

Data Upload and Access Statements

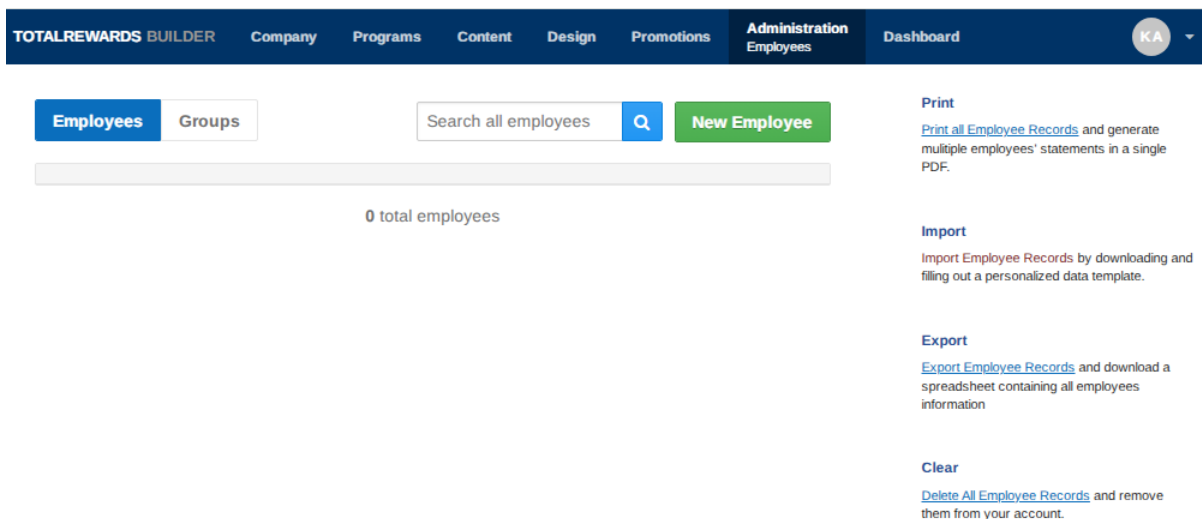
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Once your **data template** is populated, you can upload it to **TotalRewards Builder** to generate statements. After statements are generated, you can:

- Export employee records
- View online versions
- Print PDF versions
- Delete or clear records

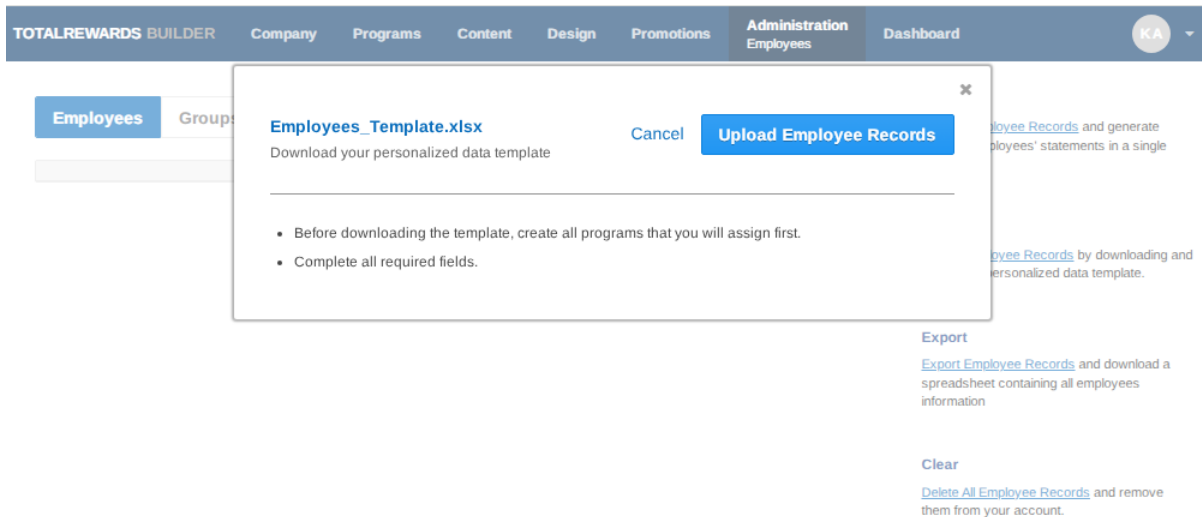
□ Import Data Template:

1. Go to **Administration**.
2. Select **Employees** from the dropdown.
3. Click the **Import Employee Records** link.



The screenshot shows the 'TOTALREWARDS BUILDER' interface. The top navigation bar includes 'Company', 'Programs', 'Content', 'Design', 'Promotions', 'Administration Employees' (selected), and 'Dashboard'. A user profile icon 'KA' is in the top right. Below the navigation bar, there are tabs for 'Employees' (selected) and 'Groups'. A search bar labeled 'Search all employees' with a magnifying glass icon and a green 'New Employee' button are present. Below the search bar, a message states '0 total employees'. On the right side, there are three sections: 'Print' with a link 'Print all Employee Records' and a description; 'Import' with a link 'Import Employee Records' and a description; and 'Export' with a link 'Export Employee Records' and a description. At the bottom, there is a 'Clear' section with a link 'Delete All Employee Records' and a description.

4. Click the **Upload Employee Records** button.



Employees_Template.xlsx

Download your personalized data template

Cancel Upload Employee Records

- Before downloading the template, create all programs that you will assign first.
- Complete all required fields.

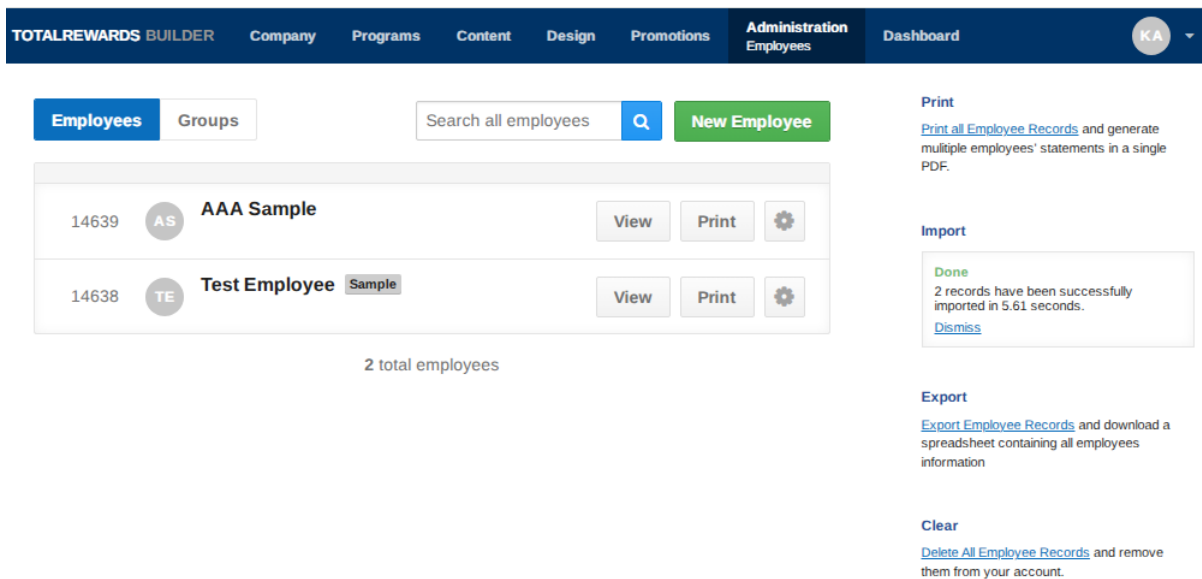
Export

[Export Employee Records](#) and download a spreadsheet containing all employees information

Clear

[Delete All Employee Records](#) and remove them from your account.

- Choose the update data template and wait for the job to process, you will see a processing indicator.
- If the upload is successful, a list of all uploaded employees will display.
- Click **Dismiss** to close the upload confirmation.



Employees Groups

Search all employees

New Employee

14639	AS	AAA Sample	View	Print	Settings
14638	TE	Test Employee Sample	View	Print	Settings

2 total employees

Print

[Print all Employee Records](#) and generate multiple employees' statements in a single PDF.

Import

Done

2 records have been successfully imported in 5.61 seconds.

[Dismiss](#)

Export

[Export Employee Records](#) and download a spreadsheet containing all employees information

Clear

[Delete All Employee Records](#) and remove them from your account.

Note: Ensure your data matches the template exactly. Do not rename columns, alter the file structure, or delete columns. If a column is not in use, leave it blank to prevent upload errors.

Quick Steps: Administration → Employees → Import Employee Records → Upload Employee Records → Choose Template → Process → Dismiss

Access or View Statements:

- **View button** – Opens the online version of the statement.
- **Print button** – Generates the PDF/print version.

□ **Note:** Use the **View** button to quickly check statement details online. Use the **Print** button to see a downloadable PDF or a hard copy.

□ **Quick Steps:** Administration → Employees → Select Employee → View / Print
