naturalhr
TRANSFORMING BUSINESS

Bulk Upload
Guide

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Natural HR
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Introduction

Bulk upload allows companies to quickly and easily upload multiple employees into the system without having to manually add the employees via the web interface. The process is facilitated via utilising a CSV file which you can download to your computer, input your employee information into and then upload via the main admin interface of Natural HR.

Please note: The "Employees" upload template cannot be used to modify existing employee's information as this is intended for uploading new employees to the system.

If you would like to modify existing information, you should use the "Update employees" template instead.

We have made available sample CSV files for you to download and we recommend you use these files as the template for your CSV which you intend to upload (you should ensure to delete the sample data row which we have included in the file but THE HEADER ROW SHOULD REMAIN INTACT).

Whilst the process of uploading data via a CSV file is a quick and easy process you should pay extra attention to the data you are inputting into the file as there is no validation whilst you enter the information into the CSV file.

As a result, we have implemented robust validation for the data when you try to upload the file to ensure the data is correct and is as we need to receive it. If you try to upload a file which does not meet the correct criteria as outlined below the upload will fail so please pay careful attention to the general notes below as well as the field specific notes to ensure that the process is as quick and simple as possible.

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General notes

1. The file should be saved as COMMA separated CSV file with a CSV extension

2. The title row should be left in place and should not be changed

3. Make sure there are no additional rows in the document by viewing in a text editor before uploading

4. You should avoid entering data which includes a comma as this may cause an error – if you need to include a comma then the whole field should be enclosed in double quotes " "

5. When entering telephone numbers, if using a spreadsheet, ensure you set the **field type to TEXT** otherwise most spreadsheets will remove the leading zero (0) so, for example, 01234567890 will become 1234567890 – alternatively, you can enter the number in quotes or include a space so it becomes 01234 567890 hence will no longer be viewed as a number

6. When entering system determined values please note where they are case sensitive – for example, current or CURRENT is not the same thing as Current

7. Ensure none of your data contains " or ' or any other similar iteration as they will be escaped by the application to ensure data integrity. If you do try this you will end up with a \ in front of the prohibited characters which is intentional on the part of the application.

8. You will need to fill in ALL mandatory columns – please see below for the columns which are mandatory

9. Dates will only be valid entered in the format dd/mm/yyyy regardless of your system setting for date formats

10. The value in the National Insurance field (aka Social Security number) is required and *must be unique*

11. For Manager, Job title, Job status, Site, Department, Sub Department and Leave Reason you must enter a valid value exactly as it appears in the system – for example, Sales manager is not the same as Sales Manager and Bob smith is not the same as Bob Smith

12. Additionally, for these fields, the values must be unique – for example, if you have two managers called Bob Smith then anyone reporting to that manager will fail due to "Manager does not exist or is ambiguous"

13. You should ensure that you have pre-entered managers, job titles, job status and departments before attempting bulk upload as these are mandatory fields

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If you want to make bulk upload easier try to organize your CSV file in hierarchical order with the most senior person at the top, then their reports next and so on – in this way as you get to the "bottom" of the list your managers will already exist.

If you do not do this then you will either have to manually upload your managers first or a number of your employee uploads will fail due to "Manager does not exist or is ambiguous".

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Employee upload fields

Field	Description	Validation	Case Sensitive	Mandatory
Employee Works ID	Works or employee ID / reference for employee within your company	Can be made up of letters and or numbers. *e.g NHR123*	No	Optional
Title	Employee title (e.g. Mr, Mrs, Dr etc)	Can be made up of letters and or numbers *e.g MR*	No	Optional
Employee surname	Employee surname / last name	Can be made up of letters and or numbers *e.g Bloggs*	No	Mandatory
Employee first name	Employee first name	Can be made up of letters and or numbers *e.g Joe*	No	Mandatory
Employee middle name(s)	Employee middle name or names	Can be made up of letters and or numbers	No	Optional
Known as	The name the employee is usually known as	Can be made up of letters and or numbers		Optional
Gender	Employee Gender	*Male, Female or Not* disclosed are the only valid options with Not indicating not specified *If not specified will default to Not disclosed*	Yes	Mandatory
DOB (dd/mm/yyyy)	Employee date of birth	The format will need to be dd/mm/yyyy regardless of your localisation settings *If not specified will default to 01/01/Current year* *e.g 15/03/1990 =15th March 1990*	No	Mandatory
National Insurance number	Also known as Social Security number outside the UK	Can be made up of letters and or numbers but **MUST be unique within your company – please note this field is not validated other than for uniqueness** *If not specified will default to random 9-character string* *e.g 012345678A*	No	Mandatory
Manager	Name of the employee's manager exactly as it is stored in the system	Entered as Firstname Surname (with a space in the middle) – if employee has no manager then you should enter None. Can also be entered as the System identifier in the event of manager name being ambiguous or duplicated *If not specified will default to person at top of hierarchy* *e.g Joanne Bloggs*	Yes	Mandatory

Head of department name	The name of the head of this employee's department	The name of an existing employee, should be entered as "Firstname" "Surname". *e.g Joanne Bloggs*	Yes	Optional
Employee status	Depicts if an employee is a current employee or one which is to be archived immediately	Only valid entries are Current or Archived *If not specified will default to Current* *e.g Current*	Yes	Mandatory
Job title name	Job title exactly as it is entered in the system	Should be an existing job title as entered in the system *If not specified will default to TBC* *e.g Account Manager*	Yes	Mandatory
Job status name	Job status exactly as it is entered in the system – job status is typically used for things like Full time, Permanent, Temporary etc	This will need to be an existing job status as entered in the system *If not specified will default to TBC* *e.g Full Time*	Yes	Mandatory
Headcount classification	Headcount classification exactly as it is entered into the system.	Can contain letters and/or numbers – this field can be used purely as a label for employees.	Yes	Optional
Start date (dd/mm/yyyy)	Employee start date	The format will need to be dd/mm/yyyy regardless of your localisation settings *If not specified will default to 01/01/Current year* *e.g 02/02/2019 = 2nd February 2019*	No	Mandatory
Holidays per year	Number of holidays employee is entitled to per year	Numeric and consists of 3 or less digits *If not specified will default to 0* *e.g 28 = 28 days holiday per year*	No	Optional
Department name	Department name exactly as it is entered in the system	Should be an existing department as entered in the system *If not specified will default to TBC* *e.g Sales*	Yes	Mandatory
Sub Department name	Sub department name exactly as it is entered in the system	Should be an existing sub-department of the department entered under Department *e.g Retail*	Yes	Optional
Division	Division exactly as it is entered in the system	Can contain letters and/or numbers. This acts as a label against this employee *e.g Operations*	Yes	Optional
Company	Company exactly as it is entered in the system	This can contain letters and/or numbers. This acts as a label against employees	Yes	Optional

		e.g. Natural HR		
Site name	Site office name exactly as it is entered in the system	Looks for the value entered into the OFFICE NAME field *If not specified and only one site exists, will default to said site* *e.g Head Office*	Yes	Mandatory
Region	Region exactly as it is entered into the system	This can contain letters and/or numbers. This acts as a label against employees *e.g London*	Yes	Optional
Approver	Name of the employee's approver exactly as it is stored in the system	Entered as Firstname Surname (with a space in the middle) *e.g Steve Bloggs*	Yes	Optional
Super Approver	The name of the employee's super approver	Entered as "Firstname" "Surname". This option is only used within custom workflows *e.g John Bloggs*	Yes	Optional
Marital status	Employee home address line 2	Only valid options are *Married,* *Single,* *Widowed,* *Divorced,* *Living with partner,* *Separated* *Not specified*	Yes	Optional
Ethnicity	Employee ethnicity	See list in appendix *e.g White British*	Yes	Optional
Nationality	Employee nationality	See list in appendix *e.g British*	Yes	Optional
Sexuality	Employee Sexuality	Can contain open text *e.g Heterosexual*	Yes	Optional
Religion	Employee Religion	Can contain open text	Yes	Optional
Consider self-disabled?	Does the employee consider themselves to be disabled?	Valid options include: '0'', '1' or '2': 0= No 1= Yes 2 = Prefer not to say *e.g "0" = Not considered disabled*	No	Optional
Registered disabled?	Is the employee registered as disabled?	Valid options include: '0'', '1' or '2': 0= No 1= Yes *e.g Joanne Bloggs*	No	Optional
Address	Employee home address line 1	Can be made up of letters and or numbers *e.g 3 Random Street*	No	Optional

Address2	Employee home address line 2	Can be made up of letters and or numbers	No	Optional
Town	Employee town	Can be made up of letters and or numbers *e.g Random Town*	No	Optional
County	Employee county / state	Can be made up of letters and or numbers *e.g Randomshire*	No	Optional
Postcode	Employee post code / zip code	Can be made up of letters and or numbers *e.g. 1AB 2CD*	No	Optional
Country	Employee country	Please see below for valid list of countries *e.g United Kingdom*	Yes	Optional
Home telephone	Employee home telephone number	Please ensure if using a spreadsheet to create the CSV file that you set this column type to **TEXT** or it will drop the leading zeroes – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading *e.g 0123456789*	No	Optional
Home mobile	Employee home mobile / cellular number	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeroes – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading *e.g 0123456789*	No	Optional
Home email	Employee home email	No validation *e.g joe.bloggs@email.com*	No	Optional
Work telephone	Employee work telephone number	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeroes – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading *e.g 0123456789*	No	Optional
Work mobile	Employee work mobile / cellular number	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeroes – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading *e.g 0123456789*	No	Optional
Work email	Employee work email	No validation e.g joe.bloggs@email.com	No	Recommended
Skype	Skype username	Can be made up of letters and or numbers *e.g joe.bloggs*	No	Optional

Currency	Salary currency	Please see below for valid list of currencies *e.g GBP*	No	Optional
Salary	Employee salary	Enter only numbers with no commas or currency symbols *e.g 35000*	No	Optional
Salary period		Valid options are per annum, per hour, per day, per week and per month *If salary is specified and period is not specified will default to Per annum* *e.g Per Annum*	Yes	Mandatory if salary entered
Notice period	Employees required notice period	No validation *e.g. 6 Months*	No	Optional
Probationary period end date	Date at which the employee will end their probationary period	The format will need to be dd/mm/yyyy regardless of your localisation settings *e.g 01/06/2019 = 1ˢᵗ June 2019*	No	Optional
Hours per week	Number of hours per week the employee works	Must be numeric and can have maximum of 6 digits including a decimal point if required – do not enter commas or any other separators *e.g. 37.5*	No	Optional
FTE	Employee's FTE	Must be numeric and can have up to 9 decimal places *e.g 1*	No	Optional
Leave date	Date the employee left the company	Must be in the format dd/mm/yyyy regardless of your localisation settings – must be blank if the employee status is set to Current *e.g 01/06/2019 = 1st June 2019*	No	Optional
Leave reason name	The reason why the employee left exactly as it is entered in the system	Must be a valid Leave reason as entered in the system *If leave date is specified, employee status is set to Archived and Leave reason is not specified will default to TBC* *e.g Redundancy*	Yes	Mandatory if Leave date entered
Working days	Normal working days for the employee	Enter in numeric format where 1=Monday, 2=Tuesday, 3=Wednesday, 4=Thursday, 5=Friday, 6=Saturday 7=Sunday. For example, to enter Monday to Friday you should enter 12345. Maximum length of 7 digits. *e.g 12345 = Monday, Tuesday, Wednesday, Thursday, Friday*	No	Optional
Timeoff meter	If the employee timeoff is measured in hours or days	Only valid options are days or hours – if left blank will default to days *e.g Days*	Yes	Optional

Emergency contact 1 Name	Name of emergency contact 1	Can be letters or numbers e.g Gemma Bloggs	No	Optional
Emergency contact 1 relationship	Relationship of emergency contact 1	Can be letters or numbers *e.g Mother*	No	Optional
Emergency contact 1 home telephone	Home telephone number for emergency contact 1	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeroes – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading *e.g 0123456789*	No	Optional
Emergency contact 1 telephone	Work telephone number for emergency contact 1	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeroes – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading *e.g 0123456789*	No	Optional
Emergency contact 1 mobile	Mobile / cellular number for emergency contact 1	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeroes – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading *e.g 0123456789*	No	Optional
Emergency contact 1 email	Email address for emergency contact 1	No validation *e.g gemma.bloggs@email.com*	No	Optional
Emergency contact 2 Name	Name of emergency contact 2	Can be letters or numbers *e.g Gemma Bloggs*	No	Optional
Emergency contact 2 relationship	Relationship of emergency contact 2	Can be letters or numbers *e.g Mother*	No	Optional
Emergency contact 2 home telephone	Home telephone number for emergency contact 2	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeroes – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading *e.g 0123456789*	No	Optional
Emergency contact 2 telephone	Work telephone number for emergency contact 2	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeroes – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading	No	Optional

		e.g 0123456789		
Emergency contact 2 mobile	Mobile / cellular number for emergency contact 2	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeroes – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading *e.g 0123456789*	No	Optional
Emergency contact 2 email	Email address for emergency contact 2	No validation *e.g joe.bloggs@email.com*	No	Optional
Cost Centre	Employee cost centre	Should contain an existing cost centre as it appears in the system *e.g Intern*	Yes	Optional
Finance ID	Employee's Finance ID	Can contain letters and/or numbers *e.g NHR123*	Yes	Optional
Business Unit	Employee's business unit	Should contain an existing business unit as entered in the system *e.g Marketing*	Yes	Optional
Job Grade	Employee's job grade	Can contain letters and/or numbers *e.g A1*	No	Optional
Desk	Employee's desk number	Can contain letters and/or numbers *e.g D3*	No	Optional
First Aider	Whether the employee is a first aider	Valid entries are a '0' or '1'. 0= No 1= Yes *e.g. 1 = First Aider*	No	Optional
Fire Warden	Whether the employee is a fire warden	Valid entries are a '0' or '1'. 0= No 1= Yes *e.g. 1 = Fire Warden*	No	Optional
Login ID	If you wish to setup a Company User account for the employee so they can login and manage their own account then you should enter a username (which can be their email address) in this box	The entry in this field must be unique within Natural HR and not just within your account. We STRONGLY recommend using the employee email address as their login name as it makes it easier for them reset their password etc without needing to contact you as their administrator for support *e.g. Joe.bloggs@yourcompany.com*	No	Optional
Usergroup	If you have entered a login above then you must enter a user group	Only valid options are Admin, HR, Manager, Employee, Finance, Recruiter, Facilities, Trainer and Approver *E.g. Employee*	Yes	Mandatory if Login ID entered

Bulk Update

The above fields refer to the "Employees" Upload section which can be located within the Bulk upload module; this file is intended to upload employees to the system who have not already been entered. If you are looking to make adjustments to existing employee's information you should use the "Update employees" template within the Bulk Upload module rather than "Employees".

Within the "Update employees" template, all fields except the "Employee ID" are optional where you should only complete columns which you wish to change and leave all others blank to preserve existing information.

In this template, if you complete the employee ID column for an employee – you will need to enter some information in the same row to change otherwise, the upload will fail.

Field	Description	Validation	Case Sensitive	Mandatory
Employee ID	Used to identify the employee who these changes apply to. Must contain either: Employee's name, Works ID or System ID	Employee's name, Works ID or System ID should be entered **Exactly** as it appears in the system. For example, Chris and Christopher will not be sent to the same person *E.g. Joe Bloggs*	Yes	Mandatory
Manager	Name of the employee's manager exactly as it is stored in the system	Entered as Firstname Surname (with a space in the middle) – if employee has no manager then you should enter None. Can also be entered as the System identifier in the event of manager name being ambiguous or duplicated *If not specified will default to person at top of hierarchy* *E.g. John Bloggs*	Yes	Optional
Head of department name	The name of the head of this employee's department	The name of an existing employee and must be entered as "Firstname" "Surname". *E.g. Steve Bloggs*	Yes	Optional
Approver name	Name of the employee's approver exactly as it is stored in the system	Entered as Firstname Surname (with a space in the middle) *E.g. Sarah Bloggs*	Yes	Optional
Super Approver	The name of the employee's super approver	Entered as "Firstname" "Surname". This option is only used within custom approval workflows *E.g. Paul Bloggs*	Yes	Optional

Job title name	Job title exactly as it is entered in the system	An existing job title as entered in the system *If not specified will default to TBC* *E.g. Account Manager*	Yes	Mandatory
Job status	Job status exactly as it is entered in the system – job status is typically used for things like Full time, Permanent, Temporary etc	Entered as an existing job status as entered in the system *If not specified will default to TBC* *E.g. Full Time*	Yes	Mandatory
Headcount classification	Headcount classification exactly as it is entered into the system.	Can contain letters and/or numbers – this field can be used purely as a label for employees.	Yes	Optional
Department name	Department name exactly as it is entered in the system	An existing department as entered in the system *If not specified will default to TBC* *E.g. Sales*	Yes	Mandatory
Sub Department name	Sub department name exactly as it is entered in the system	An existing sub department of the department entered under "Department" *E.g. Retail*	Yes	Optional
Division	Division exactly as it is entered in the system	Can contain letters and/or numbers. This acts as a label against this employee *E.g. Operations*	Yes	Optional
Company	Company exactly as it is entered in the system	This can contain letters and/or numbers. This acts as a label against employees *E.g. Natural HR*	Yes	Optional
Site name	Site office name exactly as it is entered in the system	Looks for the value entered into the OFFICE NAME field *If not specified and only one site exists, will default to said site* *E.g. Head Office*	Yes	Optional
Region	Region exactly as it is entered into the system	This can contain letters and/or numbers. This acts as a label against employees *E.g. London*	Yes	Optional
Cost Centre	Employee cost centre	An existing cost centre as entered in the system *E.g. Marketing*	Yes	Optional
Finance ID	Employee's Finance ID	Can contain letters and/or numbers *E.g. NHR123*	Yes	Optional
Business Unit	Employee's business unit	An existing Business unit as entered in the system *E.g. Marketing*	Yes	Optional
Job Grade	Employee's job grade	Can contain letters and/or numbers	No	Optional

		E.g. A1		
Desk	Employee's desk	Can contain letters and/or numbers E.g. D3	No	Optional
Start date (dd/mm/yyyy)	Employee start date	This should be entered as dd/mm/yyyy regardless of your localisation settings *If not specified will default to 01/01/Current year* *e.g 02/02/2019 = 2nd February 2019*	No	Optional
Probationary date	Date at which the employee will end their probationary period	This should be entered as dd/mm/yyyy regardless of your localisation settings *e.g 01/06/2019 = 1st June 2019*	No	Optional
Notice period	Employees required notice period	No validation *e.g. 6 Months*	No	Optional
Salary	Employee salary	Enter only numbers with no commas or currency symbols *e.g 35000*	No	Optional
Currency	Salary currency	Please see below for valid list of currencies *e.g GBP*	No	Optional
Salary period		Only valid options are per annum, per hour, per day, per week and per month *If salary is specified and period is not specified will default to Per annum* *e.g Per Annum*	Yes	Mandatory if salary entered
Hours per week	Number of hours per week the employee works	Must be numeric and can have maximum of 6 digits including a decimal point if required – do not enter commas or any other separators *e.g. 37.5*	No	Optional
Working days	Normal working days for the employee	Enter in numeric format where 1=Monday, 2=Tuesday, 3=Wednesday, 4=Thursday, 5=Friday, 6=Saturday 7=Sunday. For example, to enter Monday to Friday you should enter 12345. Maximum length of 7 digits. *e.g 12345 = Monday, Tuesday, Wednesday, Thursday, Friday*	No	Optional
Working Hours	Hours worked each day for employees	Only required if the employee's time off entitlement is entered in "Hours". Should be entered as follows: *8|8|8|8|8* – *This suggests that the employee works for 5 days at 8 hours per day, each day of the week separated by a	or comma.*	No	Optional
FTE	Employee's FTE	Numeric field and can have up to 9 decimal places	No	Optional

		e.g 1		
Work email	Employee work email	No validation *e.g joe.bloggs@email.com*	No	Optional
Work telephone	Employee work telephone number	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeroes – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading *e.g 0123456789*	No	Optional
Skype	Skype username	Can be made up of letters and or numbers *e.g Joe.bloggs*	No	Optional
Surname	Employee surname / last name	Can be made up of letters and or numbers *e.g Bloggs*	No	Optional
First name	Employee first name	Can be made up of letters and or numbers *e.g Joe*	No	Optional
Middle name(s)	Employee middle name or names	Can be made up of letters and or numbers	No	Optional
Known as	The name the employee is usually known as	Can be made up of letters and or numbers		Optional
Title	Employee title (e.g. Mr, Mrs, Dr etc)	Can be made up of letters and or numbers *e.g MR*	No	Optional
Address	Employee home address line 1	Can be made up of letters and or numbers *e.g 3 Random Street*	No	Optional
Address2	Employee home address line 2	Can be made up of letters and or numbers	No	Optional
Town	Employee town	Can be made up of letters and or numbers *e.g Random Town*	No	Optional
County	Employee county / state	Can be made up of letters and or numbers *e.g Randomshire*	No	Optional
Postcode	Employee post code / zip code	Can be made up of letters and or numbers *e.g. 1AB 2CD*	No	Optional
Country	Employee country	Please see below for valid list of countries *e.g United Kingdom*	Yes	Optional
Home telephone	Employee home telephone number	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeroes – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading *e.g 0123456789*	No	Optional

Home mobile	Employee home mobile / cellular number	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeroes – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading *e.g 0123456789*	No	Optional
Home email	Employee home email	No validation *e.g joe.bloggs@email.com*	No	Optional
Marital status	Employee home address line 2	Only valid options are *Married,* *Single,* *Widowed,* *Divorced,* *Living with partner,* *Separated* *Not specified*	Yes	Optional
Ethnicity	Employee ethnicity	See list in appendix *e.g White British*	Yes	Optional
National Insurance number	Also known as Social Security number outside the UK	Can be made up of letters and or numbers but **MUST be unique within your company – please note this field is not validated other than for uniqueness** *If not specified will default to random 9-character string*	No	Mandatory
Nationality	Employee nationality	See list in appendix *e.g British*	Yes	Optional
Sexuality	Employee Sexuality	Can contain open text *e.g Heterosexual*	Yes	Optional
Religion	Employee Religion	Can contain open text *E.g Christian*	Yes	Optional
Consider self-disabled?	Does the employee consider themselves to be disabled?	Options include: '0'', '1' or '2': 0= No 1= Yes 2 = Prefer not to say *e.g "0" = Not considered disabled*	No	Optional
Registered disabled?	Is the employee registered as disabled?	Options include: '0' or '1'. 0= No 1= Yes *e.g 1 = Registered Disabled*	No	Optional
First Aider	Whether the employee is a first aider	Options include: '0' or '1'. 0= No 1= Yes *e.g. 1 = First Aider*	No	Optional

Fire Warden	Whether the employee is a fire warden	Options include '0' or '1'. 0= No 1= Yes *e.g. 1 = Fire Warden*	No	Optional
Is Head of Department?	Whether the employee is a head of department	Options include '0' or '1'. 0= No 1= Yes *e.g. 1 = This person is a valid head of department*	No	Optional
Is Super Approver	Whether the employee is a Super Approver	Options include '0' or '1'. 0= No 1= Yes e.g. 1 = This person is a valid Super Approver	No	Optional
Contract end date	The contract end date for this employee	Should be entered in dd/mm/yyyy format, *e.g 01/06/2019 = 1ˢᵗ June 2019*	No	Optional
Works ID	The employee's Works ID number	This can contain letters and/or numbers *e.g NHR 123*	Yes	Optional
Change Date	The date on which this change is due to take place	Should be entered in dd/mm/yyyy format *e.g 01/06/2019 = 1st June 2019*	No	Optional
Change Reason	The reason for this information change taking place	Change reasons should be entered as they appear in the system *E.g Promotion*	Yes	Optional

Contractors

Field	Description	Validation	Case Sensitive	Mandatory
Title	Employee title (e.g. Mr, Mrs, Dr etc)	Can be made up of letters and or numbers *e.g MR*	No	Optional
Employee surname	Employee surname / last name	Can be made up of letters and or numbers *e.g Bloggs*	No	Mandatory
Employee first name	Employee first name	Can be made up of letters and or numbers *e.g Joe*	No	Mandatory
Middle name	Employee middle name or names	Can be made up of letters and or numbers	No	Optional

DOB (dd/mm/yyyy)	Employee date of birth	The format will need to be dd/mm/yyyy regardless of your localisation settings *If not specified will default to 01/01/Current year* *e.g 15/03/1990 =15th March 1990*	No	Mandatory
National Insurance number	Also known as Social Security number outside the UK	Can be made up of letters and or numbers but **MUST be unique within your company – please note this field is not validated other than for uniqueness** *If not specified will default to random 9-character string* *E.g 012345678X*	No	Mandatory
Marital status	Employee home address line 2	Only valid options are *Married,* *Single,* *Widowed,* *Divorced,* *Living with partner,* *Separated* *Not specified*	Yes	Optional
Address	Employee home address line 1	Can be made up of letters and or numbers *e.g 3 Random Street*	No	Optional
Address2	Employee home address line 2	Can be made up of letters and or numbers	No	Optional
Town	Employee town	Can be made up of letters and or numbers *e.g Random Town*	No	Optional
County	Employee county / state	Can be made up of letters and or numbers *e.g Randomshire*	No	Optional
Postcode	Employee post code / zip code	Can be made up of letters and or numbers *e.g. 1AB 2CD*	No	Optional
Country	Employee country	Please see below for valid list of countries *e.g United Kingdom*	Yes	Optional
Home telephone	Employee home telephone number	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeroes – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading *e.g 0123456789*	No	Optional
Home mobile	Employee home mobile / cellular number	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it	No	Optional

		will drop the leading zeroes – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading		
Home email	Employee home email	No validation *e.g joe.bloggs@email.com*	No	Optional
Gender	Employee Gender	Male, Female or Not are the only valid options with Not indicating not specified *(If not specified will default to Not disclosed)* *e.g Male*	Yes	Mandatory
Ethnicity	Employee ethnicity	See list in appendix *E.g White British*	Yes	Optional
Right to Work	Does this contractor have the right to work?	Valid options include: '0''or "1" 0= No 1= Yes *E.g 1 = Yes*	No	Optional
Disabled	Does the employee consider themselves to be disabled?	Valid options include: '0'', '1' or '2': 0= No 1= Yes 2 = Prefer not to say *E.g 1 = Yes*	No	Optional
Currency	Salary currency	Please see below for valid list of currencies *E.g GBP*	No	Optional
Pay	Contractor pay	Enter only numbers with no commas or currency symbols] *E.g 500*	No	Optional
Pay period	Contractor pay period	Valid options are per annum, per hour, per day, per week and per month *If salary is specified and period is not specified will default to Per annum* *E.g Per Day*	Yes	Mandatory if salary entered
Location	The base-location for this contractor	No validation *E.g London*	No	Optional
Availability	The availability	The format will need to be dd/mm/yyyy regardless of your localisation settings	No	Optional
Category	The category for this contractor	Can contain letters or numbers *E.g Maintenance*	No	Optional
Rating	Rating for this contractor	Can contain any numerical value *E.g 5*	No	Optional

Comments	Any general comments against this contractor	No validation, can contain letters and/or numbers. *E.g This Contractor is skilled and qualified in both Plumbing and painting*	No	Optional

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Company sites

Field	Description	Validation	Case Sensitive	Mandatory
Site reference	Reference number / code for this office location	Can be made up of letters and or numbers. *E.g 001*	No	Mandatory
Office name	The name of this office location	Can be made up of letters and or numbers *E.g Head office*	No	Mandatory
Company name	The name of the company who reside at this site	Can be made up of letters and or numbers *E.g Natural HR*	No	Optional
Address	Address line 1	Can be made up of letters and or numbers E.g 3 Random Street	No	Optional
Address 2	Address line 2	Can be made up of letters and or numbers.	No	Optional
Town	Town or City name	Can be made up of letters and or numbers. *E.g Random Town*	No	Optional
County	County / state	Can be made up of letters and or numbers. *E.g RandomShire*	No	Optional
Post code	Post code / Zip code	Can be made up of letters and or numbers *E.g 1AB 2CD*	No	Optional
Country	Country	Please see below for valid list of countries *E.g United Kingdom*	Yes	Mandatory
Telephone	Telephone number for this site location	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeroes – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading *E.g 012345679*	No	Optional
Fax	Fax number for this site location	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeroes – e.g. 01234 will become 1234. Alternatively you can check the CSV file in a text editor before uploading *E.g 0123456789*	No	Optional

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Company users

Field	Description	Validation	Case Sensitive	Mandatory
Employee ID	The employee you wish to assign the account to	This can either be the name of the employee in format Firstname Lastname (with space in between) or the unique numeric system identifier for the employee – if there is more than one employee using the entered name then you will get an error about the employee being ambiguous and you should use the system identifier *E.g Joe Bloggs*	No	Mandatory
Login ID	If you wish to setup a Company User account for the employee so they can login and manage their own account then you should enter a username (which can be their email address) in this box	The entry in this field must be unique within Natural HR and not just within your account **We STRONGLY recommend using the employee email address as their login name as it makes it easier for them reset their password etc without needing to contact you as their administrator for support** *E.g Joe.bloggs@yourcompany.com*	No	Mandatory
Password	If you have entered a login above then you must enter a password	Password will be checked to ensure it is suitable before allowing to proceed to prevent use of common insecure passwords *E.g. SecurePasswordEx@mple*	No	Mandatory
PIN	If you have entered a login above then you must enter a PIN	Must be six digits long (no letters etc) and will be checked to ensure it is suitable before allowing to proceed to prevent use of 111111,222222, 123456 etc *E.g 987654*	No	Optional
Login enabled	If the employee account is to be enabled immediately - if you have entered a login above then you must enter a login enabled value	Please set "1" for enabled and "0" for disabled *E.g. 1 = Account is enabled and ready to use*	No	If left blank will default to disabled
Usergroup	If you have entered a login above then you must enter a user group	Only valid options Include: Admin, HR, Manager, Employee, Finance and Recruiter *E.g Employee*	Yes	Mandatory

Secondary usergroup	If employee will be member of a secondary user group	Only valid options are admin, HR, Manager, Employee, Finance and Recruiter *E.g. Finance*	Yes	Optional
Password change on login	If you want your employees to have to change their password on next login	Please enter "1" to require them to change their password on login and "0" for them not to have to *E.g. 1 = User is forced to change their password upon Login*	No	If left blank will default to force change on next login
Send email confirmation	If you want to send an email to your employees notifying them that you have setup their account with their username, password and PIN number	Please enter "1" to send the email or "0" not to – please note you must have provided a work email address AND set login enabled to 1 for this to work *E.g. 1 = Two emails are sent to the user automatically, one containing the login name and the other containing the provided password.*	No	Optional

Departments

Field	Description	Validation	Case Sensitive	Mandatory
Department name	The name for the department	Can contain letters or numbers *E.g Retail*	No	Mandatory
Parent department name	The name for the parent department if uploading a sub department – leave blank if uploading a parent department	This should contain an existing department name which has been already defined in the system *E.g Sales*	Yes	Optional

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Job roles

Field	Description	Validation	Case Sensitive	Mandatory
Job title	The job role title	Can contain letters or numbers *E.g. Account Manager*	No	Mandatory
Description	Description for the job role	Can contain letters or numbers *E.g Account management responsibilities include developing long-term relationships with your portfolio of assigned customers…*	No	Optional
Responsibilities	Responsibilities for this job role	Can contain letters or numbers *E.g. Operate as the lead point of contact for any and all matters specific to your customers* *Build and maintain strong, long-lasting customer relationships*	No	Optional
Qualifications	Required qualifications for this job role	Can contain letters or numbers *E.g. Business Degree*	No	Optional
Competencies	Required competencies for this job role	Can contain letters or numbers *E.g. Sales, Customer Service*	No	Optional
Experience	Required experience for this job role	Can contain letters or numbers *E.g. Three years' experience in similar role*	No	Optional
Salary range	Salary range for this job role	Can contain letters or numbers *E.g. £30,000-£35,000 Per annum*	No	Optional
Benefits	A list of any benefits which this job role is entitled to	Can contain letters or numbers *E.g. Car allowance*	No	Optional
Reports to	The job role which this role reports into	Can contain letters or numbers *E.g. Accounts Director*	No	Optional
Manager	Denotes if this is a manager level job role or not	This can only contain 'Yes' for manager level or 'N' for non-manager level *E.g. Yes = Employees in this role manage a team*	Yes	Mandatory

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Job status

Field	Description	Validation	Case Sensitive	Mandatory
Status	The job status name	Can contain letters or numbers *E.g Full Time*	No	Mandatory

Benefits

Field	Description	Validation	Case Sensitive	Mandatory
Employee ID	The system ID for the employee you wish to assign the account to	This must be the unique numeric system identifier for the employee – you CANNOT enter the employee name in this field *E.g Joe Bloggs*	No	Mandatory
Pension	Annual pension contribution figure	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators *E.g 3%*	No	Optional
Medical	Annual Medical benefit figure	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators *E.g 500*	No	Optional
Dental	Annual Dental benefit figure	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators *E.g 500*	No	Optional
Life assurance	Annual Life assurance benefit figure	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators *E.g 200*	No	Optional
Health insurance	Annual Health insurance benefit figure	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators *E.g 1500*	No	Optional
Critical illness	Annual Critical illness benefit figure	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators *E.g 2000*	No	Optional
Employee assistance	Annual Employee assistance benefit figure	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators *E.g 2000*	No	Optional

Gym	Annual Gym benefit figure	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators E.g 300	No	Optional
Childcare	Annual Childcare benefit figure	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators E.g 250	No	Optional
Company car	Annual Company car benefit figure	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators E.g 1000	No	Optional
Car allowance	Annual Car allowance benefit figure	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators E.g 3000	No	Optional
Fuel card	Annual Fuel card benefit figure	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators E.g 3000	No	Optional
Mobile	Annual Mobile benefit figure	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators E.g 750	No	Optional
Commission	Annual Commission benefit figure	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators E.g 540	No	Optional
Other benefit	Use for any benefits not listed above	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators E.g 600	No	Optional
Custom benefit 1	If using custom benefits will map to the benefit loaded under Custom benefit 1	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators E.g 1100	No	Optional
Custom benefit 2	If using custom benefits will map to the benefit loaded under Custom benefit 2	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators E.g 400	No	Optional
Custom benefit 3	If using custom benefits will map to the benefit loaded under Custom benefit 3	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators E.g 200	No	Optional
Custom benefit 4	If using custom benefits will map to the benefit loaded under Custom benefit 4	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators E.g 100	No	Optional
Custom benefit 5	If using custom benefits will map to the benefit loaded under Custom benefit 5	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators E.g 100	No	Optional

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Time-off

Field	Description	Validation	Case Sensitive	Mandatory
Employee ID	The employee you wish to assign the time-off to	This can either be the name of the employee in format Firstname Lastname (with space in between) or the unique numeric system identifier for the employee – if there is more than one employee using the entered name then you will get an error and you should use the system identifier *E.g Joe Bloggs*	No	Mandatory
Time off type	Time off type exactly as it is entered in the system	This should be an existing time off type as entered in the system *E.g Annual Leave*	Yes	Mandatory
Start date	The date on which this time off instance begins	Should be in the format dd/mm/yyyy *E.g 19/03/2019 = 19th March 2019*	No	Mandatory
End date	The date on which this time off instance ends	Should be in the format dd/mm/yyyy *E.g 19/03/2019 = 19th March 2019*	No	Mandatory
Duration	Duration of the request – system will NOT calculate the duration if entered via bulk upload	This field needs to be numeric, may include decimals *E.g 1 = 1 day*	No	Mandatory
Meter	If the employee timeoff is measured in hours or days	This option should contain either "Days" or "Hours" *E.g Days*	Yes	Mandatory
Employee comments	Any comments submitted by the employee	Open text *E.g I will be attending a wedding*	No	Optional
Manager comments	Any comments submitted by the manager/approver	Open text *E.g Go ahead, have fun.*	No	Optional
Approved	Status of the request	If the request is pending set to 0, if approved set to 1 and if declined set to 2 *E.g 1 = Request approved*	No	Mandatory

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Training

Field	Description	Validation	Case Sensitive	Mandatory
Employee ID	The employee you wish to assign the training to	This can either be the name of the employee in format Firstname Lastname (with space in between) or the unique numeric system identifier for the employee – if there is more than one employee using the entered name then you will get an error and you should use the system identifier *E.g Joe Bloggs*	No	Mandatory
Training title	The title of the training course	Can be letters or numbers *E.g First Aid*	Yes	Mandatory
Training description	A description of the content for this training course	Can be letters or numbers *E.g This course covers the following content…*	No	Optional
Training date	The date on which this training course took place	Should be entered in the format dd/mm/yyyy *E.g 19/03/2019 = 19th March 2019*	No	Mandatory
Mandatory	Denotes if this is a mandatory training course	Please set to "0" for No, set to "1" for yes *E.g 1 = Mandatory*	No	Optional – will default to No (0) if left blank
Number of days	Duration of the training	This field will need to be a numeric value *E.g 3 = This course lasts three days*	Yes	Mandatory
Internal	Denotes if the training is internal or external training	Options include: "Internal" and "External" *E.g Internal*	No	Mandatory
Provider	Name of the training provider	Can be letters or numbers *E.g First Aid training Inc.*	No	Optional
Location	Location where the training is held	Can be letters or numbers *E.g Meeting room 1*	No	Mandatory
Cost	Cost of the training	Can only contain numeric values including decimals – do not include any currency symbols or thousands separators *E.g 250*		Mandatory
Cost Unit	Unit linked to the above cost	Only valid values are Complete, Hour, Day, Half Day, Delegate and Week – complete indicates this is the total cost of the course *E.g Per delegate*		Mandatory
Result	The result of this training course	Only valid values are Passed, Failed and Completed *E.g Passed*		Mandatory

Employee Goals

Field	Description	Validation	Case Sensitive	Mandatory
Employee Name	The employee who you wish to assign this goal to.	This must be entered as Firstname Surname exactly as is entered in the system. *E.g Joe Bloggs*	No	Mandatory
Goal name	The title of the training course	Can contain letters and/or numbers *E.g Calls per day*	Yes	Mandatory
Goal description	A description the content of this goal	Open text *E.g Achieve 10 calls per day*	No	Mandatory
Goal type	Is this a company goal or an individual goal for the employee?	Can only contain "Company" or "Individual" *E.g Individual*	No	Mandatory
Goal category	Denotes if this is a goal for the employee's career development or a KPI	Can only contain "Development" or "KPI" *E.g KPI*	No	Mandatory
Goal options	This option defines how the responses to this goal will be recorded.	Can contain: Default 5 10 Percentage Target At this point "List" is not supported within a bulk upload file *E.g 10 = A one to ten dropdown list*	Yes	Mandatory
Target	The target figure which the employees should be achieving	Can only contain numerical figures *E.g 10,000 = a target amount of 10,000*	Yes	Mandatory if Goal options contains "Target"
Status	The current status or achieved progress towards this goal	For Goal options 5, 10, Percentage and target, the status can contain any numerical value For Default Goal options, the only valid options are: Behind On Track	Yes	Optional

		At Risk		
		Completed		
		Inactive		
		E.g on track		
Due date	Name of the training provider	Must be in the format dd/mm/yyyy regardless of your localisation settings *E.g 19/03/2019 = 19th March 2019*	No	Mandatory
Visibility	Denotes who can see this goal within the system. Public – Admin, HR, Manager and employee Private – Admin, HR, Manager	Can contain "Public" or "Private" *E.g Private*	No	Mandatory

Library Goals

Field	Description	Validation	Case Sensitive	Mandatory
Goal name	The title of the training course	Can contain letters and/or numbers *E.g Calls per day*	Yes	Mandatory
Goal description	A description the content of this goal	Open text *E.g Achieve 10 calls per day*	No	Mandatory
Goal type	Is this a company goal or an individual goal for the employee?	Can only contain "Company" or "Individual" *E.g Individual*	No	Mandatory
Goal category	Denotes if this is a goal for the employee's career development or a KPI	Can only contain "Development" or "KPI" *E.g KPI*	No	Mandatory
Goal options	This option defines how the responses to this goal will be recorded.	Can contain: Default 5	Yes	Mandatory

	10 Percentage Target At this point "List" is not supported within a bulk upload file *E.g 10 = A one to ten dropdown list*

Employee Development Records

Field	Description	Validation	Case Sensitive	Mandatory
Employee Name	The employee who you wish to assign this goal to.	This must be entered as Firstname Surname exactly as is entered in the system. *E.g Joe Bloggs*	No	Mandatory
Achievement Name	The name of the achievement attained by this employee	Can contain letters and/or numbers *E.g BA Masters in Computer Science*	Yes	Mandatory
Achievement Type	Must contain an existing achievement type	Can contain letters and/or numbers *E.g Qualification*	No	Mandatory
Achievement	The actual grade or achievement attained by this employee	Can contain letters and/or numbers *E.g 2:1*	No	Mandatory
Start date	The start date for this qualification	Must be in the format dd/mm/yyyy regardless of your localisation settings *E.g 19/03/2019 = 19th March 2019*	No	Mandatory
End date	The end date for this qualification	Must be in the format dd/mm/yyyy regardless of your localisation settings *E.g 19/03/2019 = 19th March 2019*	Yes	Mandatory
Comments	General comments against this qualification	Can contain letters and/or numbers *E.g Derby University*	Yes	Mandatory if Goal options contains "Target"

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Candidates

Field	Description	Validation	Case Sensitive	Mandatory
Title	Candidate title (e.g. Mr, Mrs, Dr etc)	Can be made up of letters and or numbers *E.g MR*	No	Optional
Surname	Candidate surname / last name	Can be made up of letters and or numbers *E.g Bloggs*	No	Mandatory
Firstname	Candidate first name	Can be made up of letters and or numbers *E.g Joe*	No	Optional
Other names	Candidate middle name or names	Can be made up of letters and or numbers *E.g Michael*	No	Optional
DOB	Candidate date of birth	Must be in the format dd/mm/yyyy regardless of your localisation settings *E.g 19/03/2019 = 19th March 2019*	No	Optional
National insurance	Also known as Social Security number outside the UK	Can be made up of letters and or numbers *E.g 0123456X*	No	Optional
Address	Candidate home address line 1	Can be made up of letters and or numbers *E.g. 3 Random Street*	No	Optional
Address2	Candidate home address line 2	Can be made up of letters and or numbers	No	Optional
Town	Candidate town	Can be made up of letters and or numbers *E.g. Random Town*	No	Optional
County	Candidate county / state	Can be made up of letters and or numbers *E.g. Random Shire*	No	Optional
Postcode	Candidate post code / zip code	Can be made up of letters and or numbers *E.g. 1AB 2CD*	No	Optional
Country	Candidate country	Please see below for valid list of countries *E.g. United Kingdom*	Yes	Optional
Home telephone	Candidate home telephone number	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeroes – e.g. 01234 will become 1234. Alternatively, you can check the CSV file in a text editor before uploading *E.g. 0123456789*	No	Optional
Mobile	Candidate home mobile / cellular number	Please ensure if using a spreadsheet to create the CSV file that you set this column type to TEXT or it will drop the leading zeroes – e.g. 01234 will become	No	Optional

		1234. Alternatively, you can check the CSV file in a text editor before uploading *E.g. 0123456789*		
Email	Candidate home email	No validation *E.g. joe.bloggs@email.com*	No	Optional
Post reference	Your internal unique post reference identifying the role applied for	This can only contain an existing reference within the system relating to a requisition in Natural HR – if you wish to upload a candidate who has not applied for a specific role then you can use "Not" – no other value is accepted *E.g. AccManager1*	Yes	Mandatory
Date received	Date the application was received	Should be entered in the format dd/mm/yyyy regardless of your localisation settings - if left blank will default to the date of the upload *E.g 19/03/2019 = 19th March 2019*	No	Optional
Stage	If you wish to set the candidate to a specific stage	Stage name exactly as it exists in Natural HR *E.g. First telephone interview*	Yes	Optional
Starred	If you wish to star the candidate in Natural HR	Only 1 for Yes and 0 for No are valid values *E.g. 1 = Starred employee*	No	Optional
Comments	Any comments you wish to enter about the candidate	Open Text	No	Optional

Cost Centres

Field	Description	Validation	Case Sensitive	Mandatory
Cost Centre Name	The name of the cost centre which your employees will be assigned to.	Can contain letters and/or number *E.g. Marketing*	Yes	Mandatory

Business Unit

Field	Description	Validation	Case Sensitive	Mandatory
Business Unit	The name of the Business unit which your employees will be assigned to.	Can contain letters and/or number *E.g. Marketing*	Yes	Mandatory

Time off allowances

Field	Description	Validation	Case Sensitive	Mandatory
Employee ID	Used to identify the employee who these changes apply to. Must contain either: Employee's name, Works ID or System ID	Employee's name, Works ID or System ID must be **Exactly** as it appears in the system. *E.g. Joe Bloggs*	Yes	Mandatory
Time off type	The name of the time off type which this allowance is linked to	Must be exactly the same as the existing time off types in the system *E.g. Annual Leave*	Yes	Mandatory
Entitlement	The amount of days or hours which this employee is entitled to	Must only contain Numerical values *E.g. 25*	No	Mandatory
Meter	Whether this entitlement is recorded in days or hours	Must contain either "Days" or "Hours" *E.g. Days*	Yes	Mandatory

Time off types

Field	Description	Validation	Case Sensitive	Mandatory
Type Name	The name of the time off type which you would like to enter	Can contain letters and/or numbers *E.g. Annual Leave*	Yes	Mandatory
Deducting	Does this time off type have an allowance against it.	Can only contain numbers 1-5 Valid options: 1 – Pool 2 – Individual 3 – Length of service 4 – Limited allowance 5 – Length of service alternate *E.g. 2 = Individual allowance*	Yes	Mandatory
Paid	Is this leave paid?	This should be entered as "0" or "1" 1 = Yes 0 = No *E.g. 1 = Paid*	No	Mandatory
Bookable	Is this type of leave available for employees to request?	This should be entered as "0" or "1" 1 = Yes 0 = No *E.g. Marketing*	No	Mandatory
RTW	Is a Return to work form required when an instance of this absence is submitted	This should be entered as "0" or "1" 1 = Yes 0 = No *E.g. 1 = Return to work form is required*	No	Mandatory
Public Calendar	How much detail would you like to display on the Public calendar for this time off type	Must contain 1, 2 or 3 1 = Yes, fully visible *e.g. Bob Smith, Annual Leave* 2 = Yes, but no reason shown *e.g. Bob Smith* 3 = No, not visible *E.g. 1*	No	Mandatory
Default deducting	Would you like your list of mandatory holidays to be deducted from this allowance	This should be entered as "0" or "1" 1 = Yes 0 = No	No	Mandatory

		E.g. 1 = Mandatory holidays are deducted		
Parent	Is this time off type part of an existing time off type? i.e – "Cold and flu" would require a parent of "Sickness"	Must contain the name of a time off type which already exists in the upload sheet exactly as it appears in the "Type name" column *E.g. Sickness*	Yes	Optional
Colour	Hex code of the colour which this will display as on the public calendar	Must contain a valid 6-digit Hex-colour code *E.g. 000000 = Black*	No	Optional

Timesheets

When entering a timesheet via this template, you should either use the Start time, end time and Breaks or total time columns: attempting to use both of these will cause the upload to fail.

Field	Description	Validation	Case Sensitive	Mandatory
Employee	The name of the employee which this timesheet entry relates to	This field should contain the name of the employee **exactly** as it appears in the system or the employee's system ID number *E.g. Joe Bloggs*	Yes	Mandatory
Week beginning	The date of the first day of the week for this timesheet entry	This should be entered in dd/mm/yyyy format *E.g 19/03/2019 = 19th March 2019*	No	Mandatory
Date	The date of the daily entry for this timesheet	This should be entered in dd/mm/yyyy format *E.g 19/03/2019 = 19th March 2019*	No	Mandatory
Reference	The reference which this timesheet relates to	Must contain an existing reference **exactly** as it appears in the system *E.g. Client A*	Yes	Mandatory
Start	The start time for this timesheet entry	This should be entered in hhmm format	No	Optional

		E.g 19/03/2019 = 19th March 2019		
End	The end time for this timesheet entry	This should be entered in hhmm format E.g 19/03/2019 = 19th March 2019	No	Optional
Breaks	The amount of time which has been taken as a break on this day	Total amount of breaks entered in **minutes** E.g 30 = 30 Minute break	No	Mandatory
Total	The total amount of time which has been worked on this day (Only required if not entering a start time, end time and breaks duration)	Total amount of time worked entered in **minutes** E.g. 240 = 4 hours worked	Yes	Optional
Comments	Any additional comments relating to this timesheet entry	Can contain letters and/or numbers	Yes	Optional

Timetracking

Field	Description	Validation	Case Sensitive	Mandatory
Employee	Used to identify the employee who these changes apply to. Must contain either: Employee's name, Works ID or System ID	Employee's name, Works ID or System ID must be **Exactly** as it appears in the system. E.g. Joe Bloggs	Yes	Mandatory
Date	The date for this time and attendance record	This should be entered in dd/mm/yyyy format E.g 19/03/2019 = 19th March 2019	Yes	Mandatory
Time in	The start time for this time and attendance record	This should be entered in hh:mm:ss format E.g. 09:00:00 = 9am	No	Mandatory
Time out	The end time for this time and attendance record	This should be entered in hh:mm:ss format E.g. 17:00:00 = 5pm	Yes	Mandatory

Carryover values

Field	Description	Validation	Case Sensitive	Mandatory
Employee Name	Used to identify the employee who these changes apply to. Must contain either: Employee's name or System ID	Employee's name, Works ID or System ID must be **Exactly** as it appears in the system. *E.g. Joe Bloggs*	Yes	Mandatory
Value	The carryover entitlement for this employee	Numerical values only *E.g. 5*	Yes	Mandatory

TOIL values

Field	Description	Validation	Case Sensitive	Mandatory
Employee Name	Used to identify the employee who these changes apply to. Must contain either: Employee's name or System ID	Employee's name, Works ID or System ID must be **Exactly** as it appears in the system. *E.g. Joe Bloggs*	Yes	Mandatory
Value	The Time off in Lieu entitlement for this employee	Numerical values only *E.g. 3*	Yes	Mandatory

Company Holidays

If you are restricting a company holiday to only apply to certain Sites, Departments or Cost Centres, the system the bulk upload template requires the system ID number rather than the name of each of these.

To find these ID numbers, you should go and edit the relevant site within your system where you will find the ID number at the end of the URL.
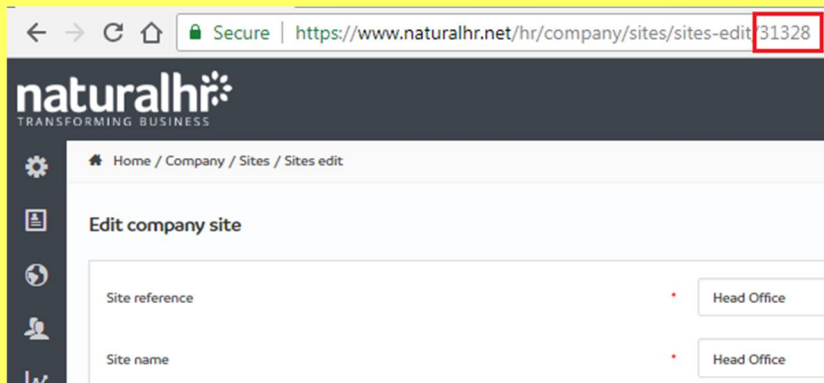
If you are restricting by multiple Sites, Departments or Cost Centres, you should enter these in the relevant column separated by commas.

Field	Description	Validation	Case Sensitive	Mandatory
Date	The date of the company holiday	This should be entered in dd/mm/yyyy format *E.g 19/03/2019 = 19th March 2019*	Yes	Mandatory
Holiday name	The name of the company holiday	Can contain letters and/or numbers *E.g. New Years' day*	Yes	Mandatory
Sites	The sites which this company holiday relates to	This should contain the system ID number for the site – Not the name of the site. *E.g. if the ID number for head office is 31328 (As shown above) this field should contain 31328*	Yes	Optional

			Case Sensitive	Mandatory
Departments	The departments which this company holiday relates to	This should contain the system ID number for the department – Not the name of the department. *E.g. if the ID number for Sales is 31328 (As shown above) this field should contain 31328*	Yes	Optional
Cost Centres	The cost centres which this company relates to	This should contain the system ID number for the cost centre – Not the name of the cost centre *E.g. if the ID number for Marketing is 31328 (As shown above) this field should contain 31328*	Yes	Optional

Employee Medical

Field	Description	Validation	Case Sensitive	Mandatory
Employee	Used to identify the employee who these changes apply to. Must contain either: Employee's name or System ID	Employee's name or System ID must be **Exactly** as it appears in the system. *E.g. Joe Bloggs*	Yes	Mandatory
Category	The category for this medical information	This should contain any of the following exactly as listed: • Allergy • Medical • Medication • Other *E.g. Medication*	Yes	Mandatory
Type	The type of medical information which is being entered	This field should contain an existing Medical condition **exactly** as it appears in the system *E.g. Inhaler*	Yes	Mandatory

Field	Description	Validation	Case Sensitive	Mandatory
Comments	Additional notes or comments relating to this condition	Can contain letters, numbers and special characters. *E.g. Blue Inhaler – top desk drawer*	Yes	Optional
Critical	Is this a critical condition?	Valid options include: '0' or '1' Yes = 1 No = 0 *E.g. 1 = Critical*	Yes	Mandatory

Meetings

Field	Description	Validation	Case Sensitive	Mandatory
Employee ID	Used to identify the employee who these changes apply to. Must contain either: Employee's name or System ID	Employee's name or System ID must be **Exactly** as it appears in the system. *E.g. Joe Bloggs*	Yes	Mandatory
Type	The type of meeting which is occurring. For example, a one-monthly meeting, annual meeting etc...	Can contain any of the following options: 1 = Monthly meeting 3 = 3 Monthly meeting 6 = 6 Monthly meeting 12 = Annual meeting Blank = General meeting *E.g. 12 = Annual meeting*	Yes	Mandatory
Meeting with	The name of the person who is meeting with the employee	Should contain the name of another active employee exactly as it appears in the system *E.g. Joe Bloggs*	Yes	Mandatory
Time	The start time of this meeting	Times should be entered in HHMM format *E.g. 1000 = 10am*	Yes	Mandatory
Location	The location of this meeting	Can contain letters and/or numbers *E.g. Meeting room 1*	Yes	Mandatory
Comments	General comments relating to this meeting	Can contain letters and/or numbers	Yes	Optional

E.g. Annual meeting with Joe bloggs

Custom employee fields

Custom employee fields will allow you to capture information about an employee which is not already captured within the system.

You should ensure that you have created your custom fields within the system before uploading the information.

In this template, you are entering the values for each employee against these fields.

Whilst creating your custom fields, it is worth making a note of which field names relate to the relevant number.

Field	Description	Validation	Case Sensitive	Mandatory
Employee ID	Used to identify the employee who these changes apply to. Must contain either: Employee's name or System ID	Employee's name or System ID must be **Exactly** as it appears in the system. *E.g. Joe Bloggs*	Yes	Mandatory
Custom 1-10	Values for each of these fields	Can contain letters and/or numbers	Yes	Mandatory

Competencies

The competencies upload template can be used for a variety of different combinations:

- Uploading a new current competency rating for each employee – For example, Joe Bloggs has a score of 3 for Sales
- Uploading required ratings for Job roles – For example, the required competency rating for an Account Manager is Sales of 3
- Uploading new competencies to the system
- Adjusting existing ratings for both employees and the required ratings for their job role – For example, changing Joe Bloggs' Sales score from a 3 to a 4 or changing the required job role rating from a 3 to a 4.

Please note the following rules when uploading competencies

- In **Column A (Employee OR Job title name)** if this includes either the employee's system ID number or the employee's name, you **must** enter the **Competency Name**, **Employee Score** and **Assigned Date**

- If **Column A** contains the name of a Job title, the **Required Score for job role (column E) must** be completed

- If Updating existing employees' ratings or required job role ratings, this will override the current values

- If uploading a new list of competencies, only **Column B (Competency name)** is **mandatory**

- All scores and ratings must be within the parameters of the module – For example, if your company settings dictate that scores are between 1-5 uploading a rating of a 6 will cause the upload to fail.

Field	Description	Validation	Case Sensitive	Mandatory
Employee OR Job title name	Used to identify the information which these changes apply to.	Employee's name, system ID or Job title name must be exactly as it appears in the system *E.g. Joe Bloggs*	Yes	Mandatory *(If uploading/adjusting employee's or Job title ratings)* Optional *(if uploading new competencies to the system)*

Competency name	The name of the competency to which you are making the adjustment	If adjusting existing data, this should be exactly as the competency name appears in the system *E.g. Sales*	Yes	Mandatory
Competency description	The description for this competency	Can contain letters and/or Numbers *E.g. Sales Skills*	Yes	Optional
Employee Score	The employee's rating for this competency	Must be a numerical value within the parameters of the competency module *E.g. 3 = 3 out of 5*	Yes	Mandatory *(if assigning a competency to an employee or adjusting an existing score)*
Required Score for job role	The required score for the employee's job role	Must be a numerical value within the parameters of the competency module *E.g. 4*	Yes	Mandatory *(If adjusting a required rating for a job role or adjusting an existing employee's required competency score)*
Date Assigned	The date on which this rating is being assigned to the employee	Assigned date should entered in dd/mm/yyyy format *E.g 19/03/2019 = 19th March 2019*	Yes	Mandatory *(If assigning any score to an employee)*
Comments	General comments relating to this meeting	Can contain letters and/or numbers	No	Optional

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Vehicles

Field	Description	Validation	Case Sensitive	Mandatory
Employee	Used to identify the employee who these changes apply to. Must contain either: Employee's name or System ID	Employee's name or System ID must be **Exactly** as it appears in the system. *E.g. Joe Bloggs*	Yes	Mandatory
Vehicle type	The type of vehicle: For example, car, van, motorbike	Can contain letters and/or numbers *E.g. Car*	Yes	Optional
Make	The Make of the vehicle	Can contain letters and/or numbers *E.g. Ford*	Yes	Mandatory
Model	The Model of the vehicle	Can contain letters and/or numbers *E.g. Fiesta*	Yes	Optional
Reg No	The registration number of the vehicle	Can contain letters and/or numbers *E.g. ABC 1*	Yes	Mandatory
Colour	The colour of the vehicle	Can contain letters and/or numbers *E.g. Blue*	Yes	Optional
Fuel type	The fuel type of the vehicle	Can contain letters and/or numbers *E.g. Petrol*	Yes	Optional
Engine size	The engine size of the vehicle	Can contain letters and/or numbers *E.g. 1200 CC*	Yes	Optional
Mileage	The mileage of the vehicle	This can only contain numerical values *E.g. 50000*	Yes	Optional
Company owned	Is this vehicle owned by the company?	Should be entered as either "0" or "1" 1 = Yes 0 = No *E.g. 1 = Company owned vehicle*	Yes	Optional

Primary vehicle	Is this vehicle the employee's primary mode of transport	Must contain either "0" or "1" 1 = Yes 0 = No *E.g. 1 = Primary Vehicle*	Yes	Optional
Lease company	The name of the company who leases this vehicle	Can contain letters and/or numbers *E.g. Car Lease Company*	Yes	Optional
Lease start	The start date for the lease agreement	Should be entered in dd/mm/yyyy format *E.g 19/03/2019 = 19th March 2019*	Yes	Optional
P11D	The P11D value of this vehicle	Must contain numerical values *E.g. 8000*	Yes	Optional
Comments	Any additional comments for this vehicle	Can contain letters and/or numbers	Yes	Optional

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Expenses

Bulk uploading Expenses should only be used for one employee at a time

The name of the employee, expenses report name and currency are defined on the bulk-upload page.

Field	Description	Validation	Case Sensitive	Mandatory
Date	The date on which this expenses claim was incurred.	Should be entered in dd/mm/yyyy format *E.g 19/03/2019 = 19th March 2019*	Yes	Mandatory
Vendor	The vendor for this expense claim	Can Contain letters and/or numbers *E.g. Th Train Company*	No	Optional
Value	The value / cost of this expense	This field can contain a numerical value up to 2 decimal places *E.g. 50*	Yes	Mandatory

Mileage

Bulk uploading Mileage should only be used for one employee at a time

The name of the employee, mileage report name and currency are defined on the bulk-upload page.

Field	Description	Validation	Case Sensitive	Mandatory
Date	The date on which this mileage claim was incurred.	Should be entered in dd/mm/yyyy format *E.g 19/03/2019 = 19th March 2019*	Yes	Mandatory
From	The location where the journey began	Can Contain letters and/or numbers *E.g Birmingham*	Yes	Mandatory
To	The location where the journey ended	Can Contain letters and/or numbers	Yes	Mandatory

Field	Description	Validation	Case Sensitive	Mandatory
		E.g Birmingham		
Distance	The overall distance of the journey	Should contain a numerical value with a maximum of 2 decimal places *E.g 40*	Yes	Mandatory
Comments	Any general comments relating to this mileage claim	Can contain letters and/or numbers	No	Optional

Payments

> Bulk uploading Mileage should only be used for one employee at a time
>
> The name of the employee, mileage report name and currency are defined on the bulk-upload page.

Field	Description	Validation	Case Sensitive	Mandatory
Employee	The name or system ID for the employee who this payment relates to	Must contain either the Employee's name or the system ID number **exactly** as it appears in the system *E.g Joe Bloggs*	Yes	Mandatory
Payment type	The payment type which this payment relates to	Payment type should contain an existing payment type (or payment reason) **exactly** as it appears in the system *E.g Commission*	Yes	Mandatory
Payment title	The title of this payment	Can contain letters and/or numbers *E.g March 2019 Commission*	No	Mandatory
Payment value	The numerical value of this payment	This field should be entered as a numerical value up to a maximum of 2 decimal places *E.g 200*	Yes	Mandatory
Payment currency	The currency in which the	See list of valid currencies	No	Optional

	payment will be made	E.g GBP		
Payment from date	The date on which this payment starts	This date should be entered in dd/mm/yyyy format E.g 19/03/2019 = 19th March 2019	Yes	Mandatory
Payment to date	The date on which this payment ends	Should be entered in dd/mm/yyyy format E.g 19/03/2019 = 19th March 2019	Yes	Optional
Payment frequency	The frequency of this payment	Can contain letters and/or numbers E.g Monthly	No	Optional

Reminders

Field	Description	Validation	Case Sensitive	Mandatory
Employee	The employee who this reminder relates to	Must contain the employee's name of the system ID **exactly** as it appears in the system E.g Job Bloggs	Yes	Mandatory
Title	The title or name of this reminder	Can Contain letters and/or numbers E.g Passport reminder	No	Mandatory
Due date	The date on which this reminder is due	Should be entered in dd/mm/yyyy format E.g 19/03/2019 = 19th March 2019	Yes	Mandatory
Send reminder date	The date for the system to send the reminder	Should be entered in dd/mm/yyyy format E.g 19/03/2019 = 19th March 2019	Yes	Mandatory
Comments	General comments relating to this reminder	Can contain letters and/or numbers	No	Optional
Access level	Defines who will receive the reminder.	Valid options include numerical values, 1-9. 1 = Administrators only 2 = HR only 3 = Manager only 4 = Administrators and HR only 5 = Administrators and Manager only 6 = HR and Manager only 7 = Administrators, HR and Manager 8 = Finance users only 9 = Finance notification email only	Yes	Mandatory

Assets

Field	Description	Validation	Case Sensitive	Mandatory
Asset type	The type of asset which being uploaded	Must contain an existing asset type exactly as It appears in the system *E.g Laptop*	Yes	Mandatory
Asset name	The name of the asset which is being uploaded	Can Contain letters and/or numbers *E.g Laptop 1*	Yes	Mandatory
Asset tag	A tag or ID number for this asset	Can Contain letters and/or numbers *E.g LPTP123*	Yes	Optional
Asset serial number	A unique serial number for this asset	Can Contain letters and/or numbers *E.g ABC12345*	Yes	Optional
Asset warranty expiry	Warranty expiry date for this asset	Should be entered in dd/mm/yyyy format *E.g 19/03/2019 = 19th March 2019*	Yes	Optional
Asset supplier	The name of the supplier of this asset	Can Contain letters and/or numbers *E.g PC Company*	Yes	Optional
Asset purchase price	The purchase price for this asset	Should be entered as a numerical value *E.g 500*	Yes	Optional
Asset PO number	The purchase order number for this asset	Can Contain letters and/or numbers *E.g PC123*	No	Optional
Asset condition	The current condition of this asset	Can Contain letters and/or numbers *E.g New, excellent*	No	Optional

Asset location	The current location of this asset	Can Contain letters and/or numbers *E.g IT Store room*	No	Optional
Asset owner	The current owner of this asset	Can contain the name of an existing employee exactly as it appears in the system or "Company" if the asset is company-owned *E.g Company*	Yes	Optional
Asset loss risk	The risk of losing this asset	Should be entered as a numerical value *E.g Low Risk*	Yes	Optional
Asset loss impact	The impact of losing this asset	Should be entered as a numerical value *E.g Replacement*	Yes	Optional
Asset loss probability	The probability score of losing this probability	Should be entered as a numerical value *E.g Medium*	Yes	Optional
Asset status	The current status of this asset,	Can contain "Current" or "Retired" *E.g Current = active assets*	Yes	Optional
Asset assigned to	If assigned to an employee, the name of the employee who is currently using this asset	Must contain the name of an existing employee **exactly** as it appears in the system *E.g Joe Bloggs*	Yes	Optional
Asset assigned date	The date on which this assigned was assigned to the employee	Should be entered in dd/mm/yyyy format *E.g 19/03/2019 = 19th March 2019*	Yes	Mandatory *(If assigned to an employee)* Optional *(If unassigned)*
Asset assigned comments	Any general comments associated to this asset being assigned to the employee	Can Contain letters and/or numbers	Yes	Optional

Employee Systems

Field	Description	Validation	Case Sensitive	Mandatory
Employee	The employee who this reminder relates to	Must contain the employee's name of the system ID **exactly** as it appears in the system *E.g Joe Bloggs*	Yes	Mandatory
System name	The name of the system which this employee can access	System name should contain existing system name exactly as it appears in the system *E.g CRM*	Yes	Mandatory
System level	The access level for this employee	Should contain an existing system level exactly as it appears in the system *E.g. End user*	Yes	Mandatory
Login name	The login name for this system	The user name for this employee's system account *E.g joe.bloggs@yourcompany.com*	Yes	Mandatory
Comments	General comments relating to this reminder	Can contain letters and/or numbers *E.g Joe has standard access to the CRM system*	No	Optional
Date	The date when this login was added	Should be entered in dd/mm/yyyy format *E.g 19/03/2019 = 19th March 2019*	Yes	Mandatory

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Exchange rates

Uploading exchange rates will allow you to define your own currency conversions in the system.

These will always relate to the Default Currency which has been entered within your Company Settings menu

Field	Description	Validation	Case Sensitive	Mandatory
Date 1	The start date for this currency conversion	Should be entered in dd/mm/yyyy format E.g 19/03/2019 = 19th March 2019	Yes	Mandatory
Date 2	The end date for this currency conversion	Should be entered in dd/mm/yyyy format E.g 19/03/2019 = 19th March 2019	Yes	Mandatory
Currency	The currency which this rate relates to	See list of valid currencies E.g GBP	Yes	Mandatory
Rate	The exchange rate for this currency in relation to your default currency	Rates should be entered as a numerical value up to 2 decimal places E.g 1.12	Yes	Mandatory

Timesheet references

If you are restricting a timesheet reference so that only certain departments can access them, the bulk upload template requires the system ID number rather than the name of each of these.

To find these ID numbers, you should go and edit the relevant department within your system where you will find the ID number at the end of the URL.
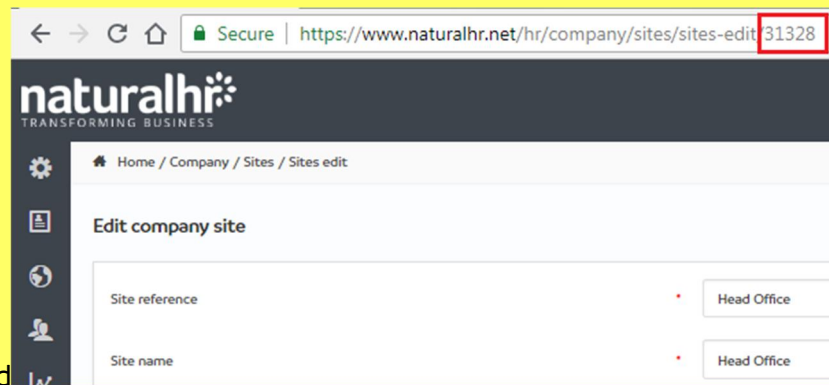
Field	Description	Validation	Case Sensitive	Mandatory
Reference	The name of the timesheet reference	Can contain letters and/or numbers

E.g Project 1 | Yes | Mandatory |
| Level | The level of this timesheet | Valid options include 0,1,2 or 3

E.g 0 = a highest-level reference | Yes | Mandatory |
| Department | The ID numbers of the department(s) which are able to use this reference | Must contain the system ID numbers for each department which this relates to.
If left blank, all departments will be able to submit timesheets using this reference

E.g 123 | Yes | Optional |
| Active | Is this reference enabled? | This option can only contain "0" or "1"
1 = Active
2 = Inactive

E.g 1 = Active reference | Yes | Mandatory |

List of valid countries

Must be entered EXACTLY as shown

Afghanistan	Dominican Republic	Libyan Arab Jamahiriya
Aland Islands	Ecuador	Liechtenstein
Albania	Egypt	Lithuania
Algeria	El Salvador	Luxembourg
American Samoa	Equatorial Guinea	Macao
Andorra	Eritrea	Macedonia The Former Yugoslav Republic of
Angola	Estonia	
Anguilla	Ethiopia	Madagascar
Antarctica	Falkland Islands (Malvinas)	Malawi
Antigua and Barbuda	Faroe Islands	Malaysia
Argentina	Fiji	Maldives
Armenia	Finland	Mali
Aruba	France	Malta
Australia	French Guiana	Marshall Islands
Austria	French Polynesia	Martinique
Azerbaijan	French Southern Territories	Mauritania
Bahamas	Gabon	Mauritius
Bahrain	Gambia	Mayotte
Bangladesh	Georgia	Mexico
Barbados	Germany	Micronesia Federated States of
Belarus	Ghana	Moldova Republic of
Belgium	Gibraltar	Monaco
Belize	Greece	Mongolia
Benin	Greenland	Montenegro
Bermuda	Grenada	Montserrat
Bhutan	Guadeloupe	Morocco
Bolivia Plurinational State of	Guam	Mozambique
Bonaire Sint Eustatius and Saba	Guatemala	Myanmar
Bosnia and Herzegovina	Guernsey	Namibia
Botswana	Guinea	Nauru
Bouvet Island	Guinea-Bissau	Nepal
Brazil	Guyana	Netherlands
British Indian Ocean Territory	Haiti	New Caledonia
Brunei Darussalam	Heard Island and McDonald Islands	New Zealand
Bulgaria	Holy See (Vatican City State)	Nicaragua
Burkina Faso	Honduras	Niger
Burundi	Hong Kong	Nigeria
Cambodia	Hungary	Niue
Cameroon	Iceland	Norfolk Island
Canada	India	Northern Mariana Islands
Cape Verde	Indonesia	Norway
Cayman Islands	Iran Islamic Republic of	Occupied Palestinian Territory
Central African Republic	Iraq	Oman
Chad	Ireland	Pakistan
Chile	Isle of Man	Palau
China	Israel	Panama
Christmas Island	Italy	Papua New Guinea
Cocos (Keeling) Islands	Jamaica	Paraguay
Colombia	Japan	Peru
Comoros	Jersey	Philippines
Congo	Jordan	Pitcairn
Congo The Democratic Republic of the	Kazakhstan	Poland
Cook Islands	Kenya	Portugal
Costa Rica	Kiribati	Puerto Rico
Cote d'Ivoire	Korea Democratic People's Republic of	Qatar
Croatia	Korea Republic of	Reunion
Cuba	Kuwait	Romania
Curacao	Kyrgyzstan	Russian Federation
Cyprus	Lao People's Democratic Republic	Rwanda
Czech Republic	Latvia	Saint Barthelemy
Denmark	Lebanon	Saint Helena Ascension and Tristan da Cunha
Djibouti	Lesotho	
Dominica	Liberia	Saint Kitts and Nevis

Saint Lucia
Saint Martin (French part)
Saint Pierre and Miquelon
Saint Vincent and The Grenadines
Samoa
San Marino
Sao Tome and Principe
Saudi Arabia
Senegal
Serbia
Seychelles
Sierra Leone
Singapore
Sint Maarten (Dutch part)
Slovakia
Slovenia
Solomon Islands
Somalia
South Africa
South Georgia and the South Sandwich
Islands

South Sudan
Spain
Sri Lanka
Sudan
Suriname
Svalbard and Jan Mayen
Swaziland
Sweden
Switzerland
Syrian Arab Republic
Taiwan Province of China
Tajikistan
Tanzania United Republic of
Thailand
Timor-Leste
Togo
Tokelau
Tonga
Trinidad and Tobago
Tunisia
Turkey

Turkmenistan
Turks and Caicos Islands
Tuvalu
Uganda
Ukraine
United Arab Emirates
United Kingdom
United States
United States Minor Outlying Islands
Uruguay
Uzbekistan
Vanuatu
Venezuela Bolivarian Republic of
Viet Nam
Virgin Islands British
Virgin Islands U.S.
Wallis and Futuna
Western Sahara
Yemen
Zambia
Zimbabwe

List of valid currencies

Must be entered EXACTLY as shown

- GBP
- EUR
- USD
- JPY
- AUD
- CAD
- ZAR
- SGD
- AED
- INR
- THB
- HKD
- PHP
- IDR
- FJD
- KES
- BWP
- BGN
- SAR
- DKK
- MYR
- CHF
- CZK
- CNY
- NZD
- BHD
- EGP
- OMR
- SAR
- XOF
- GTQ
- COP
- SEK
- MXN
- YEN

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List of valid nationalities

Must be entered EXACTLY as shown

British
Irish
Polish
French
German
Italian
Spanish
American
Chinese
Afghan
Albanian
Algerian
Andorran
Angolan
Antiguans
Argentinean
Armenian
Australian
Austrian
Azerbaijani
Bahamian
Bahraini
Bangladeshi
Barbadian
Barbudans
Batswana
Belarusian
Belgian
Belizean
Beninese
Bhutanese
Bolivian
Bosnian
Brazilian
Bruneian
Bulgarian
Burkinabe
Burmese
Burundian
Cambodian
Cameroonian
Canadian
Cape Verdean
Central African
Chadian
Chilean
Colombian
Comoran
Congolese
Costa Rican
Croatian
Cuban
Cypriot
Czech
Danish
Djibouti

Dominican
Dutch
Dutchman
Dutchwoman
East Timorese
Ecuadorean
Egyptian
Emirian
Equatorial Guinean
Eritrean
Estonian
Ethiopian
Fijian
Filipino
Finnish
Gabonese
Gambian
Georgian
Ghanaian
Greek
Grenadian
Guatemalan
Guinea-Bissauan
Guinean
Guyanese
Haitian
Herzegovinian
Honduran
Hungarian
I-Kiribati
Icelander
Indian
Indonesian
Iranian
Iraqi
Israeli
Ivorian
Jamaican
Japanese
Jordanian
Kazakhstani
Kenyan
Kittian and Nevisian
Kuwaiti
Kyrgyz
Laotian
Latvian
Lebanese
Liberian
Libyan
Liechtensteiner
Lithuanian
Luxembourger
Macedonian
Malagasy
Malawian

Malaysian
Maldivan
Malian
Maltese
Marshallese
Mauritanian
Mauritian
Mexican
Micronesian
Moldovan
Monacan
Mongolian
Moroccan
Mosotho
Motswana
Mozambican
Namibian
Nauruan
Nepalese
Netherlander
New Zealander
Ni-Vanuatu
Nicaraguan
Nigerian
Nigerien
North Korean
Northern Irish
Norwegian
Omani
Pakistani
Palauan
Panamanian
Palestinian
Papua New Guinean
Paraguayan
Peruvian
Portuguese
Qatari
Romanian
Russian
Rwandan
Saint Lucian
Salvadoran
Samoan
San Marinese
Sao Tomean
Saudi
Scottish
Senegalese
Serbian
Seychellois
Sierra Leonean
Singaporean
Slovakian
Slovenian
Solomon Islander

Somali	Taiwanese	Ugandan
South African	Tajik	Ukrainian
South Korean	Tanzanian	Uruguayan
Sri Lankan	Thai	Uzbekistani
Sudanese	Togolese	Venezuelan
Surinamer	Tongan	Vietnamese
Swazi	Trinidadian or Tobagonian	Welsh
Swedish	Tunisian	Yemenite
Swiss	Turkish	Zambian
Syrian	Tuvaluan	Zimbabwean

List of valid ethnicities

Must be entered EXACTLY as shown

Caucasian
Black
White
White and Black Caribbean Mixed
White and Black African Mixed
White and Asian Mixed
Other Mixed
Indian
Pakistani
Bangladeshi
Other Asian
Black Carribean
Black African
Black Other
Chinese
Other group
No answer
BA: Black African
WH: White
BC: Black Coloured
BI: Black Indian / Asian
Hispanic
W British
W English
W Scottish
W Welsh
W Northern Irish
W Irish
W Gypsy/Irish traveller
W Polish
W Any other white ethnic
background
M White and Black Caribbean
M White and Black African
M Other mixed / multiple ethnic
background
A Indian
A Pakistani
A Bangladeshi
A Any other Asian ethnic
background
B African
B Caribbean
B Any other Black / African /
Caribbean background
C Chinese
O Any other ethnic background
N Not stated
D Declined