

H&S Compliance Manager Gold – Interfaces

Import Employee Information from IMS Payroll Partner >Version 2.4.4

This technical newsletter describes how to import Employee information into H&S Compliance Manager from IMS Payroll Partner version 2.4.4 or above. (Last updated 1-4-04).

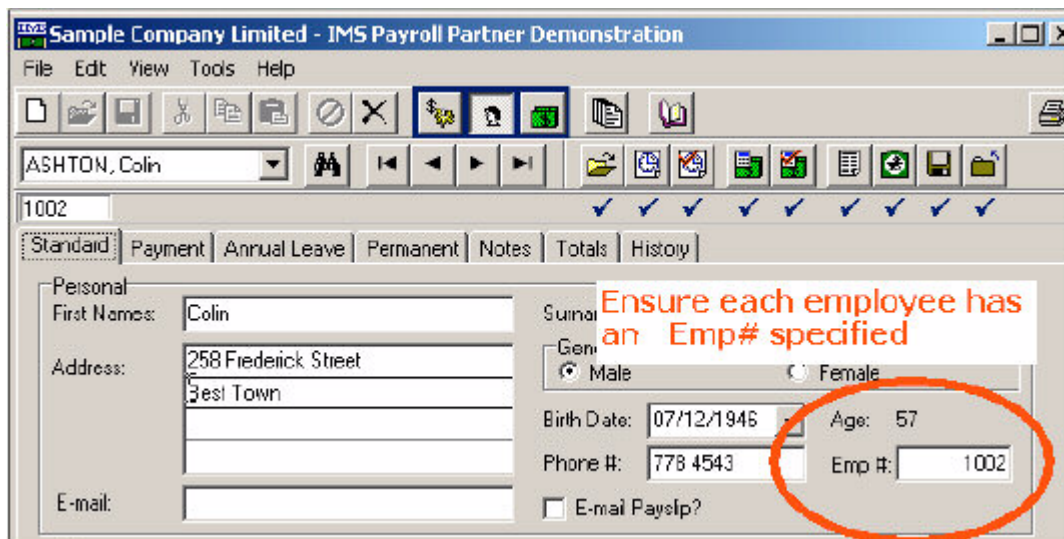
General

IMS Payroll Partner can export employee information in the "Personnel Manager" format and this may be imported into H&S Compliance Manager. From version 3.0 of H&S Compliance Manager (Gold) up to 3 IMS payrolls may be imported. New employees will be added and current employee's details can be amended if they have changed in the payroll.

A. Exporting from IMS Payroll Partner (From each payroll)

Important

Every employee in the payroll must have an "Emp No" specified. This is a unique ID that is used to synchronise employees in both systems. Employees without an "Emp No" will be ignored by H&S Compliance Manager. If Multiple IMS payrolls are used, a suffix is appended to the "Emp No" by the import routine in the H&S Compliance manager to ensure that the matching ID is always unique.



Sample Company Limited - IMS Payroll Partner Demonstration

File Edit View Tools Help

ASHTON, Colin

1002

Standard | Payment | Annual Leave | Permanent | Notes | Totals | History

Personal

First Names: Colin

Address: 258 Frederick Street
Best Town

E-mail:

Surname

Gen: Male Female

Birth Date: 07/12/1946 Age: 57

Phone #: 778 4543 Emp #: 1002

E-mail Payslip?

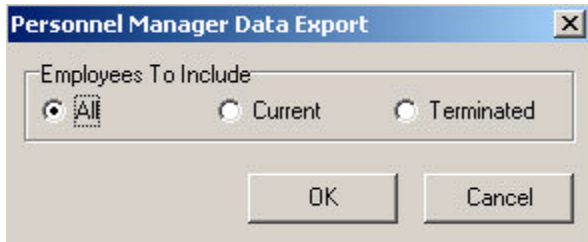
Ensure each employee has an Emp# specified

IMS Payroll Partner showing Employee Emp# field specified for interfacing to H&S Compliance Manager

The following procedure is used to export the employee information for IMS for each payroll. It should be performed initially, then whenever changes are made to employees that will affect the H&S Compliance Manager.

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1. Start IMS Payroll Partner and load the payroll required.
2. From the Tools menu select Files Export / Personnel Manager.



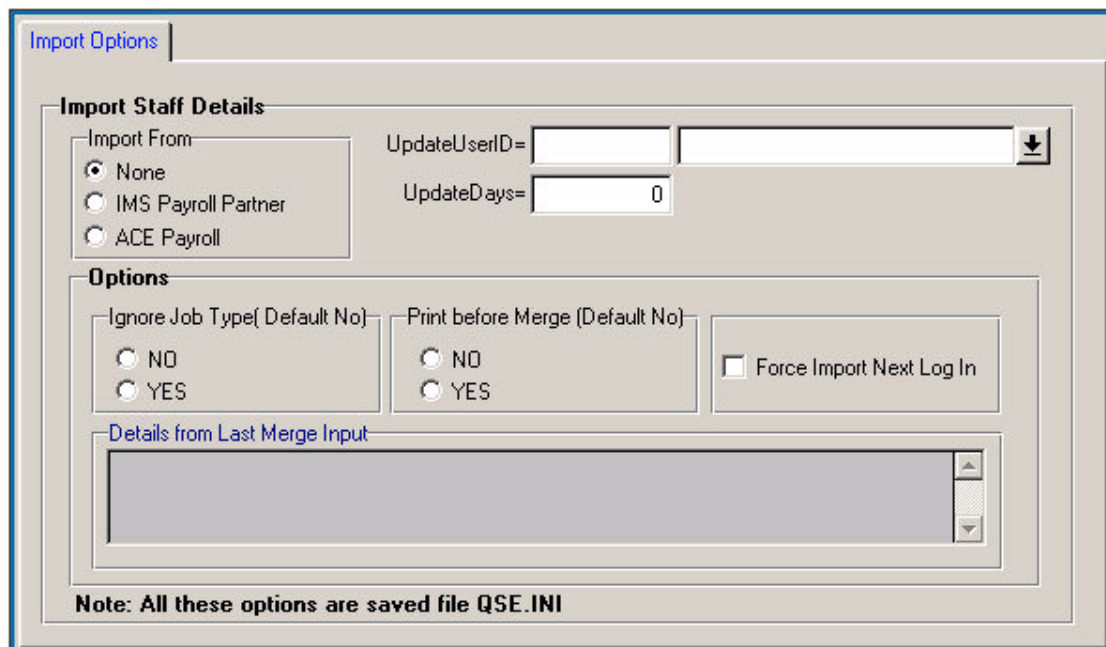
3. Select "All" then press OK. *Note:* H&S Compliance Manager needs all employees so it can update employees who have recently been terminated.

Notes:

- These files are imported into the H&S Compliance Manager when a nominated user logs in. This user needs to have access to the directory the files are in. If the user does not have access to the location where the files are, they must be moved to a directory where the user does have access to them.
- The name of each file exported from IMS is "Personnel.txt". if you are copying multiple files from the payroll then make sure each has a different name eg: Personnel.txt, Personnel2.txt, Personnel3.txt – or copy them into separate directories.

B. Configuring H&S Compliance Manager for IMS – Using the Configuration Wizard

1. Start the H&S Compliance Manager and log in using the initial default login Demo and password Demo.
2. From the Menu select File / Options / Payroll Import Option.



3. Fill in the following information on The Import Options Tab
 - *Import From* – select IMS Payroll Partner
 - *UpdateUserID* – Press the drop button and select the ID of the employee who, when they log in, will start the synchronisation to merge the IMS employee changes into the H&S Compliance Manager.

Notes: The ID is not a login ID, it is the Employee ID of an employee in the H&S Compliance Manager. If this is a new system and you have not yet merged the IMS employees into H&S Compliance Manager, initially select the Demo employee ID. After the initial import of employees, you can change this 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 with *UpdateUserID* must log into H&S Compliance Manager.
- *Options – IgnoreJobType* – By default, when employees are imported from the payroll, employee job types are updated in H&S Compliance Manager. To prevent this, select NO. To enable it again, select YES. Normally, keeping the job types synchronised with the payroll is a desirable feature, but if you set up different job types in H&S Compliance Manager 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 H&S Compliance Manager. 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 IMS Payroll Partner Tab – and fill in the following information

- *Import File 1* – Press the drop down button to select the first Personnel.txt file to import. Employees in the first Import file will have an employee ID the same as ‘Emp No’ from IMS.
- *Import File 2* – If there is a second IMS payroll file, 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 payroll file and the default suffix is ‘2’ ie: If ‘Emp No’ is 2003 the employee ID in H&S Compliance Manager 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 payroll 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 H&S Compliance Manger have a unique employee ID. It is this ID (along with a suffix) that is used for data matching between the two systems.

5. Press the Save Options Button.

C. Importing Payroll Changes into H&S Compliance Manager

Whenever the employee (whose ID was 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.

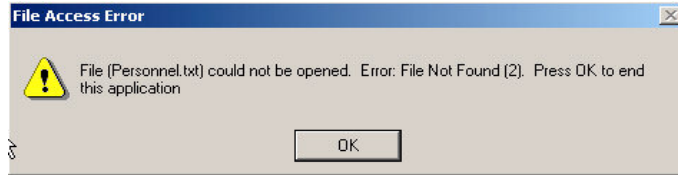
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Appendix 1 - Possible reasons why synchronisation may not have occurred

If the update does not occur when you log in to the H&S Compliance Manager, possible reasons could be:

File Error – File Not Found

The import file name or path to the export file is not correct or it does not exist. Make sure the file



has been created by exporting it from IMS Payroll Partner. Ensure that the entry `IMSPersonnelFile=Personnel.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 rights to the import file.
- **Nothing Happens**
 - *If you made a new shortcut* to run H&S Compliance Manager, check the properties of the shortcut in the 'Shortcut tab' to ensure the 'Start In' folder is where the H&S Compliance Manager data is stored. By default, Windows XP does not set this correctly.
 - Check that the employee ID (*UpdateUserID*) is correct (check it against the H&S Compliance Manager staff update screen. Make sure the Employee has an entry in the Employee Login Security).
 - Check the version of H&S Compliance Manager is equal to or greater than release level 3.000 (see Help, About for the release level).
 - Make sure the *UpdateDays* since the last import has expired.
- Not all employees are imported
 - Employees in the payroll that do not have an 'Emp No' will be ignored.
 - Check that when the employees were exported from the payroll, you selected ALL 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.