

## SafetyLink® – Interfaces

### Import Employee Information from IMS Payroll Partner

This technical newsletter describes how to import Employee information SafetyLink from IMS Payroll Partner. (Last updated 20 Aug 14).

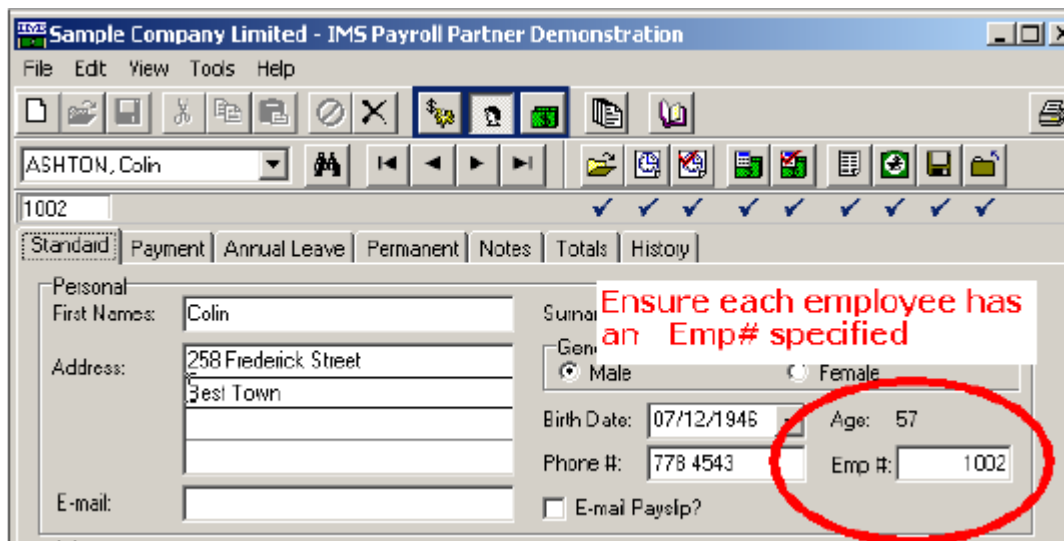
#### General

IMS Payroll Partner can export employee information in the "Personnel Manager" format and this may be imported SafetyLink. Up to 4 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 SafetyLink. 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.



The screenshot shows the 'IMS Payroll Partner Demonstration' window for 'Sample Company Limited'. The employee record for 'ASHTON, Colin' (ID 1002) is displayed. The 'Personal' tab is active, showing fields for First Names (Colin), Address (258 Frederick Street, Best Town), Birth Date (07/12/1946), Age (57), and Phone # (778 4543). The 'Emp #' field is set to 1002 and is circled in red. A red text box above the 'Emp #' field reads: 'Ensure each employee has an Emp# specified'.

#### IMS Payroll Partner showing Employee Emp# field specified for interfacing to SafetyLink

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 SafetyLink.

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1. **Start IMS Payroll Partner** and load the payroll required.
2. From the Tools menu select- **Files Export / SafetyLink**.
3. Select **"All"** then **press OK**. *Note:* SafetyLink needs all employees so it can update employees who have recently been terminated.

*Notes:*

- These files are imported into SafetyLink 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 SafetyLink for IMS – 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.
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 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 SafetyLink. 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 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 IMS Payroll Partner Tab – and fill in the following information

The screenshot shows the 'IMS Payroll Partner Setup' dialog box. It has two tabs: 'Import Options' and 'IMS Payroll Partner'. The 'IMS Payroll Partner' tab is selected. The dialog is divided into three sections:

- First Payroll File:** 'Import File 1:' is set to 'C:\Program Files\IMS\IMS Payroll Partner2-44\Initial Company\Personnel.txt'. There is a drop-down arrow to the right of the text box.
- Second File (Optional):** 'Import File 2:' is set to 'C:\Program Files\IMS\IMS Payroll Partner2-44\Company2\Personnel.txt'. 'Emp. ID. Suffix 2:' is set to 'S'. There is a drop-down arrow to the right of the suffix text box.
- Third File (Optional):** 'Import File 3:' is set to 'C:\Program Files\IMS\IMS Payroll Partner2-44\Company3\Personnel.txt'. 'Emp ID. Suffix 3:' is set to 'P'. There is a drop-down arrow to the right of the suffix text box.

- *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 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.

### C. 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.

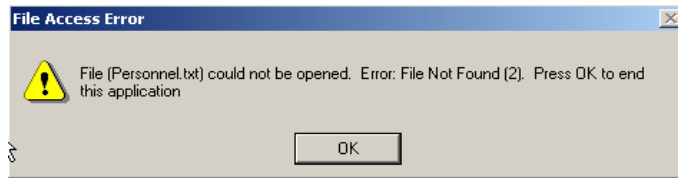
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## Appendix 1 - Possible reasons why synchronisation may not have occurred

If the update does not occur when you log in to SafetyLink, 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 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*) is correct (check it against SafetyLink staff update screen. Make sure the Employee has an entry in the Employee Login Security).
- Check the version of SafetyLink 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.