

Bulk Imports

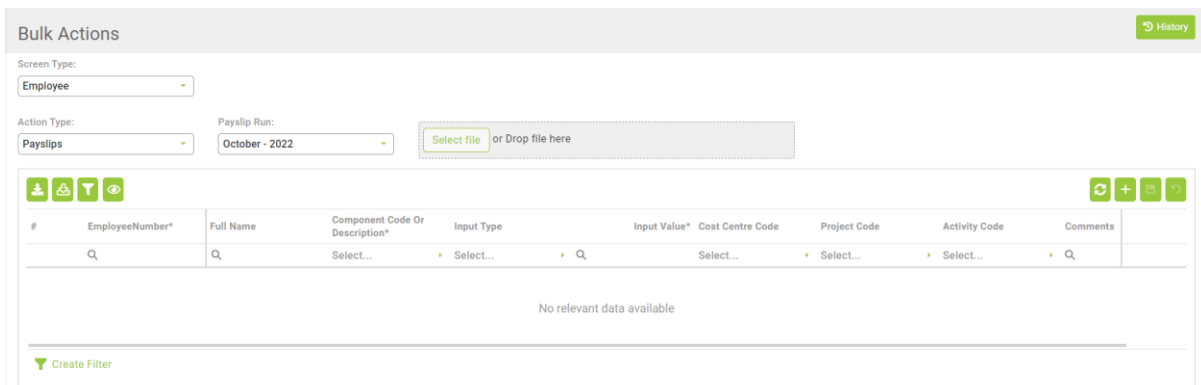
How to do bulk imports on the employee level and company level








Navigation Path

To access the Bulk Action screen:

- Top menu items select **Bulk Actions**

Bulk Action Screens




Fields	Description
Screen Type:	Selection of Employee Level or Company Level
Action Type:	Selection of screens inside the different levels
 Download:	Download the data loaded on the screen
 Download Template:	Download a template to use of imports
 Filter:	Filter option for data loaded
 Load Data:	Load existing data in the system
 Refresh:	Refreshes the loaded data screen
 Save:	Save changes made on the data screen
 Discard Changes:	Removes any changes made before the screen was saved

Bulk Functionality

There are two different ways to do Bulk changes.

1. Upload a file
2. Make changes on the screen

To upload a file, you need a file in the correct format:

- Select the “Screen type” and “Action type” of where you want to do a bulk import.
- Download a **Template Format** . The file will come in a excel sheet.
- Populate the file
- Upload the file

History

Screen Type:
Employee



Action Type:
Basic Profile Select file or Drop file here

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#	Employee Number(*)	First Name*	Last Name*	Middle Name	Initials*	Preferred Name	Maiden Name	
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Make changes on the screen:

- Click on the **Load Data** button 
- You will be able to edit the data in the columns
- Click on the **Save** button to save the changes 

History

Screen Type:
Employee

Action Type:
Basic Profile Select file or Drop file here

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#	Employee Number(*)	First Name*	Last Name*	Middle Name	Initials*	Preferred Name	Maiden Name	
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▶ 1	EMP001	Emma	Smith		ES			🗑
▶ 2	EMP017	Mason	Clark		MC			🗑