM2\_Manager\_Note\_\_c

9. Click **Upload CSV**, load your .csv data load file and the following screen appears:

Manager Note Insert

1. Connection & Object      2. File      3. Mapping      4. Run

Quick find...    All    Mapped    Unmapped

| Source Header    | Sample Data        | Salesforce Field   |
|------------------|--------------------|--------------------|
| Salesforce ID    | a0Y8d000005T1AcEAK | Select...          |
| Comment          | Salary Increase    | → Comment          |
| Show Manager     | TRUE               | → Show Manager     |
| Show Team Member | TRUE               | → Show Team Member |

10. The screen defaults to show **All** column header fields included in the data load template. The next step is to 'map' any 'Unmapped' fields. Click **Unmapped**. In this example we need to map the Salesforce ID. Click **Select**. Click on the **Ids** tab and select **Employment**.

Manager Note Insert - Production

1. Connection & Object 2. File 3. Mapping 4. Run

Quick find...

All Mapped Unmapped

Source Header Sample Data Salesforce Field

Salesforce ID a0Y8d000005T1ACEAK Select...

Quick find...

Required Unmapped Ids Custom

Created By ID Created By ID

Employment fHCM2\_Emplo... Required

Last Modified By ID LastModifiedById

One Up Manager fHCM2\_One\_Up\_Man...

11. All fields have now been mapped. Click on the **Mapped** tab. Tick the **Lookup via:** checkbox and click **Select**. Scroll down the list of options until you find Salesforce ID, click on the field and click **Next**.

Manager Note Insert - Production

1. Connection & Object 2. File 3. Mapping 4. Run

Quick find...

All Mapped Unmapped

Source Header Sample Data Salesforce Field

Salesforce ID a0Y8d000005T1ACEAK

→ Employment

☒ Lookup via:

Employment Record

Use first match if found

Mark record with found

Insert null values

Comment

→ Show Manager

→ Show Team Member

Comment Salary Increase

Show Manager TRUE

Show Team Member TRUE

Depreciated

Depreciated

Download Status

Employment Record #

Employment Type

eVerify Status

Gender

J-9 Status

Location Country

Location Payroll Country

Payroll Number

Performance Rating

Photo

Policy Group

Salary Currency

Salesforce ID

Source

Talent Performance Rating

Team Member-Status-Basis

Cancel Previous Next

12. Click **Save & Run**.

Manager Note Insert - Production

1. Connection & Object 2. File 3. Mapping 4. Run

Summary

Name Manager Note Insert

Connection Manager Note (fHCM2\_Manager\_Note\_c) - Production

Object Manager Note (fHCM2\_Manager\_Note\_c)

Type Import

Rows 2

Schedule Task None

API Mode

Use Bulk API

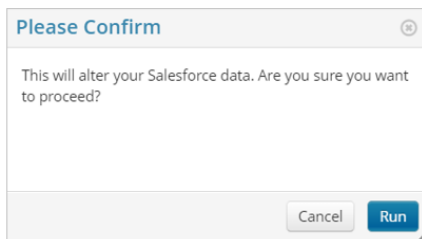
Use Batch API with 200 records per request.

Send me the results via e-mail

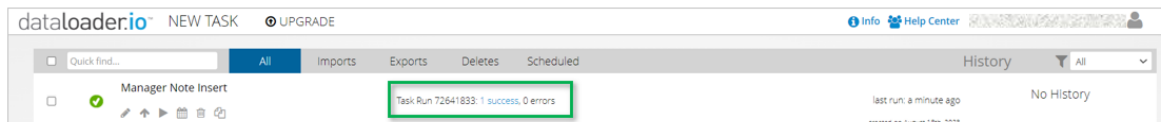
Advanced

Cancel Previous Save Save & Run

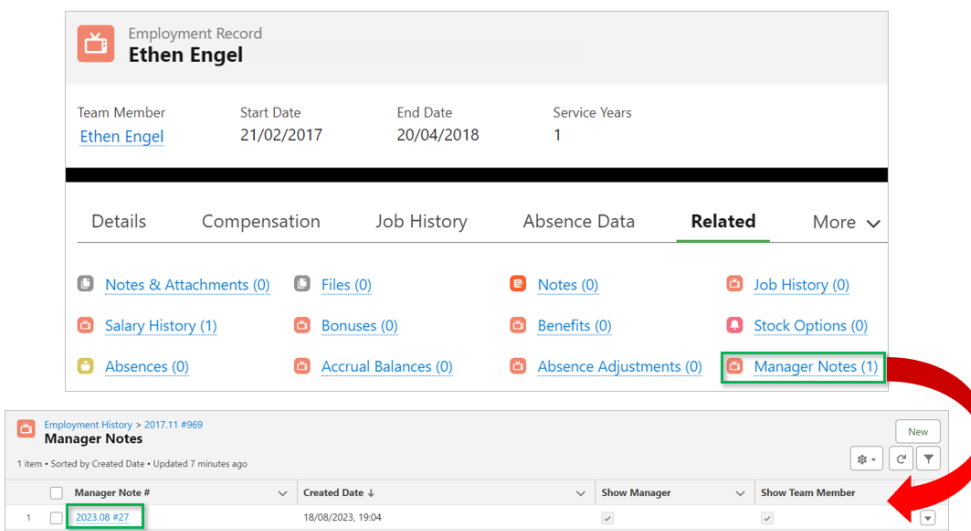
13. You will be asked to confirm you want to proceed, click **Run**.



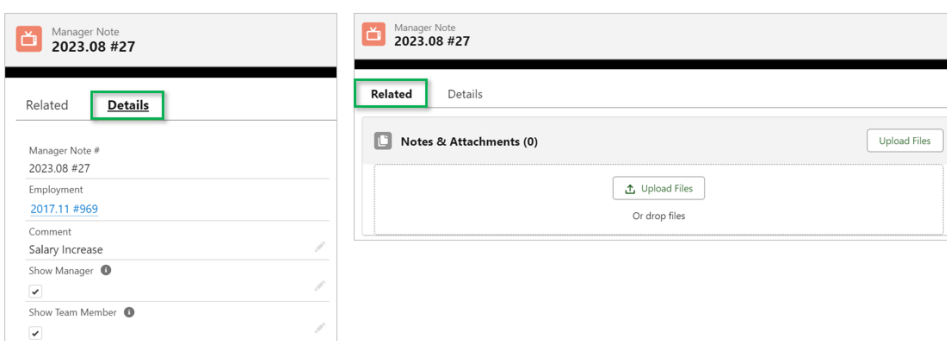
14. The import will run and once the task has completed (refresh the screen) you will see this on the **History** screen. Check that the number returned as successful matches the number of rows of employee data in your import template.



15. A new **Manager Note** Related List record will show on the **Employment** record for each employee included in the data load. Spot check a few Employment records to make sure you are happy with the data.



16. The Manager Note record shows all data fields included in the import file. This information appears in the **Details** tab. The next step is to import the corresponding PDF file attachment to the record so that this appears in the **Related** tab and is also visible to the Manager and Team Member in WX.





17. Open a new Excel template and add in the following fields as column headers:

- **Parent ID**; This field needs to be set up in the **Employment** Object, you will already have this information from the first import file used to create the Manager Note records
- **Body**; this is the file path location for where the file is stored e.g. C: Drive, SharePoint etc. If you are uploading the files in a Zip folder (Step 19) this field should just be a repeat of the filename of the attachment only.
- **Name**; this is the PDF file name e.g. Salary increase letter.pdf

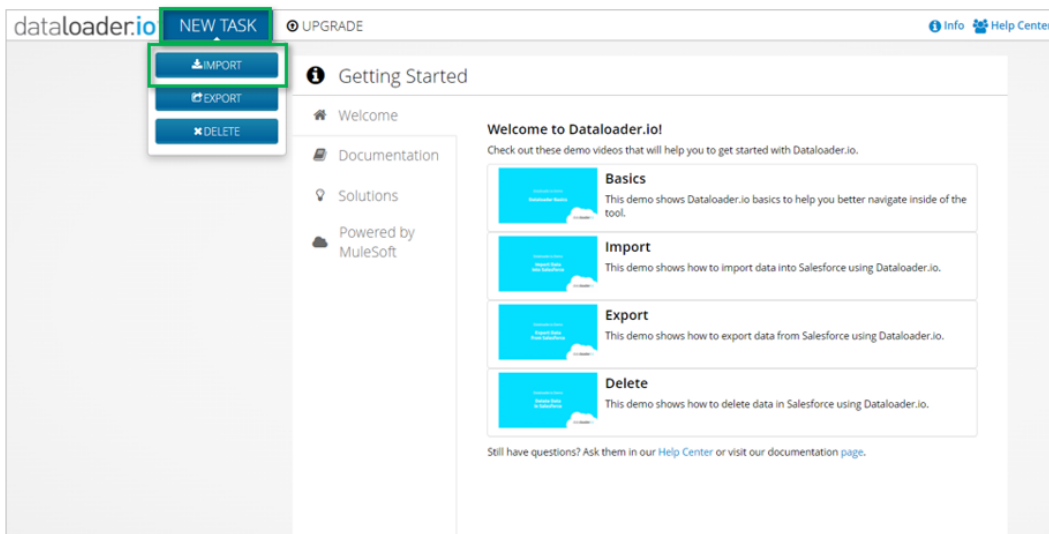
| Parent ID          | Body                       | Name                       |
|--------------------|----------------------------|----------------------------|
| a24QH000000TszXYAS | Salary Increase Letter.pdf | Salary Increase Letter.pdf |

18. Once you have created the data load template, save the template as a .csv file format (Comma delimited)

19. Save the Attachment(s) to be uploaded in a Zip folder; right click on the PDF file name > click **Send to > Compressed (zipped) folder**

20. Go back to the Salesforce Dataloader i.o **NEW TASK** screen, if you have logged out, please follow [these](#) steps to regain access.

21. Click **NEW TASK** and then click **Import**.



22. A new window will open, select the following options:

- Operation: Insert
- Object: In the Quick find..., type in **Attachment**, select **Attachment** and click **Next**

Attachment Insert - Production

1. Connection & Object 2. File 3. Mapping 4. Run

Connection: [Production id] +

Operation: **Insert** Upsert Update

Object:

| Attachment              | Attachment                      |
|-------------------------|---------------------------------|
| AttachmentToFile        | fRecruit_AttachmentToFile_c     |
| Document Entity Map     | DocumentAttachmentMap           |
| Feed Attachment         | FeedAttachment                  |
| Share: AttachmentToF... | fRecruit_AttachmentToFile_Share |

23. Click **Attachment Zip**.

Attachment Insert - Production

1. Connection & Object 2. File 3. Mapping 4. Run

Source CSV

**Attachment Zip**

24. Click **Upload Zip**, load your Zip file and the following screen appears, click **Source CSV** and then click **Upload CSV**, load your .csv data load file.

Attachment Insert - Production

1. Connection & Object 2. File 3. Mapping 4. Run

Source CSV

Use existing Salary increase example letter.zip file  
or  
Attachment Zip

Powered by MuleSoft

Cancel Previous Next

25. The following screen appears. The screen defaults to show **All** column header fields included in the data load template.

Attachment Insert - Production

1. Connection & Object 2. File 3. Mapping 4. Run

Quick find...

**All** Mapped **Unmapped**

| Source Header | Sample Data                                           | Salesforce Field |
|---------------|-------------------------------------------------------|------------------|
| Salesforce ID | a0g8d0000035EG6AAM                                    | Select...        |
| Body          | C:\Users\laura.wetton\OneDrive - Sage Software, Inc\Z | → Body           |
| Name          | Salary increase example letter.pdf                    | → File Name      |

26. You may need to map the fields the Salesforce ID. Click **Select**. Click on the **Ids** tab and select **Parent ID**.

Attachment Insert

1. Connection & Object 2. File 3. Mapping 4. Run

Quick find...

All Mapped Unmapped

| Source Header | Sample Data        | Salesforce Field |
|---------------|--------------------|------------------|
| Salesforce ID | a0g8d0000035EG6AAM | Select...        |

Attachment Insert

1. Connection & Object 2. File 3. Mapping 4. Run

Quick find...

All Mapped Unmapped

| Source Header | Sample Data        | Salesforce Field |
|---------------|--------------------|------------------|
| Salesforce ID | a0g8d0000035EG6AAM | Selected         |

Required Unmapped IDs Custom

Created By ID CreatedByld

Last Modified By ID LastModifiedByld

Owner ID Ownerld

Parent ID Parentld Required

27. Click **Save & Run**.

Attachment Insert

1. Connection & Object 2. File 3. Mapping 4. Run

Summary

Name Attachment Insert

Connection Production

Object Attachment (Attachment)

Type Import

Rows 1

Schedule Task None

API Mode

☐ Use Bulk API

☒ Use Batch API with 200 records per request.

Send me the results via e-mail ☐

Advanced

Powered by MuleSoft

Cancel Previous Save Save & Run

28. You will be asked to confirm you want to proceed, click **Run**.

Please Confirm

This will alter your Salesforce data. Are you sure you want to proceed?

Cancel Run

29. The import will run and once the task has completed (refresh the screen) you will see this on the **History** screen. Check that the number returned as successful matches the number of rows of employee data in your import template.

dataloader.io NEW TASK UPGRADE

Info Help Center

Quick find...

All Imports Exports Deletes Scheduled History

Attachment Insert

Task Run 72641833: 1 success, 0 errors

last run: a minute ago

created on August 18th, 2023

No History

30. The PDF attachments will now appear in the **Manager Note** Related List records you created earlier on the **Employment** records.

The screenshot shows the 'Employment Record' for 'Ethen Engel'. The 'Related' tab is selected, displaying various record types with their counts: Notes & Attachments (0), Files (0), Notes (0), Job History (0), Salary History (1), Bonuses (0), Benefits (0), Stock Options (0), Absences (0), Accrual Balances (0), Absence Adjustments (0), and Manager Notes (1). A red arrow points from the 'Manager Notes (1)' link to a detailed view of a Manager Note.

**Employment Record**  
Ethen Engel

| Team Member | Start Date | End Date   | Service Years |
|-------------|------------|------------|---------------|
| Ethen Engel | 21/02/2017 | 20/04/2018 | 1             |

Details Compensation Job History Absence Data **Related** More ▾

Notes & Attachments (0) Files (0) Notes (0) Job History (0)  
Salary History (1) Bonuses (0) Benefits (0) Stock Options (0)  
Absences (0) Accrual Balances (0) Absence Adjustments (0) **Manager Notes (1)**

**Manager Notes**  
1 Item • Sorted by Created Date • Updated 7 minutes ago

| Manager Note # | Created Date      | Show Manager                        | Show Team Member                    |
|----------------|-------------------|-------------------------------------|-------------------------------------|
| 2023.08 #27    | 18/08/2023, 19:04 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

31. Spot check a few Manager Note records to make sure you are happy with the data. The PDF attachment appears in the **Related** tab.

The screenshot shows the 'Manager Note' details for '2023.08 #27'. The 'Related' tab is selected, showing a list of attachments. A PDF file titled 'Salary increase letter for Manager Note import example' is listed with a date of '18 Aug 2023' and a size of '40KB'. A 'View All' link is at the bottom.

**Manager Note**  
2023.08 #27

Related Details

Notes & Attachments (1) Upload Files

Salary increase letter for Manager Note import example  
18 Aug 2023 • 40KB • pdf

[View All](#)

# HR Requests

## How to data load future dated HR Requests

This section of the guide walks you through how to data load future dated HR Requests in bulk for multiple Team Members at the same time. This type of data load uses the **Salesforce Data Import Wizard**.

There are many fields that can be updated via an HR Request and certain [considerations](#) will need to be taken into account when going through the data load process but for the purpose of this example, we will data load a new future dated HR Request for a salary increase.

There are 3 questions/steps to follow when using the Data Load Wizard:

1. What kind of data are you importing? Choose the Object you want to load data into; you can only import data into one Object at a time.
2. What do you want to do? You can add new records, update existing records, or add new records and update existing records at the same time.

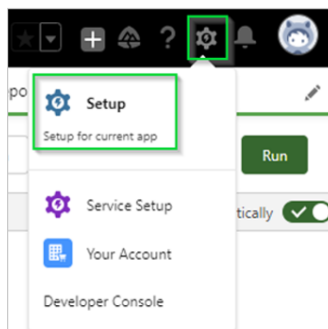
3. Where is your data located? Select the data file that you want to import.

1. Open a new Excel template and add in the following fields as column headers; save the template as a .csv file format (Comma delimited):

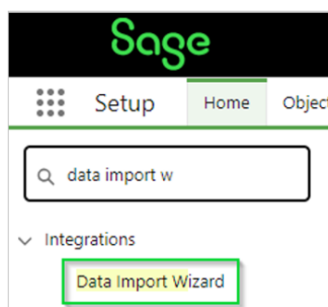
- 18-character Salesforce ID field (for the **Employment Object**)
- Reason
- Change Reason
- Submitted Date
- Approved Date
- Effective Date
- New Salary
- Currency
- Annual Multiplier
- Period
- Rationale

| Salesforce ID       | Reason         | Change Reason  | Submitted Date | Approved Date | Effective Date | New Salary | Currency | Annual Multiplier | Period | Rationale         |
|---------------------|----------------|----------------|----------------|---------------|----------------|------------|----------|-------------------|--------|-------------------|
| a0qg8d0000035EG6AAM | Cost of Living | Cost of Living | 06/07/2023     | 06/07/2023    | 01/08/2023     | 75000      | GBP      | 1                 | Year   | Due to relocation |

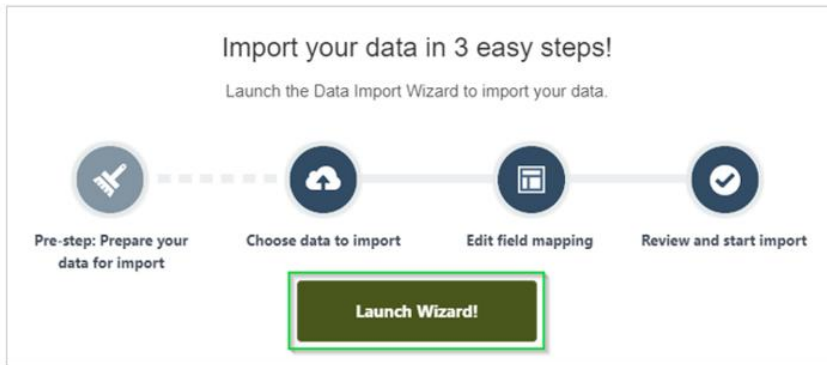
2. When you are ready to start your data load, navigate to Sage People and click **Setup**.



3. In the **Quick Find** box, search for and select **Data Import Wizard**.



4. Select **Launch Wizard!**



5. Select **Custom objects**. Scroll down until you find HR Requests; click **HR Requests**.

Import your Data into Salesforce

You can import up to 50,000 records at a time.

What kind of data are you importing? ?

Standard objects

**Custom objects**

Choose data

**HR Requests**

6. For the purpose of this example, we want to add new HR Requests to Team Member records so click **Add new records**. For the question **Which Exchange Rate field in your file do you want to match against to set up the Currency lookup field**, select **Exchange Rate Name**.

For the question **Which Employment Record field in your file specifies the Master/Detail relationship**, select **Salesforce.com ID**.

Choose data

Edit mapping

Action Events

Action Roles

Actions

Actions Digests

Assessments (fHCM2\_\_Assessment\_\_c)

Which Exchange Rate field in your file do you want to match against to set the Currency lookup field?

**Exchange Rate Name**

Which Employment Record field in your file specifies the Master/Detail relationship? ?

**Salesforce.com ID**

Trigger workflow rules and processes? ?

☐ Trigger workflow rules and processes for new and updated records

7. Now upload your file, ensure that the file has been saved as a **CSV UTF-8** file, select the character code **Unicode (UTF8)** and click **Next**.

CSV

**File**

Choose File Future Date...example.csv

**Character Code** ? ✓

Unicode (UTF8)

**Values Separated By**

Comma

8. The system will then map (where it can) the relevant headers in your template to the fields in Sage People. For each field that shows as **Unmapped** you will need to click on the **Map** link from the **Edit** column and then select the relevant field to map the CSV Header to e.g. for the purpose of this example you would map the **Salesforce ID** field to the **Employment Record** field and the **New Salary** field to the **Salary Amount**. Click **Map** after you map each **Unmapped** field.

| Choose data |                          | Edit mapping   |                    |
|-------------|--------------------------|----------------|--------------------|
| Edit        | Mapped Salesforce Object | CSV Header     | Example            |
| Map         | Unmapped                 | Salesforce ID  | a0g8d0000035EG6AAM |
| Change      | Reason                   | Reason         | Cost of Living     |
| Change      | Change Reason            | Change Reason  | Cost of Living     |
| Change      | Submitted Date           | Submitted Date | 06/07/2023         |
| Change      | Approved Date            | Approved Date  | 06/07/2023         |
| Change      | Effective Date           | Effective Date | 01/08/2023         |
| Map         | Unmapped                 | New Salary     | 75000              |

| Choose data |                          | Edit mapping   |                    |
|-------------|--------------------------|----------------|--------------------|
| Edit        | Mapped Salesforce Object | CSV Header     | Example            |
| Change      | Employment Record        | Salesforce ID  | a0g8d0000035EG6AAM |
| Change      | Reason                   | Reason         | Cost of Living     |
| Change      | Change Reason            | Change Reason  | Cost of Living     |
| Change      | Submitted Date           | Submitted Date | 06/07/2023         |
| Change      | Approved Date            | Approved Date  | 06/07/2023         |
| Change      | Effective Date           | Effective Date | 01/08/2023         |
| Change      | Salary Amount            | New Salary     | 75000              |
| Change      | Currency                 | Currency       | GBP                |

9. Once all fields have been mapped, click **Next** and **Start Import**.

Choose data Edit mapping Start import

Review & Start Import  
Review your import information and click Start Import.

Your selections:

- HR Requests ✓
- Add new records ✓
- Future Dated HR Request example.csv ✓

Your import will include:

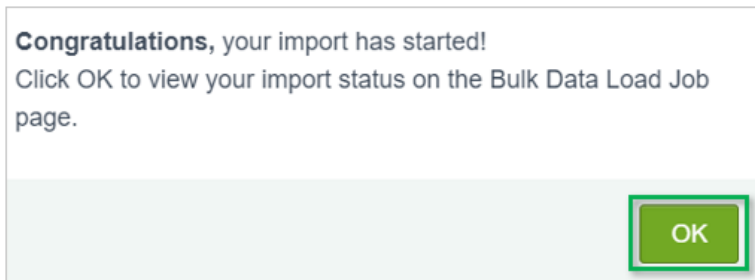
Mapped fields  
11

Your import will not include:

Unmapped fields  
0

Cancel Previous **Start Import**

10. The screen will display a message to say that the import has started, click **OK**.



11. You will now see the log screen that shows the status of the import. Once the import has completed the status will change to **Completed** and if there are any errors with the file, these will be displayed in the log; correct the errors as required. Spot check a few Employment > HR Request Related List records to make sure you are happy with the data.

**Bulk Data Load Jobs**

**Bulk Data Load Job Detail**

|                             |                       |                     |         |                                 |        |
|-----------------------------|-----------------------|---------------------|---------|---------------------------------|--------|
| Job ID                      | 7508d0000Pgg3l        | Job Type            | Bulk V1 | Status                          | Closed |
| Submitted By                | Sage_Pasols           | Operation           | Insert  | Total Processing Time (ms)      | 5787   |
| Start Time                  | 22/08/2023, 16:03 GMT | Queued Batches      | 0       | API Active Processing Time (ms) | 5713   |
| End Time                    | 22/08/2023, 16:03 GMT | In Progress Batches | 0       | Apex Processing Time (ms)       | 5417   |
| Time to Complete (hh:mm:ss) | 00:06                 | Completed Batches   | 1       |                                 |        |
| Object                      | HR Request            | Failed Batches      | 0       |                                 |        |
| External ID Field           |                       | Progress            | 100%    |                                 |        |
| Content Type                | CSV                   | Records Processed   | 1       |                                 |        |
| Concurrency Mode            | Parallel              | Records Failed      | 0       |                                 |        |
| API Version                 | 58.0                  | Retries             | 0       |                                 |        |

**Batches**

| View Request                 | View Result                 | Batch ID       | Start Time        | End Time          | Total Processing Time (ms) | API Active Processing Time (ms) | Apex Processing Time (ms) | Records Processed | Records Failed | Retry Count | State Message | Status           |
|------------------------------|-----------------------------|----------------|-------------------|-------------------|----------------------------|---------------------------------|---------------------------|-------------------|----------------|-------------|---------------|------------------|
| <a href="#">View Request</a> | <a href="#">View Result</a> | 7518d0000XVeuH | 22/08/2023, 16:03 | 22/08/2023, 16:03 | 5787                       | 5713                            | 5417                      | 1                 | 0              | 0           |               | <b>Completed</b> |

12. In our example, the Approved Date is a date in the past so once the HR Request record has been data loaded into the HR Request Related List on the Employment record, the **Status** will show as **Approved**.

**Sage**

Search...

Sage People HCM L... Home Workforce eXperience Team Members Dashboards Reports WX Process Operation Messages Policies More

**Employment History > 2017.11 #969**

**HR Requests**

1 item • Updated a few seconds ago

|   | HR Request                   | Team Member | Reason         | Status          | Submitted Date | Approved Date     |
|---|------------------------------|-------------|----------------|-----------------|----------------|-------------------|
| 1 | <a href="#">2023.08 #174</a> | Ethen Engel | Cost of Living | <b>Approved</b> | 06/07/2023     | <b>06/07/2023</b> |



13. Every night the **HRRequestExecuteBatch** runs and will automatically set the HR Requests Status to **Finalized** once the Effective Date is met.

|                                                                                                                                                   |            |           |   |   |   |             |                   |                       |  |
|---------------------------------------------------------------------------------------------------------------------------------------------------|------------|-----------|---|---|---|-------------|-------------------|-----------------------|--|
| <div>  <div> <div>SETUP</div> <div>Apex Jobs</div> </div> </div> |            |           |   |   |   |             |                   |                       |  |
| 22/08/2023, 00:00                                                                                                                                 | Batch Apex | Completed | 0 | 0 | 0 | People Sage | 22/08/2023, 00:00 | HRRequestExecuteBatch |  |

|                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |                          |              |             |                |                |               |                |            |  |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|--------------|-------------|----------------|----------------|---------------|----------------|------------|--|
| <div>  <div> <div>Search...</div> <div>      </div> </div> </div> |                          |              |             |                |                |               |                |            |  |
| <div> <div>Sage People HCM L...</div> <div>Home</div> <div>Workforce eXperience</div> <div>Team Members</div> <div>Dashboards</div> <div>Reports</div> <div>* 2017.11 #969   Employe...</div> <div>* More</div> </div>                                                                                                                                                                                                                                                                                                                                                            |                          |              |             |                |                |               |                |            |  |
| <div> <div>Employment History &gt; 2017.11 #969</div> <div>HR Requests</div> <div>1 item • Updated a few seconds ago</div> <div> <div>New</div> <div>    </div> </div> </div>                                                                                                                                            |                          |              |             |                |                |               |                |            |  |
| <input type="checkbox"/>                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          | HR Request               | Team Member  | Reason      | Status         | Submitted Date | Approved Date | Effective Date |            |  |
| 1                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 | <input type="checkbox"/> | 2023.08 #174 | Ethen Engel | Cost of Living | Finalized      | 06/07/2023    | 06/07/2023     | 01/08/2023 |  |

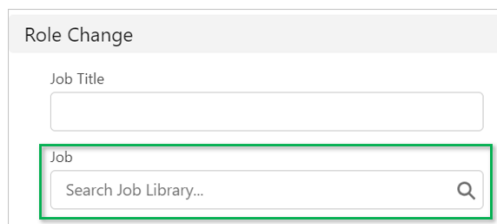
14. The details of the HR Request will now be live on the Employment record e.g. the new salary record for this example now shows as £75,000 effective 01/08/2023.

|                                                                                                                                                                                       |                          |               |                       |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------|---------------|-----------------------|
| <div>  <div> <div>Employment History &gt; 2017.11 #969</div> <div>Salary History</div> </div> </div> |                          |               |                       |
| 2 items • Sorted by Start Date • Updated a few seconds ago                                                                                                                            |                          |               |                       |
| <input type="checkbox"/>                                                                                                                                                              | Salary #                 | Start Date    | Annual Amount         |
| 1                                                                                                                                                                                     | <input type="checkbox"/> | 2023.08 #1791 | 01/08/2023 £75,000.00 |
| 2                                                                                                                                                                                     | <input type="checkbox"/> | 2017.11 #1159 | 21/02/2017 £86,919.60 |

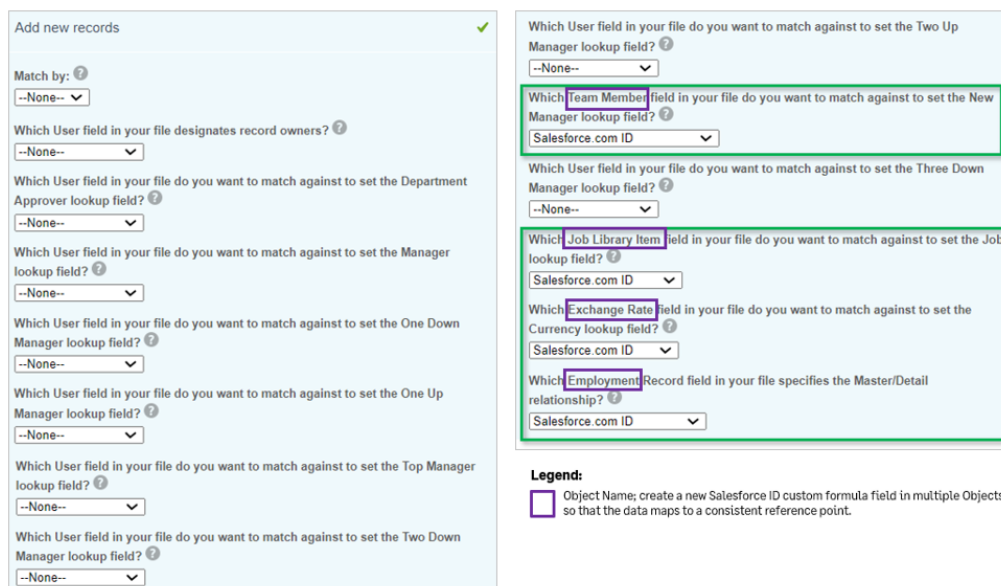
## Considerations when data loading HR Requests

There are many fields that can be updated via an HR Request data load and depending on the data being loaded, there are certain considerations to take into account which are documented below (this list is not exhaustive):

- Run a report that includes all Team Members and the Salesforce ID field so you can easily identify the Salesforce ID field records that you need to add to the data load template.
- When data loading a **Lookup** field into the HR Request data load Custom object, you may want to consider creating the 18-Character Salesforce ID field for all relevant Objects you are looking to include in the HR Request data load e.g. the Salesforce ID for Exchange Rates, Job Library Item (for Job) etc.



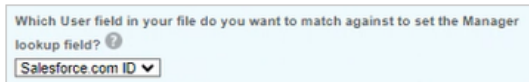
This then allows you to reference the Salesforce ID in multiple places when you get to step 2. What do you want to do? section of the data load process.



**Legend:**  
Object Name: create a new Salesforce ID custom formula field in multiple Objects so that the data maps to a consistent reference point.

- When loading new Salary data, always include the Effective Date, Currency and Annual Multiplier.
- If you are changing the Manager Name for a Team Member, you must include the 18-Character Salesforce ID of the new Manager Name (the Team Member Salesforce ID for the Manager) in the csv.data load template.
- If you are updating the name of a Manager, when you get to step 2. What do you want to do? make sure you use the correct Manager reference i.e. **Which User field**

**in your file do you want to match against to set the Manager lookup field?**



Which User field in your file do you want to match against to set the Manager lookup field? ?

Salesforce.com ID ▼

- The Submitted Date should be the date that you are loading the data into the system.
- Never include the Finalized Date, this will be managed by the processing of the overnight HR Request batch.

