



Cloud HR Systems

Subscribe-HR Excel Connector

Data Uploader



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The XL uploader is a tool developed by Subscribe-Software Pty Ltd and remains our intellectual property. It is provided to you at no cost.

Disclaimer:

If you are in doubt about any of its functionality please contact us.

We do not take responsibility for any loss of data should the upload process fail in some way irrespective as to the cause of that failure.

Make sure that your data is always backed up before you attempt an import.

Exporting any data from the system will not cause loss of data since the data exported will remain in the SHR system.

Re-importing exported data into the system may over-ride the exported data.

1 Introduction

The Excel data uploader allows clients to upload data from an XL spreadsheet into SHR system. It is a convenient and fast way to import data from excels to the Subscribe-HR system and can be performed by a person who has little technical knowledge. The tool includes a validation feature, which allows you to check the validity of the data before importing it.

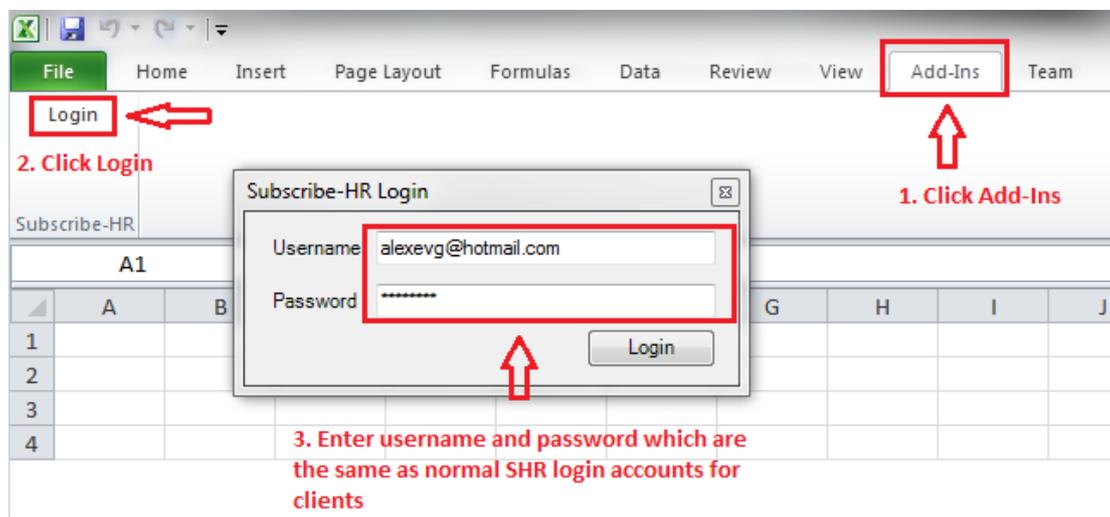
This includes data time format, empty mandatory field and incorrect email format. It allows you to remedy the data before the import is executed.

There are three processes in data uploader.

1. Firstly, clients need to **login** using normal subscribe-HR system account.
2. **Click Export button** to select which objects or related objects you want to re-import.
3. After inserting or updating data in spreadsheet, **click Import and Update** button to import data to Subscribe-HR.

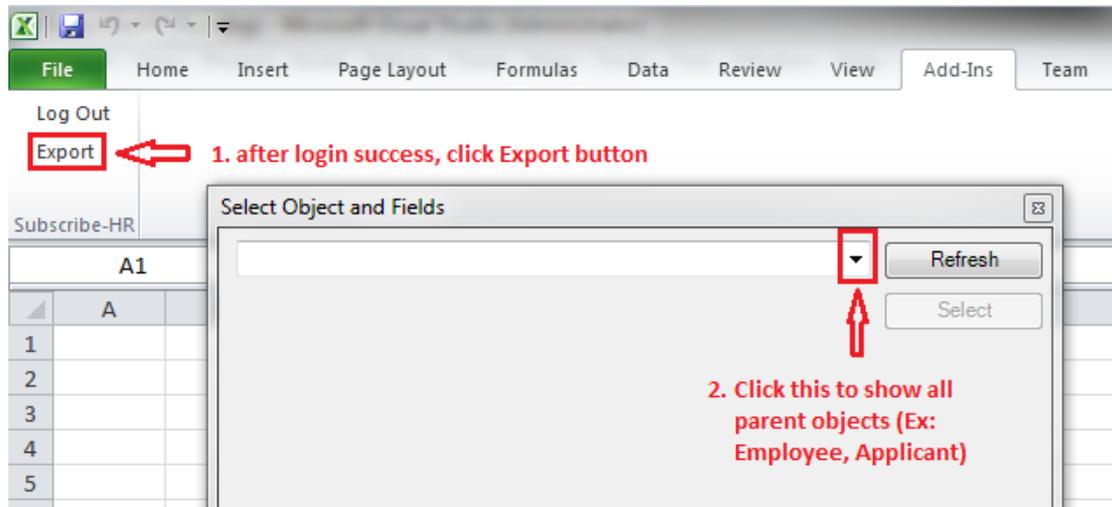
1.1 Login

Open the Excel, click 'Add-ins' => 'Login' => enter username and password in Subscribe-HR Login pop-up window, they are the same as your Subscribe-HR account.



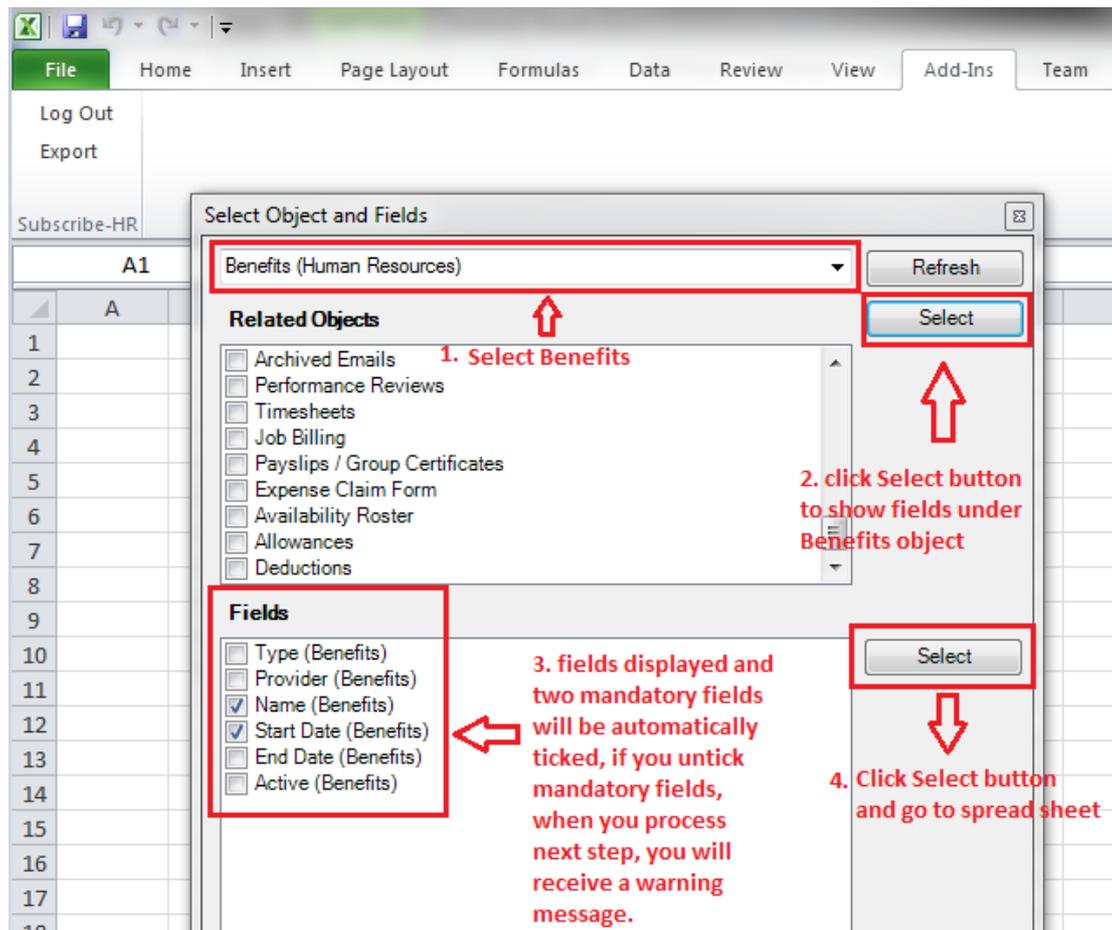
1.2 Export Existing Data From Subscribe-HR

After entering username and password in Subscribe-HR Login popup window, click Export button. You will see a popup panel 'Select Object and Fields'. You can select parent objects, related objects (child objects) and fields.



1.2.1 Select Parent Objects (Single Object) and fields

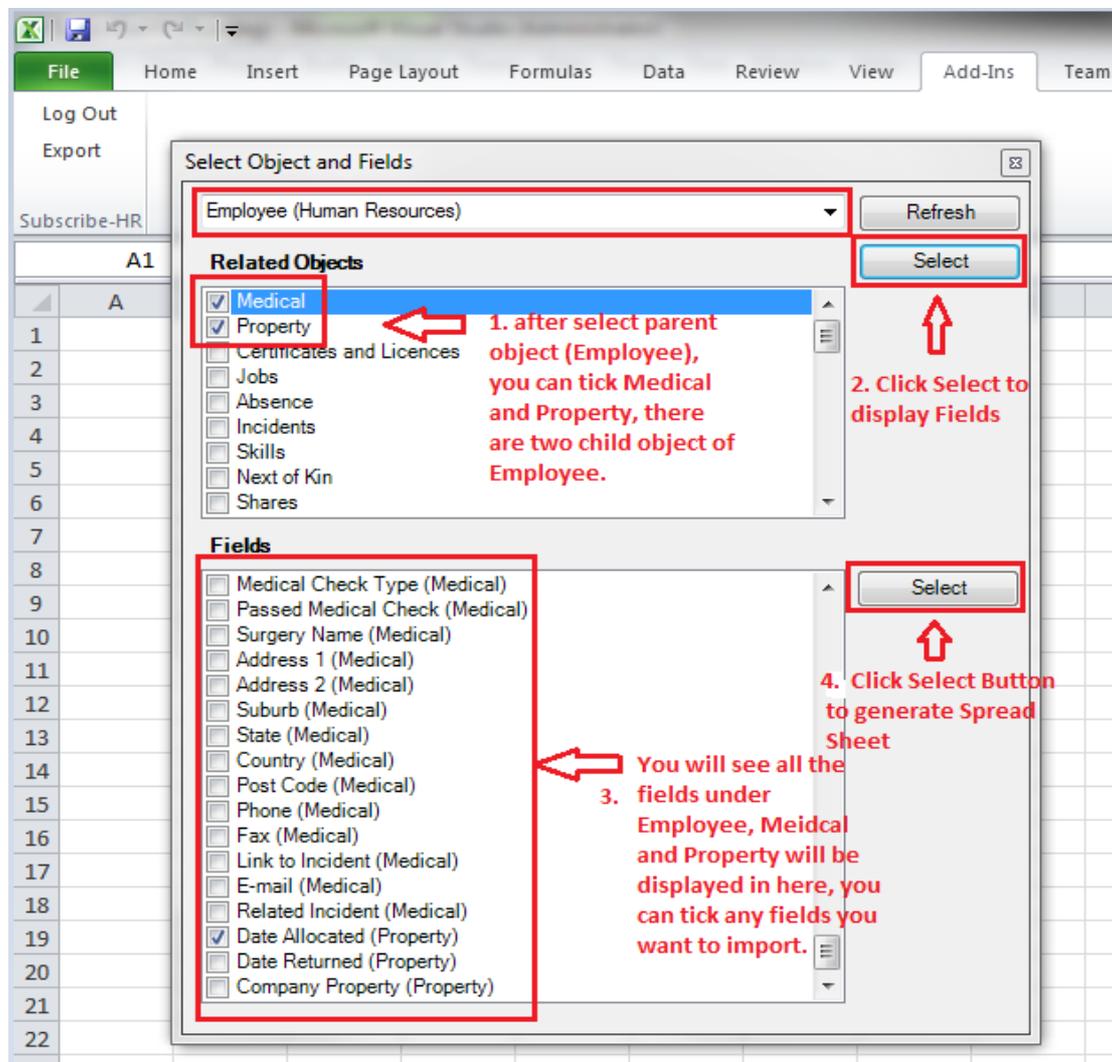
The top dropdown box shows all parent objects such as Benefits.



AS an example we will use Benefits for demonstration purposes. After selecting Benefits (Human Resources), you see a list of fields. Because "benefits" is a single parent object, relatives to that object do not need to be selected. In the field list, you can see there are 6 fields related "Benefits" object; two of them are mandatory fields (*name and start date*). You can select which fields you want to import from here and then click Select button to generate the spreadsheet.

1.2.2 Select Parent and Child Objects (Mutiple Objects) and fields

You want to import the parent and child objects together. For example, you have data about the employee such as medical and property information you want to import. Medical and property are the children objects of the employee object.



After selecting fields and clicking the Select button, a spreadsheet with existing data will be generated.

1.3 Import Or Update Data From a Spread Sheet

After exporting data from Subscribe-HR to a spreadsheet, you will see the data. You can now modify and add new records in that spread sheet before Importing or updating it.

1.3.1 Import Parent Objects (Single Objects) and Fields

Make Benefits as an example:

Benefits Id	Type	Provider	Name	Start Date	End Date	Active
9	Health (health)	API Leisure and Life (apileisureandlife)	Gym Memberships	3/01/2010		No
10	Entertainment (entertainment)	API Leisure and Life (apileisureandlife)	Power Boat Racing Weekends	1/03/2010		No
11	Health (health)	API Leisure and Life (apileisureandlife)	Pancakes at Work	3/01/2010		No
12	Shopping (shopping)	Power to Motivate (powertomotivate)	Fresh Cakes	18/05/2010		No
13	Shopping (shopping)	API Leisure and Life (apileisureandlife)	Muffins at Work	8/02/2009	23/06/2012	No
14	Entertainment (entertainment)	Anista (anista)	Pumpkin Scones	7/11/2010		Yes
15	Financial and Well Being (financialandwellbeing)	API Leisure and Life (apileisureandlife)	Mobile Phone	7/12/2010		Yes
	Entertainment (entertainment)	Anista (anista)	Laptop For Work	13/10/2014		Yes

In this spread sheet, you can see all Benefits data from row 2 to row 8. Now you can add new benefits records at the end of row 8 like row 9. When you add new records, leave the ID column as blank. The application will automatically generate an ID for these items.

1.3.2 Import Parent Objects and Child Objects (Mutiple-Objects) and fields

Let's take Employee, Employee Medical and Employee Property as an example: you can add or update any record. You do not need to touch ID fields, the application will automatically generate the ID for inserted records and existing ID for previously updated records will be locked.

3 different ID

1	A	B	C	D	E	F	G	H
	Employees Id	Medical Id	Property Id	Surname	First Name	Start date	Date	Date Allocated
2	71	3	15	Brounders	Marias	4/03/2010	10/06/2009 13:00	1/06/2011
3	72	4	5	Brounders	Jane	26/11/2010	10/12/2009 13:00	10/07/2009
4	72	8	5	Brounders	Jane	26/11/2010	18/11/2013 00:00	10/07/2009
5	73	5	6	Aramniani	Peter	23/08/1983	6/10/2009 13:00	7/10/2009
6	74	6	21	Funaki	Loni	17/06/2009	6/10/2009 13:00	15/01/2013
7	75	10		Simeone	Jane	6/01/2010	22/01/2013 00:00	
8	76	11		Moore	Sione	17/06/1991	23/01/2013 00:00	
9	77	24		SHR2	TEST2	29/11/1993	23/01/2013 00:00	
10	78			Raubty	Jenny	10/04/1994		
11	80	7	12	McClausky	Bob	15/10/2008	28/06/2010 00:00	29/06/2010
12	82	9	20	Clarke	Les	12/01/2006	22/01/2013 00:00	8/01/2013
13	86		24	French	Mathew	1/01/2011		1/01/2013
14	86		25	French	Mathew	1/01/2011		1/01/2013
15	86		26	French	Mathew	1/01/2011		1/01/2013
16	90			William	Xin	24/04/1983		
17	91			John	French	24/04/1953		
18	109	22		Nigel	Robinson	24/04/1973	22/01/2013 00:00	
19	110			SHR	Test	24/04/1973		
20								

Update

Insert

Don't need to touch ID fields, Program will generate ID fields for new records