Sense Workplace

Sense HR Bulk Upload – Introduction and Guidance

Customer-led Bulk Upload Process

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Document overview
This document explains how to prepare, validate, and import your organisation's HR data and employee documents into Sense HR using the Bulk Upload feature in the web app.
It provides detailed guidance for completing your data templates, validating and importing data through Settings > Bulk upload, and securely bulk uploading employee documents.

This version supports the customer-led data import process, where internal Sense administrators upload data directly — without the involvement of the Sense Data Team.

Version details

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Document ownership and use
This document is issued by the Sense Customer Success Team and forms part of your onboarding pack.

It is intended for authorised use by your organisation only and should be followed carefully to ensure successful data import and configuration.

Contents

SECTION A: Introduction and Overview

About this guide

This guide explains how to prepare, validate, and upload your organisation's HR data and employee documents into Sense HR using the Bulk Upload feature available under Settings > Bulk upload.

It covers:

- Completing and uploading **data templates** for initial system setup
- Field-by-field guidance for every template
- Using **custom and customised screens** (where applicable)
- Preparing and uploading **employee documents** in bulk
- Validation rules, upload order, and common issues to avoid

Following this guide will ensure your data is correctly formatted, validated, and imported, helping you complete your initial system setup efficiently and with minimal rework.

Bulk upload: data, documents, and custom screens

The Bulk Upload feature supports three related but distinct processes, each with its own rules:

Data templates

- Used primarily for initial system setup
- Include structured HR data such as employees, entitlements, time off, and other records
- Must be uploaded before your system goes live
- On live systems, can only be used in limited scenarios (for example, adding new records to table-type screens, loading data to screens that were never previously populated, or adding a new entitlement year)
- Cannot be used to update or overwrite existing live data

Employee documents

- Used to upload or update employee documents in bulk
- Can be used **at any time**, including after go-live
- Require strict folder structure and naming conventions to ensure correct matching

Custom and customised screens

- Used where you have created **custom screens** or **customised standard screens** using **Screen Designer** (Elite and Enterprise only)
- Require a different upload option (**Upload custom screen data**)

- Can be used to extend data on a live system in a structured, rule-based way
- Follow additional rules and constraints, which are covered separately in **Section C**

This guide clearly identifies where processes differ and when additional steps apply.

Templates at a glance

You'll use the Bulk Upload feature inside Sense HR to download, complete, validate, and import your HR data templates.

Each template (.xlsx) corresponds to a specific data area — for example, Employee Data, Event Entitlements, and Time Off Data.

You'll complete these templates, then upload and validate them in the correct order directly within the web app.

The Bulk Upload feature checks your data for format errors before importing it, allowing you to correct and re-validate in real time.

> ℹ️ Bulk Upload usage overview
>
> On live systems, standard bulk upload can only be used in limited, additive scenarios — such as:
> - Adding new records to table-type screens
> - Loading data to previously unpopulated screens
> - Adding a new entitlement year
>
> It cannot be used to update or overwrite existing data. For corrections to live data, update records directly in the app or contact Support.
>
> Other bulk upload options available on live systems:
> - Advanced bulk upload (Elite & Enterprise only):
>   Add new records to table-type screens, populate empty fields in form-type screens, or upload new or newly customised screens using Screen Designer.See **Section C: Advanced bulk upload with custom screens**
> - Document bulk upload:
>   Upload new or updated documents at any time. See **Section D: Document bulk upload**)

Detailed how-to guides for the bulk upload process are also available in the Sense Workplace Help Centre:

- **Guide to completing data templates for initial system setup**
- **Data preparation and upload for initial system setup**

Data Review and Support Process

During your implementation project, you are responsible for uploading and validating your own data through **Settings** > **Bulk upload**.

Sense Customer Success will monitor completion milestones and assist if you encounter upload errors you cannot resolve in-app.

The Bulk Upload feature performs automated validation. Rows containing missing or invalid data are highlighted with error messages so you can edit inline (click the edit icon (✏️) to correct and the tick icon (✅) to confirm or click the bin icon on any row (🗑️) to delete that row)

Once all rows are valid, the data can be imported immediately.

Advanced bulk upload using Screen Designer

In addition to the standard bulk upload templates, Elite and Enterprise customers with access to Screen Designer can also bulk upload data using custom or customised screen templates.

This allows organisations to define or extend their data structure during implementation or when introducing new screens to a live system. Detailed guidance on this advanced use case is provided in **Section C of this document**.

Before you begin

Please make sure that:

☑️ You're logged in to the Sense HR web app.
☑️ You have administrator permissions.
☑️ You can open and edit .xlsx files on your device.
☑️ Your Calendar & Planner settings (Working Hours) are configured correctly under Settings > Calendar & Planner.
☑️ Any custom Sickness Reasons and Rules that are additional to the system defaults are correctly preconfigured under Settings > Calendar & Planner > Event Manager > Sickness.
☑️ Any custom Time-off events and Working events have been added and correctly preconfigured under Settings > Calendar & Planner > Event Manager > Create
☑️ You've downloaded the latest templates via Settings > Bulk upload > Download templates.
☑️ You understand which templates are mandatory for your system setup.

⚠️ **Caution:**

Ensure any custom Working Hours, Sickness Reasons/rules, and Time-off/Working events are fully configured and correct before starting your data load.
Any mismatch between your system's existing setup and your bulk-upload data can cause event entitlements, holiday calculations, and Time-off/Working events to fail or display incorrectly.

⚠️ **Important – Date format in Excel**
When selecting a date format in Excel, **do not use any format that includes an asterisk (*)**. Date formats with an asterisk automatically change based on your computer's regional settings. This can cause **inconsistent values, validation failures, and bulk upload errors**, even if the dates appear correct in Excel.
Before attempting bulk upload:

- Choose a date format **without** an asterisk
- Double-check all date columns to confirm **no asterisk is present**

If an asterisked date format is used, the bulk upload **may fail** or produce incorrect results.

Downloading your data templates

Downloading your data templates

To begin:

1. In Sense HR, go to **Settings** > **Bulk upload**.
2. Click **Download** (upper-right), then
3. Select **Download templates**

A zip file containing all mandatory and optional templates will download to your device.

Extract the zip file before editing to prevent compression or permission issues.

These templates are colour-coded to indicate required fields:

- 🔴 Red = Mandatory fields
- 🟡 Yellow = Conditional fields (required only in specific scenarios)
- 🟢 Green = Optional fields

💡 **Tip:** Complete all mandatory fields and as many optional ones as possible.
The more complete your data, the smoother your system setup will be.

Data modification policy

To ensure successful validation and easier troubleshooting:

- Do not rename template files
- Avoid changing column headers
- Avoid reordering or restructuring columns

While Bulk Upload can tolerate some reformatting, altering the template structure may:

- Cause validation inconsistencies
- Lead to incorrect data mapping
- Make troubleshooting more complex

For best results, complete the template exactly as downloaded.

Sense Support cannot repair or reformat heavily modified templates.

Required pre-configurations

⚠️ **Caution:**
The **Bulk Upload** process depends on certain system settings being configured **before** you begin.
If these are missing or incorrect, some data (such as working hours, sickness, or time-off events) may not validate or import correctly.

System setup checklist

🔴 **Required:**
Your **Calendar & Planner** settings are fully configured (including **Working Hours** configurations) under **Settings > Calendar & Planner** > **Working Hours**
🟡 **Conditionally required:**
If you use any **custom sickness reasons or rules** (beyond the system defaults), ensure they are correctly configured under
Settings > Calendar & Planner > Event Manager > Sickness.
🟡 **Conditionally required:**
If you have **custom time-off events** or **working events**, confirm they are added and preconfigured under
Settings > Calendar & Planner > Event Manager > Create.

Which templates to submit

For your Sense HR setup to function correctly, you must upload the following mandatory templates in the correct order:

1️⃣ 1.EmployeeData.xlsx – Upload employees
2️⃣ 2.EventEntitlementData.xlsx – Upload event entitlements
3️⃣ 3.TimeOffData.xlsx – Upload booked time off events

⭐ Conditional:
7.CustomPublicHolidayData.xlsx – Required only if your system includes public holidays other than England & Wales, Scotland, or Northern Ireland.
Upload this first (before 1.EmployeeData.xlsx) if used.

All other templates are optional but recommended if you want your system to launch with full historical and reference data (for example, training history, pay details, or benefits).

Summary: Required and optional templates

Category	Template Name	File Name
🔴 **Required**	Employee Data	1.EmployeeData.xlsx
	Event Entitlement Data	2.EventEntitlementData.xlsx
	Time Off Data	3.TimeOffData.xlsx
🟡 **Conditional**	Custom Public Holidays Data	7.CustomPublicHolidayData.xlsx.
🟢 **Optional**	All other templates listed in this document	e.g. 4.OtherContactData.xlsx, 5.SicknessData.xlsx, etc.

SECTION B: Field-by-Field Guidance

1. Employee Data

File name: 1.EmployeeData.xlsx

Purpose: Defines your employee records. Each employee listed here is created in Sense HR and linked to all other templates via their **Employee ID**.

Please ensure all **mandatory fields** are completed.

Optional fields can be left blank but will improve reporting, search, and data accuracy if included.

💡 **Tip:**
Ensure spelling, spacing, and date formats are consistent across all templates to prevent validation errors.
Keep capitalisation consistent to avoid reporting inconsistencies and unnecessary data cleanup
later.

Important rules

- Ensure **Working Hours** are configured correctly in your system before submitting data (see Required pre-configurations).
  If these don't align, event entitlements and time-off data may not load or calculate correctly.
- All dates must be in **DD/MM/YY** or **DD/MM/YYYY** format. Do not mix formats within the same file.
- Do not use asterisk (*) date formats. They change with system settings and can cause bulk upload validation errors. Check all date columns before upload to ensure no asterisk is present.

Employee Data – Full Field Guidance

Field	Mandatory or Optional	Instructions
Employee ID	🔴 Mandatory	Enter a **unique ID** for each employee. This ID must match exactly across all templates. **Allowed characters: letters, numbers, hyphens (-), and underscores (_).**
First Name	🔴 Mandatory	Enter the employee's legal first name. Ensure correct spelling, as it must match across all templates. Do not use the following special characters in First Name: < > : " / \ | ? *

Last Name	Mandatory	Enter the employee’s legal surname. Must match exactly across all templates. Do not use the following special characters in Last Name: < > : “ / \ | ? *
Title	Optional	Enter the employee’s title (e.g. Mr, Mrs, Dr).
Known As	Optional	Preferred or common name if different from legal name.
Login Email	Optional	Must be a valid email address (e.g. **name@domain.com**).
Date of Birth	Optional	Use format **DD/MM/YY** or **DD/MM/YYYY.** Do not use asterisk (*) date formats. They change with system settings and can cause bulk upload validation errors. Check all date columns before upload to ensure no asterisk is present.
Gender	Optional	Enter gender as recorded in company records.
Nationality	Optional	Enter employee’s nationality.
National Insurance Number	Optional	Must be in format **AB123456A** with no spaces (case-sensitive). Incorrect formatting will prevent data validation. See further guidance in ‘Tips for this template’.
Work Phone	Optional	**Recommended**: Include the country code (for example, +44 7123456789). Use text format in Excel to preserve the “+” symbol. **Note**: Phone numbers without a country code (for example, 07123456789) will still pass validation. In these cases, the system automatically applies the country code based on the employee’s address country. If no country is recorded, the number defaults to a UK country code.
Personal Phone	Optional	Same format as Work Phone.
Line 1	Optional	Enter primary address line.
Line 2	Optional	Secondary address line, if applicable.
Town	Optional	Town or city.
County	Optional	County or region.
Postcode	Optional	Full postcode.
Country	Optional	Full country name.
Employment Start Date	Mandatory	Enter the employee’s official start date using **DD/MM/YY** or **DD/MM/YYYY** format.
Job Title	Mandatory	Enter current job title only. Ensure spelling is consistent across all records.
Job Title Start Date	Mandatory	Enter start date for the current job title in **DD/MM/YY** or **DD/MM/YYYY** format.

Company	Optional	Enter company name if your Sense system includes multiple companies.
Department	Mandatory	Enter department name exactly as it is to appear in Sense. Spelling must match across all entries.
Location	Mandatory	Enter location name exactly as you want it to appear in Sense.
Line Manager Employee ID	Optional	Must match the line manager's Employee ID exactly. This ensures correct reporting hierarchy.
Contract Type	Optional	e.g. Permanent, Fixed Term, Casual, Temporary.
Notice Period	Optional	Enter value in weeks (e.g. "4 weeks") or months if relevant.
Probation Status	Optional	e.g. Completed, Extended, Failed, Ongoing, Passed
Probation End Date	Optional	Enter in **DD/MM/YY** or **DD/MM/YYYY** format if probation applies.
Probation Review Date	Optional	Enter review date in **DD/MM/YY** or **DD/MM/YYYY** format.
Fixed Term End Date	Optional	Required only for fixed-term employees. Format **DD/MM/YY** or **DD/MM/YYYY**.
Working Hours	Optional	Enter name of the working hours configuration. Must exactly match the name of the working hours configuration in your system. If the employee has no working hours configuration, enter "No working pattern"
Working Hours Effective Date	Conditional	Required when data is entered for **Working hours configuration.** Enter the date from which the working hours should apply. If the employee has **No working hours** configuration, enter the date this status took effect**.** Format **DD/MM/YY** or **DD/MM/YYYY**.
Starting Week	Optional	For rotating work patterns and daily schedules only. Identify which week of the pattern the employee starts in.
Contracted Hours	Mandatory	Total weekly contracted hours.
Full-time Hours	Mandatory	Enter company-wide full-time hours (e.g. 37.5 or 40).
Public Holiday Group	Optional	Enter the exact name of a Public Holiday Group configured in Sense — e.g. *England & Wales*, *Scotland*, or *Northern Ireland*. Or enter the Public Holiday Group name exactly as entered in

		7.CustomPublicHolidayData.xlsx if applicable.
Are Public Holidays Included in Entitlement?	🟢 Optional	Default setting is **No.** Enter **Yes** if public holidays are included in this employee's entitlement.
Automatically Book Public Holidays?	🟢 Optional	Default setting is **No.** Enter **Yes** to automatically book public holidays to the employee's planner. 💡Recommended if public holidays are included in the employee's entitlement.
Holiday Year	🔴 Mandatory	Enter holiday year range (e.g. Jan - Dec, Apr - Mar) using the three-letter month format.
Final Date of Employment	🟢 Optional	Only complete for employees who have left. Format **DD/MM/YY** or **DD/MM/YYYY**.
Reason for Leaving	🟢 Optional	Only complete for employees who have left. Enter reason for leaving, e.g. Resignation, Redundancy, Retirement.
Leaver Comments	🟢 Optional	Only complete for employees who have left. Any notes relating to the employee's departure or final settlement.

💡 **Tips for this template**

- Verify that all mandatory red-header columns are filled in.
- Use consistent capitalisation and naming across all templates.
- Use consistent spacing across all templates. Leading and trailing spaces are ignored, but extra spaces within entries (e.g. "Sarah Louise" vs "Sarah Louise") will be treated as different values and may cause validation errors.
  Check for extra spaces in all entries — they can cause data mismatches.
- Avoid merging, adding, or renaming columns.
- National Insurance numbers must be 8 or 9 characters in the form:
  2 letters, 6 digits, with an optional final letter (e.g. AB123456A or AB123456)
  Rules for valid entries:
  - First letter: Uppercase; cannot be D, F, I, Q, U, or V
  - Second letter: Uppercase; cannot be D, F, I, O, Q, U, or V
  - Next 6 characters: Digits 0–9
  - Final letter (if entered): A, B, C, D, F, or M

⚠️ **Caution:**

- Ensure all records use consistent date and time formats to avoid validation errors during import (see Important rules)

2. Event Entitlement Data

File name: 2.EventEntitlementData.xlsx

Purpose: Defines each employee's entitlement for holidays and other time-off events that carry an entitlement (for example, annual leave).

This template ensures every employee has the correct entitlements when the system goes live.

Please complete all **mandatory fields** before submission.

Optional fields can be left blank but help provide a complete and accurate entitlement picture.

💡 **Tip:** Ensure that all names, IDs, and event types match exactly with the **Employee Data** and **Time Off Data** templates.

Even small differences (like extra spaces) may prevent successful verification.

✏️ **Note: Event Entitlement Data template – annual and historic use**
The **Event Entitlement Data** template behaves slightly differently from other standard templates.
Renewing entitlement for a new year
You can use this template each year to load entitlement for the upcoming holiday year.
To do this:

- Enter all required data for the new holiday year
- Ensure all mandatory columns are completed for each row
- Upload the template on (or after) the first day of the new holiday year

Loading historic entitlement data
You may also use this template to load historic entitlement data.

- Add the relevant year in the Event year column
- Historic and current year data can be entered and uploaded in a single template or managed as separate templates for each year and uploaded individually.
- Historic entitlement can be added retrospectively (i.e. after entitlement has already been uploaded and imported for the current year)

⚠️ **Important:**
Entitlement data can only be entered from the employee's **start year of employment** up to the **current year**. Future years cannot be uploaded.

Event Entitlement Data – Full Field Guidance

Field	**Mandatory or Optional**	**Instructions**
Employee ID	🔴 Mandatory	Must match the **Employee ID** on the *Employee Data* sheet exactly. Do not add or change leading zeros or spaces.
First Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly.
Last Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly.
Event Type	🔴 Mandatory	Enter the exact **Event Type** name configured in your Sense system. For example: Holiday, Unpaid Leave, Maternity Leave. The spelling (including spaces) must be identical to the setup under **Settings > Events**.

Measured In	🔴 Mandatory	Specify whether entitlement is measured in **Days** or **Hours**. Be consistent across all templates for each event.
Event Year	🔴 Mandatory	Enter the relevant event year (e.g. 2026). This determines which entitlement period applies. Entitlement data can only be entered for years from the employee's **employment start year** up to the **current year**. Future years are not permitted.
Current Event Entitlement	🔴 Mandatory	Enter the employee's current entitlement for this event type. If the employee started partway through the year, enter the **pro-rata** amount that applies from their start date.
Contracted Entitlement	🟡 Conditional	**Mandatory** when **Event year = current year**. **Do not complete** for **historic entitlement data (Event year = past year).** Enter the employee's **full-year** entitlement for a **complete year of service**. This value forms the base entitlement before any carry-over or Length of Service (LOS) adjustments are applied.
Carried Over from Previous Year	🟢 Optional	Enter any unused entitlement carried forward from the previous year. This amount will be added to the current entitlement automatically. If there is no carry-over, leave blank.
Current LOS Entitlement	🟢 Optional	Enter any additional entitlement earned from length of service (LOS). This amount will be added to the current entitlement. Leave blank if not applicable.
Notes	🟢 Optional	Use this column for internal context notes. Not displayed to employees.

Best-practice guidance

💡 **Tips for accuracy**

- Each employee can have **multiple rows** if they have more than one event type (e.g. Holiday and Unpaid Leave) or your adding historic data to the template.
- Confirm that each **Event Type** exists in your system before submission. Mismatched names will cause upload failure.
- Use **consistent units** (Days or Hours) for each employee across all event and time-off templates.
- Where possible, check pro-rata calculations against your HR policy or legacy system before submitting.

⚠️ **Caution:**

- If **Event Type** values do not exactly match existing settings in your Sense configuration, entitlement rows will fail validation and will not load.
- Avoid inserting extra spaces, punctuation, or alternative spellings.

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3. Time Off Data

File name: 3.TimeOffData.xlsx

Purpose: Records all booked **time off events** for each employee, excluding sickness. This includes any scheduled absences such as **annual leave, TOIL, maternity/paternity leave, or other authorised absences**.

Please ensure all **mandatory fields** are completed.

Optional fields help improve reporting and historical accuracy.

💡 **Tip:**
All names, event types, and IDs must match the **Employee Data** and **Event Entitlement Data** templates exactly. Even a small mismatch (extra space, incorrect spelling) can cause validation failure.

Important rules

- Each row represents **one booked time off event**.
- You must use only **one duration type** per booked event — either *Days* or *Hours/Mins* or just *Mins* not a combination of two or more.
- All dates must be in **DD/MM/YY** or **DD/MM/YYYY** format. Do not mix formats within the same file.
- Do not use asterisk (*) date formats. They change with system settings and can cause bulk upload validation errors. Check all date columns before upload to ensure no asterisk is present.
- Fields in **yellow** within the template are **conditionally required** (depending on the duration type and duration of the event).
- Events in this sheet should **not** include sickness — use the **Sickness Data** template for that.

Time Off Data – Full Field Guidance

Field	Mandatory or Optional	Instructions
Employee ID	🔴 Mandatory	Must match the **Employee ID** from the *Employee Data* sheet exactly. Do not modify or add leading zeros.
First Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly, including spelling and spacing.
Last Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly.
Event Type	🔴 Mandatory	Enter the exact event type name configured in Sense. For example: Holiday, Unpaid Leave, Parental Leave.
Event Start Date	🔴 Mandatory	Enter the event's start date using **DD/MM/YY** or **DD/MM/YYYY** format.
Event End Date	🔴 Mandatory	Enter the event's end date using **DD/MM/YY** or **DD/MM/YYYY** format. For single-day events, the start and end date will be the same.

Start Date Part of Shift	Conditional	Required only when the event is measured in Days, includes entitlement deduction, and starts with a half day. Use: - Enter **First half** if the event starts in the morning - Enter **Second half** if the event starts in the afternoon This is also required for multi-day events such as 1.5 or 2.5 days where the first day is a half day. Do not complete this field for events measured in Hours or Mins. See **worked examples**
End Date Part of Shift	Conditional	Required only when the event is measured in Days, includes entitlement deduction, and includes a half day at the end. Use: - Enter **First half** if the event ends in the morning - Enter **Second half** if the event ends in the afternoon This is also required for multi-day events such as 1.5 or 2.5 days where the last day is a half day. Do not complete this field for events measured in Hours or Mins. See **worked examples**
Event Start Time	Conditional	Required when the event is measured in Hours or Mins and includes less than a full day. - Enter the time in **24-hour format** (e.g. 08:30, 13:00). If the event spans multiple days and begins with a part-day: - Split the event into separate rows - Use one row per segment (e.g. first part-day, full-day period) - Complete Event Start Time and End Time on the part-day row only - Leave Event Start Time and End Time blank for any row representing a full-day segment See **worked examples**
Event End Time	Conditional	Required when the event is measured in Hours or Mins and includes less than a full day. - Enter the time in **24-hour format** (e.g. 12:00, 17:30). If the event spans multiple days and ends with a part day: - Split part-days into separate rows - Use one row per segment (e.g. full-day period, final part-day) - Complete Event Start Time and Event End Time on the part-day row only

		- Leave Event Start Time and End Time blank for any row representing a full-day segment See **worked examples**
Event Duration Type	🔴 Mandatory	Accepted values – Day, Days, Hour, Hours, Mins. - Use Day/Days if entitlement type is Days, - Hour/Hours/Mins if entitlement type is Hours. For non-entitlement events, any value can be used. ⚠ Use **Mins** for minutes. Currently, 'minutes' will fail validation.
Event Duration	🔴 Mandatory	Enter total duration of the event. - If measured in **Days**: values must be in increments of 0.5 (e.g. 0.5, 1, 1.5, 2). - If measured in **Hours**: values can include up to two decimal places and may use either a **decimal point** or **colon**. Examples: 6.25, 10.25, 0.30, 6:25, 10:25, 0:30. - If measured in **Mins**: Enter whole positive numbers only (e.g. 10, 30, 120). Be consistent in your chosen format across all entries.
Comments	🟢 Optional	Enter any notes or context for this time off record (e.g. "Carried forward leave", "Manual adjustment", "Legacy record").

Best-practice guidance

💡 **Tips for accuracy**

- Ensure that **Event Types** used here are configured in your Sense system (under **Settings > Events**).
- Always verify that the **Employee ID** and **Measured In** type match the *Event Entitlement Data* for the same employee.
- For any hourly event shorter than a standard day, both **start** and **end times** are required.
- Keep the **date and time formats consistent** across all entries — this is one of the most common causes of validation errors.

⚠ **Caution:**

- Mixing **Days** and **Hours** in one row per employee per event will cause upload errors. Ensure each Event type per employee has one consistent measurement type across all templates.
- Ensure all records use consistent date and time formats to avoid validation errors during import (see Important rules)

Worked examples: Completing event date and time fields

The following practical examples of completing date, part-of-shift, and time fields (including multi-day and part-day scenarios), can be used for guidance when completing the:

- 3.TimeOffData,
- 5.SicknessData, and

- 6.OtherEventsData templates

Example 1: Single full-day event (Days)
Event Duration Type: Days
Event Duration: 1 day

Field	Value
Event Start Date	15/03/2026
Event End Date	15/03/2026
Start Date Part of Shift	(leave blank if included in template)
End Date Part of Shift	(leave blank if included in template)
Event Start Time	(leave blank)
Event End Time	(leave blank)

Example 2: Half-day event (Days)
(3.TimeOffData template only)
Event Duration Type: Days
Event Duration: 0.5 days

Field	Value
Event Start Date	15/03/2026
Event End Date	15/03/2026
Start Date Part of Shift	Second half
End Date Part of Shift	(leave blank)
Event Start Time	(leave blank)
Event End Time	(leave blank)

Example 3: 2.5 day event (half day at start)
(3.TimeOffData template only)
Event Duration Type: Days
Event Duration: 2.5

Field	Value
Event Start Date	15/03/2026
Event End Date	17/03/2026
Start Date Part of Shift	Second half
End Date Part of Shift	(leave blank)
Event Start Time	(leave blank)
Event End Time	(leave blank)

Example 4: Hour-based single-day event
Event Duration Type: Hours
Event Duration: 4

Field	Value
Event Start Date	15/03/2026
Event End Date	15/03/2026
Event Start Time	09:00
Event End Time	13:00

Example 5: Multi-day event measured in hours (split into rows)

Scenario
An employee takes time off measured in hours that:

- Starts with a partial day
- Includes two full days in the middle
- Ends with a partial day

Total duration: **24 hours**

Breakdown:

- Day 1: 4 hours (afternoon)
- Day 2 and 3: Full days (no time entry required)
- Day 4: 4 hours (morning)

Because the event spans multiple days and is measured in hours, it must be split into **separate rows**.

Row 1 – First part-day (Day 1)

Field	Value
Event Duration Type	Hours
Event Duration	4
Event Start Date	15/03/2026
Event End Date	15/03/2026
Event Start Time	13:00
Event End Time	17:00
Start Date Part of Shift	(leave blank if included in template)
End Date Part of Shift	(leave blank if included in template)

Row 2 – Full day in the middle (Day 2 and 3)

Field	Value
Event Duration Type	Hours
Event Duration	16
Event Start Date	16/03/2026
Event End Date	17/03/2026
Event Start Time	(leave blank)
Event End Time	(leave blank)
Start Date Part of Shift	(leave blank if included in template)
End Date Part of Shift	(leave blank if included in template)

Row 3 – Final part-day (Day 4)

Field	Value
Event Duration Type	Hours
Event Duration	4
Event Start Date	18/03/2026
Event End Date	18/03/2026
Event Start Time	09:00

Event End Time	13:00
Start Date Part of Shift	(leave blank if included in template)
End Date Part of Shift	(leave blank if included in template)

Key rules demonstrated in example 5:

- Multi-day events measured in **Hours or Mins must be split into separate rows**
- Continuous full-day segments can be grouped into a single row
- Start and End time fields are completed **only for part-day segments**
- Start and End time fields must be left blank where not required (i.e. for full days)

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4. Other Contact Data

File name: 4.OtherContactData.xlsx

Purpose: Records each employee's emergency or next-of-kin contact details.
These details are stored on the employee's profile in Sense and can be used by managers or HR teams in case of emergency.

Please ensure all **mandatory fields** are completed.

Optional fields may be left blank but will help ensure full records and accurate reporting.

✏ **Note:** Telephone number entry requirements differ between the Other Contact Data template and the Employee Data template.

Other Contact Data – Full Field Guidance

Field	Mandatory or Optional	Instructions
Employee ID	🔴 Mandatory	Must match the **Employee ID** from the *Employee Data* sheet exactly. This links the contact to the correct employee.
First Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly.
Last Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly.
Type of Contact	🔴 Mandatory	For emergency contacts, enter either **Next of Kin** or **Emergency**. For all other records, ensure values remain consistent throughout the system.
Contact First Name	🔴 Mandatory	Enter the first name of the contact person.
Contact Last Name	🔴 Mandatory	Enter the last name of the contact person.
Relationship	🔴 Mandatory	Enter the contact's relationship to the employee (e.g. Spouse, Parent, Sibling, Friend).
Contact Phone	🔴 Mandatory	Enter in the international format, starting with +44 for UK numbers, followed by a space and the rest of the number (e.g. +44 7123456789). Use **text format** in Excel to retain the "+" symbol.

Email Address	🟢 Optional	Enter a valid email address (e.g. **contact@email.com**).
Line 1	🟢 Optional	Enter the first line of the contact's address.
Line 2	🟢 Optional	Enter the second line of the address, if applicable.
Town	🟢 Optional	Enter the town or city.
County	🟢 Optional	Enter the county or region.
Country	🟢 Optional	Enter the full country name.
Postcode	🟢 Optional	Enter the postcode in full.
Notes	🟢 Optional	Include any relevant notes or context, such as additional contact instructions or preferred communication method.

Best-practice guidance

💡 **Tips for accuracy**

- Each employee can have **multiple contact records** but ensure there is at least one valid **emergency contact** per employee.
- Avoid duplicate records — double-check that contact details aren't repeated under different types.
- Use consistent **capitalisation** to avoid any post import clean-up.
- For global contacts, always include the correct country code in the phone number.

⚠️ **Caution:**

- Do **not** rename columns, merge cells, or add extra fields. These changes will cause validation to fail during upload.

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5. Sickness Data

File name: 5.SicknessData.xlsx

Purpose: Records sickness absence events for employees.

This sheet captures both full-day and part-day sickness events and links them to the corresponding employee record.

Please ensure all **mandatory fields** are completed before submitting.

Optional fields can be used to capture additional details or context for each sickness record.

💡 **Tip:** Ensure all names, IDs, and formats are consistent with the **Employee Data** sheet to prevent errors when the file is imported.

Important rules

- You **cannot** record 0.5-day sickness events.
  Sickness of less than a full day must be recorded in **hours** (e.g. 3.5 hours) or **mins** (e.g. 120 mins)

- All dates must use **DD/MM/YY** or **DD/MM/YYYY** format. Do not mix formats within the same file.
- Do not use asterisk (*) date formats. They change with system settings and can cause bulk upload validation errors. Check all date columns before upload to ensure no asterisk is present.
- Time fields (for hourly events) must use **24-hour format** (e.g. 09:00, 14:30).
- One row = one sickness event.

Sickness Data – Full Field Guidance

Field	Mandatory or Optional	Instructions
Employee ID	🔴 Mandatory	Must match the **Employee ID** from the *Employee Data* sheet exactly. This links the sickness record to the correct employee.
First Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly, including spelling and spacing.
Last Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly.
Sickness Reason	🔴 Mandatory	Enter the sickness reason exactly as it appears in your system. For example: Cold & Fever, Flu, Back Pain. ⚠️ Ensure consistent spelling and spacing — Cold & Fever and Cold and Fever will be treated as different reasons.
Event Start Date	🔴 Mandatory	Enter the start date of the sickness event in **DD/MM/YY** or **DD/MM/YYYY** format.
Event End Date	🔴 Mandatory	Enter the end date of the sickness event in **DD/MM/YY** or **DD/MM/YYYY** format. For one-day sickness, start and end dates will be the same.
Event Start Time	🟡 Conditional	Required when the event is measured in Hours or Mins and includes less than a full day. - Enter the time in **24-hour format** (e.g. 08:30, 13:00). If the event spans multiple days and begins with a part-day: - Split the event into separate rows - Use one row per segment (e.g. first part-day, full-day period) - Complete Event Start Time and End Time on the part-day row only - Leave Event Start Time and End Time blank for any row representing a full-day segment See **worked examples**
Event End Time	🟡 Conditional	Required when the event is measured in Hours or Mins and includes less than a full day. - Enter the time in **24-hour format** (e.g. 12:00, 17:30).

		If the event spans multiple days and ends with a part day: - Split part-days into separate rows - Use one row per segment (e.g. full-day period, final part-day) - Complete Event Start Time and Event End Time on the part-day row only - Leave Event Start Time and End Time blank for any row representing a full-day segment See **worked examples**
Event Duration Type	🔴 Mandatory	Accepted values – **Day**, **Days**, **Hour**, **Hours**, **Mins**. - Use Day(s) for full days (Hour(s)/Mins can also be used), - Use Hour(s)/Mins for part-days. - For multi-day events with part-days, split into separate rows (e.g. One row for the first part-day, one row for the full-day period, one row for the final part-day).
Event Duration	🔴 Mandatory	Enter total duration of the event: • For **Days**: enter whole numbers only (e.g. 1, 2, 3). No decimals allowed. - For **Hours**: values can include up to two decimal places and may use either a **decimal point** or **colon**. Examples: 6.25, 10.25, 0.30, 6:25, 10:25, 0:30. - For **Mins**: Enter whole positive numbers only (e.g. 10, 30, 120). Be consistent in your chosen format across all entries.
Comments	🟢 Optional	Add any notes, for example: “Doctor’s certificate received”, “Work-related incident”, or “Self-certified.”

Best-practice guidance

💡 **Tips for accuracy**

- Use one row per distinct sickness period (except in the case of multi-day sickness, recorded in hours/mins that includes part-days at the beginning and/or end – see field notes). If an employee has multiple absences, record each separately.
- Always confirm that **Sickness Reasons** exist in your Sense configuration under **Settings > Events**.
- For partial-day sickness, verify that **start and end times** align logically with the duration entered.
- Double-check that durations and units (Days/Hours/Mins) match the organisation’s standard configuration.

⚠️ **Caution:**

- Do **not** enter 0.5-day sickness durations — these must be recorded in hours or mins (e.g. 3.5 hours).

- Ensure all records use consistent date and time formats to avoid validation errors during import (see Important rules)
- Avoid using merged cells or additional columns — they will break the upload mapping.

---

6. Other Event Data

File name: 6.OtherEventData.xlsx

Purpose: Used to record **work-related or company events** that are *not* time off or sickness-related.

Examples include conferences, company meetings, training days, team-building events, or project work periods.

Please ensure all **mandatory fields** are completed.

Optional fields can be left blank but will make records more complete and useful for reporting.

✏️ **Note:** Use this sheet for events that represent work activity, not absence. Absence-related events should be entered in either the **Time Off Data** or **Sickness Data** templates.

Important rules

- Each row represents **one event** per employee.
- All dates must be in **DD/MM/YY** or **DD/MM/YYYY** format. Do not mix formats within the same file.
- Do not use asterisk (*) date formats. They change with system settings and can cause bulk upload validation errors. Check all date columns before upload to ensure no asterisk is present.
- For events measured in hours, use **24-hour time format** (e.g. 09:00, 13:30).
- You cannot record “half days” for these events — durations less than a full day must be logged in **hours** or **mins** (e.g. 3.5 hours, 120 mins).

Other Event Data – Full Field Guidance

Field	Mandatory or Optional	Instructions
Employee ID	🔴 Mandatory	Must match the **Employee ID** from the *Employee Data* sheet exactly.
First Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly, including spelling and spacing.
Last Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly.

Event Type	🔴 Mandatory	Enter the event type exactly as configured in your Sense system. ⚠ Ensure consistent spelling and naming conventions — Product Launch and Launch Event will all be treated as different events.
Event Start Date	🔴 Mandatory	Enter the event start date in **DD/MM/YY** or **DD/MM/YYYY** format.
Event End Date	🔴 Mandatory	Enter the event end date in **DD/MM/YY** or **DD/MM/YYYY** format. For one-day events, the start and end dates will be the same.
Event Start Time	🟡 Conditional	Required when the event is measured in Hours or Mins and includes less than a full day. - Enter the time in **24-hour format** (e.g. 08:30, 13:00). If the event spans multiple days and begins with a part-day: - Split the event into separate rows - Use one row per segment (e.g. first part-day, full-day period) - Complete Event Start Time and End Time on the part-day row only - Leave Event Start Time and End Time blank for any row representing a full-day segment See **worked examples**
Event End Time	🟡 Conditional	Required when the event is measured in Hours or Mins and includes less than a full day. - Enter the time in **24-hour format** (e.g. 12:00, 17:30). If the event spans multiple days and ends with a part day: - Split part-days into separate rows - Use one row per segment (e.g. full-day period, final part-day) - Complete Event Start Time and Event End Time on the part-day row only - Leave Event Start Time and End Time blank for any row representing a full-day segment See **worked examples**
Event Duration Type	🔴 Mandatory	Accepted values – **Day**, **Days**, **Hour**, **Hours**, **Mins**. - Use Day(s) for full days (Hour(s)/Mins can also be used), - Use Hour(s)/Mins for part-days. - For multi-day events with part-days, split into separate rows (e.g. One row for the first part-day, one row for the full-day period, one row for the final part-day).

Event Duration	🔴 Mandatory	Enter total duration of the event: • For **Days**: enter whole numbers only (e.g. 1, 2, 3). No decimals allowed. - For **Hours**: values can include up to two decimal places and may use either a **decimal point** or **colon**. Examples: 6.25, 10.25, 0.30, 6:25, 10:25, 0:30. - For **Mins**: Enter whole positive numbers only (e.g. 10, 30, 120). Be consistent in your chosen format across all entries.
Comments	🟢 Optional	Add any notes about the event — e.g. “Quarterly team meeting”, “Annual company offsite”, or “Department strategy session.”

Best-practice guidance

💡 **Tips for accuracy**

- Use clear and consistent naming for **Event Types** across all records to ensure clean reporting (e.g. “Conference” rather than variations like “Conf” or “Conf.”).
- Group recurring company events under the same **Event Type** (e.g. “Team Meeting”).
- If the event spans multiple days, ensure both the **start** and **end** dates are accurate and that the **duration** matches that period.
- For shorter events, double-check that start and end times align logically with the total hours entered.

⚠️ **Caution:**

- Do **not** record sickness or time-off events here. Those should be logged using the **Sickness Data** or **Time Off Data** templates.
- Ensure all records use consistent date and time formats to avoid validation errors during import (see Important rules).

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7. Custom Public Holiday Data

File name: 7.CustomPublicHolidayData.xlsx

Purpose: Used to add **custom public holiday groups** that differ from the default sets provided in Sense (England & Wales, Scotland, Northern Ireland).

Complete this sheet only if your organisation operates in regions or countries that require additional or alternative public holidays.

If you are using one of the UK default public holiday groups, you do **not** need to complete this template.

However, if you operate internationally or have company-specific holidays, you must provide this data.

💡 **Tip:** The Custom Public Holiday template must include all relevant historical public holiday data (covering any years where entitlement data exists), as well as dates for the current holiday year.

To reduce the need for frequent uploads, it is recommended to also include public holiday dates for the upcoming holiday year.

Important rules

- Enter one row per holiday date.
- Do not use repeating or relative date patterns (e.g. “First Monday in April”).
- Dates must be entered as **fixed dates** in **DD/MM/YY** or **DD/MM/YYYY** format. Do not mix formats within the same file.
- Do not use asterisk (*) date formats. They change with system settings and can cause bulk upload validation errors. Check all date columns before upload to ensure no asterisk is present.
- Ensure all spelling, spacing, and naming conventions are consistent across the group name and holiday names.

Custom Public Holiday Data – Full Field Guidance

Field	Mandatory or Optional	Instructions
Public Holiday Group	🔴 Mandatory	Enter the exact name of the **Public Holiday Group** you want to create. For example, United States Public Holidays, France Public Holidays, or Company-Specific Holidays. ⚠️ The group name entered here must match the name referenced in the *Employee Data* sheet under the “Public Holiday Group” field.
Public Holiday Date	🔴 Mandatory	Enter the date of the public holiday in **DD/MM/YY** or **DD/MM/YYYY** format. Do **not** use relative terms like “First Monday in April.” Each date must be an actual calendar date (e.g. 01/05/25).
Holiday Name	🔴 Mandatory	Enter the name of the holiday exactly as you want it displayed in Sense (e.g. Bastille Day, Thanksgiving, Company Foundation Day). Use clear, descriptive names for accurate reporting.

Best-practice guidance

💡 **Tips for accuracy**

- Include all historical public holiday data covering any years where entitlement data exists.
- Add all holidays for the current holiday year.
- Add holidays for the upcoming holiday year to reduce the need for annual uploads.
- Keep holiday names consistent across groups (e.g. always “Christmas Day”, not “Xmas Day”).

- Ensure the Public Holiday Group name exactly matches what is entered in the Employee Data sheet. Any mismatch will prevent holidays from linking to employees.
- For multinational companies, create one group per country or region to simplify assignment and reporting.

⚠ **Caution:**
- If your company operates in the UK and uses only standard public holidays (England & Wales, Scotland, or Northern Ireland), **do not complete this sheet**.
- Completing it unnecessarily could duplicate holiday entries and cause entitlement errors.
- Ensure all records use consistent date and time formats to avoid validation errors during import (see Important rules).

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8. Bank Details Data

File name: 8.BankDetailsData.xlsx

Purpose: Records employee bank details for payroll purposes.
This sheet ensures each employee's payment details are available in Sense for future payroll and reporting integrations.

Please ensure all **mandatory fields** are completed before submitting.

Optional fields can be used to record additional account information or bank address details.

💡 **Tip:** If you have employees paid into multiple accounts, provide only the **primary payroll account**. Any secondary payment arrangements can be added later in the system if needed.

Important rules
- Each row represents **one employee's primary bank account**.
- Sort codes and account numbers must follow the correct UK formats.
- Ensure names and Employee IDs match exactly with the *Employee Data* template.
- Bank data should only be handled and transferred via secure upload links provided by Sense.

Bank Details Data – Full Field Guidance

Field	**Mandatory or Optional**	**Instructions**
Employee ID	🔴 Mandatory	Must match the **Employee ID** from the *Employee Data* sheet exactly. This links the bank details to the correct employee.
First Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly, including spelling and spacing.
Last Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly.
Sort Code	🔴 Mandatory	Use the standard UK sort code format: 00-00-00.

		⚠️ Do not add spaces or omit hyphens. Use **text format** in Excel to preserve formatting.
Account Number	🔴 Mandatory	Use the standard 8-digit format: 00000000. Do not use spaces or punctuation.
Account Name	🔴 Mandatory	Enter the **account holder's name** exactly as it appears on the bank account (typically the employee's full name).
Bank Name	🟢 Optional	Enter the name of the bank (e.g. "HSBC", "Barclays").
Bank Address	🟢 Optional	Enter the full address of the bank branch (street, town, postcode).
Notes	🟢 Optional	Include any relevant notes — for example, "Joint account", "International payroll account", or "Manual verification required".

Best-practice guidance

💡 **Tips for accuracy**

- Verify all sort codes and account numbers before submission — incorrect entries will cause payroll rejections later.
- Use **text formatting** in Excel for numeric fields to ensure values retain leading zeros.
- For non-UK accounts, contact your Sense Project Manager for additional templates (IBAN/SWIFT support).
- Ensure employee IDs are consistent across all templates before upload.

⚠️ **Caution:**

- Do **not** include personal banking data in emails — always use the secure upload link provided by your Sense Project Manager.
- Never rename or reformat the Bank Details file or its column headers, as this will prevent successful mapping during upload.

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9. Employment Checks Data

File name: 9.EmploymentChecksData.xlsx

Purpose: Records pre-employment or compliance-related checks for employees — for example, **Right to Work**, **DBS**, **Visa**, or **Qualification Verification** checks.

Completing this sheet ensures your organisation's compliance data is available in Sense from the start of your implementation.

Please ensure all **mandatory fields** are completed before submission.

Optional fields can be left blank but help build a full compliance record for each employee.

💡 **Tip:** Enter one row per check completed. If an employee has multiple checks (e.g. DBS and Right to Work), add a separate row for each.

Important rules

- Each employee can have **multiple entries** for different check types.
- All dates must use **DD/MM/YY** or **DD/MM/YYYY** format. Do not mix formats within the same file.
- Do not use asterisk (*) date formats. They change with system settings and can cause bulk upload validation errors. Check all date columns before upload to ensure no asterisk is present.
- Enter clear, consistent check types — this supports accurate reporting.
- Ensure employee IDs and names match exactly with the *Employee Data* template.

Employment Checks Data – Full Field Guidance

Field	Mandatory or Optional	Instructions
Employee ID	🔴 Mandatory	Must match the **Employee ID** from the *Employee Data* sheet exactly. This links the check record to the correct employee.
First Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly, including spelling and spacing.
Last Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly.
Type of Check	🔴 Mandatory	Enter the name of the check performed — e.g. Right to Work, DBS, Visa, Reference Check, Qualification Verification. Use consistent wording across all entries.
Date of Check Completed	🔴 Mandatory	Enter the date the check was completed in **DD/MM/YY** or **DD/MM/YYYY** format. This marks when verification was finalised, not requested.
Validity From	🟢 Optional	Enter the start date of the check's validity period, if applicable (e.g. visa start date). Use **DD/MM/YY** or **DD/MM/YYYY** format.
Validity To	🟢 Optional	Enter the end date of the check's validity period, if applicable (e.g. visa expiry date). Use **DD/MM/YY** or **DD/MM/YYYY** format.
Notes	🟢 Optional	Add relevant details, such as check reference numbers, issuing authority, or notes about follow-up requirements (e.g. "Recheck due 2026", "Renewal required annually").

Best-practice guidance

💡 Tips for accuracy

- Use a **separate line** for each check type — e.g. one row for DBS, another for Right to Work.
- Always use the **completion date** (not the date the check was submitted).
- If a check has an expiry date (like a visa), always fill in both **Validity From** and **Validity To** fields.

- Be consistent in naming conventions — for example, always use “DBS” (not “Disclosure Check”).
- Use the **Notes** field for additional references, such as certificate IDs or reminder details.

⚠ **Caution:**
- Missing or mismatched Employee IDs will prevent checks from linking to employee records.
- Ensure all records use consistent date and time formats to avoid validation errors during import (see Important rules).
- Do **not** merge cells or rename columns — doing so will stop the import from completing successfully.

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10. Company Equipment Data

File name: 10.CompanyEquipmentData.xlsx

Purpose: Records all company equipment assigned to employees — such as laptops, mobile phones, ID badges, or uniforms.

This information helps maintain accurate asset tracking and supports recovery processes when employees leave.

Please ensure all **mandatory fields** are completed.

Optional fields can be used to record additional information such as warranty, condition, or return dates.

💡 **Tip:** Record only items that have been formally issued to an employee. Pool or shared resources (like office monitors) don’t need to be included unless tracked individually.

Important rules
- Each row should represent **one item of equipment per employee**.
- All dates must use **DD/MM/YY** or **DD/MM/YYYY** format. Do not mix formats within the same file.
- Do not use asterisk (*) date formats. They change with system settings and can cause bulk upload validation errors. Check all date columns before upload to ensure no asterisk is present.
- Ensure the **Employee ID** matches the *Employee Data* sheet exactly.
- Use consistent spelling and naming for equipment types to ensure accurate reporting.

Company Equipment Data – Full Field Guidance

Field	Mandatory or Optional	Instructions

Employee ID	🔴 Mandatory	Must match the **Employee ID** from the *Employee Data* sheet exactly. Links the item to the correct employee record.
First Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly, including spelling and spacing.
Last Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly.
Type of Equipment	🔴 Mandatory	Enter the equipment category — e.g. Laptop, Mobile Phone, ID Badge, Uniform, Access Card. Keep wording consistent.
Equipment Information	🔴 Mandatory	Enter identifying details — e.g. make, model, serial number, or asset tag. For example: Dell Latitude 5540, SN12345.
Date Assigned	🔴 Mandatory	Enter the date the employee was issued the item. Format: **DD/MM/YY** or **DD/MM/YYYY** .
Warranty Expiry Date	🟢 Optional	Enter the warranty expiry date in **DD/MM/YY** or **DD/MM/YYYY** format, if applicable.
Recover on Termination	🟢 Optional	Enter Yes or No. Yes indicates the item must be returned when the employee leaves.
Return Date	🟢 Optional	Enter the date the item was returned, if applicable. Format: **DD/MM/YY** or **DD/MM/YYYY** .
Notes	🟢 Optional	Include any relevant notes — e.g. “Damaged screen”, “Upgraded in May 2025”, “Transferred from previous employee”.

Best-practice guidance

💡 **Tips for accuracy**

- Use one row per piece of equipment — if an employee has multiple items (e.g. laptop and phone), enter each on a separate line.
- Always include **serial numbers** or unique identifiers where possible for traceability.
- Use clear, consistent terms for equipment types to simplify asset reports.
- Complete the **Recover on Termination** field for all valuable or returnable items.
- When recording returns, make sure the **Return Date** reflects the date of physical return, not reassignment.

⚠️ **Caution:**

- Do **not** merge or rename columns — this will break the data mapping.
- Ensure all records use consistent date and time formats to avoid validation errors during import (see Important rules).
- Missing **Employee IDs** or mismatched names will cause the equipment to fail linking to an employee record.

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11. Pay Details Data

File name: 11.PayDetailsData.xlsx

Purpose: Records each employee’s pay details, including salary, rate, and effective date.

This information ensures that employee pay data is correctly imported into Sense and can be used for reporting or future payroll integrations.

Please ensure all **mandatory fields** are completed.

Optional fields can be left blank but will help support pay history and reporting accuracy.

💡 **Tip:** If you're recording multiple pay changes (for example, a raise or pay band update), create a separate line for each change, with the correct **Effective Date**.

Important rules

- Each row represents **one pay record per employee**.
- Use **DD/MM/YY** or **DD/MM/YYYY** for all dates. Do not mix formats within the same file.
- Do not use asterisk (*) date formats. They change with system settings and can cause bulk upload validation errors. Check all date columns before upload to ensure no asterisk is present.
- Currency codes (e.g. GBP, EUR, USD) must be included before salary figures.
- Ensure the **Employee ID** matches exactly with the *Employee Data* sheet.
- Do not use formulas — convert all calculated values to plain numbers.

Pay Details Data – Full Field Guidance

Field	Mandatory or Optional	Instructions
Employee ID	🔴 Mandatory	Must match the **Employee ID** from the *Employee Data* sheet exactly. Links the pay record to the correct employee.
First Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly, including spelling and spacing.
Last Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly.
Effective Date	🔴 Mandatory	Enter the date the pay rate or amount takes effect, using **DD/MM/YY** or **DD/MM/YYYY** format. For example, the start date of a new salary or pay adjustment.
Amount	🔴 Mandatory	Enter the salary or pay amount, including the currency code. Use format: GBP 50000, EUR 48000, or USD 60000. For hourly rates, use a similar format (e.g. GBP 15.50).
Rate	🔴 Mandatory	Describe how often the amount is paid (e.g. Annual, Monthly, Hourly, Weekly).
Pay Period	🔴 Mandatory	Define the payment frequency (e.g. Monthly, Bi-weekly, Weekly). This should align with your organisation's payroll cycle.

Reason for Change	🟢 Optional	Explain why the pay record was added — e.g. New starter, Annual review, Promotion, Pay scale adjustment.
Notes	🟢 Optional	Include any additional details, such as "Backdated to April", "Interim pay rise", or "Moved to new role."

Best-practice guidance

💡 **Tips for accuracy**

- Double-check that **currency codes** are entered before each amount — Sense will not recognise numbers without currency identifiers.
- Ensure that **Rate** and **Pay Period** values are logical and consistent (e.g. Annual rate with a Monthly pay period).
- For employees with multiple historical pay changes, list each record in chronological order with the correct **Effective Date**.
- Use consistent formatting for currency and decimals (e.g. always GBP 35000, not £35,000 or 35,000 GBP).
- Save files in .xlsx format only before uploading.

⚠️ **Caution:**

- Do **not** include any formulas or cell references — export or paste values only.
- Ensure Employee IDs, names, and Effective Dates are correct before upload.
- Never rename or reorder the template columns.
- Ensure all records use consistent date and time formats to avoid validation errors during import (see Important rules).

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12. Training Data

File name: 12.TrainingData.xlsx

Purpose: Records details of employee training courses, including course names, statuses, and completion dates.

This information helps your organisation maintain a central record of completed, scheduled, and in-progress training.

Please ensure all **mandatory fields** are completed.

Optional fields can be used to record additional context such as course expiry or progress status.

💡 **Tip:** Use consistent course names (e.g. "Fire Safety Training") to make reports clear and searchable. Avoid variations such as "Fire safety", "Fire training", or "Fire awareness".

Important rules

- Each row represents **one training record per employee**.

- All dates must be in **DD/MM/YY** or **DD/MM/YYYY** format. Do not mix formats within the same file.
- Do not use asterisk (*) date formats. They change with system settings and can cause bulk upload validation errors. Check all date columns before upload to ensure no asterisk is present.
- Use standardised course titles and statuses.
- Ensure **Employee ID** matches exactly with the *Employee Data* sheet.

Training Data – Full Field Guidance

Field	Mandatory or Optional	Instructions
Employee ID	🔴 Mandatory	Must match the **Employee ID** from the *Employee Data* sheet exactly. This links the training record to the correct employee.
First Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly, including spelling and spacing.
Last Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly.
Course	🔴 Mandatory	Enter the course name. Group similar courses under a consistent title for reporting accuracy. Example: use Fire Safety Training rather than multiple variations like Fire Safety, Fire Awareness, or Fire Training.
Course Status	🔴 Mandatory	Enter the current status of the course: Not Started, In Progress, or Completed. Use one of these exact values.
Course Start Date	🔴 Mandatory	Enter the date the course begins (**DD/MM/YY** or **DD/MM/YYYY**).
Course End Date	🟢 Optional	Enter the date the course ends or is expected to end (**DD/MM/YY** or **DD/MM/YYYY**).
Expires On	🟢 Optional	Enter the course expiry date, if applicable (**DD/MM/YY** or **DD/MM/YYYY**). Use for certifications that require renewal (e.g. "First Aid – renew every 3 years").
Progress	🟢 Optional	Can be number 0-100 to indicate percentage.
Notes	🟢 Optional	Add any context or notes, such as "Mandatory induction", "Renewed early", or "Completed externally".

Best-practice guidance

💡 **Tips for accuracy**

- Use consistent **course names** to ensure clean data and reporting (especially when multiple departments track the same course).
- Keep **statuses** consistent — only use the defined list (Not Started, In Progress, Completed).
- Fill in **Course End Dates** wherever possible to help track completions.
- Add expiry dates for all renewable certifications to simplify reminders later.
- Check all Employee IDs and names for exact matches with the Employee Data sheet before submission.

⚠ **Caution:**

- Avoid abbreviations or one-off course names that could cause duplicate entries.
- Do **not** merge, rename, or remove any columns.
- Ensure all records use consistent date and time formats to avoid validation errors during import (see Important rules).

---

13. Job Details Data

File name: 13.JobDetailsData.xlsx

Purpose: Records historical or secondary job details for employees — for example, previous positions, temporary assignments, or additional management roles.

Use this template if you want to capture each employee's role history or define more than one job record per person.

Please ensure all **mandatory fields** are completed.

Optional fields can be included to provide a full employment history and more detailed reporting.

💡 **Tip:** Use this sheet for additional or historic jobs only. The employee's **primary current role** should already be captured in the **Employee Data** template.

Important rules

- Each row represents **one job record per employee**.
- Use **DD/MM/YY** or **DD/MM/YYYY** for all date fields. Do not mix formats within the same file.
- Do not use asterisk (*) date formats. They change with system settings and can cause bulk upload validation errors. Check all date columns before upload to ensure no asterisk is present.
- Ensure **Employee ID**, **Department**, and **Location** values match those configured in your system.
- Only include secondary or past jobs — do not duplicate an employee's current position from the Employee Data sheet.

Job Details Data – Full Field Guidance

Field	Mandatory or Optional	Instructions
Employee ID	🔴 Mandatory	Must match the **Employee ID** from the *Employee Data* sheet exactly. Links the job record to the correct employee.
First Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly, including spelling and spacing.
Last Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly.

Job Title	Mandatory	Enter the job title for this record (e.g. Assistant Manager, Warehouse Operative). Ensure job titles are spelled and capitalised consistently across all templates.
Company	Optional	Enter the company name if your Sense system includes multiple companies.
Department	Mandatory	Enter the department name exactly as configured in your Sense system. Spelling and naming conventions must match.
Location	Mandatory	Enter the employee's work location exactly as configured in your Sense system.
Line Manager ID	Optional	Enter the Employee ID of the line manager for this role. Must match an existing Employee ID in the Employee Data sheet.
Start Date	Mandatory	Enter the date this job record began. Use **DD/MM/YY** or **DD/MM/YYYY** format.
End Date	Optional	Enter the end date for this role if it has finished. Leave blank for roles still active. Use **DD/MM/YY** or **DD/MM/YYYY** format.
Notes	Optional	Add relevant notes, such as "Temporary secondment", "Previous department", or "Additional management role".

Best-practice guidance

💡 **Tips for accuracy**

- Use one row per job record — for example, if an employee has had three roles, create three separate rows.
- Keep job titles and department names consistent with those configured in Sense to avoid validation issues.
- Use **Notes** to clarify context, such as "Promotion to new role", "Cross-department transfer", or "Historical record from legacy system".
- If capturing multiple concurrent roles (e.g. dual management responsibilities), enter both with the same start date and unique titles.

⚠️ **Caution:**

- Do **not** duplicate the employee's current job record — it already exists in the **Employee Data** template.
- Ensure all mandatory fields are completed for every record (especially Start Date, Department, and Location).
- Ensure all records use consistent date and time formats to avoid validation errors during import (see Important rules).
- Avoid renaming or adding columns, as this will prevent the import from mapping correctly.

---

14. Vehicle Data

File name: 14.VehicleData.xlsx

Purpose: Records details of company-assigned vehicles or vehicles linked to employee benefit schemes.

This ensures accurate tracking for insurance, tax (e.g. P11D reporting), and maintenance purposes.

Please ensure all **mandatory fields** are completed.

Optional fields help provide a full record for each vehicle and should be completed wherever possible for compliance and reporting accuracy.

💡 **Tip:** Enter one row per vehicle per employee. If an employee has had multiple vehicles (e.g. leased car replacements), record each separately with accurate start and expiry dates.

Important rules

- Each row represents **one vehicle record per employee**.
- All dates must be entered in **DD/MM/YY** or **DD/MM/YYYY** format. Do not mix formats within the same file.
- Do not use asterisk (*) date formats. They change with system settings and can cause bulk upload validation errors. Check all date columns before upload to ensure no asterisk is present.
- Ensure **Employee IDs** match the *Employee Data* sheet exactly.
- Include all relevant vehicle details, especially registration, make, and model.
- Use clear, consistent naming conventions for vehicle types.

Vehicle Data – Full Field Guidance

Field	Mandatory or Optional	Instructions
Employee ID	🔴 Mandatory	Must match the **Employee ID** from the *Employee Data* sheet exactly. This links the vehicle to the correct employee record.
First Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly, including spelling and spacing.
Last Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly.
Type of Vehicle	🔴 Mandatory	Enter the type of vehicle (e.g. Car, Van, Motorbike). Use consistent naming for reporting.
Registration Number	🔴 Mandatory	Enter the vehicle registration in standard format (e.g. AB12 CDE). Ensure accuracy, as this is often used as a unique identifier.
Make	🔴 Mandatory	Enter the manufacturer (e.g. Ford, Tesla, Volkswagen).

Model	🔴 Mandatory	Enter the model name (e.g. Focus, Model 3, Golf GTI).
P11D Value	🟢 Optional	Enter the vehicle's taxable value (P11D value). Enter the value, including the currency code. Use format: GBP 50000, EUR 48000, or USD 60000. Can have 2 decimal places (e.g. GBP 59999.99)
Colour	🟢 Optional	Enter the vehicle colour (e.g. Black, Silver, White).
Engine Size	🟢 Optional	Enter the engine size in cubic centimetres (e.g. 1999, 1600). Numeric only — no units required.
Type of Fuel	🟢 Optional	Enter the fuel type (e.g. Petrol, Diesel, Hybrid, Electric).
MOT Due Date	🟢 Optional	Enter the MOT due date in **DD/MM/YY** or **DD/MM/YYYY** format.
Insurance Provider	🟢 Optional	Enter the name of the insurance provider (e.g. Aviva, Direct Line).
Policy Number	🟢 Optional	Enter the insurance policy number.
Insurance Expiry Date	🟢 Optional	Enter the insurance expiry date in **DD/MM/YY** or **DD/MM/YYYY** format.
Notes	🟢 Optional	Add any additional information about the vehicle, such as "Leased vehicle", "Transferred from previous employee", or "Personal contribution required".

Best-practice guidance

💡 **Tips for accuracy**

- Always verify registration numbers and policy dates before submitting — this data is often audited.
- For **company car benefits**, include all financial details (e.g. P11D Value, Insurance Provider).
- Enter **MOT and insurance expiry dates** for active vehicles to support automatic reminders in Sense.
- Record leased vehicles under the employee currently responsible for them, even if ownership is external.
- Ensure consistency across all naming and formatting to support accurate reporting and compliance exports.

⚠️ **Caution:**

- Do **not** merge cells or rename columns.
- Ensure all records use consistent date and time formats to avoid validation errors during import (see Important rules).
- Check that the **Employee ID** is correct before upload; mismatched IDs will prevent vehicle records from linking properly.

---

15. Benefits Data

File name: 15.BenefitsData.xlsx

Purpose: Records employee benefits, such as healthcare, pension, life assurance, company car allowances, or other financial/non-financial perks.

This data supports accurate tracking of employee benefits and can be used for payroll, reporting, and compliance purposes.

Please ensure all **mandatory fields** are completed.

Optional fields can be left blank but are recommended to maintain a full record of active and expired benefits.

💡 **Tip:** Each row should represent one benefit record per employee.
If an employee has multiple benefits (e.g. pension + private healthcare), list each on a separate line.

Important rules

- Each row = one benefit per employee.
- All dates must be entered in **DD/MM/YY** or **DD/MM/YYYY** format. Do not mix formats within the same file.
- Do not use asterisk (*) date formats. They change with system settings and can cause bulk upload validation errors. Check all date columns before upload to ensure no asterisk is present.
- Amounts should include a **currency code** (e.g. GBP, EUR, USD).
- Ensure Employee IDs and names match the *Employee Data* sheet exactly.
- Use consistent wording for benefit types and providers.

Benefits Data – Full Field Guidance

Field	Mandatory or Optional	Instructions
Employee ID	🔴 Mandatory	Must match the **Employee ID** from the *Employee Data* sheet exactly. Links the benefit to the correct employee.
First Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly, including spelling and spacing.
Last Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly.
Type of Benefit	🔴 Mandatory	Enter the type of benefit — e.g. Private Healthcare, Pension, Life work patterAssurance, Gym Membership, Car Allowance. Keep naming consistent across all records.
Provider	🔴 Mandatory	Enter the name of the provider offering the benefit (e.g. BUPA, Scottish Widows, Aviva).

Awarded On	🔴 Mandatory	Enter the date the benefit started or was awarded, using **DD/MM/YY** or **DD/MM/YYYY** format.
Expires On	🟢 Optional	Enter the benefit end or expiry date, if applicable, using **DD/MM/YY** or **DD/MM/YYYY** format. Leave blank for ongoing benefits.
Benefit Value	🟢 Optional	Enter the value or amount of the benefit, including the **currency code**. Examples: GBP 5000, EUR 1200, USD 200. Use text format to preserve leading letters and avoid automatic number conversion.
Notes	🟢 Optional	Add any context or clarifying information — e.g. “Employee contribution required”, “Company pays full premium”, or “Benefit renewed annually”.

Best-practice guidance

💡 **Tips for accuracy**

- Record each benefit separately to allow accurate tracking, expiry reminders, and reporting.
- Keep **Type of Benefit** and **Provider** entries consistent (e.g. always use BUPA not BUPA Healthcare).
- Include **Awarded On** and **Expires On** dates for all temporary or renewable benefits.
- Use consistent **currency and value formats** (e.g. GBP 1500 rather than £1,500).
- Enter benefit values only if known — leave blank if the value is non-financial (e.g. flexible hours or company discounts).

⚠️ **Caution:**

- Do **not** merge, rename, or delete columns — this will cause upload failure.
- Ensure all records use consistent date and time formats to avoid validation errors during import (see Important rules).
- If you provide benefit values, always include the **currency code**.
- Mismatched Employee IDs will stop the benefits from linking correctly in the system.

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16. Additional Notes Data

File name: 16.AdditionalNotesData.xlsx

Purpose: Used to record any additional employee-related notes or context that aren’t covered in other templates.

This might include internal remarks, historic information, or comments migrated from legacy systems.

Please ensure all **mandatory fields** are completed.
Optional fields can be left blank but are useful for maintaining context and completeness of employee records.

💡 **Tip:** Use this sheet to capture meaningful notes that may be valuable for HR reference, onboarding, or audit purposes. Avoid including personal or sensitive commentary.

Important rules

- Each row represents **one note** per employee.
- All dates must use **DD/MM/YY** or **DD/MM/YYYY** format. Do not mix formats within the same file.
- Do not use asterisk (*) date formats. They change with system settings and can cause bulk upload validation errors. Check all date columns before upload to ensure no asterisk is present.
- Ensure **Employee IDs and names** match those used in the *Employee Data* template.
- Keep notes factual, relevant, and compliant with your organisation's privacy policies.

Additional Notes Data – Full Field Guidance

Field	Mandatory or Optional	Instructions
Employee ID	🔴 Mandatory	Must match the **Employee ID** from the *Employee Data* sheet exactly. Links the note to the correct employee record.
First Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly, including spelling and spacing.
Last Name	🔴 Mandatory	Must match the *Employee Data* sheet exactly.
Type	🟢 Optional	Enter a short category or label for the note (e.g. Onboarding, Performance, Transfer, Legacy Record).
Date	🟢 Optional	Enter the date the note was recorded in **DD/MM/YY** or **DD/MM/YYYY** format.
Notes	🟢 Optional	Enter the note text. Keep entries concise but clear (e.g. "Transferred from Division A to Division B in April 2024"). Avoid using special characters such as quotation marks or emojis.

Best-practice guidance

💡 **Tips for accuracy**

- Use **one row per note** — if an employee has multiple notes, enter each on a new line.
- Use consistent naming for note **Types** (e.g. always "Onboarding", not "Onboard").
- Include **dates** for any note referring to a specific event or change.
- Keep the content factual and appropriate — e.g. record decisions, updates, or actions, not personal opinions.
- Avoid duplicating information already covered in other templates (for example, probation details or pay adjustments).

⚠️ **Caution:**

- Never include confidential or sensitive personal information in this sheet (such as medical details or disciplinary notes).
- Ensure all records use consistent date and time formats to avoid validation errors during import (see Important rules).

- Do **not** add, rename, or remove columns.
- Ensure Employee IDs are accurate so the notes attach to the correct employee profile.

SECTION C: Advanced bulk upload with custom screens

Available on: Elite and Enterprise plans
Requires: Access to Screen Designer

If you're new to Screen Designer, see our **Screen Designer series** for step-by-step guidance.

Advanced bulk upload at a glance

Advanced bulk upload allows Administrators to upload data into:

- New custom screens
- Customised standard screens
- Empty fields in form-type screens
- New rows in table-type screens

This feature can be used:

- During initial system setup, or
- In a live system to extend your data structure in a controlled way

Unlike standard bulk upload, validation is based on your Screen Designer field properties, not fixed system rules.

⚠ **Important:**
This feature is powerful and flexible. It includes fewer built-in guardrails and must be used carefully.

Bulk upload is always additive. It cannot update or overwrite existing records.

What This Feature Supports

Scenario	Supported
Bulk upload to a new, unpopulated custom screen	✓ Yes
Bulk upload for employees whose screen is currently empty	✓ Yes
Populate newly added fields on form-type screens	✓ Yes
Add new rows to table-type screens	✓ Yes
Populate newly added columns for existing table rows	✗ No
Update or replace existing data	✗ No

Key Definitions

Populated Screen: A screen containing data for at least one employee.

Once populated:
- Structural edits affect all employees
- Removing fields may permanently remove stored data

You may still bulk upload:
- Data for employees whose screen is empty
- Data into empty fields on form-type screens
- New rows in table-type screens

Unpopulated Screen: A screen containing no data for any employee.

You may:
- Add or remove fields
- Change field properties
- Export the template
- Bulk upload all required data

Form-Type Screen: Stores a single record set per employee.

Bulk upload can:
- Populate empty fields
- Populate newly added fields

Bulk upload cannot:
- Overwrite existing values

Table-Type Screen: Stores multiple records sets per employee (rows).

Bulk upload can:
- Add new rows only

Bulk upload cannot:
- Update existing rows
- Populate newly added columns for existing rows

Critical Prerequisites

Before exporting and uploading a custom screen template:

1. The Screen Must Be Assigned

- The screen must be added to a Profile Template

- That Profile Template must be assigned to at least one employee

Bulk upload relies on Employee ID to attach records correctly.

2. Bulk Upload Is Additive Only

You may:

- Populate empty fields
- Add new rows
- Populate new screens
- Upload for employees whose screen is empty

You must not:

- Update existing records
- Use bulk upload as a correction tool

3. Mandatory Template Sequencing (Before Go-Live Only)

If using custom screen templates before go-live, upload the mandatory templates first, in this order:

1️⃣ 1.EmployeeData
2️⃣ 2.EventEntitlementData
3️⃣ 3.TimeOffData

⭐ Conditional:
7.CustomPublicHolidayData (upload first if used)

Only after these are complete should you upload custom screen templates.

Core Screens – Special Rules

The following screens are populated by the **1.EmployeeData** template and must always be treated as populated:

- Personal Details (form-type)
- Employment Details (form-type)
- Contact Details (form-type)
- Job Details (table-type)

Before Uploading 1.EmployeeData

Do not:

- Remove fields
- Change field properties

- Alter structure
  … for core screens

The EmployeeData template depends on the original structure.

After Uploading 1.EmployeeData

Form-Type Core Screens

You may:
- Add new fields
- Export updated template

Complete only:
- Employee ID
- First Name
- Last Name, and
- New field columns

You do not need to re-enter existing data.

Table-Type Core Screen (Job Details)

You may:
- Add new rows only

You must not:
- Update existing rows
- Add new fields
- Change layout or structure

Structural changes may prevent upload.

Reserved System Columns

Every exported template includes the columns:
- Employee ID
- First Name
- Last Name

These are system validators.

They should:
- Not be used as field labels in custom screens
- Not be relabelled in a screen

- Not be recreated as labels for custom fields
- Not have their column headers edited in the downloaded template
- Always be completed in the template before upload

Changing these fields in Screen Designer may:

- Impact validation
- Impact reporting
- Cause future misidentication
- Impact other screens using the same fields

💡 **Tip:**
If a screen that you want to customise already contains these fields (for example, Other Contact Details):

- Remove the fields from that screen
- Add new fields with different labels (e.g. Given name, Surname, Contact first name)

If you're creating a new custom screen and need name-type fields:

- Add new fields with labels like Given name, Surname, or Full name instead of using First Name or Last Name

---

Shared Fields – Critical Behaviour

Fields in Screen Designer are shared objects.

If you change:

- Label
- Character limit
- Dropdown options

The change applies everywhere that field is used.

Implications:

- If a field label is renamed, standard template uploads for those screens will fail validation
- If other field properties are changed (e.g. required status or character limits), standard template uploads will still run — but they will validate against the original system rules, not your updated Screen Designer settings

Structural inconsistency increases upload risk.

💡 **Best practice:**
If a field requires different behaviour on one screen only, create a new custom field instead of editing a shared one.

Downloading the Custom Screen Template

1. Go to **Settings** > **Screen Designer** > **Screens**
2. Locate the relevant screen
3. Click **More actions (...)**
4. Select **Export template**
5. Complete the template as follows:
    - Unpopulated screens → complete all required fields
    - Populated form-type screens → complete ONLY validator columns and new fields
    - Populated table-type screens → complete ONLY validator columns and new row data

💡 **Tip:** Mandatory fields that have already been populated do not need to be reentered.

⚠ **Do not:**
- Rename column headers
- Remove columns
- Reorder or merge columns
- Add new columns manually

Uploading Custom Screen Data

1. Go to **Settings** > **Bulk upload**
2. Click **New upload**
3. Select **Upload custom screen data**
4. Select the relevant screen
5. Enter a **Session name**
6. Upload file
7. Click **Validate**
8. Resolve errors (see **validation guidance**)
9. Click **Import**

Processing runs in the background.

Large files may take up to 30 minutes.

Validation Behaviour

Standard templates validate against fixed system rules.

Custom screen templates validate against your Screen Designer configuration. For example:
- Field type
- Required status

- Character limits
- Dropdown values

You are responsible for ensuring:

- Consistent date formats
- Consistent units
- Consistent naming conventions
- Consistent capitalisation
- Clean dropdown values

Known Issue (Temporary Behaviour)

Currently:

- The Employee ID field can be deleted by removing it from the Employment Details screen.
- The Employment Details screen itself can be deleted.

These are critical system components.

- Do not remove or delete them.

This will be restricted in a future release.

Final Guidance

Advanced bulk upload provides flexibility to:

- Extend your data model
- Capture legacy information
- Add new custom screens in live systems

That flexibility also means:

- Fewer enforced safeguards
- Greater structural responsibility
- Higher risk if misused

Use this feature deliberately, review screen design carefully, and treat uploads as additive extensions — never as update tools.

SECTION D: Document bulk upload

Document Load Instructions

Purpose:
This section explains how to prepare and submit employee documents using the Document Bulk Upload feature.

Following the structure and naming conventions below ensures documents are correctly validated, linked to the right employee records, and imported successfully.

Unlike data templates, documents can be bulk uploaded at any time, including after go-live, provided the correct naming conventions are used.
When updating existing documents, the new file must be named exactly the same (including file extension) as the document it replaces.

💡 **Tip**: Prepare and organise all employee documents before creating the zip file. This reduces errors during
validation.

Important rules

- Each document must be an accepted file format (see table below)
- Each file must be 10 MB or less.
- Folder structure and names must not be altered after downloading the document structure
- Avoid including sensitive or irrelevant files that do not belong in the employee record.

Accepted file formats

Accepted file formats and extensions are listed in the tables below.

Document Files

Extension	File type
.pdf	Portable Document Format
.doc	Microsoft Word Document (older format)
.docx	Microsoft Word Open XML Document

Image Files

Extension	File type
.jpg / .jpeg	Joint Photographic Experts Group
.png	Portable Network Graphics

Spreadsheet files

Extension	File type

.xls	Microsoft Excel Spreadsheet (older format)
.xlsx	Microsoft Excel Open XML Spreadsheet

Presentation files

Extension	**File type**
.ppt	Microsoft PowerPoint Presentation (older format)
.pptx	Microsoft PowerPoint Open XML Presentation

Forbidden file extensions

The following file extensions will prevent upload entirely.

Extension	**File type**
.exe	Executable file (Windows program)
.dll	Dynamic Link Library
.dat	Data file (generic)
.zip	Compressed archive (ZIP)
.7z	Compressed archive (7-Zip)
.bat	Batch file (Windows command script)
.msi	Windows Installer package
.bin	Binary file (generic)
.rar	Compressed archive (RAR)
.run	Executable file (commonly Linux installer)
.sh	Shell script (Unix/Linux)
.cmd	Command script (Windows)

Files with extensions that are not in the accepted list and are not explicitly forbidden will be skipped, and the upload will continue.

File naming rules

To avoid upload errors, file names must follow these rules:

- The following characters are not allowed in file names:
  \ / : * ? " < > |
- File names must not contain multiple dots (.)
  Only one dot is permitted, used to separate the file name and extension (e.g. filename.pdf).

Downloading your document folder structure

The document folder structure contains:
- One folder per **active employee** (leavers and employees without an Employee ID are excluded)
- Each employee folder is named using **Employee Name – Employee ID**

- A **Personal** subfolder inside each employee folder — this is where documents must be placed

Prerequisite
You must complete the **Employee Data** upload before downloading the document structure. Employee names and IDs are generated from the Employee Data template.

Download steps
1. In **Sense HR**, go to **Settings > Bulk upload**
2. Click **Download** (upper-right)
3. Select **Download document structure**
✅ A zip file containing folders for all eligible employees will download to your device.
4. Extract the downloaded zip file before editing

⚠️ **Important:**
If the download fails, this is most commonly caused by **duplicate Employee IDs** in the system.
This can only occur if a duplicate ID has been manually added after bulk uploading Employee Data.

To resolve:
- Go to **Sense HR > People > [select profile] > Employment details**
- Correct any duplicate Employee IDs
- Reattempt the download

⚠️ **Important:**
Employees will not appear in the document folder structure — and cannot have documents bulk uploaded — if:

- They do not have an **Employee ID**, or
- Their **Employee ID**, **First Name**, or **Last Name** contains any of these special characters:
  < > : “ / \ | ? *

To include these employees:

- Assign a unique **Employee ID** under **Employment details**, and/or
- Edit the **Employee ID** (**Employment details**) and **First Name** / **Last Name** (**Personal details**) to remove the special characters listed above

Once corrected, download the document structure again.

Data modification policy

The document bulk upload process matches documents to employees using the **exact folder name and Employee ID**.

- Do **not** rename, remove, or restructure any folders
- If changes are needed, update the employee's **name or Employee ID in the system first**, then re-download the folder structure

Navigation:

- **Name changes:** Sense HR > People > [profile] > Personal details
- **Employee ID changes:** Sense HR > People > [profile] > Employment details

Incorrect folder names or structures will cause documents to be **rejected during validation**.

Sense Support cannot repair malformed folder structures.
If changes are made after download, you must **download the document structure again**.

⚠️ **Exception:**
If the main folder is renamed automatically (e.g. *ConsumerDocs (copy)* or *ConsumerDocs 2*), rename it back to **ConsumerDocs**. The root folder name must always be **ConsumerDocs**.

Document Preparation – Step-by-Step Process

Step 1: Name each document correctly
Document names should reflect how they will appear in Sense once uploaded.

Examples:

- Driving Licence.png
- Passport.jpg
- Employment Contract.pdf

For document updates, the filename **must exactly match** the existing document (including extension).

This ensures the document is updated rather than duplicated.

💡 **Tip:** Using a consistent, precise naming convention (e.g. *John Smith Employment Contract*) makes administration easier and can help avoid files being placed in the wrong folder.

Step 2: Place documents in the correct Personal folder

Each document must be placed inside the correct employee's **Personal** folder.

Example path:
ConsumerDocs > John Smith – EMP378 > Personal > Passport.jpg

Folder hierarchy:

- **ConsumerDocs** – root folder
- **Employee Name – Employee ID** – used for validation and matching
- **Personal** – document destination in Sense

⚠️ **Caution:**
Placing documents in the wrong employee folder may result in employees seeing documents that do not belong to them.

Step 3: Zip the ConsumerDocs folder

Compress the **entire ConsumerDocs folder** (not individual employee folders).

Example:
ConsumerDocs.zip

Best-practice guidance

💡 **Tips for accuracy and efficiency**

- Check each Personal folder contains only that employee's documents
- Confirm filenames before zipping
- Remove duplicates and outdated files
- Keep the zip file size under **2 GB** where possible

⚠️ **Caution:**
Incorrect folder structure or naming will cause documents to be rejected or imported incorrectly.

SECTION E: Submitting Your Completed Data and Documents

Submitting your data templates

Once you've completed all required .xlsx templates, upload and validate them directly in **Sense HR** using the **Bulk Upload** feature.

Step 1: Go to Bulk Upload

1. In **Sense HR**, navigate to **Settings > Bulk upload**.
2. Select the upload action that matches your data file:

- Choose the relevant standard upload option (e.g. Upload employees, Upload event entitlements, Upload vehicle data), or
- If uploading a custom or customised template created via Screen Designer, select **Upload custom screen data**
  (This applies even if the upload replaces the process for a standard template, such as *Vehicle Data*)

💡 **Tip:** The upload options are grouped by data area. Choose the action that corresponds to the template you're uploading. But always use Upload custom screen data for templates downloaded from Screen Designer > Screens (Elite and Enterprise only).

⚠ **Caution:**
Upload the three **mandatory templates** in the correct order to maintain data dependencies. The number in each filename indicates the order:

1️⃣ **1.EmployeeData.xlsx**
2️⃣ **2.EventEntitlementData.xlsx**
3️⃣ **3.TimeOffData.xlsx**

⭐ If using **7.CustomPublicHolidayData.xlsx** (for regions outside England & Wales, Scotland, or Northern Ireland), upload this **first**, before *1.EmployeeData.xlsx*.

Step 2: Create a new session

1. Enter a **Session name** (for example, *Initial employee data load*).
   - This lets you return to the same session later if you need to correct or re-validate data.
2. Drag and drop your completed .xlsx file into the upload box, or click **Browse** to select it.
3. Click **Next** to open the preview screen.

Step 3: Validate your data

Click **Validate** in the top-right corner.

The system will check your data and show:

- **Warnings**: Rows with non-critical issues
- **Errors**: Rows with missing or invalid data
- **Success**: Rows ready to import

💡 **Tip:** Use the **Status** dropdown (upper-left) to filter by error type (e.g. *Required field*, *Invalid value*, *Duplicate*). This makes it easier to locate and fix specific issues.

Step 4: Correct and re-validate

You can edit inline

- Click the ✏️ **Edit** icon in a row.
- Make your correction.
- Click the ✅ **Check** icon to confirm and validate row.

You can delete rows that contain persistent validation errors or that are no longer required.
- Click the 🗑️ **Bin** icon in one or more rows
- Click **Delete [X] item(s)** (the number reflects the rows selected)
- Confirm deletion

Once all rows show **Valid**, proceed to import.

💡 **Tip:**
You can revalidate at any time before importing — either the entire template or specific rows. Simply click **Revalidate**.
This is useful if you return to an editing session after a break or make changes incrementally.

Step 5: Import your data
1. Click **Import** in the top-right corner.
2. The import will begin immediately, and you will see the confirmation message **Import started**.
    - You can close your browser or continue other work; processing runs in the background.
    - Large files may take up to 30 minutes to complete.
3. When finished, you'll see a confirmation message.
    - You can review uploaded sessions at any time under **Settings > Bulk upload > View history**.

Submitting your employee documents

Once you've populated each employee's **Personal** folder and created your zip file, upload documents via **Bulk Upload**.

Upload the zip file via bulk upload

Once your zip file is ready:
1. In Sense HR, go to **Settings** > **Bulk upload**
2. Click **New upload**
3. Select **Upload documents**
4. Enter a session name and upload the .zip file (drag and drop or browse)
5. Click **Next**
6. If duplicate document names are detected, choose whether to:
    - **Overwrite** the existing document
    - **Append** (add as well as) to the existing document
    - **Skip** that file

7. Click **Import**
8. Click **Done**

After submission

Once your data templates and employee documents have been uploaded:

- Your Sense HR system will immediately import the data.

💡 **Tip:** The **Bulk Upload History** tab provides an audit trail of uploaded sessions, including timestamps and user details.

Need help?
If you have any questions during the data preparation or upload process:

📩 Contact your **Sense Project Manager** or **Data Specialist** directly.

They'll guide you through corrections or confirm next steps once your data has been reviewed.

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