

## H&S Compliance Manager Gold – Interfaces

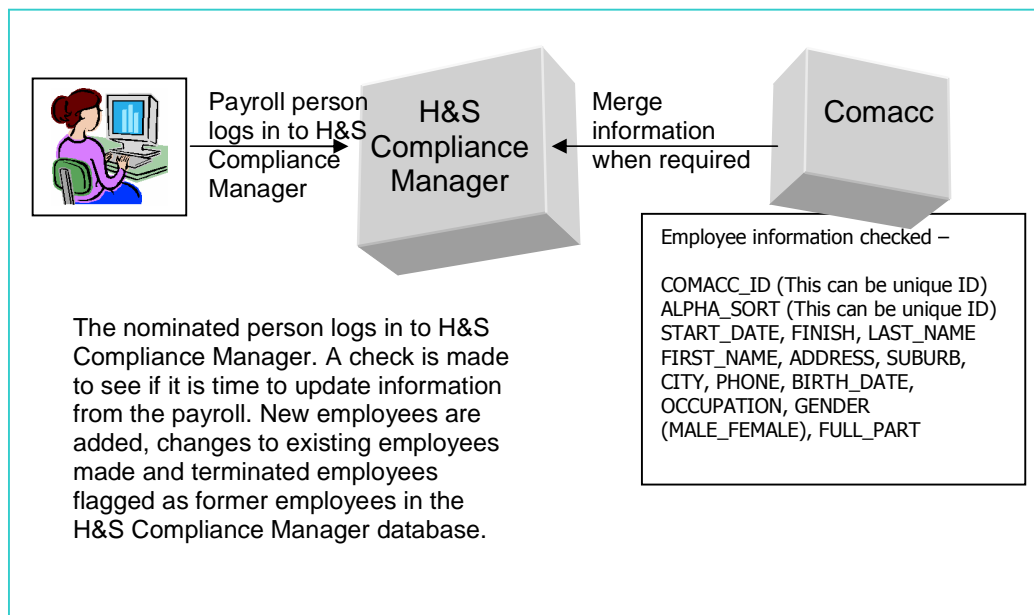
### Import Employee Information from Comacc Payroll

The H&S Compliance Manager can interface with up to 3 Comacc payrolls. This technical letter describes how to set up the interface with Comacc and how to ensure that information flows from the Comacc payroll(s) to H&S Compliance Manager. (Last updated 16 Aug 05).

#### A. What is transferred from Comacc and how does it work?

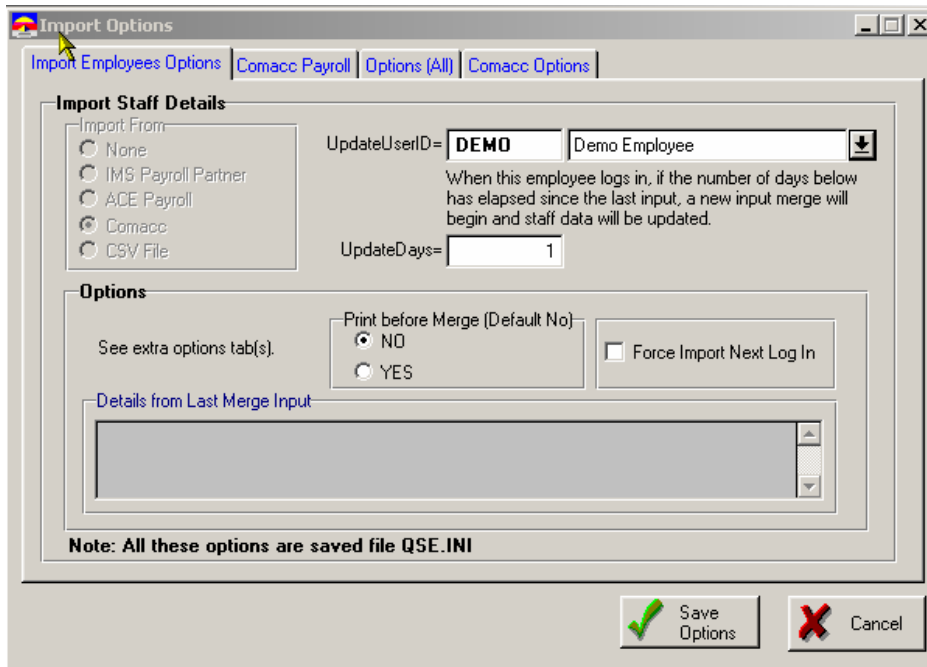
Only basic staff information is transferred from the payroll, details applicable for health and safety and training purposes. The payroll staff table is directly accessed in read-only mode and changes are merged to the H&S Compliance Manager database when the employee with a nominated employee-ID logs into the H&S Compliance Manager. The date of the last check is compared with the current date to determine if checking is required, and if so the data merge occurs.

Usually the person in charge of the payroll will have access to both payroll and H&S Compliance Manager databases and will be nominated as the user who, when they log in to the H&S Compliance Manager, will trigger the data update and merge if it is time.



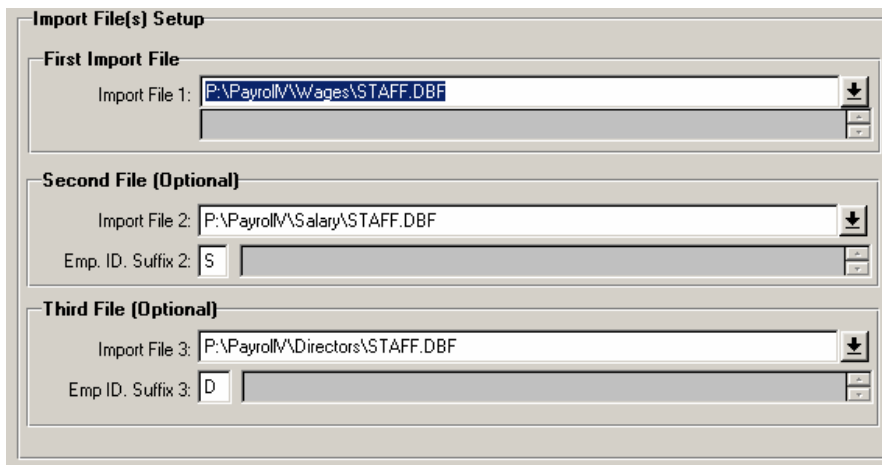
#### B. Setting up H&S Compliance Manager

1. Start 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 Options.
3. On The Import Options Tab



- **Import From** – select **Comacc**
- **UpdateUserID** – **Press the drop button** and select the 'Demo Employee'. (After all employees have been imported, this will be changed to be the payroll person or another employee.) Note: this employee must have a log in set up in the H&S Compliance Manager (see later).
- **UpdateDays** – Key in 1. This is the number of days between checks and this number will depend on the frequency of employee changes. For example, if you set this to 7, a check is made to see if 7 days since the last merge has expired when the nominated employee logs in.
- **PrintBeforeMerge - Select NO.** This option prints all the employee information to the printer before it does the merging. It is only used if there is a discrepancy you wish to check.
- **ForceImportNextLog in - leave unchecked.** This option forces a check for changed information when the nominated employee logs in regardless of how many days since the last check. It is turned off after the next check.

4. Select the Comacc Payroll Tab –



- **Import File 1** – Press the drop down button to select the first Comacc STAFF.DBF file. Select 'Comacc Staff Files' to display appropriate file types in the browse then select the STAFF.DBF file you want.

- **Import File 2** – Repeat the process if there is a second Comacc STAFF.DBF file.
  - **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 the Comacc Staff ID 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' to indicate salaried employees, 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.
5. Select the Comacc Options Tab to select options specific to Comacc.

- **Comacc Staff File Type.** There are different formats of Comacc STAFF.DBF files. To determine your Comacc file type press the button that says 'Test file Type'. This will automatically detect the file type of the first Comacc STAFF.DBF file you specified in *Import File 1* and fill file Type. If you get an error message please call us.
- **For ID Use Comacc (important).** Select the Comacc Staff ID you wish to use in the H&S Compliance Manager. Comacc uses two types of staff ID's: an ALPHA Code and an numeric code. When merging information from Comacc to the H&S Compliance Manager, one of these ID is used as a unique identifier to match information. You can use - EITHER the Comacc ALPHA code – OR the staff number. Once this has been selected do not change it or you will end up with two entries for each person.

*Important Note: All employees in the H&S Compliance Manger must have a unique employee ID (including the suffix). It is this ID and suffix that is used for data matching between the two systems.*

6. Select the Options (ALL) tab. These are options common to all employee import sources.

**Format Options**

**Ignore Job Type (Default NO)**  
 NO  YES (Default NO. Selecting YES all Job types imported will be ignored.)

**Add Terminated (Default YES)**  
 YES  NO (Default YES. Selecting NO only current employees will be imported. NOTE: After the first import you should set this to YES otherwise you will need to terminate employees manually in this system.)

**Ignore Department (Default NO)**  
 NO  YES (Default NO. Selecting YES will ignore importing any Employee Departments changes. This overrides any other department options.)

**Ignore Email**  
 NO  YES (Default NO. Selecting YES will ignore importing any Employee Email changes.)

- **IgnoreJobType (Default NO).** If set to NO, when employees are imported job types are updated in H&S Compliance Manager. If you wish to ignore job types being overridden select YES.

**Note:** Keeping the job types synchronised with the payroll (NO) is often desirable but, if you have many job types in your payroll and can group employees by fewer job types manually, maintaining job type training, processes and tasks can be made easier by selecting (YES) to ignore importing them from the payroll.

- **Add Terminated (Default YES).** Under normal circumstances you would not want to import previously terminated employees so you should change this selection to NO.

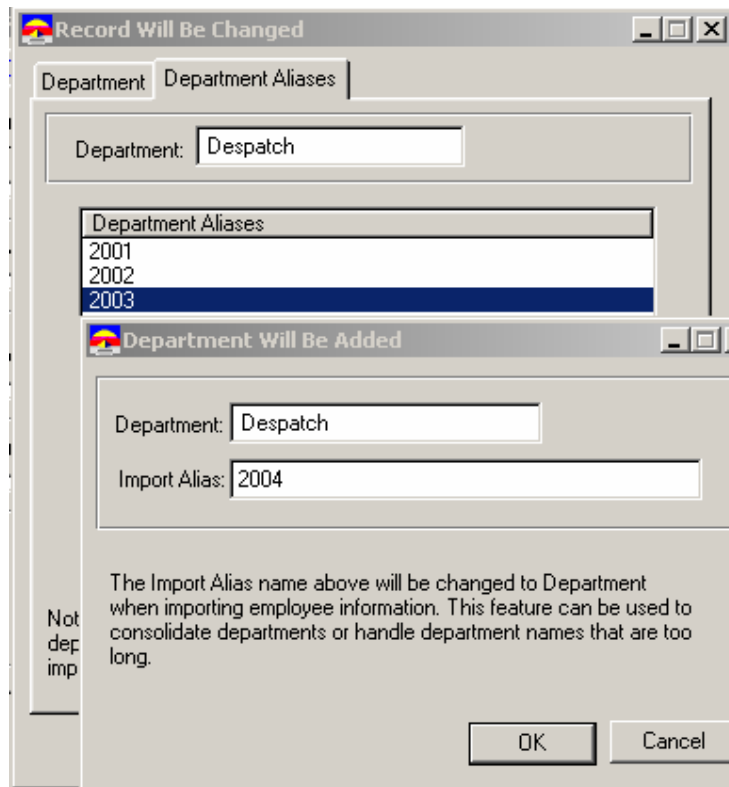
Note 1: This setting will not affect employees who are already in the H&S Compliance Manager and who are subsequently terminated in the payroll. They will still be made former employees in H&S Compliance Manager.

Note 2: Only current employees are counted for licensing purposes in the H&S Compliance Manager. All former employees are not counted.

- **Ignore Departments (Default NO).** The default (NO) is to import Comacc cost centers and set them up as a departments in the H&S Compliance Manager. Selecting YES will ignore these and you can set up your own departments in the H&S Compliance Manager then assign employees to it.

**Note – an alternative:** If you would like to set up your own departments in the H&S Compliance Manager, and automatically have employees in Comacc cost centers allocated to your departments select (NO) and before the first import set up links from Comacc Cost Centers to departments as below.

- Set up all the departments you need in H&S Compliance Manager.
- Select each department and edit (change) and select the Department Aliases Tab to show a list of aliases (Comacc cost centers) for the department.
- Add each cost Comacc cost center into the list by pressing the Add button and keying the cost center then pressing OK. Repeat for each cost center in the department.



*In this example there are several Aliases: 2001-2004, (Comacc cost centers) for the Despatch department. Employees with these cost centers will be allocated to the Despatch department.*

- **Ignore Email (Default NO).** If YES, no email address will be brought in from the payroll. Select this if you have manually specified employee email address in the H&S Compliance Manager and do not want them to be modified from the payroll.

7. **Press the Save Options Button** to save all the payroll import options.

You have now set up all the information to bring in all the employees from Comacc.

### **C. Importing Payroll Changes into H&S Compliance Manager**

#### **Initial load of employee names**

1. Exit the H&S Compliance Manager if it is open.
2. Restart the H&S Compliance Manager and log in with a User ID of **Demo** and a password of **Demo**. (This uses the default employee Demo Employee.)
3. If the options are set up correctly, you will see the merge screen as employees are brought into the H&S Compliance Manager. This will also optionally set up departments and job types if they are not ignored. You can view these and the employees to make sure you have the correct settings.

#### **To change the employee for future merges to the payroll person**

1. From the menu select File / Options / Payroll Import Options.
2. Press the dropdown on the *UpdateUserID* to select a new employee to initiate the payroll merge.
3. Press the Save Options button to save the new options.

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.

**To set up a Login for payroll person so they can log in**

1. From the Menu select File / Security / Employee Login Security.
2. Press the Add button to add a new Login for the employee.
3. In the Employee Login Tab, press the Employee Dropdown button and select the employee name from the list by pressing the Select button.
4. Key in the employee's login ID. You could use the employee's initials for this.
5. Select the employee's Security Group of 'System Administrator'.
6. Press OK to save the new Login.

**To check the updating occurs when the payroll person logs in**

1. From the Menu, select File / Options / Payroll Import Options.
2. Check on 'Force Import Next Login'.
3. Press Save Options.
4. Close down the application.
5. Restart the application and login with the new payroll employee's login. (Note initially the login password is the same as the employee Login User ID). You should see the merge begin.

**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 STAFF.DBF import file name or path to the file is not correct or it does not exist.

**File Access Error** – As above and ensure the Employee logging in has full access rights to access the STAFF.DBF file(s).

▪ **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.
- 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 4.008 (see Help, About for the release level).
- Make sure the *UpdateDays* since the last import has expired.

*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.