

Create Data Template

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What is a Data Template?

The data template is generated based upon the programs entered: Cash Compensation, Benefits, Estimated Tax Savings and Other Valuable Benefits. After you have entered and finalized your programs naming conventions, it is time to generate the data template.

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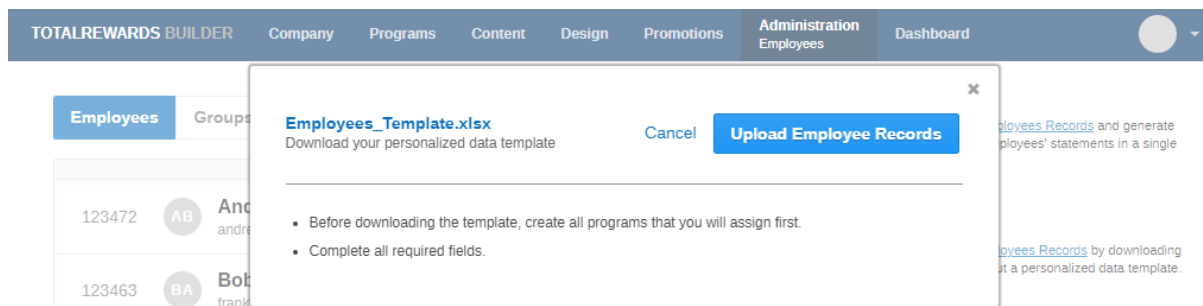
Once all Cash Compensation and Benefits **programs** are set up in the portal, *download blank data template*, go to **Administration**

Then select **Employees** in the drop-down

Then click **Import Employees Records** link

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On the pop-up window, click **Employees_Template.xlsx**



Save the blank template to your computer and use that to populate your data fields.