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## H&S Compliance Manager Gold – Interfaces

### Import Employee Information from ACE Payroll Partner Plus

This technical newsletter describes how to import Employee information into H&S Compliance Manager from ACE Payroll. Up to 3 ACE payrolls may 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 H&S Compliance Manager

Staff ID Code - *used* for 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 H&S Compliance Manager for ACE – Using the Configuration Wizard

1. Start the H&S Compliance Manager and log in using the initial default login Demo and password Demo.

**Import Options**

**Import Staff Details**

Import From:

- None
- IMS Payroll Partner
- ACE Payroll

UpdateUserID= [ ] [ ] [v]

UpdateDays= [ 0 ]

**Options**

Ignore Job Type( Default No):

- NO
- YES

Print before Merge (Default No):

- NO
- YES

Force Import Next Log In

Details from Last Merge Input

[ ] [v]

**Note: All these options are saved file QSE.INI**

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 synchronisation to merge the ACE 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 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 DEPARTMENT.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 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.

### **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.