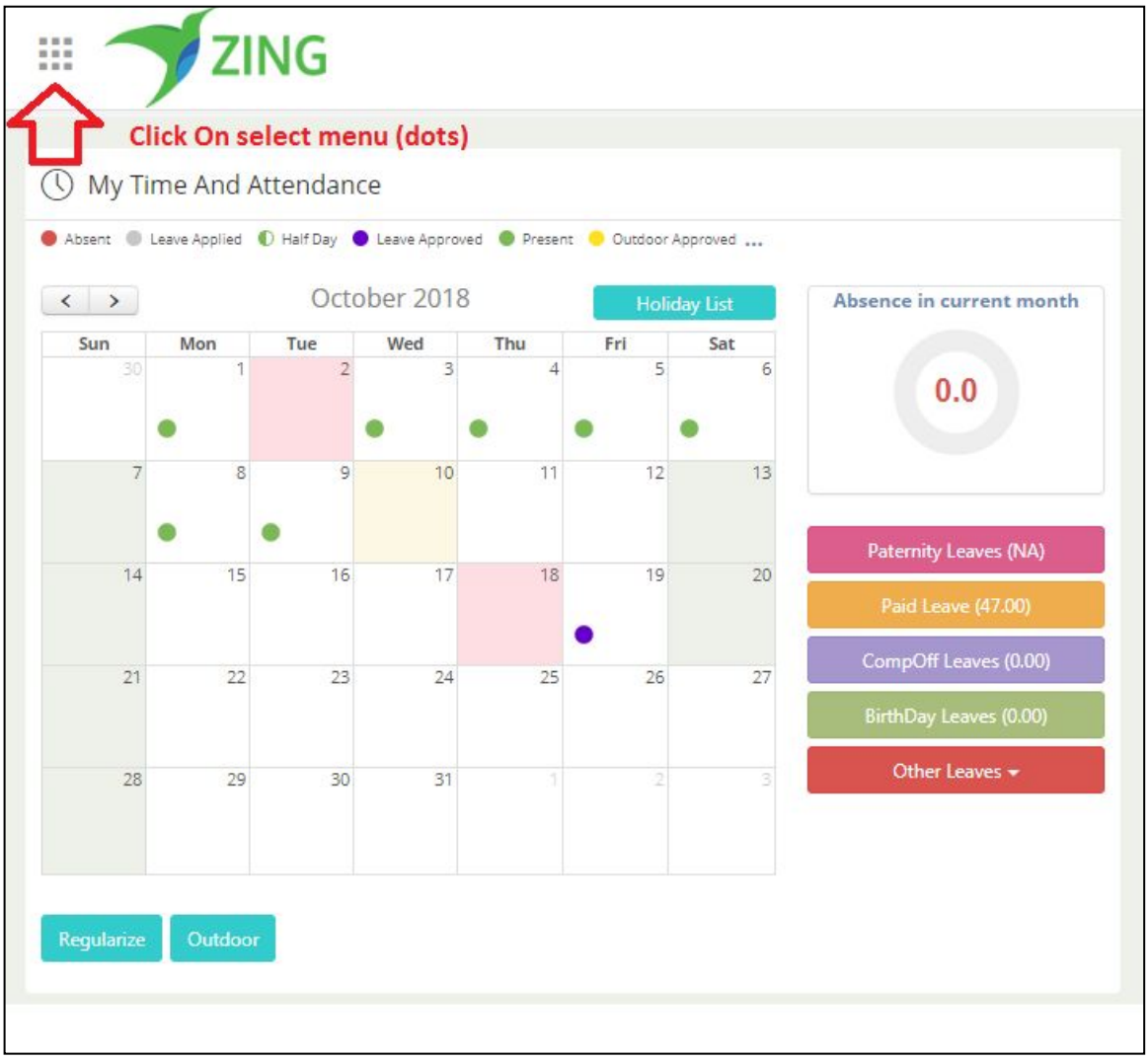
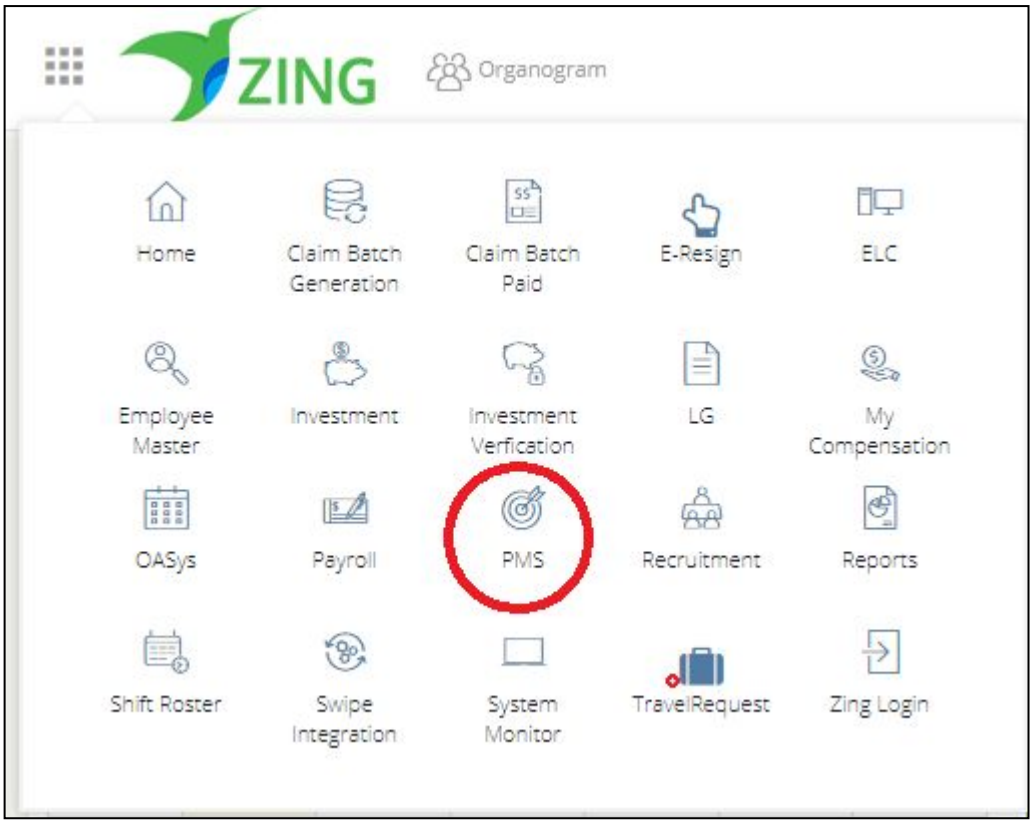
How to do ‘Goal Upload’ in PMS.

You can follow the below steps for ‘Goal upload’ on Zing HR :

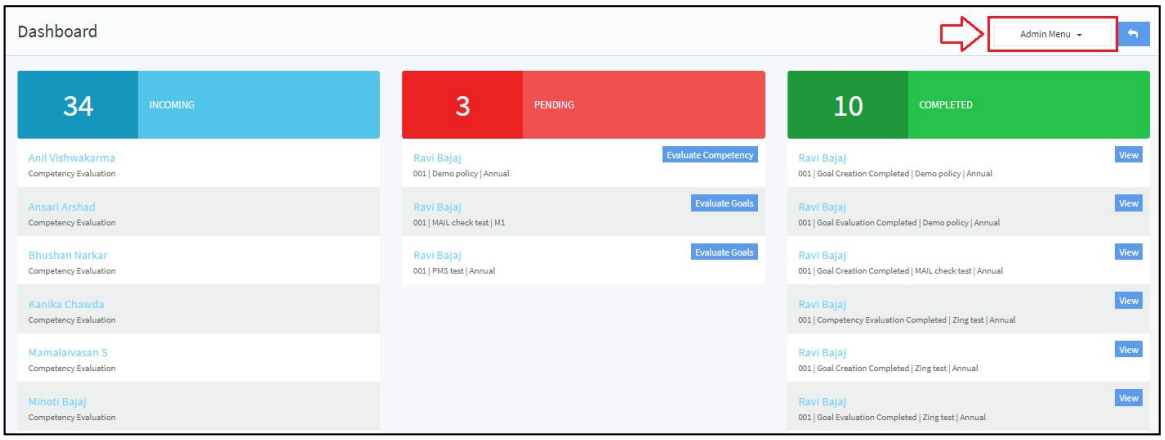
IMP : For bulk Goal upload this process will help.

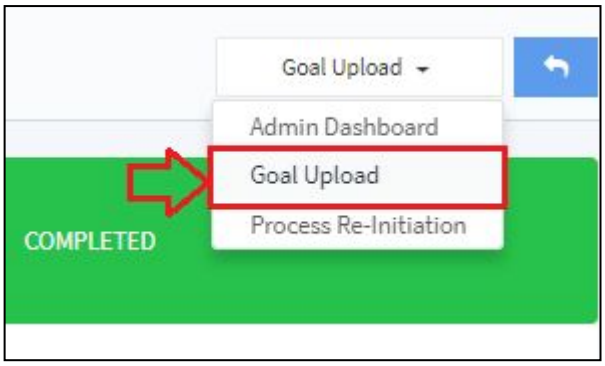
1. Log in to your Zing HR account.
2. On the home screen left-hand top side click on select menu, then ‘PMS ‘ as shown below.



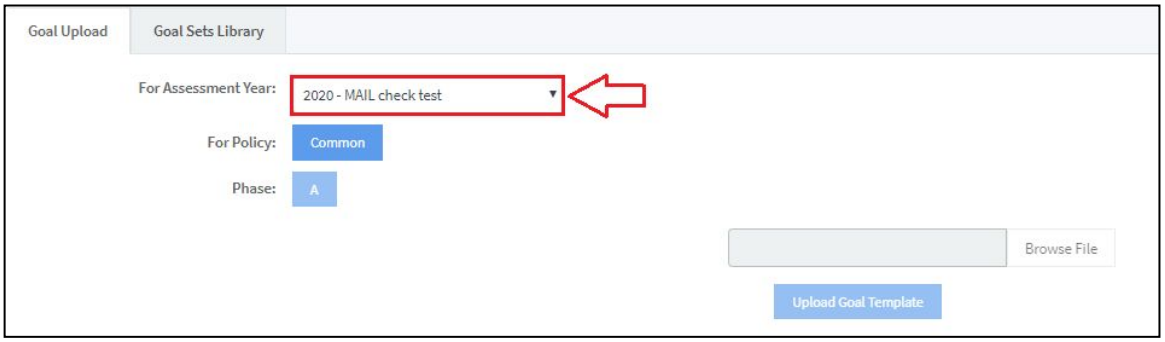


On the new window please click on the 'Admin Menu' and select the 'Process Re-Initiation'.

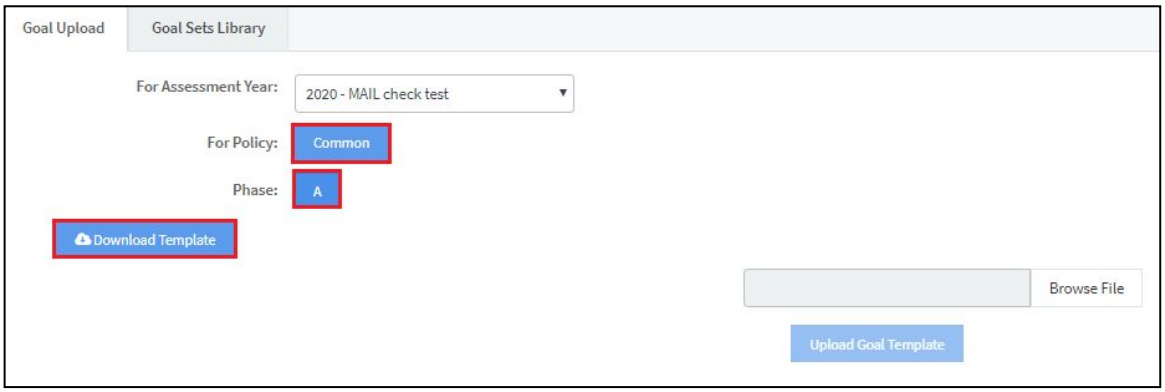




Select ‘For Assessment Year’(Policy) from ‘for assessment year’ dropdown.



Select ‘Policy Applied’ from policy applied dropdown and ‘Phase’



Download the template and submit the data according to the excel sheet.
(After selection of Phase ‘Download Template’ button will be visible).

Important Note -

1) Data Validation:
   a) All fields are Mandatory fields
   b) Target as per Unit of measurement (UOM)
   c) You will not allow to enter only Percentage (%)

d) Check Total Weightage as 100% for all Employees.

e) Perspective Name & Weightage <--> Check from Goals Upload Template (System Generated).

f) Total Goals Weightage under Perspective should be equal to Perspective Weightage.

g) Data Type in UOM should be same as in System Generated Goals Upload Template.

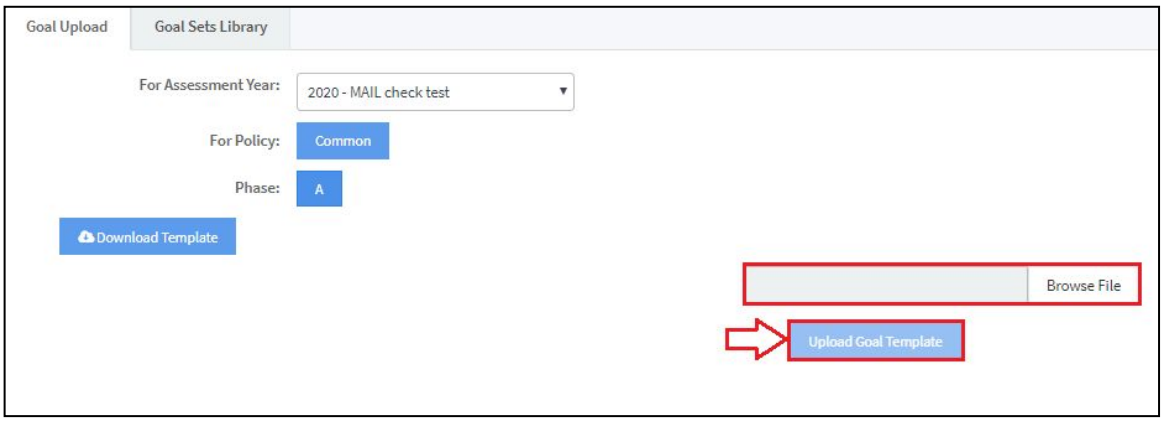
h) Replace all single quotes with double single quotes.

e.g. replace : person's with: person''s

i) Replace all # with 'Number of' or relevant text.

e.g. Replace : # of Training conducted with : Number of Training conducted

j) Employee code is in Text Format.

k) You will not allow to enter 0 in Goal Weightage

Next browse the file and click on ‘Upload Goal Template’.