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# Employee Import

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The following instructions are for the import of employees from an Excel or csv file.

This import may be used to import employees from third party systems or any Excel/CSV format. If the file you are importing uses Datatech's field names in the Header, the program will automatically map the data to the corresponding field in the Employee file. If you are importing a file that is not using Datatech's field names, you will need to map the Excel columns to their respective Datatech field. You may request assistance with this from our software support department. Once the first mapping is done, the settings can be saved and loaded for future imports.

## Conditions:

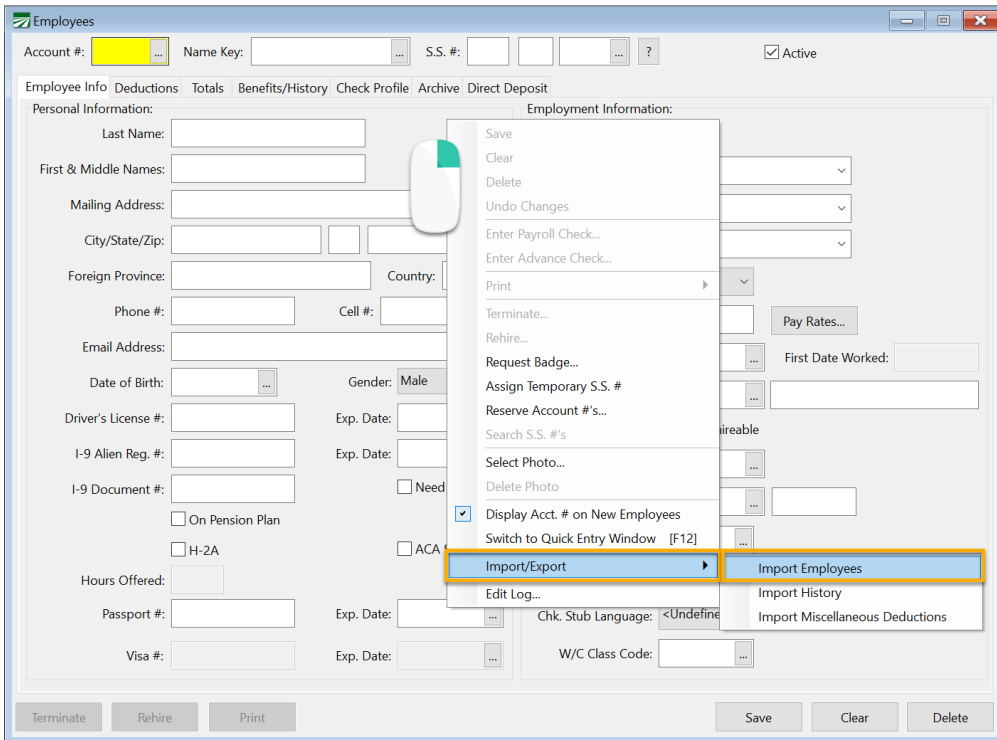
1. The employee account number that is supplied in the import file should not have been previously used in the Datatech employee file. If a PIN # is supplied for data collection badges, this PIN # must not have been previously used in the Datatech employee file.

If no employee account number is provided, the system will auto-assign the account number.

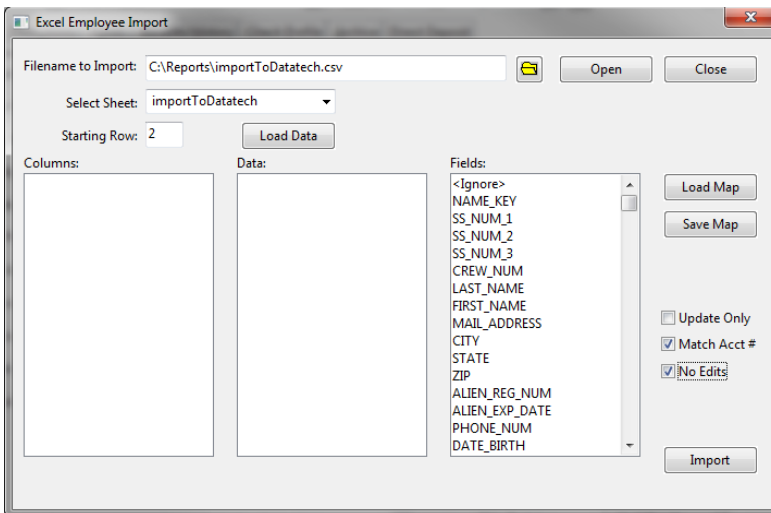
2. The file will either contain only new hires or map the hire date to HIRE\_OR\_REHIRE\_DATE. If the file contains a date greater than the Datatech Hire Date, a Re-Hire record will be created for the employee.
3. Where required information is missing, such as pay cycle or pay type, the Datatech software defaults will apply (see last page).
4. When updating existing records, the SSN is the main link to the employee's current record. You may also select Match Account # and the program will require the SSN and Account # to match in order to update information on the employee's current record.

## **To Import:**

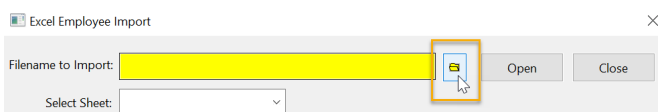
1. To import an employee upload file, go to **Payroll > Employees > Right-Click on the Main Screen > Import/Export > Import Employees.**



This screen will appear:



2. Click the **Open File** button (as shown below) and select the file to import.



3. Click **Open** to open the CSV file. This will load the file into Excel, and the Excel window will open. You can minimize the Excel file but do not close it.

4. You should now see **your** CSV file in the *Select Sheet* entry and *Starting Row* should be **2**.

Filename to Import: Documents\BCK hiring\_export\_datatech\_2022

Select Sheet: BCK hiring\_export\_datatech

Starting Row: 2

Load Data

5. Click **Load Data**. You will see the column names from the CSV file appear in the *Columns* box.

Excel Employee Import

Filename to Import: Documents\BCK hiring\_export\_datatech\_2022\_08\_19.csv

Select Sheet: BCK hiring\_export\_datatech

Starting Row: 2

Load Data

Columns:

- ACCT NUM
- SS NUM
- STATUS
- REG AG
- FIRST NAME
- LAST NAME
- MAIL ADDRESS
- MAIL ADDRESS2
- CITY
- STATE
- ZIP
- PHONE NUM
- SEX
- POSITION
- ALIEN REG NUM
- ALIEN EXP DATE
- FEDERAL FILING STATUS
- W4 DEP CREDITS
- W4 OTHER INCOME
- W4 DEDUCTIONS
- ADDL FED WHT

Data:

- 4210
- 4211
- 4212
- 4213
- 4214
- 4215
- 0

Fields:

- ACCT NUM
- ST MIN WAGE EXEMPT
- MAILING ADDR BAD
- OTT WAGES
- W4 OTHER INCOME
- COUNTRY
- PENSION FLAG
- NOT REHIRABLE
- W4 DEDUCTIONS
- HOURS PERIOD1
- HOURS PERIOD2
- WEEKS WORKED
- EDIT DATE
- EDIT TIME
- OPERATOR
- PAY CYCLE
- FOREIGN PROVINCE
- BLANK1
- HOURS PERIOD3
- DEF COMP
- LICENSE NUM
- ST MARITAL STAT

QB Map

Load Map

Save Map

Update Only

Match Acct #

No Edits

Import

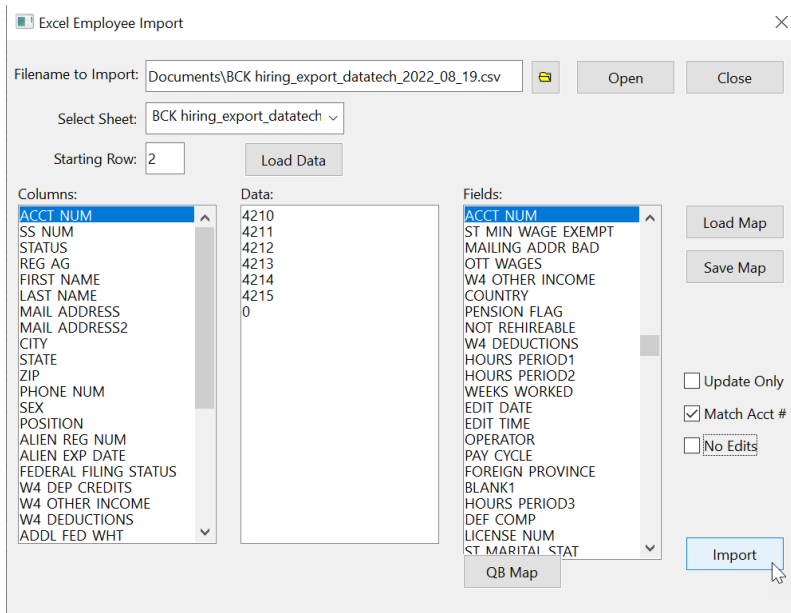
6. You can choose from the following options:

- Update Only:** Check this box when you are updating information, but not creating new records. This may be used to update information like Department, Pay Rate, and other employee information.
- Match Acct #:** Check this box when updating information on *existing* employees. The program will require the SSN and Account # to match in order to update employee information. (When left unchecked, the program will only update matching SSNs.)
- No Edits:** When *No Edits* is selected, the program will **not** update information on existing employees. This may be desired if you have updated or corrected employee information in your Datatech software and you do not want that information over-written with outdated data from the third party application. (If you do want all employee information updated from the third party app, do not select No Edits.)

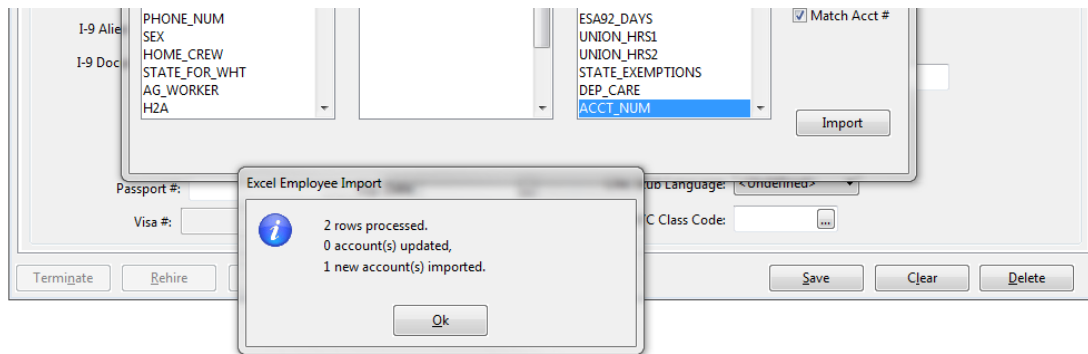
7. Click **Import** to begin the import process.

8. When finished, the program will report the results.

This is how the screen should look after the above steps and before clicking on the Import button (your checkbox options may differ depending on what you decided):



This results box will appear when finished:



## **Default Values**

### **Sick Pay Plan**

Make sure that you have set up a default Sick Pay Plan. The program will assign this default plan to each employee that is imported. Sick Pay anniversary and Date Available will be filled in when their first check is processed.

### **Pay Cycle**

The import file does not have a Pay Cycle defined. The program will assign the Default pay Cycle to each employee that is imported.

### **Pay Type**

The import file does not have a Pay Type defined. If there is no pay type in the import file (H for Hourly or P for Piecework), the program will default to Hourly.

### **Date Hired**

The Date Hired in the import file will be included in the employee record, but a Hire record is not created in the Employee History list.