SafetyLink® Risk Manager - Interfaces

Import Employee Information from CSV (comma delimited file)

This technical newsletter describes importing employee information into SafetyLink® from a general CSV comma delimited file. (Last updated 8 Nov.-13 HSE Version10.002).

General

Up to 3 comma-delimited CSV employee files may be imported into the SafetyLink . New employees will be added and current employee's details amended.

A. Preparing the comma-delimited CSV file.

A comma delimited CSV file is like a text file except each row begins on a new line and each field is separated by a comma. There are some rules, for example the data in a field may not contain a comma. Take particular care with this in address fields. Also if a column does not have data, a comma (delimiter) is still required to indicate position in the row. Fortunately you can create or open a comma-delimited file in Microsoft Excel and check its contents, make sure it is saved in MSDOS CSV format. Sometimes the first row in a comma-delimited file is a header record that contains the title of each column. In our case, if a header record is present it is indicated by the title STAFF_ID being found in the first column of the first record. If a header record is present it is skipped. Subsequent rows contain data, in our case one row per employee.

Each of the Employee rows has the following columns.
Columns are marked as:
- **Required** = must be present.
- Pref. = Optional but preferred
- Opt. = Optional
- Reserved = Actioned only from certain payrolls. May be present for others but will be ignored.
- Yellow = normal fields provided.

Col #	Column	Type/Max size input	Header * see note	Required or optional	Format
1	**IDCode**	STRING(12)	If present must be **STAFF_ID**	Required	Upper case alphanumeric unchanging unique ID for employee. Used for matching data between the two systems and must always be present. Note: If this changes there is provision to translate this value to another existing employee ID code if required.
2	**LastName**	STRING(25)		Required	Employee last name
3	**FirstName**	STRING(25)		Required	Employee first name(s)
4	Resaddress	STRING(40)		Pref.	Residential address line – street
5	Suburb	STRING(25)		Pref.	Residential address – suburb
6	City	STRING(25)		Pref.	Residential address – city
7	DOB	STRING(20)		Pref.	Date of birth – format dd/mm/yyyy
8	HomePhone	STRING(13)		Opt.	Home telephone number – numeric

9	EthnicOrigin	STRING(20)		Opt.	Ethnic origin eg: Maori, NZ European
10	Gender	STRING(6)		Pref.	If it starts with '**M**' – Male If it starts with '**F**' – Female
11	JobTitle	STRING(25)		Pref.	Job Title – this is placed into the Job Title table. If '*Ignore Job Title*' is checked in *Payroll Import Options* the Job Title is ignored. NOTE: This field may be suppressed by Import options.
12	Department	STRING(15)		Pref.	SafetyLink -Enterprise = Site Name -Gold = Department -Express =Department. Note 1: If a pay area is provided instead there is provision to translate value to a Department name when imported – see *Department Aliases* in help. Note 2: This field may be suppressed by Import options.
13	WorkPhone	STRING(15)		Pref.	Work phone number – numeric
14	Mobile	STRING(15)		Opt.	Mobile contact number - numeric
15	Pager	STRING(15)		Opt.	Pager number – numeric
16	Fax	STRING(15)		Opt.	Fax number – numeric
17	Email	STRING(90)		Opt.	Email address eg: name @ domain.co.nz This is normally a home email from payrolls. May be suppressed on input.
18	**StartDate**	STRING(20)		**Required**	Date employee started - work format dd/mm/yyyy
19	EmploymentType	STRING(9)		Pref. Default P	Employment Type – if it starts with 'C' - Casual 'T' - Temporary 'P' – Permanent *default if not specified)
20	**EndDate**	STRING(20)		**Required only if employee terminated**	Date employment terminated. If present the employee will be terminated in SafetyLink. Format dd/mm/yyyy.
21	WorkHoursPerDay	STRING(20)		Opt.	Hours worked per day for accident statistics. Format decimal. (If not specified default is used – defined in accident statistics and initially set to 8.0 hours).
22	WorkDaysPerWeek	STRING(20)		Opt.	Days worked per week. Integer 0-7. (If not specified default is used – defined in accident statistics and initially set to 5 days). Note: If *WorkDaysPerWeek* is specified and *WorkHoursPerDay* is not then *WorkHoursPerDay* defaults to 8.
23	AnnualHolidayDays	STRING(20)		Opt.	Annual holidays per year - Excluding Statutory Holidays. Integer.

					(If not specified the default used is as defined in accident statistics and initially set to 15 work days per year. Note: Statutory Holidays is set in Accident Statistics and applies to all employees.
24	Login ID	STRING(60)		Opt.	Only required if an automatic login is required to be created for the employee allowing them to them log in to the application. The default password, if not is specified in Col 25 will be the same as the first 20 characters of the Login ID. (See Col 25).
25	Login Password	STRING(20)		Opt.	If a login is created for the employee (see Col 24) an optional password can be specified in this column.
26	Pay Type	STRING(1)		salary import option	S – Salary W- Waged or blank
27	Salary			salary import option	
28	Hourly Rate			salary import option	
29	Pay Frequency	STRING(1)		salary import option	W - Weekly F - Fortnightly H – Half Monthly Q – Quarterly
30	Last Pay Rate Change Date			salary import option	
31	Review Date			salary import option	
32	Next of Kin First and Last Name			From 10.002 Opt	Last name –or- first + last name (if both leave next of kin first name blank)
33	Next of Kin Street Address			From 10.002 Opt	
34	Next of Kin Suburb			From 10.002 Opt	
35	Next of Kin City			From 10.002 Opt	
36	Next of Kin Home Phone No			From 10.002 Opt	
37	Next of Kin Work Phone No			From 10.002 Opt	
38	Next of Kin Cell Phone			From 10.002 Opt	
39	Next of Kin Relationship			From 10.002 Opt	
40	Physician Name			From 10.002 Opt	
41	Physician Tel No			From 10.002 Opt	
42	National Student Index No			From 10.002 Opt	
43	Passport Country			Reserved Opt	
44	Passport No			Reserved	
45	Photo File Name			From 10.002	
46	IRD Number	String (11)		From 8.016	Either numeric number (up to 9 digits) or ###-###-###
47	Tax Code	String(5)		From 10.002	IRD Tax code

48	Annual Accrued Leave	String(11)		Reserved	Decimal number @n-11.2
49	Annual Outstanding Leave	String(11)		Reserved	Decimal number @n-11.2
50	Total Annual Leave Balance	String(11)		Reserved	Decimal number @n-11.2
51	Sick Leave Balance	String(11)		Reserved	Decimal number @n-11.2
52	LWOP - Approved prior to leave	String(11)		Reserved	Decimal number @n-11.2
53	LWOP - Not Approved prior to leave	String(11)		Reserved	Decimal number @n-11.2
54	Annual Leave In	String(20)		Reserved	Unit of Annual Leave (eg: Hours)
55	Special Leave In	String(20)		Reserved	Unit of Special Leave (eg Hours)
56	Lieu Leave In	String(20)		Reserved	Unit of Leave in Lieu (eg: Hours)
57	Annual Leave Due Date	STRING(20)		Reserved	Date dd/mm/yyyy
58	Date Leave Updated	String(20)		Reserved	Date dd/mm/yyyy

Change history
Version 7.022 - Added fields 47-54.
Version 8.016 – Added fields 55-59. NOTE: these are ignored during csv import).
Version 10.002 – Updated documentation.

General notes for the CSV file.

Fields
* 1: The header row is optional and if it is present, column 1 MUST have a value of 'STAFF_ID' without the quotes.

2. Fields must not include quotes – eg: " or '

3. Fields must not include commas eg: ',' – this is especially important in address fields.

File Name(s)
4. The file name can be anything but it is a good idea to keep it short and descriptive eg: Employye1.CSV. The file extension may be any valid filename extension but we recommend .CSV as this is the extension the application uses for the drop-down CSV file search.

Location of the file(s)
5. The CSV file(s) may be located anywhere on the network so long as the employee who is nominated to initiate the merge has access rights to the CSV file(s). It is good practice to export or place the CSV file into the same folder as the SafetyLink's data files. (See File/Registration/View Registered Options to identify SafetyLink has been installed.

B. Configuring SafetyLink – Using the Configuration Wizard

1. Start SafetyLink and log in using the initial default login Demo and password Demo.

2. From the Menu select File / Options / Payroll Import Option.
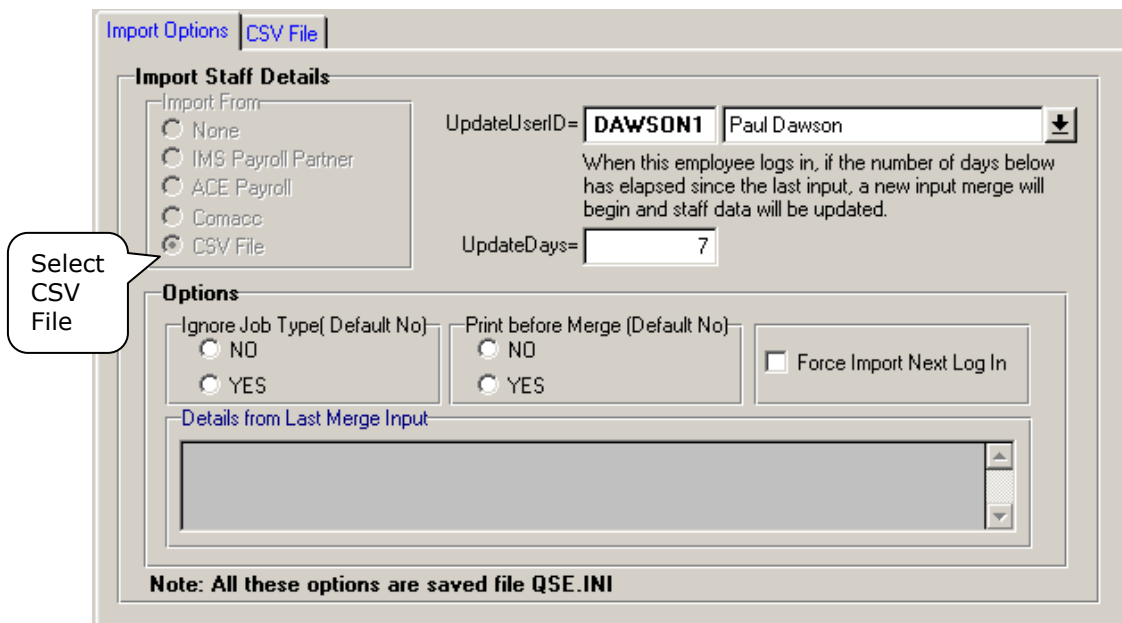
Select CSV File

3. Fill in the following information on The Import Options Tab

- *Import From* – select CSV File

- *UpdateUserID* – Press the drop button and select the employee who, when they log in, will start the synchonisation to merge the IMS employee changes into SafetyLink.

  Notes: The ID is not the login Id but the 'Employee ID' of an employee in the SafetyLink Staff file. If this is a new system and you have not yet merged any employees into SafetyLink, initially select the Demo Employee with and ID of DEMO. After the initial import of employees, you can change this to another employee.

- *UpdateDays* – indicates the number of days between checking the import files for changes. The number of days will depend on the frequency of employee information change. For the checking to begin, the employee in *UpdateUserID* must log into SafetyLink.

- *Options – IgnoreJobType* – By default, when employees are imported from the payroll, employee job types are updated in SafetyLink. To prevent this, select NO. To enable it again, select YES. Normally, keeping the job types synchonised with the payroll is a desirable feature, but if you set up different job types in SafetyLink you can prevent them from being overwritten.

- *Options – PrintBeforeMerge* – Default is not specified. If changed to YES, you can preview or print information before it is merged to SafetyLink. Note: If you get an error "No Bind" select ignore.

- *Force Import Next Log In* – Default is not specified. Checking this on will force a check for changes next time the *UpdateUserID* employee logs into the system

4. Select the CSV File Tab – and fill in the following information

- *Import File 1* – Press the drop down button to select File Types 'Comma Elimited CSV Files'. Navigate to the folder where your first employee csv file is and select it. Employees in the first Import file will have an employee ID the same as the Staff ID in that file.

- *Import File 2* – If there is a second employee CSV fle, press the drop button and select it.

- Emp. ID. Suffix 2 – If there is no second payroll file, leave this blank. If there is a second input employee file, by default the import process will append '/2' to the Staff ID so that there will never be a staff ID the same as in the first import file. eg: If Staff ID is 2003 the employee ID in SafetyLink will be 2003/2. If you prefer you can specify an alternative single digit number or character to use as the suffix eg: if you specify a suffix of 'S', the employee ID would be 2003/S.

- *Import File 3* – If there is a third employee CSV file, press the drop button and select it.

- *Emp. ID. Suffix 3* - If there is no second payroll file, leave this blank. If there is a third payroll, the default suffix is '3'. If you prefer a different suffix change it here.

Note: It is important that all employees in the SafetyLink have a unique employee ID. It is this ID (along with any suffix) that is used for data matching between this system and the source of the employee CSV files.

5. Press the 'Save Options' button to save the selections you have made.

C. Importing Employee changes into SafetyLink

Whenever the employee specified in UpdateUserID above logs in, a check is made to see if it is time for another import to begin. UpdateDays above specifies this checking period in days. If it is time, the import will begin as soon as their login has been verified.

Appendix 1 - Possible reasons why synchonisation may not have occurred

If the update does not occur when you log in to SafetyLink, possible reasons could be:

- **File Error – File Not Found**

  The import file name or path to the import file is not correct or the file does not exist.

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Make sure the file has been created correctly and that the parh and name are correct in the options. Ensure that the entry StaffCsvFile=c:\myfolder\Filename.txt points to the correct import file name in the QSE.INI.

- **File Access Error** – As above and ensure the Employee logging in has full access (read, write and create rights) to the import file.

- **Nothing Happens**

    - *If you made a new shortcut* to run SafetyLink, check the properties of the shortcut in the 'Shortcut tab' to ensure the 'Start In' folder is where SafetyLink data is stored. By default, Windows XP does not set this correctly.

    - Check that the employee ID (*UpdateUserID in QSE.INI*) is correct (check it against the SafetyLink staff browse/update screen. Make sure the Employee has an entry in the Employee Login Security (note the *UpdateUserID* is not the login ID but the Employee ID).

    - Check the version of SafetyLink is equal to or greater than release level 3.702 (see Help, About for the release level).

    - Make sure the *UpdateDays* since the last import has expired. If it has not and you wish to force the import/merge check on '*Force Import Merge Next Login*' and get the employee to login again.

- Not all employees are imported

    - Employees that do dot have an 'Staff ID' will be ignored.

    - Check that you have not exceed the maximum licensed employees (Gold and Express editions) and if so call Compliance Solutions Ltd to purchase and increment in the maximum number of employees.

To rerun with a printout, from the File / Payroll Import Options, select *PrintMergeQueue=YES* and check on *ForceImportNextLogin* and save the options. Login again to rerun the merge with a printout and check the details. Don't forget to reset the options later.

Note: To view the results of the last import, from the menu select File / Payroll Import Options and check the results on each of the two tabs.

Other – please call us on 0800 438 674 or +64 9 410 2810 or email support@cslnz.co.nz.