

Compliance Solutions Ltd 9A Prospect Terrace PO Box 31 087, Milford Auckland, New Zealand Tel (09) 410-2810 Fax (09) 410-3613

CALL FREE 0800 438-674

sales@cslnz.co.nz support@cslnz.co.nz

SafetyLink®-Interfaces

Import Employee Information from ACE Payroll Partner Plus

This technical newsletter describes how to import Employee information into SafetyLink from ACE Payroll. Up to 3 ACE payrolls many be imported. New employees will be added and current employee's details can be amended if they have changed in the payroll.

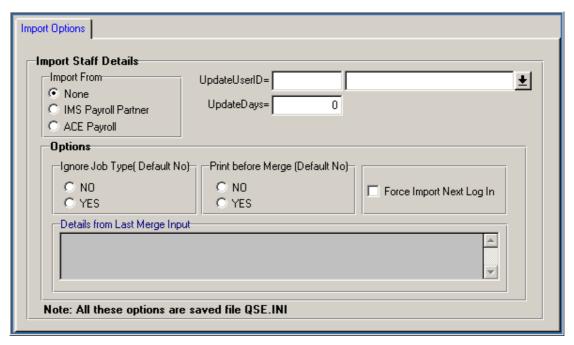
Information transferred from ACE to SafetyLink

Staff ID Code-used or matching data between the two systems must be present.

- Last Name
- First name
- Residential address
- Suburb
- City
- Code
- · Date of Birth
- Home phone number optional normally set to ignore
- Gender
- Job title
- Department
- Work phone
- Mobile
- Work email
- Start date
- Employment type
- End date
- Work hours per day
- Work days per week
- Annual holiday entitlement

Configuring SafetyLink for ACE – Using the Configuration Wizard

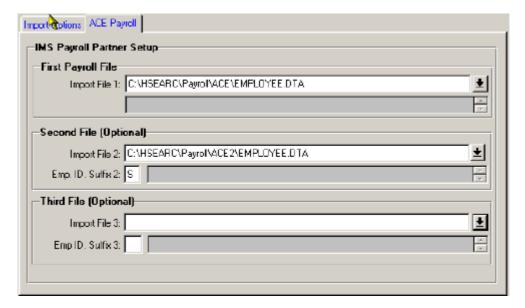
- 1. Start the SafetyLink and log in using the initial default login Demo and password Demo.
- 2. From the Menu select File / Options / Payroll Import Option.



- 3. Fill in the following information on The Import Options Tab
 - Import From select ACE Payroll
 - UpdateUserID Press the drop button and select the ID of the employee who, when
 they log in, will start the synchonisation to merge the ACE employee changes
 SafetyLink.

Notes: The ID is not a login ID, it is the Employee ID of an employee in SafetyLink. If this is a new system and you have not yet merged the IMS employees into SafetyLink, initially select the Demo employee ID. 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 with UpdateUserID must log into SafetyLink.
- 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
 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 ACE Payroll Tab and fill in the following information



- Import File 1 Press the drop down button and select "All Files" then select the first ACE EMPLOYEE.DTA file to import. Employees in the first Import file will have an employee ID the same as in ACE. The ACE DEPTMENT.DTA file must exist in the same folder as the EMPLOYEE.DTA file.
- Import File 2 If there is a second ACE 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 the ACE employee Number is 2003 the employee ID in SafetyLink 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 SafetyLink 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.

Importing Payroll Changes into SafetyLink

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.