

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.

ZING

Click On select menu (dots)

My Time And Attendance

● Absent ● Leave Applied ● Half Day ● Leave Approved ● Present ● Outdoor Approved ...

October 2018 [Holiday List](#)

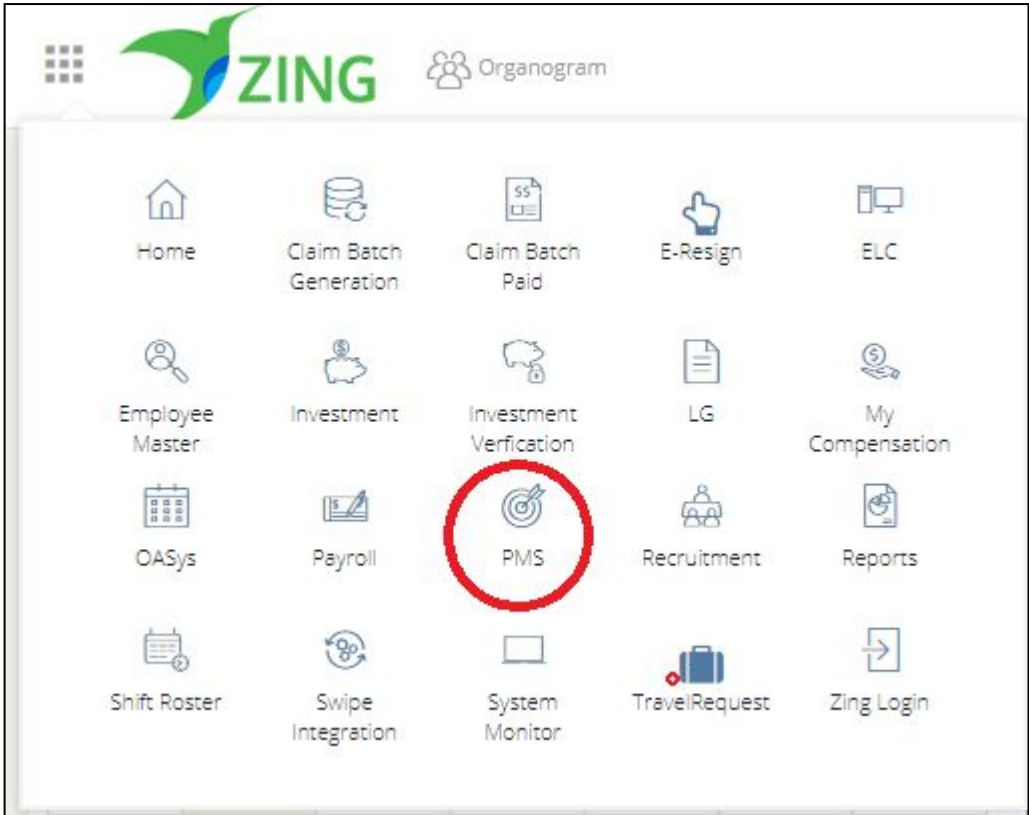
Sun	Mon	Tue	Wed	Thu	Fri	Sat
30	1	2	3	4	5	6
	●		●	●	●	●
7	8	9	10	11	12	13
	●	●				
14	15	16	17	18	19	20
					●	
21	22	23	24	25	26	27
28	29	30	31	1	2	3

Absence in current month

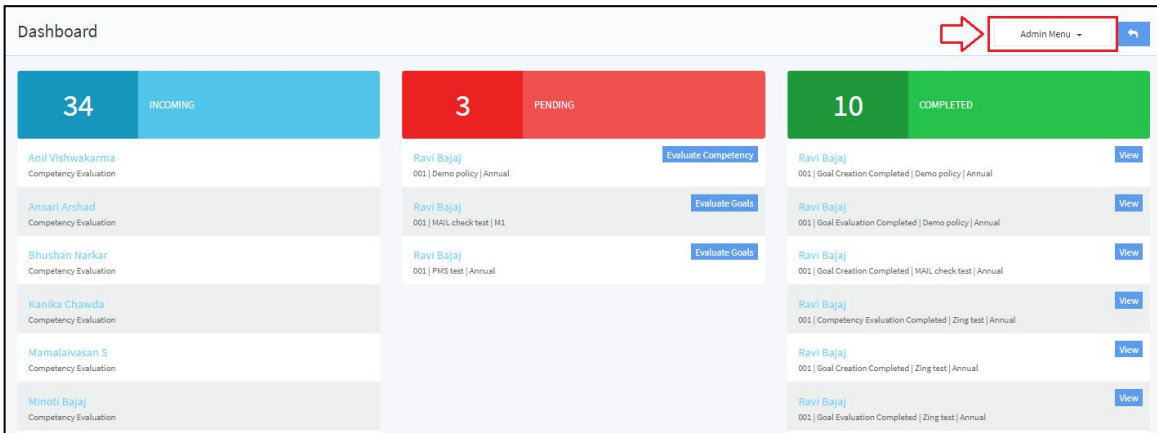
0.0

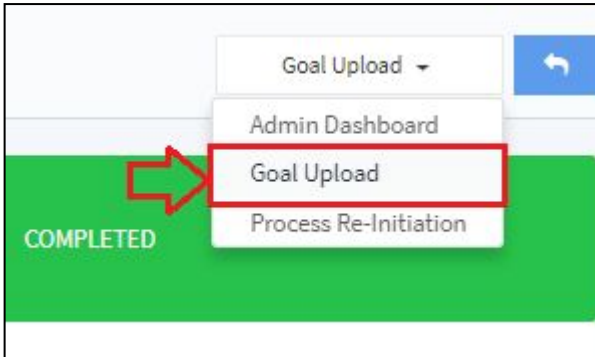
- Paternity Leaves (NA)
- Paid Leave (47.00)
- CompOff Leaves (0.00)
- BirthDay Leaves (0.00)
- Other Leaves ▾

[Regularize](#) [Outdoor](#)



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.

A screenshot of the 'Goal Upload' form. The form has two tabs: 'Goal Upload' and 'Goal Sets Library'. The 'Goal Upload' tab is active. The form contains three dropdown menus: 'For Assessment Year' (set to '2020 - MAIL check test'), 'For Policy' (set to 'Common'), and 'Phase' (set to 'A'). The 'For Assessment Year' dropdown is highlighted with a red rectangular box, and a red arrow points from the right towards it. At the bottom right, there is a 'Browse File' button and an 'Upload Goal Template' button.

Select 'Policy Applied' from policy applied dropdown and 'Phase'

A screenshot of the 'Goal Upload' form, similar to the previous one. The 'For Policy' dropdown (set to 'Common') and the 'Phase' dropdown (set to 'A') are highlighted with red rectangular boxes. A red arrow points from the left towards the 'Download Template' button, which is also highlighted with a red rectangular box. The 'Upload Goal Template' button is visible at the bottom right.

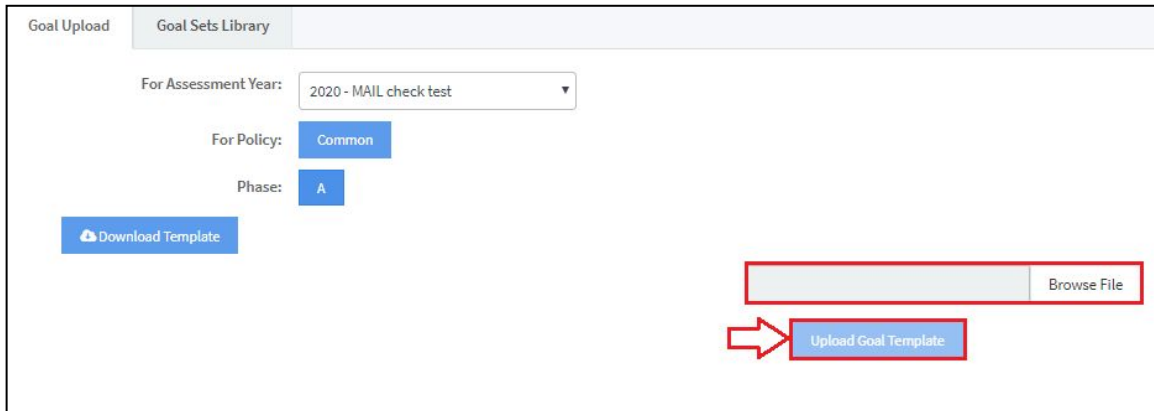
Download the template and submit the data according to the excel sheet.
(After selection of Phase 'Download Template' button will be visible).

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'.



The screenshot shows a web interface for 'Goal Upload'. At the top, there are two tabs: 'Goal Upload' and 'Goal Sets Library'. Below the tabs, there are several filters: 'For Assessment Year:' with a dropdown menu showing '2020 - MAIL check test', 'For Policy:' with a blue button labeled 'Common', and 'Phase:' with a blue button labeled 'A'. On the left side, there is a blue button labeled 'Download Template'. On the right side, there is a file upload area consisting of a text input field, a 'Browse File' button, and a blue button labeled 'Upload Goal Template'. A red arrow points to the 'Upload Goal Template' button.