

Import Employees

EPM Connect Guide



Document Control

Document Overview: This document outlines the step-by-step process for importing employees within EPM Connect.

Classification: Public

Document ID: EPMC019

Author: Lauren McGuire, Product Manager, Product Management

Version: 2.0

Date of Last Review: 23rd October 2025

Last Reviewed by: Keren Prior, Director of Operational Excellence

Date of Next Review: 23rd October 2026

Document Approval

The Director of Operational Excellence shall review this guide annually and shall determine whether any further changes need to be made prior to approval.

This document was approved by Keren Prior, Director of Operational Excellence on 23rd October 2025 and is issued on a version-controlled basis under her signature.

Document History

Date of Change	23rd October 2025
Summary of Change	Changes to improve clarity.
New Version Number	v2.0
Changes to be notified to	Director of Operational Excellence

Contents

Introduction	3
Download import Spreadsheet	3
Edit Information	3
Add Employees	4
Import the spreadsheet and check for errors	4
Errors and Warnings	6

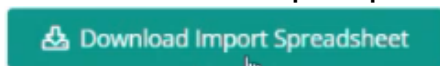
Introduction

Should you wish to upload employee data en-masse, or update records for multiple employees, this can be managed within the **Import Employees** area of the module. This can also be used for checking employee data within the system.

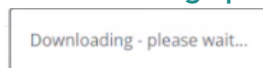
Using the **Import Employees** function will save time, particularly if adding more than ten employees. You will also benefit from validation, which will highlight any errors and provide warnings of potentially inaccurate information.

Download Import Spreadsheet

1. On the left-hand side of the EPM Connect window, click **Employees**. A list of further menu options will appear.
2. Select **Details**. A list of further options is displayed.
3. Select **Import Employees**. The **Import Employees** page is displayed.
4. Click the **Download Import Spreadsheet** button.



A **Downloading - please wait** message will appear.



Once downloaded, an Excel spreadsheet will open. If this does not open, go to your Downloads and open the most recent document.

This document is the document that you will update with the data that you wish to import.

5. Click the **Enable Editing** button in the top yellow bar of the document.



6. Select the **Instructions** tab and read the instructions carefully.

Edit information

The spreadsheet will be pre-populated with any information held within the system. Scroll through the columns and add or edit information to any blank cells, or replace data in cells you wish to update.

Important

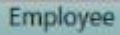
Only information within the **Employees** and **Other Qualifications** tab should be completed.

Information within the **Roles** and **Pay Additions** tabs should not be edited as this will affect payroll, with the exception of **Line Manager**, which can be updated within the **Roles** tab.

Add employees

We recommend removing all existing employees that you are not updating to avoid updating an employee in error.

1. Select the **Employees** tab.

A rectangular button with a light blue background and the word "Employee" in a dark blue font.

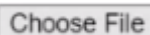
2. On the row under the last employee record, enter a new email. Do not add an employee key, this will be created automatically.

Please note any columns highlighted in a peach tone denote a **Key Column** and must not be changed. Each individual already within the system will already have an **Individual Key** set up. For new employees or individuals, once uploaded an **Individual Key** will be created, so this can be left blank. Re-look at the **Instructions** tab to check the formatting that applies to each coloured cell.

3. Move through the rest of the columns, adding any relevant data.
4. Move through the additional tabs and add any relevant data.
5. Save the document by clicking **File > Save** and return to the EPM Connect screen.

Import the spreadsheet and check for errors

1. Scroll down to the **To Import Your Data** section and click the **Choose File** button. This will open up a new **Open** window.

A rectangular button with a light blue background and the text "Choose File" in a dark blue font.

This will upload the spreadsheet ready for validation.

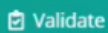
Important

Do not untick the **Use Strict Validation box** as this may result in incomplete records.

2. Go to **Downloads** and open up the last file you downloaded from your Download folder and click **Open** at the bottom of the window. You will return to the main screen.

A rectangular button with a light blue background and the word "Open" in a dark blue font.

3. Click the burgundy **Validate** button and the system will check the document for any warnings or errors within the document.

A rectangular button with a dark blue background, a white checkmark icon, and the word "Validate" in white font.

4. A message will appear to show the document is being checked.

/ validation results carefully in the returned workbook.

A progress bar with a light blue background and a dark blue border. Inside the bar, there is a dark blue box with the text "Validating uploaded file. Please wait, this may take some time." in white font. Above the bar, there are two interlocking gears, one light blue and one dark blue.

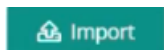
5. If the file passes validation you will see the following message within the screen

The file passed validation with no errors or other information to note. You can click 'Import' to import the file.

6. If this message appears click the **Import** button. If a message appears displaying any errors and warnings, see **Errors and Warnings** below.



7. A **Confirm Import** window will appear. Please be aware that any information you have changed within the spreadsheet will overwrite any information in the system, if you do not wish to over-ride these changes click **Cancel** or to override these, click **Import**.



8. A message will appear whilst the system imports the information and the data within the spreadsheet will be imported into the module.



9. Once the information is imported you will see the following message within the screen:

File imported successfully. This file cannot be used again; please download a new copy above if further changes are needed.

10. To view the details you have added, go to the left-hand side of the EPM Connect window and click **Employees**. A list of further menu options will appear.
11. Click **All Employees**. The **Employees** page is displayed. This will show all employee records.

Once imported the spreadsheet you have used before cannot be used again. Therefore, should you need to add or update employees en-masse again - a further download and update of the import spreadsheet would be required.

This spreadsheet contains PII (Personally Identifiable Information) and sensitive data. We therefore recommend deletion of the spreadsheet once the process is completed, and best practice, in order to ensure adherence to data protection should include regular checks of your downloads.

Errors and Warnings

If a message appears displaying any errors and warnings, follow the instructions below.

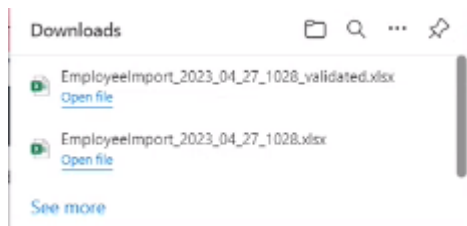
The file passed validation with no errors. However, please review the following points carefully before you click 'Import' to import the file:

- Validation has identified 11 warnings in the spreadsheet.
- Validation has identified 93 empty rows that have not been read in the spreadsheet.

If there are no errors, only warnings, you can still import the spreadsheet. However, we recommend reviewing these warnings before uploading.

Review Errors and Warnings

1. Go to **Downloads**. Open up the file with 'validated' in the title. The file will open.

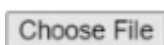


2. The **Instructions** tab is displayed. Read through the instructions carefully.
3. Click the **Employees** tab. The **Employees** tab is displayed.
 - Any tabs highlighted in red denote a **Critical Issue**.
 - Any tabs highlighted in yellow denote a **Warning**.
 - Any tabs highlighted in green denote there are no errors or warnings and do not need to be changed.

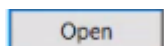
4. Click on any of the yellow or red tabs.

Column A confirms whether there are any Warnings or Critical Issues. Hover over the cells in column A and the cell that the Warning or Critical Issue relates to will be shown.

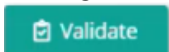
- Any cells highlighted in red denote a **Critical Issue**.
 - Any cells highlighted in yellow denote a **Warning**.
5. Make any changes to the highlighted cells.
 6. Move through each tab highlighted in red or yellow and repeat the steps above.
 7. Save the validated version by clicking **File > Save** and return to the EPM Connect screen.
 8. Click the **Reset** button.
 9. Scroll down to the **To Import Your Data** section and click the **Choose File** button. This will open up a new **Open** window.



10. Go to **Downloads** and open up the last file you downloaded and click **Open** at the bottom of the window. You will return to the main screen.



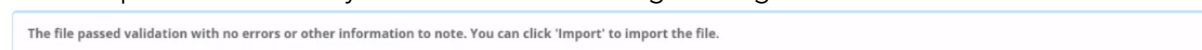
11. Click the burgundy **Validate** button and the system will check the document through for any warnings or errors within the document.



12. A message will appear to show the document is being checked.



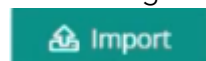
13. If the file passes validation you will see the following message within the screen



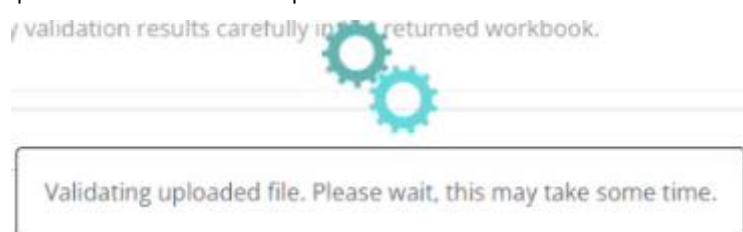
14. If this message appears click the **Import** button. If a message appears displaying any errors and warnings, see **Errors and Warnings** below.



15. A **Confirm Import** window will appear. Please be aware that any information you have changed within the spreadsheet will overwrite any information in the system, if you do not wish to over-ride these changes click **Cancel** or to override these, click **Import**.



16. A message will appear whilst the system imports the information and the data within the spreadsheet will be imported into the module.



17. Once the information is imported you will see the following message within the screen:



18. If this message is not seen and instead replaced by remaining errors and warnings, repeat the steps above until no errors and warning are shown.

Warnings relate to potential errors identified by the system. If you agree with all the information displayed within these cells, the warnings will still appear, but you are able to import the spreadsheet.

19. To view the details you have added, go to the left-hand side of the EPM Connect window and click **Employees**. A list of further menu options will appear.

20. Click **All Employees**. The **Employees** page is displayed. This will show all employee records.

Once imported the spreadsheet you have used before cannot be used again. Therefore, should you need to add or update employees en-masse again - a further download and update of the import spreadsheet would be required.