

IRIS

Cascade HRi

Cascade HR Data Template



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Contents

Introduction	3
Field types	4
Tool tips.....	5
Data sorting and filtering	5
System lists.....	5
Additional fields	6
Help & assistance	7
Company STRUCTURE (Hierarchy)	7
Posts	9
Working calendars.....	11
Working day	12
Working calendar (Fixed) – 7 day calendar.....	13
Working calendar (Not Fixed) – rolling calendar	13
Currencies	14
Bank holidays.....	15
Employee.....	15
Job & salary	16
Statutory leave	18
Absences	19
Holidays.....	20
Home address.....	21
Next of kin	21
Bank.....	22
Pension.....	22
Auto enrolment.....	22
Benefits.....	23
Medical contacts.....	23
Appraisals.....	23
Discipline	24
Grievance	24
Skills	24
Qualifications	25





Vehicles.....26

Training history.....26

Introduction

This document is a guide to help you to populate the Cascade HR data template with your employee data and is designed to be used in conjunction with the data template file, which should have been sent along with this document and the pre-recorded video, which can be found here:

<https://trainingcentre.iris.co.uk/courses/category/iris-cascade-hr-payroll>.

It is not a step-by-step explanation, so if you have questions that are not answered in this guide or the video, please contact your Cascade project manager who will be able to provide the relevant assistance.

It is very important this document is referred to when populating the data template. Any assumptions made may result in the Cascade system working differently than you thought. This may result in substantial time being spent by you correcting issues.

There are multiple data sheets for you to populate but only company structure, posts, working day, working calendar (fixed), employee, and job & salary are mandatory. All mandatory fields and sheets are detailed on the data template, and they must be populated as a minimum for the Cascade data migration team to create basic employee records.

A useful and time-saving tip is that data for the following screens can be directly imported into the system using the Cascade excel import function, once you have access to the system using the screen and database customiser tool (if you have purchased this functionality), which you will be shown how to use during your screen design session:

- Home address
- Next of kin
- Bank
- Pension
- Benefits
- Medical contacts
- Appraisals
- Disciplinary
- Grievance
- Qualifications
- Training history

We do however recommend that you add as much information that you can into the data template.

The key below details how to identify which columns and sheets are mandatory:



Column Key		
Mandatory	Orange	Must always contain an entry
Optional	White/Blank	These fields are optional
Work Sheet Key		
Mandatory	Orange	These sheets must be filled in
Cross Referenced	Yellow	These sheets contain data which are referenced in other sheets
Optional	White/Blank	These are your additional employee sheets which are optional

Data key

- The mandatory (orange) fields and sheets detail the minimum which must be populated to create your employees in Cascade.
- The yellows sheets contain data which is referenced in other sheets.
- The optional (white/blank) fields and sheets are those which do not have to be populated. If you do enter data into these fields and sheets, that data will be transferred into your Cascade database.

Field types

All fields have a 'type' associated to them. These types must be conformed to, and they are outlined below. Each field type is detailed at the top of each column.

Text

Any character can be added into this field. The amounts of characters that are allowed in a text field are limited to 3, 50 or 1000 characters. Any extra characters added will be removed to meet the limit of the field.

Numeric

Enter numbers only in this field. You can enter decimal places but not commas or symbols.

Integer

Enter whole numbers only in this field. You cannot enter decimal places, commas or symbols.

Date

All dates must be in the format dd/MM/yyyy e.g.: 01/01/2005, not 01/01/05.

Yes/No

Must only contain the word Yes or No. If left blank, it will default to No.

M/F

Must only include M or F, any left blank will default to F.

Currency

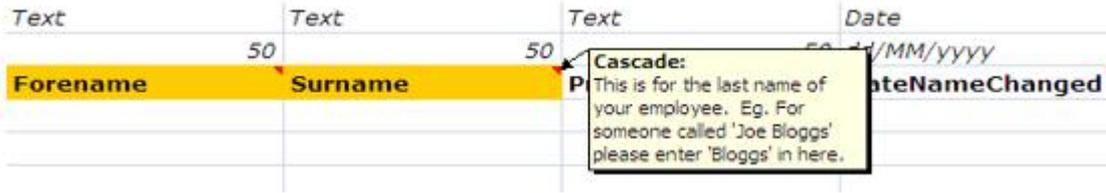
You can enter any currency value in this field by using the 3-letter code name for the currency. Any values left blank will default to GBP.

All Fields

Where you do not have any data, please leave it blank (unless it is a mandatory field) please do not add things such as N/A as this will have to be removed before the import.

Tool tips

In the column headers on each data sheet, you will see a small red triangle in the corner of the field name. This is a tool tip. Hold the cursor over the field you will see a text box appear; indicating what data is required in that column. Please ensure you review this information as you complete each field.



Data sorting and filtering

You must not change the field names in the column headers or the order in which they appear, as this will affect the data review and data transfer and you may incur an additional cost for rectifying and completing your transfer.

If you wish to change the field name, you can easily change this in Cascade later once you have access to the system by using the screen and database customiser tool (if you have purchased this functionality).

You can perform data sorts and filtering on your data in all the worksheets but please ensure that you don't include the column headers. See example below:

EmployeeID	Forename	Surname	PreviousName	DateNameChanged	MiddleName	Initials
101	Test	Name	Testname	01/01/2000	Testmid	T
102	Test	Name	Testname	02/01/2000	Testmid	T
103	Test	Name	Testname	03/01/2000	Testmid	T
104	Test	Name	Testname	04/01/2000	Testmid	T
105	Test	Name	Testname	05/01/2000	Testmid	T
106	Test	Name	Testname	06/01/2000	Testmid	T

Sort

Add Level
 Delete Level
 Copy Level
 Options...
 My data has headers

Column	Sort On	Order
Sort by: EmployeeID	Values	Smallest to Largest

OK Cancel

System lists

When populating some of the columns with a 'Text' field type, you will be creating a system list (drop-down menu) within Cascade.

Try and be as accurate and consistent with your spelling/wording as possible so that the system lists in Cascade are kept tidy. However, you can easily edit system lists in Cascade later.



There are columns that create system lists on each data sheet. Read the tool tip for each column as it will be noted there if it will create a system list or not. Examples of the incorrect and correct way of creating system lists are below:

Incorrect:

Text	Text
Title	<div style="border: 1px solid black; padding: 5px;"> Cascade: i.e. Mr, Mrs, Miss, Ms. Populating this field will create a system list within Cascade. </div>
Miss	
miss	
MISS	
Miss.	
MISS.	

Correct:

Text	Text
Title	<div style="border: 1px solid black; padding: 5px;"> Cascade: i.e. Mr, Mrs, Miss, Ms. Populating this field will create a system list within Cascade. </div>
Miss	

Additional fields

If you have additional data that you wish to transfer but there are no existing columns for it on the Data Template, this needs to be discussed and agreed with your Project Manager as it may be chargeable. Up to 30 additional fields can be added free of charge – more than 30 will be chargeable.

The fields can either be added to end of existing sheets or added to new sheets. If you add new sheets to the end of the template, these will be created as screens in Cascade.

Do not move columns around within the template. If you wish to add an additional column, insert it at the very end of all the other columns on the relevant sheet.

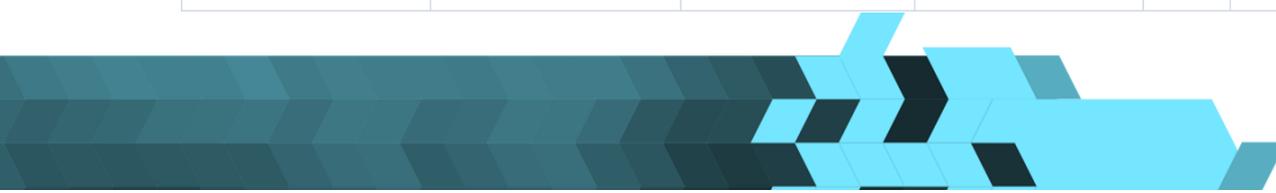
Important: Only add additional fields if you have data which you want Cascade to transfer. If you require additional fields but you don't currently have any data for them, these can be added during your training, using the screen and database customiser tool (if you have purchased this functionality).

To add an additional field to the data template, you must enter the data type, field length/format and field name for each new column you add. Please note that field names cannot include special characters, e.g. : / £ \$: " . ,

In this example 2 additional fields have been added into columns AJ and AK:

- Column AJ is to be added as a "Text" field with "50" characters.
- Column AK is to be added as a "Date" field with the standard format for dates "dd/MM/yyyy".

AH	AI	AJ	AK	AL	AM	AN
Yes/No	Yes/No	Text	Date			
3	3	50	dd/MM/yyyy			
BookAbsenceInMinutes	BookHolidaysInMinutes	Test Additional Field 1	Test Additional Field 2			
		Test Data	01/01/2000			
		Test Data	02/01/2000			
		Test Data	03/01/2000			
		Test Data	04/01/2000			
		Test Data	05/01/2000			
		Test Data	06/01/2000			
		Test Data	07/01/2000			
		Test Data	08/01/2000			
		Test Data	09/01/2000			



Help & assistance

This document should answer any questions you may have in relation to the data template. Also please remember the tool tips on each field in the template.

Should you still need assistance you can contact the Cascade data migration team, if you do not already have a contact to reach out to, please refer to your project manager who can arrange further assistance of you.

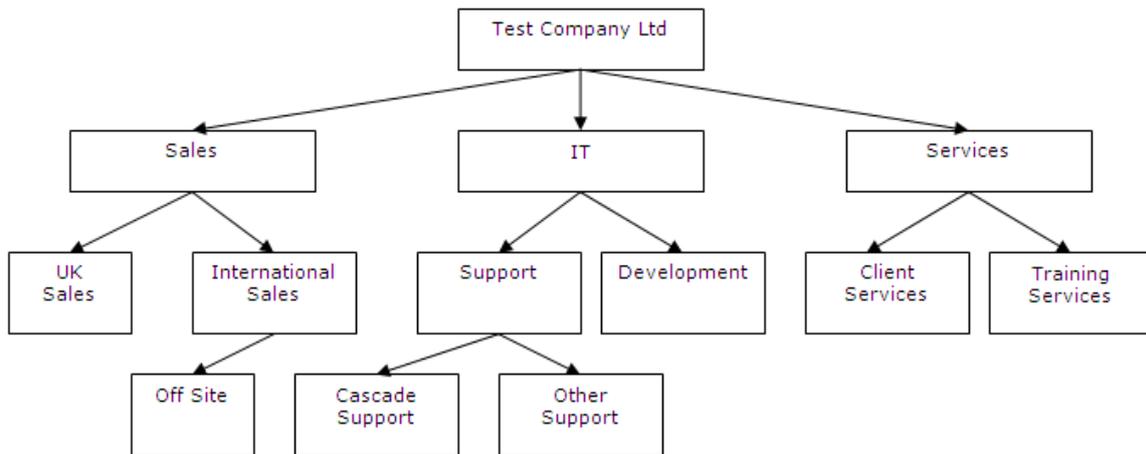
Company STRUCTURE (Hierarchy)

This data sheet is used to build your company structure into the Cascade format. Below is an example of how this data sheet should be populated:

	A	B	C	D	E	F
1	Company Structure	This sheet is mandatory				
2	<i>Integer</i>	<i>Text</i>	<i>Text</i>	<i>Text</i>	<i>Text</i>	<i>Text</i>
3	<i>nnn</i>	<i>50</i>	<i>50</i>	<i>50</i>	<i>50</i>	<i>50</i>
4	CompanyStructureNode	StructureLevel1	StructureLevel2	StructureLevel3	StructureLevel4	StructureLevel5
5		1 Test Company Ltd				
6		2 Test Company Ltd	Sales			
7		3 Test Company Ltd	Sales	UK Sales		
8		4 Test Company Ltd	Sales	International Sales		
9		5 Test Company Ltd	Sales	International Sales	Off Site	
10		6 Test Company Ltd	IT			
11		7 Test Company Ltd	IT	Support		
12		8 Test Company Ltd	IT	Support	Cascade Support	
13		9 Test Company Ltd	IT	Support	Other Support	
14		10 Test Company Ltd	IT	Development		
15		11 Test Company Ltd	Services			
16		12 Test Company Ltd	Services	Client Services		
17		13 Test Company Ltd	Services	Training Services		
18						
19						

Each time you add a new node to the company structure, you should add it on the next row down (see the above example). This is because each new division, department and team that is added, must have its own unique Company Structure Node for reporting purposes.

Below is the company structure of Test Company Ltd. Note that this is not an organisation chart. The company structure is based around divisions, departments, and teams.



When your company structure data is transferred from the data template into Cascade, an example of what it will look in the organisation explorer is shown below:



When populating the company structure data sheet, do not think about person-to-person reporting lines. This is catered for on the job & salary data sheet.

Here is an explanation of the company structure data sheet fields:

Company structure node:

This column will automatically populate as you enter data into the structure levels. This value will then be used to assign an employee to the correct location in the company.

Structure level 1:

This is the top level of the company structure, i.e. your company name. During the data transfer, this will default to the company name that is on your Cascade licence if it's different to what you have entered on the data sheet. There can only be 1 unique structure level 1 as this is the root node.

Structure level 2:

This is the second layer of the company structure, i.e. the names of the different divisions (e.g. sales, IT and services). In the data sheet example, each division name appears more than once because there are multiple departments in each of the divisions.

Structure level 3:

This is the third layer of the company structure, i.e. the names of the departments (e.g. UK sales, international sales, support, development, client services and training services). In the data sheet example, the support department appears twice because there are 2 teams in this department.

Structure level 4:

This is the fourth layer of the company structure, i.e. the names of the teams (e.g. Cascade support, other support and off Site) that are within the support and international sales departments.

If you have locations to consider this could be added into structure level 2, and the other levels above would all move to the next structure level for example:

- Structure Level 1 = Company Structure
 - ↳ Structure Level 2 = Locations
 - ↳ Structure Level 3 = Divisions
 - ↳ Structure Level 4 = Departments
 - ↳ Structure Level 5 = Teams

You do not have to use all the above levels if you are a relatively small company or have flat structures, these are just examples.

Posts

This sheet is mandatory.

It is used to record all distinct posts and their related job titles.

The posts are used as a job template when new starters join.

The post ID and job title are, in most instances likely to be the same i.e. post ID of HR manager and job title of HR manager.

PostID	JobTitle	NormalHours	ContractType	Classification	CompanyStructureNode
Project Manager	Project Manager	40	Permanent	Managerial	1
HR Manager	HR Manager	37.5	Permanent	Managerial	2

The Post ID can be alphanumeric. The most important thing to note whilst filling in the posts is that each one must have a distinct name.

If say for example, you have two teams of project managers and one team works a standard 37.5 hours per week and the other works a standard 40 hours per week, you will need to create two distinct posts to calculate their FTE (Full Time Equivalent) correctly.

If you have multiple employees with the same Post for example, if you have 10 admin assistants who all have 37.5 hours as their full-time hours then you only need to create one Post for them. If any of them are part time and work less than this, then this will be reflected by the number of hours they work added on the Job & Salary tab.

PostID	JobTitle	NormalHours	ContractType	Classification	CompanyStructureNode
Project Manager 40	Project Manager	40	Permanent	Managerial	1
Project Manager 37.5	Project Manager	37.5	Permanent	Managerial	1



There is a Posts table in Cascade where all your job posts can be maintained.

Posts screen – list view:

Posts

Last Logged In: 16/09/2022 13:40

Use this page to view, add and delete posts.

Search On: Group on Job Title Show Closed Posts

Filter on Job Title: [\[All\]](#) [A](#) [B](#) [C](#) [D](#) [E](#) [F](#) [G](#) [H](#) [I](#) [J](#) [K](#) [L](#) [M](#) [N](#) [O](#) [P](#) [Q](#) [R](#) [S](#) [T](#) [U](#) [V](#) [W](#) [X](#) [Y](#) [Z](#)

Job Title	Post ID	Actions
HR Assistant	HR Assistant	[Clone] [Delete]
HR Director	HR Director	[Clone] [Delete]
HR Executive	HR Executive	[Clone] [Delete]
HR Manager	HR Manager	[Clone] [Delete]
HR Manager 40	HR Manager 40	[Clone] [Delete]
HR Officer	HR Officer	[Clone] [Delete]

How are posts used in Cascade?

The posts table links to the job & salary screen in Cascade. A Post is selected each time a new Job record is created for an employee, by selecting it from the post ID field. The values held against the post record such as the job title and normal hours are then used as the basis for the Job record. Some of these values can be changed for the individual job record e.g. The actual number of working hours, some are fixed by the choice of Post e.g. Job Title.

An employee’s FTE (Full Time Equivalent) is calculated from the position you allocate to them from the posts table, along with the data you have entered against that post:

Important: The post must be given the standard full-time weekly hours for that position in the Normal Hours field. When that position is allocated to an employee, you can then amend the actual hours the employee works in their job & salary screen in the normal weekly hours field. For example, a post may have 37.5 weekly hours as standard, but an employee assigned to that post might only work 28 hours per week. Cascade will link these 2 pieces of information together and calculate that the employee’s FTE is 0.75.

In turn, this will then go on to calculate pro-rata rules in Cascade, based upon the employee’s FTE value.



Working calendars

All employees in Cascade must be assigned a working calendar. If you have part-time staff or employees on various shift patterns, you can build in all the different working calendars on the data template. If you wish to build your working calendars into the data template, we recommend that you have a Cascade consultancy day to ensure they are created correctly.

It is possible to configure working calendars when you get access to Cascade, rather than building them in the data template but there are implications of doing this. If you don't complete the working calendars on the data template, employees will be given a default working calendar at the time of data transfer.

The implication of doing this is that when you later enter the Cascade system to amend the employee's working calendar to its true pattern, Cascade will not back-date the changes, and therefore the employee's job history won't be accurate.

If a working calendar is not provided, then the following assumptions will be made when constructing your absence data:

- When the data is transferred, it is assumed that 1 day of absence is 7.5 hours.
- If you indicated on the employee data sheet that you wish to book absence in minutes, then each 7.5 day of absence will be calculated to 450 minutes.
- When the data is transferred, a 5-day working week is assumed (Monday – Friday). If any absences fall outside of this time, then they will not be calculated as absence.

An example of the default office calendar is shown below. As you can see, the employee works Monday to Friday and non-working days are highlighted in grey.

Working calendars are used in Cascade for calculating the duration of holidays and absences for SSP rate (payroll) when a record is recorded against an employee.

The standard option in the system, is for holidays or absence to be booked in days or half days, however you can also choose for some employees who work short, varied, or compressed hours in their working patterns to be switched to have their holidays and absence calculate in hours and minutes. Please refer to the employee section of this guide to identify if an employee should have their holidays and or absence recorded in days or hours and minutes.

On the office calendar below, a holiday or absence booked on a working day will show on their record as a duration of 1 day or 7 hours 30 minutes if you choose to calculate in hours and minutes.

Working calendar screen:

Working Calendars

Use this screen to create, modify and delete working calendars.

Day
Pattern
Calendar
Calendar Preview

Calendar to Preview: Office Calendar Show: 12 Months Year: 2011 Month: Jan

	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M							
Jan							01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Feb			01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28							
Mar			01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31				
Apr					01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30			
May	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31						
Jun				01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30				
Jul					01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31		
Aug		01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31					
Sep					01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30			
Oct						01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	
Nov			01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30					
Dec					01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31		

If you wish to create Working Calendars in the data template, the following data sheets need to be populated. Please read the Fixed and Not Fixed options to make sure that you are using the correct template to populate your data.

Working day

Populate this data sheet with all the current working days (and non-working days) that you have in use. This will show how many hours are in a particular working day and whether this is a full working day or just a morning or afternoon. This is needed for accurately calculating absences and holidays. Please look at the test data for an example.

For example, the default office day is set as 1 day in duration and 450 minutes (i.e. 7hours 30minutes). You can use a set working day in multiple working calendars, so you only have to create this working day once.

If you have part-time employees who work half a day in the morning or afternoon, then you would create a working day called office AM or office PM example below:

Working Day	This sheet is mandatory	
<i>Text</i>	<i>Numeric</i>	<i>Integer</i>
	50	nnn.n
DayName	DurationDays	DurationMinutes
Office Day		1 450
Non Working Day		0 0
Office AM		0.5 225
Office PM		0.5 225
8 Hour		1 480
5 hour		1 300
9 hour		1 540

There are 2 types of working calendars in Cascade.

- **Fixed** – the pattern is fixed to the days of the week and is a 7-day working pattern, starting on a Sunday and ending on a Saturday.
- **Not-Fixed** – the pattern is not fixed to days of the week and is used for rolling shift patterns.

Working calendar (Fixed) – 7 day calendar

CalendarName:

Populate this field with a name that you want this specific working calendar to be called. We recommend these are kept generic, so if there is someone else with the same working calendar then you only need to create one, which then can be assigned to multiple employees if required.

SundayDayName/MondayDayName etc:

If the working calendar you are building has a pattern of Monday-Friday only, then populate the SundayDayName and SaturdayDayName fields with the name 'Non-Working Day' – do not leave it blank.

See the below example of how to populate this data sheet:

Working Calendar (Fixed To Day Of Week)			This sheet is mandatory			Note: No User Defined fields can be added to this sheet		
Text	Text	Text	Text	Text	Text	Text	Text	Text
50	50	50	50	50	50	50	50	50
CalendarName	SundayDayName	MondayDayName	TuesdayDayName	WednesdayDayName	ThursdayDayName	FridayDayName	SaturdayDayName	
Office Calendar	Non Working Day	Office Day	Office Day	Office Day	Office Day	Office Day	Non Working Day	
Mon - Thur	Non Working Day	Office Day	Office Day	Office Day	Office Day	Non Working Day	Non Working Day	
Tue - Sat	Non Working Day	Non Working Day	Office Day	Office Day	Office Day	Office Day	Office Day	

Working calendar (Not Fixed) – rolling calendar

This type of working calendar is not fixed to the days of the week and can be any length of working pattern. This is used for any working pattern that is not 7 days long and is a rolling pattern.

You must create a record on this sheet for every day of the working pattern, even if a day is not due to be worked.

DayNumber:

The first day in the pattern should be number 1, the second day 2 and so on for every day that is in the working pattern. There should be no gaps or duplicates in this field.

DayName:

Enter a day name (which you populated in the working day data sheet) for each day of that working pattern. If the employee doesn't work on a particular day, populate the field with 'Non-Working Day' – do not leave it blank.

StartDate:

This must be completed for each not-fixed calendar. This links the pattern to specific dates in the planner. You only need to enter the date when the pattern begins as the pattern will then carry on until the end date of the pattern, which will be automatically set in the system.

In the below example, the 4 on 4 off pattern starts on the 1st January 2022 and starts with 4 working days. This will indicate that any employee on this working calendar will be at work between 1st and 4th January 2022. As the last 4 days in the pattern are indicated as non-working days, any employee assigned to this working calendar will show as not due to work between the 5th and 8th January 2022.

Working Calendar (Not Fixed To Day Of Week)			Note: No User Defi
Text	Integer	Text	Date
50	nnn	50	dd/MM/yyyy
CalendarName	DayNumber	DayName	StartDate
4 on 4 off		1 Office Day	01/01/2022
4 on 4 off		2 Office Day	
4 on 4 off		3 Office Day	
4 on 4 off		4 Office Day	
4 on 4 off		5 Non Working Day	
4 on 4 off		6 Non Working Day	
4 on 4 off		7 Non Working Day	
4 on 4 off		8 Non Working Day	

How to record flexible working patterns and the best way to deal with these for your business can be discussed further with your product consultant, once they have established your requirements during your administration session.

Currencies

If you leave currency fields blank, they will default to GBP. If you pay employees in different currencies, enter the details into this data sheet.

Some countries have 2-bit symbols which may not be compatible with Cascade, e.g., Japanese, Chinese, Arabic. In this case, just use the 3-character currency code into the Symbol field.

Currencies				
Text	Text	Text	Integer	Text
3	3	1	n	1
Currency	Symbol	DecimalSeparator	DecimalPlaces	ThousandSeparator
GBP	£	.	2	,
USD	\$.	2	,
JPY	¥			

Bank holidays

During data transfer, the next three years' worth of bank holidays for England & Wales, Scotland and Northern Ireland are automatically created. If the bank holidays column on the Job & Salary sheets is not filled in, all records are defaulted to be England & Wales.

If you want to build a company specific bank holiday year, enter the details in here. See the example below for a test company who gives with 3 bank holidays a year over the Christmas and New Year. If you wanted to add Bank holidays in for a different country, then you would add the country's name into the "ProfileName" field

Bank Holidays			Note: No User Defined fields can be added to this sheet		
<i>Text</i>	<i>Text</i>	<i>Date</i>			
50	50	dd/mm/yyyy			
ProfileName	HolidayName	HolidayDate			
Xmas and NY	New Years Day	01/01/2023			
Xmas and NY	Christmas Day	25/12/2023			
Xmas and NY	Boxing Day	26/12/2023			

Once you have added in your new bank holiday name, you can go back to the Job & Salary data sheet and also enter it into the "BankHolidays" column against the appropriate employee.

Employee

The Employee data sheet is where you populate data about your employees, whether they are current staff, leavers, or contractors etc. You must not exceed the live employee count you are licensed for, but you can add as many leavers as you wish.

Here are some of the most important fields on the Employee data sheet. For information about all the fields, read the tool tips on the data template.

Employee ID:

Each employee must have a unique employee ID value assigned to their record. If you do not currently have IDs for your staff, you will need to generate one on this template. We recommend that you use numeric rather than alphanumeric IDs.

If you have (or are thinking about purchasing) the Cascade payroll module, you should use only numeric IDs, as Cascade payroll cannot accept alphanumeric IDs or leading zeros.

Don't start your numbering with leading zeros as they will be dropped when data is transferred.

Date of join:

This is the date that the employee started with the company.

Continuous start date:

Enter a date in here if the employee was a TUPE employee that was transferred from one company to your current company. This field is used for Length of Service calculations.

Date of leaving:

If you populate this field with a date, it will mark that employee as a leaver in Cascade. If there is no date in this field, they will count towards your live employees.

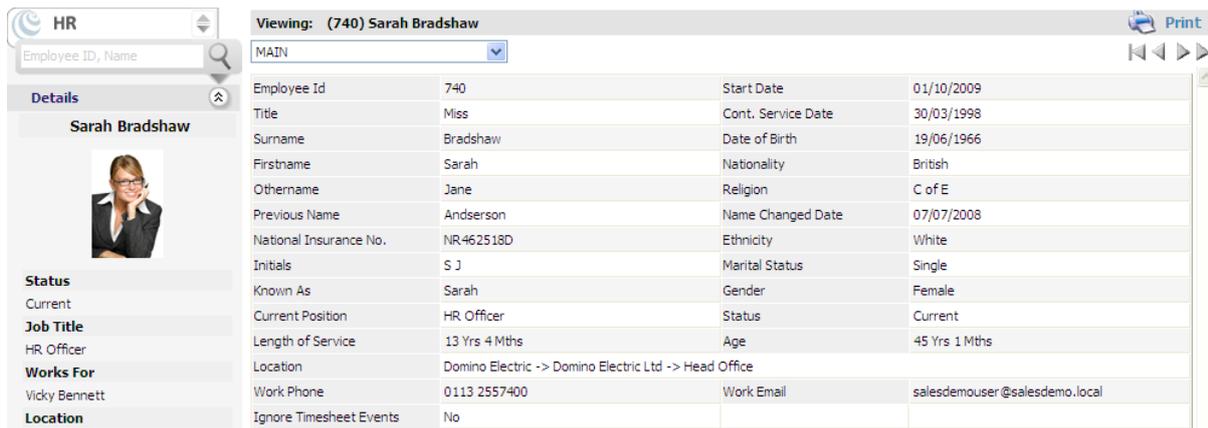
Book absence in minutes:

Populate this field with Yes if you want to report on absence in minutes. Populate it with No if you want to report on absence in days.

Book holidays in minutes:

Populate this field with Yes if you want to report on holidays in minutes. Populate it with No if you want to report on holidays in days.

Below is an example of what the Employee data sheet will create in Cascade:



The screenshot shows the HR system interface for viewing employee details. The main area displays a table of employee information for Sarah Bradshaw (Employee ID: 740). The interface includes a search bar, a 'Details' sidebar with a profile picture, and a 'Viewing:' header.

Viewing: (740) Sarah Bradshaw			
Employee ID	740	Start Date	01/10/2009
Title	Miss	Cont. Service Date	30/03/1998
Surname	Bradshaw	Date of Birth	19/06/1966
Firstname	Sarah	Nationality	British
Othername	Jane	Religion	C of E
Previous Name	Anderson	Name Changed Date	07/07/2008
National Insurance No.	NR462518D	Ethnicity	White
Initials	S J	Marital Status	Single
Known As	Sarah	Gender	Female
Current Position	HR Officer	Status	Current
Length of Service	13 Yrs 4 Mths	Age	45 Yrs 1 Mths
Location	Domino Electric -> Domino Electric Ltd -> Head Office		
Work Phone	0113 2557400	Work Email	salesdemouser@salesdemo.local
Ignore Timesheet Events	No		

Job & salary

Entering information in this data sheet will populate the job & salary screen in Cascade. You must create at least 1 record for all current employees. Enter multiple records if you have the historical job and salary data.

If you do not have historical job and salary data and you're only populating the data sheet with employees' current job record, then you have 3 options:

- (i) Populate the record start date field with the same date you entered in the date of join field on the employee data sheet
- (ii) Populate the record start date field with the correct date of when the employee started their current role. This may leave a gap between when they joined the company and when they started their current role. To rectify the gap in dates, you can enter a dummy job record with the start date of when they joined the company up until their current role. This will bridge the gap so there is a continuous historical job and salary record.
- (iii) Populate the record start date field with the correct date of when the employee started their current role. This may leave a gap between when they joined the company and when they started their current role. If you leave this as it is and don't add a dummy job record, Cascade will do this automatically during the data transfer to bridge the gap so there is a continuous historical job and salary record.

Although this may not be accurate data, it will ensure there are no gaps in the system. E.g.: if an employee joined the company on 01/01/2000 but their current job and salary record starts on 01/01/2005, that employee will have a 5-year unaccountable gap on their record, which will have an effect on areas of the system such as working calendars, holiday entitlements, pro-rata rules etc.

Please Note: For any attendance records to import correctly you should ensure the employee has a job record with the correct working calendar assigned to cover the period in the attendance record.

The below screen shots taken from Cascade show a record with a full job history.

Job & salary screen – list view (i.e. current, and historical records):



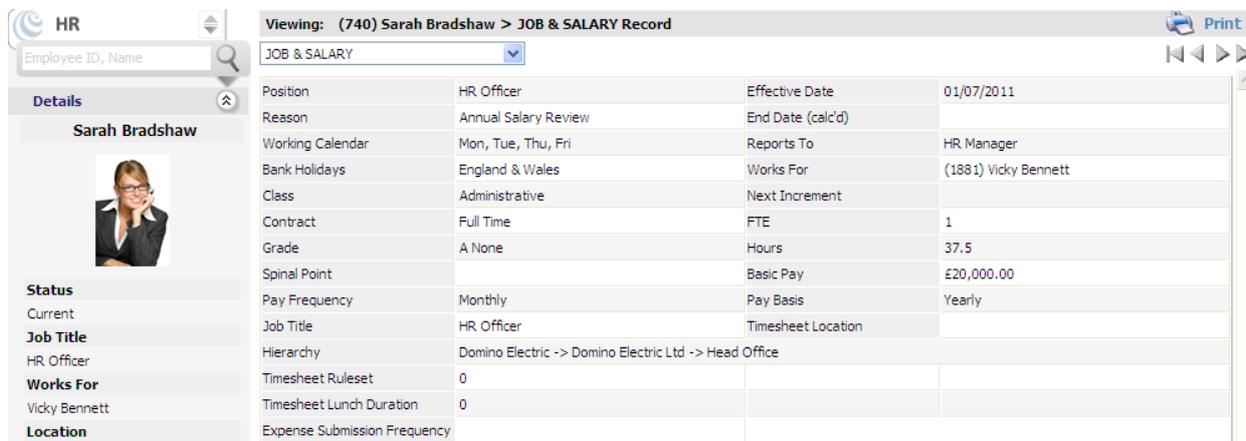
Viewing: (740) Sarah Bradshaw

Employee ID, Name: Sarah Bradshaw

Details: Sarah Bradshaw

Position	Effective Date	End Date (calc'd)	Grade	Reason	Basic Pay	
HR Officer	01/07/2011		A None	Annual Salary Review	£20,000.00	[View]
HR Officer	01/04/2011	30/06/2011	E Spine	Annual Salary Review	£16,647.89	[View]
HR Officer	01/10/2010	31/03/2011	E Spine		£16,163.00	[View]
HR Officer	01/10/2009	30/09/2010	E Spine	Promotion	£15,846.00	[View]
Warehouse Operative	01/10/2008	30/09/2009		Annual Salary Review	£9.22	[View]
Warehouse Operative	01/10/2007	30/09/2008		Annual Salary Review	£8.20	[View]
Warehouse Operative	01/10/2006	30/09/2007		Annual Salary Review	£7.20	[View]
Warehouse Operative	30/03/1998	30/09/2006		New Employee	£5.20	[View]

Job & salary screen – screen view (i.e. current record only):



Viewing: (740) Sarah Bradshaw > JOB & SALARY Record

Employee ID, Name: Sarah Bradshaw

Details: Sarah Bradshaw

Position	HR Officer	Effective Date	01/07/2011
Reason	Annual Salary Review	End Date (calc'd)	
Working Calendar	Mon, Tue, Thu, Fri	Reports To	HR Manager
Bank Holidays	England & Wales	Works For	(1881) Vicky Bennett
Class	Administrative	Next Increment	
Contract	Full Time	FTE	1
Grade	A None	Hours	37.5
Spinal Point		Basic Pay	£20,000.00
Pay Frequency	Monthly	Pay Basis	Yearly
Job Title	HR Officer	Timesheet Location	
Hierarchy	Domino Electric -> Domino Electric Ltd -> Head Office		
Timesheet Ruleset	0		
Timesheet Lunch Duration	0		
Expense Submission Frequency			

Here are some of the most important fields on the job & salary data sheet. For information about all the fields, read the tool tips on the data template.

Employee ID:

The data template now refers to Employees by their ID numbers only and not their names, so it's vital that the ID number you enter correlates to the correct employee that you are entering data for.

Post ID:

Enter the post IDs from the posts sheet that you have already completed.

Company structure node:

Look back at the completed company structure data sheet and highlight where the employee sits within the company (for the current record you are entering for them). Once you have located which area of the business they sit under, make a note of that company structure node and enter that number in the corresponding field in the job & salary data sheet.

Line manager ID:

Populating this field determines who the employee reports to. Find the employee's line manager on the employee data sheet and make a note of their employee ID number. Enter this number in the line manager ID field on the job & salary data sheet.

Working calendar:

To populate this field and give an employee their correct working pattern, you must first populate the working day and working calendar data sheets which are at the end of the data template.

If you leave this field blank, it will default to a standard office working calendar of Monday – Friday, 9:00am – 5:30pm. Please note that leaving this field blank will have implications. Please go to the working calendar section of this document to find out what the implications are.

Bank holidays:

If your company uses standard UK bank holiday years, these are already built into Cascade as standard for you, so just populate this column with 'England & Wales', 'Scotland' or 'Northern Ireland'. If it's left blank it will default to England & Wales.

If you have a different bank holiday year that is company specific, then you can build this in the Bank Holidays data sheet. When you've created the new bank holiday year, come back to the job & salary data sheet and enter the profile name Bank holidays column.

Additions to annual salary, it maybe that you want to include other items for pay that are not on the template, these can be added as additional fields to the end of the columns on the job & salary tab. Items such as car allowance, in this example you would need to add two additional columns the first one a numeric field where you should add the **annual amount** of the Car Allowance and the second one to identify it as a currency field so in this column you would add GBP for £ Sterling.

L	M	N	O	P	Q
t	Text	Text	Date	Numeric	Currency eg GBP/EUR
50	50	50	dd/MM/yyyy	xxxxx.xx	3
WorkingCalendar	BankHolidays	NoticePeriod	ProbationEndDate	Car Allowance	Car Allowance

Job&Salary

Statutory leave

This data sheet allows you to populate any statutory leave for employees. It caters for maternity, paternity and adoption leave.

When populating the fields, please refer to the tool tips as they will give you information about what data should be entered.

When the data transfer takes place, the key dates you have entered here will be used to calculate further statutory leave dates in line with current HMRC legislation.

Statutory Leave				
Text	Text	Date	Date	Date
50	50	dd/MM/yyyy	dd/MM/yyyy	dd/MM/yyyy
EmployeeID	StatutoryType	StartDate	EndDate	ExpectedDate
10001	Maternity	01/01/2012		01/02/2012
10056	Paternity	01/10/2011		01/10/2011
10012	Adoption	01/08/2012		01/08/2012

Absences

Populate all your employee absence data in this data sheet, excluding Holiday data as this has a data sheet of its own.

Absences other than Holidays					
Text	Text	Text	Date	Date	Numeric
50	50	50	dd/MM/yyyy	dd/MM/yyyy	nnn.n
EmployeeID	Category	Type	StartDate	EndDate	DurationDays
10001	Sick	Cold/Flu	01/01/2005	05/01/2005	5
10001	Sick	Sickness/Diarrhea	01/05/2004	03/05/2004	3
10001	Appointment	Dentist	01/03/2004	01/03/2004	0.5
10056	Sick	Headache/Migraine	01/09/2009	01/09/2009	1
10114	Study Leave	Exam	01/05/2008	01/05/2008	1

Here are some of the most important fields on the absence data sheet. For information about all the fields, read the tool tips on the data template.

Categories for payroll:

Important: Please make sure you add paid and unpaid in the category column and then the different types of absence to be duplicated for each Paid and Unpaid if applicable.

Category	Type
Paid	Emergency
	Compassionate
	Authorised
Unpaid	Emergency
	Compassionate
	Authorised

Category:

The data you populate in the category column (e.g. sick, appointment, study leave, etc) will be used to build the attendance categories within Cascade (see below screenshot).

Type:

The Type column is used for the reason of the absence (e.g. cold/flu, headache/migraine, dentist, etc). If you do not have any historical data for the type field, it will default to match what you populated in the category field.

End date:

This is the last day of the absence, not the day that the employee came back to work.

Duration days:

This is the total amount of days the employee was absent for, according to their working pattern, i.e. if the employee was off for a full week but they are contracted to only work 3 days a week, then the duration would be 3 days, not 5.

Please note: This data is required for the data to import, however during the transfer all attendance records are recalculated based on the employees working calendar on their job record covering the attendance spell.

If the employee does not have a job record with a working calendar covering the period of the absence the records will not recalculate correctly.

Durations minutes:

This field isn't required but can be used as a sense check during the transfer.

Please note: During the transfer all attendance records are recalculated based on the employees working calendar on their job record covering the attendance spell.

If the employee does not have a Job Record with a working calendar covering the period of the absence the records will not recalculate correctly.

Please ensure you have populated the "book absences in minutes" field in the employee data sheet with a 'Yes', otherwise the minutes won't calculate in Cascade.

Holidays

When completing the Holidays data sheet, refer to the absences section of this document and apply all the same rules as both data sheets work in the same way.

There is no category field as this is purely for holidays. The Type field will always be populated with the word 'Holiday'.

Holidays					
Text	Text	Date	Date	Numeric	
50		50 dd/MM/yyyy	dd/MM/yyyy	nnn.n	
EmployeeId	Type	StartDate	EndDate	DurationDays	
10001	Holiday	01/01/2005	14/01/2005	10	
10001	Holiday	01/05/2004	05/05/2004	5	
10001	Holiday	01/03/2004	01/03/2004	1	
10056	Holiday	01/09/2009	16/09/2009	12	

When entering holiday duration of more than 1 day, over the same period. For example, if an employee takes 5 consecutive days off, enter it on one row with the correct start and end dates and give duration of 5 days as shown above.

An example of how holidays, bank holidays and absences look on the Cascade planner are shown in the screen shot below:

Details

(33057) Bridget Jones
2011

Entitlement: 30.00 Day(s)

Taken: 10.00 Day(s)

Remaining: 20.00 Day(s)

O/S Requests: 0.00 Day(s)

Remaining (inc. requests): 20.00 Day(s)

[Print these details](#)

	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M							
Jan							01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31
Feb			01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28							
Mar			01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31				
Apr					01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30			
May	01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	Holiday All Day										31									
Jun			01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30					
Jul					01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31		
Aug			01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31				
Sep					01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30			
Oct						01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31	
Nov			01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30					
Dec					01	02	03	04	05	06	07	08	09	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	31		

Holiday entitlements and carry over are not created at the data transfer stage. You will be shown how to configure and allocate those rules during your core HR training.

Home address

Enter the employees' contact details in the relevant columns. You have 2 options with this data sheet (if you have the self-service module):

1. It can be completed at the data template stage by your HR team
2. You can leave this data sheet blank and ask all employees to fill in their addresses when you give them access to the system via self service.

Home Address	Text	Text	Text	Text	Text	Text	Text	Text
EmployeeID	HomeAddress1	HomeAddress2	HomeAddress3	HomeAddress4	HomeAddress5	HomePostCode	HomePhone	PersonalMobileNumber
10001	36 Example Street	Example Town	Example City	Example County	AB1 2CD	0123 4567890	07123 456789	

If you do not have the address details of an employee, please do not include just the employee ID for that employee, with blank address fields. Please omit that employee from this tab.

Next of kin

Employees often have more than 1 next of kin. You can use this template to add multiple next of kin records for each employee and select one as the primary contact.

You have 2 options with this data sheet (if you have the self-service module):

1. It can be completed at the data template stage by your HR team
2. You can leave this data sheet blank and ask all employees to fill in their Next of Kin details when you give them access to the system via self service.

Next of Kin	Text	Text	Yes/No	Text	Text	Text	Text
EmployeeID	NameOfNextOfKin	Relation	PrimaryContact	HomePhone	WorkPhone	MobileNumber	Address1
10001	Mike Bradshaw	Father	No	0123 1234567	0123 0987654	07890 123456	102
10001	Joe Bloggs	Partner	Yes	0123 4567890	0123 1122334	07788 112233	36

Bank

Enter the employees' bank details into each column. You have 2 options with this data sheet (if you have the Self-Service module):

1. It can be completed at the data template stage by your HR team
2. You can leave this data sheet blank and ask all employees to fill in their bank details when you give them access to the system via self service.

Bank Details							
Text	Text	Text	Text	Text	Text	Text	Text
50	50	50	nn-nn-nn	50	50	50	50
EmployeeID	BankName	BankAccountName	BankSortCode	BankAccountNumber	BankAddress1	BankAddress2	BankAddress3
10001	UK Bank Plc	Miss S Bradshaw	11-22-33	12345678	Bank House	Bank Street	Bank Town

Pension

This is the data sheet you enter any pension data you have for an employee. This may be an external private scheme or an internal company scheme.

If you populate the employee contribution field, then you must also populate the employee contribution type field with either value or percentage. This is also true for the employer contribution and AVC fields. See the below example:

Pension							
Text	Text	Date	Date	Date	Numeric	Text	Text
50	50	dd/MM/yyyy	dd/MM/yyyy	dd/MM/yyyy	nnn.nn	Value/Percentage	Currency code eg GBP/EUR
EmployeeID	PensionType	DateEligibleToJoin	DateJoined	DateLeftScheme	EmployeeContribution	EmployeeContributionType	EmployeeContributionCurrency
10001	Company Scheme	01/01/2000	01/04/2006		5.00	Percentage	GBP

Auto enrolment

As part of the UK's pensions reform the government is stipulating that, by default, employers must automatically enrol eligible employees onto a qualifying pension scheme. The aim is to encourage the working population to make better provisions for retirement.

For more information, please click on the website link below.

<http://www.thepensionsregulator.gov.uk/automatic-enrolment.aspx>

Very few fields are required to be imported for Auto Enrolment, and these are mostly for existing members of pension schemes who do not need to be assessed.

If the IsMemberofQualifyingPensionScheme is set to Yes, then the employee will be ignored by the AE assessment. Use this for employees who are already contributing to a scheme which complies with AE legislation. For employees outside the UK or for consultants/temporary workers, use ExcludeEmployeefromAutoEnrolment.

Auto Enrolment					
Text	Yes/No	Text	Date	Yes/No	Yes/No
50	3	50	dd/MM/yyyy	3	3
EmployeeID	IsMemberofQualifyingPensionScheme	QualifyingPensionSchemeName	SchemeJoinDate	IsOnDBHybridScheme	ExcludeEmployeefromAutoEnrolment
100	Yes	Cascade Company Scheme	01/11/2013	No	No

Benefits

If you want to populate this data sheet, ensure that there is an entry in the type field, i.e. dental plan, private medical insurance, critical illness cover, etc.

If the employee no longer has the benefit but you want to capture their benefit history, populate the relevant date in the end date column.

Benefit					
<i>Text</i>	<i>Text</i>	<i>Date</i>	<i>Date</i>	<i>Numeric</i>	<i>Text</i>
50	50	dd/MM/yyyy	dd/MM/yyyy	nnnnnn.nn	Currency code eg GBP/EUR
EmployeeID	Type	StartDate	EndDate	Value	ValueCurrency
123	Dental Plan	22/06/2021		35.00	GBP
123	Private Medial Insurance	06/07/2021		45.00	GBP
123	Critical Illness Cover	17/08/2021		75.00	GBP

Medical contacts

Enter the employees' medical contacts into each column. You have 2 options with this data sheet (if you have the self-service module):

1. It can be completed at the data template stage by your HR team
2. You can leave this data sheet blank and ask all employees to fill in their medical contacts when you give them access to the system via Self Service.

Medical Contacts					
<i>Text</i>	<i>Text</i>	<i>Text</i>	<i>Text</i>	<i>Text</i>	<i>Text</i>
50	50	50	50	50	50
EmployeeID	Type	ContactName	Phone	Mobile	Address1
10001	Doctor	Dr Paul Robinson	0123 7788990	07770 556677	New Croft Surgery

Appraisals

When populating this data sheet, ensure you indicate whether the appraisal is open or closed – if you don't populate this field, it will default to No, meaning that the appraisal will show as open.

Appraisals						
<i>Text</i>	<i>Date</i>	<i>Text</i>	<i>Date</i>	<i>Text</i>	<i>Text</i>	<i>Yes/No</i>
50	dd/MM/yyyy	50	dd/MM/yyyy	1000	1000	3
EmployeeID	AppraisalDate	AppraisedBy	NextAppraisal	Notes	ActionPlan	Closed
10001	01/03/2010	Jane Bloggs		Passed probationary period		Yes
10001	01/12/2010	Jane Bloggs	01/12/2011	Annual Review	Needs to meet objectives	No

Discipline

When populating this data sheet, ensure you indicate whether the discipline is open or closed – if you don't populate this field, it will default to No, meaning that the appraisal will show as open.

Discipline								
Text	Date	Text	Text	Text	Date	Text	Text	Yes/No
50	dd/MM/yyyy	50	50	50	dd/MM/yyyy	50	1000	3
EmployeeID	ActionDate	Description	ActionType	Action	AppealDate	AppealNotes	FollowUpNotes	Closed
10001	01/01/2005	Continuing lateness	Verbal warning				Lateness stopped	Yes
10078	01/09/2011	Abusive Behaviour	Final warning				Behaviour monitored	No

Grievance

The grievance data sheet works in the same way as the discipline data sheet.

When populating this data sheet, ensure you indicate whether the grievance is open or closed – if you don't populate this field, it will default to No, meaning that the appraisal will show as open.

Grievance							
Text	Date	Text	Text	Date	Text	Text	Yes/No
50	dd/MM/yyyy	50	50	dd/MM/yyyy	50	1000	3
EmployeeID	GrievanceDate	GrievanceDetails	ActionedBy	ActionDate	ActionDescription	FollowUpNotes	Closed
123	01/01/2010	Colleague Complaint	Vicky Bennett	01/01/2010	Informal Discussion		Yes

Skills

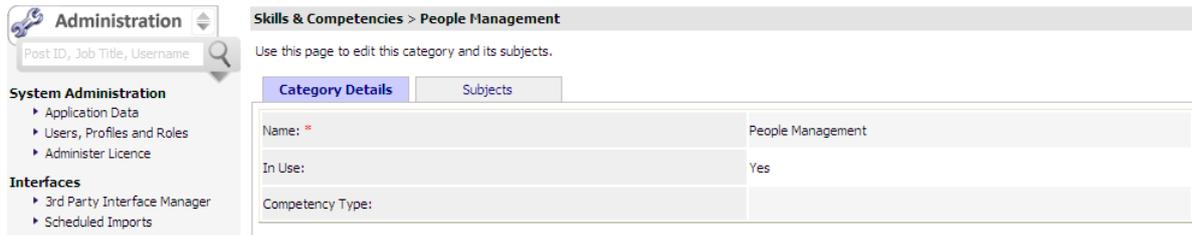
This data sheet is used to populate the skills and competencies screen in Cascade. The skills and competencies functionality within Cascade is a 3-layer matrix, made up of categories, subjects and levels.

If you start to populate this data sheet, please note that you must fill in all the columns. If you were to only populate the category column and leave the rest blank, the entire entry would be dropped during the data transfer as Cascade cannot build the skills matrix unless it has all 3 layers available.

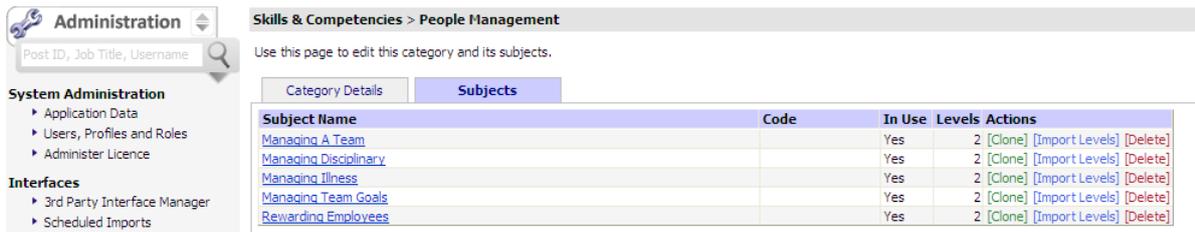
Skills				
Text	Text	Text	Text	Date
50	50	50	50	dd/MM/yyyy
EmployeeID	Category	Skill	Level	AttainedDate
10001	People Management	Managing a Team	Advanced	
10001	People Management	Managing a Team	Basic	
10001	People Management	Managing Disciplinary	Advanced	
10001	People Management	Managing Disciplinary	Basic	
10001	People Management	Managing Illness	Advanced	
10001	People Management	Managing Illness	Basic	
10001	Microsoft Office	Excel	Advanced	
10001	Microsoft Office	Word	Advanced	
10001	Microsoft Office	Powerpoint	Basic	

Below is an example of the people management skill set in Cascade:

People management – category:

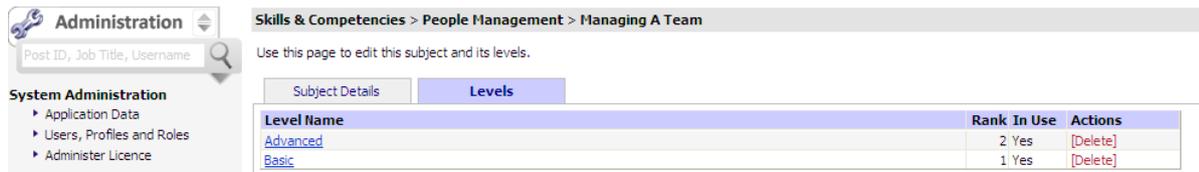


People management – subjects:



Subject Name	Code	In Use	Levels	Actions
Managing A Team		Yes	2	[Clone] [Import Levels] [Delete]
Managing Disciplinary		Yes	2	[Clone] [Import Levels] [Delete]
Managing Illness		Yes	2	[Clone] [Import Levels] [Delete]
Managing Team Goals		Yes	2	[Clone] [Import Levels] [Delete]
Rewarding Employees		Yes	2	[Clone] [Import Levels] [Delete]

People management – levels:



Level Name	Rank	In Use	Actions
Advanced	2	Yes	[Delete]
Basic	1	Yes	[Delete]

Qualifications

This data sheet works in the same way as the skills data sheet. You have the ability to build as many different subjects and levels as you like. During the data transfer, a system list will be created using the data you populate on this data sheet, allowing you to select from a drop-down list in the future.

Qualifications				
Text	Text	Text	Date	Text
50	50	50	dd/MM/yyyy	50
EmployeeID	Level	Subject	DatePassed	Grade
10001	Degree	English Literature	01/07/1999	1st
10001	A-Level	English	01/07/1995	A
10001	A-Level	Maths	01/07/1995	B
10001	A-Level	Science	01/07/1995	C
10001	GCSE	English	01/07/1993	A

Vehicles

The vehicles data sheet is used to populate the Vehicles Management table within Cascade. The vehicles management table is a fleet management database where you can keep a record of all company vehicles with the ability to assign them to employees.

If you enter an employee ID number, that vehicle will be assigned to that employee. If you leave the employee ID field blank, the vehicle will sit in the list of fleet vehicles but won't be assigned to anybody.

Vehicles							
Text	Text	Date	Date	Text	Text	Text	Text
50	50	dd/MM/yyyy	dd/MM/yyyy	50	50	50	50
EmployeeID	RegistrationNo	StartDate	EndDate	Make	Model	EngineSizeCc	FuelType
10001	AA08 AAS	01/01/2000		Citroen	Picasso	1600	Diesel
	AF57 AFU	01/01/2000		Ford	Focus	1200	Petrol

Training history

If you hold historical data for employee's training records and you want to keep a record of it in Cascade, enter it into this data sheet.

Please note that this data sheet does not have any link with the training manager module – it is captured as a static record only.

Training History						
Text	Text	Text	Date	Date	Date	Numeric
50	50		50 dd/MM/yyyy	dd/MM/yyyy	dd/MM/yyyy	nn.n
EmployeeID	CourseCode	CourseDescription	StartDate	EndDate	ExpiryDate	Duration
10001	EX1	Microsoft Excel - Basic	01/01/2009	01/01/2009		1
10001	EX2	Microsoft Excel - Advanced	02/01/2009	03/01/2009		2
10001	FA	First Aid	01/05/2000	01/05/2000		1

We hope you have found this guide useful in helping you populate the Cascade data template.

If you have any questions which have not been answered within this guide, then please contact your Cascade project manager and they will be happy to assist you.