



EXCEL FOR HR & PAYROLL ANALYTICS

Zambia Hands-on Masterclass

Employee Records | Leave | Attendance | Payroll Inputs | Statutory Deductions | Dashboards | Management Reporting

Course Promise

A hands-on course designed for the real work HR teams do in Zambia every month: keeping clean employee records, preparing accurate payroll inputs, tracking leave and attendance, monitoring contracts and compliance, controlling overtime, and producing management-ready HR dashboards.

Designed For	HR Officers, HR Managers, Payroll Officers, Administrators, Operations Teams and Business Owners
Practical Outputs	Employee database, leave tracker, attendance tracker, payroll input model, statutory deductions template, compliance tracker and HR dashboards
Facilitator	Mr. Emmanuel Nyirongo - over 10 years of experience in data analytics, reporting, business intelligence and corporate training

Prepared by Regnum Solutions

Empowering Organizations. Developing People. Driving Results.

1. Course Overview

This practical course is designed for the Zambian workplace and focuses on the HR activities that are done often: employee records management, leave tracking, attendance monitoring, payroll preparation, statutory deduction reporting, contract tracking, recruitment tracking, performance reporting and monthly HR dashboards. The course is not theory-based. Participants work on realistic HR datasets and build tools they can immediately adapt for their organizations.

Important statutory note

Payroll and statutory deduction models must be built with editable rate tables. PAYE bands, NAPSA ceilings, NHIMA rules and other statutory requirements should always be verified before live payroll processing.

2. Main Pain Points This Course Solves

- Employee records scattered across different files and departments.
- Manual payroll inputs that cause errors, delays and disputes.
- Unclear leave balances and weak leave documentation.
- Poor attendance, absenteeism and late-coming tracking.
- Missed probation reviews, contract renewals and document expiry dates.
- Limited analysis of overtime, allowances and employee cost by department.
- Weak recruitment tracking from vacancy to appointment.
- Difficulty preparing monthly HR reports for management.
- Lack of HR dashboards that show headcount, turnover, leave, payroll cost and compliance issues.

3. Learning Outcomes

- Create a clean and professional employee master database.
- Use Excel formulas to automate common HR calculations.
- Track leave, attendance, absenteeism and late coming accurately.
- Prepare payroll input schedules and employee cost summaries.
- Build editable payroll deduction models for PAYE, NAPSA, NHIMA and SDL reporting support.
- Monitor contracts, probation, disciplinary cases and missing statutory details.
- Analyse recruitment, training and performance data.
- Build HR dashboards and present insights clearly to management.

4. What Makes This Course Zambia-Specific

NRC, TPIN, NAPSA number, NHIMA number, employee number and bank details checklist.

Basic salary, allowances, overtime, salary advances, loans, unpaid leave, deductions, gross pay, net pay and employer cost.

Editable templates for PAYE, NAPSA, NHIMA and Skills Development Levy reporting support.

Annual leave, sick leave, maternity/paternity leave, unpaid leave, study leave, probation dates and contract expiry alerts.

Monthly headcount, payroll changes, staff movements, late coming, absenteeism, overtime, recruitment and compliance reports.

5. Recommended Duration Options

Best For	Coverage
HR Excel Essentials	Employee records, core formulas, leave tracking and basic HR reports.
HR Excel, Payroll & Reporting	HR formulas, payroll inputs, statutory deduction support, attendance, overtime and dashboards.
Advanced HR Analytics Bootcamp	Full HR data system, payroll analytics, compliance trackers, dashboards and report pack.

6. Detailed Course Outline

Module 1: Excel Setup for HR Work in Zambia	
Purpose	Help participants organize HR data professionally and avoid common spreadsheet mistakes.
Topics Covered	• Correct HR data structure • Employee codes and employee master lists • Excel Tables, filters, sorting and search tools • Data validation dropdowns for department, branch, gender, job title and status • Protecting sensitive HR worksheets
Practical Output	Employee Master Database

Module 2: Employee Records Management	
Purpose	Build a practical system for managing staff information and required employee details.
Topics Covered	• Employee number, NRC, TPIN, NAPSA and NHIMA fields • Job title, department, branch, employment type and status • Date joined, salary grade, contract start/end and probation period • Next of kin and emergency contact checklist • Missing document and missing information report
Practical Output	Employee Records Tracker

Module 3: HR Formulas Every HR Officer Must Know

Purpose	Automate the calculations HR officers repeat every month.
Topics Covered	• IF for HR decisions and alerts • COUNTIF/COUNTIFS for staff counts • SUMIF/SUMIFS for salary and cost summaries • XLOOKUP for employee details • Date formulas for age, length of service, contract expiry and probation • Text formulas for cleaning names and staff records
Practical Output	Automated HR Formula Sheet

Module 4: Leave Management for the Zambian Workplace

Purpose	Track leave clearly, reduce disputes and produce accurate leave reports.
Topics Covered	• Annual leave tracker and leave balances • Sick leave, maternity leave, paternity leave, compassionate leave, unpaid leave and study leave • Leave approval status and leave calendar • Leave days earned, taken and remaining • Leave liability report
Practical Output	Leave Management Tracker with Automatic Balances

Module 5: Attendance, Late Coming and Absenteeism Tracking

Purpose	Monitor attendance patterns and support workplace discipline using data.
Topics Covered	• Daily attendance register • Clock-in and clock-out tracking • Late-coming report • Absenteeism report • Time lost due to lateness • Monthly attendance summary by employee and department • Linking attendance exceptions to payroll inputs where policy allows
Practical Output	Attendance and Late Coming Dashboard

Module 6: Payroll Data Preparation

Purpose	Prepare accurate payroll inputs before submission to finance or management.
Topics Covered	• Basic salary and allowances • Overtime, leave pay, unpaid leave and deductions • Salary advances and loans • Gross pay and net pay preparation • Payroll approval checklist • Payroll change register
Practical Output	Monthly Payroll Input Sheet

Module 7: PAYE, NAPSA, NHIMA and SDL Payroll Analysis

Purpose	Help HR and payroll officers prepare statutory deduction summaries using editable Excel models.
Topics Covered	• PAYE calculation structure using editable tax bands • NAPSA employee and employer contribution setup • NHIMA employee and employer contribution setup • Skills Development Levy reporting support • Gross pay to net pay model • Payroll deduction summary and exception checks
Practical Output	Zambian Payroll Analysis Model

Module 8: Overtime, Allowances and Employee Cost Control

Purpose	Identify payroll leakages and help management control staff costs.
Topics Covered	• Overtime tracker by employee and department • Allowance analysis • Salary movement report • Employee cost by department • Employer cost summary • Payroll variance report
Practical Output	Employee Cost and Overtime Analysis Report

Module 9: Contracts, Probation and Compliance Alerts

Purpose	Avoid missing important employment dates and compliance requirements.
Topics Covered	• Contract start and end dates • Probation review dates • Renewal alerts • Retirement tracking • Medical or permit expiry tracking where applicable • Disciplinary case register • Warning letter and grievance tracker • Exit clearance tracker
Practical Output	Contract and Compliance Alert Tracker

Module 10: Recruitment and Workforce Planning

Purpose	Track recruitment from vacancy approval to appointment.
Topics Covered	• Vacancy tracker • Applicant database • Shortlisting tracker • Interview schedule and scoring sheet • Recruitment source analysis • Time-to-hire calculation • Headcount gap analysis • New hire onboarding checklist
Practical Output	Recruitment and Workforce Planning Tracker

Module 11: Performance and Training Analytics

Purpose	Track employee performance, training needs and staff development.
Topics Covered	• Employee performance scorecard • KPI tracker • Performance rating analysis • Training needs analysis • Training attendance and cost tracker • Skills gap tracker • Promotion readiness tracker
Practical Output	Performance and Training Dashboard

Module 12: HR Dashboards and Monthly Management Reports

Purpose	Present HR information clearly to management using dashboards and report packs.
Topics Covered	• HR KPI cards • Headcount dashboard • Payroll dashboard • Leave and attendance dashboard • Recruitment dashboard • Compliance dashboard • PivotTables, PivotCharts and slicers • Monthly HR management report formatting
Practical Output	Complete HR Executive Dashboard and Monthly HR Report Pack

7. Key Dashboards Participants Will Build

HR Executive Dashboard

Total employees, active employees, new hires, exits, staff turnover, headcount by department, gender distribution, average length of service and contract expiry alerts.

Payroll Dashboard

Gross pay, net pay, PAYE, NAPSA, NHIMA, employer statutory cost, payroll cost by department, payroll variance and overtime cost.

Leave and Attendance Dashboard

Leave days taken, leave balances, absenteeism, late-coming trends, attendance by department and unpaid leave deductions.

Recruitment Dashboard

Vacancies, applicants, shortlisted candidates, interviewed candidates, successful candidates, time-to-hire and recruitment source performance.

Compliance Dashboard

Contracts expiring soon, probation reviews due, missing statutory details, disciplinary cases, staff documents missing and exit clearance status.

8. Practical Exercises

- Create an employee database from scratch.
- Clean messy HR data and remove duplicates.
- Find missing NRC, TPIN, NAPSA and NHIMA numbers.
- Calculate age, length of service, probation due dates and contract expiry dates.
- Calculate leave balances and prepare leave summaries.
- Prepare a monthly payroll input sheet.
- Build editable PAYE, NAPSA, NHIMA and SDL calculation support tables.
- Analyse overtime and allowances by department.
- Create recruitment, performance and training trackers.
- Build HR dashboards and present insights to management.

9. Tools and Templates Participants Receive

- Employee Master Database template
- Leave Management Tracker
- Attendance and Late Coming Tracker
- Monthly Payroll Input Sheet
- Payroll Deduction Analysis Model
- Overtime and Employee Cost Report
- Contract and Compliance Alert Tracker
- Recruitment Tracker
- Performance and Training Dashboard
- HR Executive Dashboard
- Monthly HR Report Pack template

10. Training Methodology

- Practical demonstrations using realistic Zambian HR datasets.
- Hands-on exercises after every major concept.
- Template-building approach so participants leave with usable files.
- Scenario-based learning around payroll, leave, attendance, contracts and reports.
- Facilitated discussion on controls, common errors and management reporting expectations.

11. Final Course Outcome

By the end of the course, participants will not only understand Excel formulas. They will have built practical HR tools that can immediately improve how their organizations manage employee records, leave, attendance, payroll inputs, contracts, recruitment, performance and monthly reporting.

Final Positioning Statement

This is not a normal Excel course. It is a practical HR productivity course designed for the Zambian workplace. It helps HR professionals move from manual records, scattered files and delayed reports to accurate payroll support, clean employee data, proper leave tracking, compliance monitoring and management-ready HR dashboards.



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