



## Importing Employee Information in Sage BusinessWorks 2010

### **Sage BusinessWorks Accounting import format requirements:**

1. The import file must be in a comma delimited variable (.CSV) text format. Each field can contain only standard ASCII characters, separated by commas. Your file should resemble the examples at the end of this document.
2. **Only those fields listed on the following page can be imported into Sage BusinessWorks, and they must be imported in the order shown.**
3. Each record in the file must be terminated by a carriage return and line feed.

### **Before you begin the import process:**

1. Always back up your company data prior to importing a file.
2. Do not delete the import file from your system's memory until you are satisfied with the results of the import.

### **Time-saver: Using a model employee**

To have default information added for all of the employees in the import file, create a model employee before importing. Then specify that employee as the model employee on the Import Employee Information window. Sage BusinessWorks copies information shown in the table below from the model employee into all employee records as they are being imported:

<b>Personal</b>	<b>Pay type / rate</b>	<b>Taxable Status</b>
SWT State	Pay period	FWT exempt?
SDI/SUI State	Pay type	FICA exempt?
Department	Standard rate	FUTA exempt?
Task code	Rate per	SWT exempt?
Shift	Vacation hours rate	SDI exempt?
Deduction IDs	Sick pay rate	SUI exempt?
Other pay IDs		Agricultural employee?

**Special note on SWT & SDI/SUI States:** If you don't use a model employee when importing employee information, Sage BusinessWorks assigns the first (alphabetically) activated state to all employees being imported. For example, if you have activated Arizona (AZ) and California (CA), Sage BusinessWorks assigns all imported employees to Arizona unless you have specified a model employee who is assigned to California.

### **Importing Employee Names:**

Sage BusinessWorks parses employee names into first name, middle initial and last name from a single field in the import file. During the import process, Sage BusinessWorks determines the format of the name field by the presence or absence of a comma:

- **Comma present in the name field:** Sage BusinessWorks places the text preceding the comma into the last name field. The text through the next space is placed into the first name field, and the first letter of any remaining text is placed in the middle initial field.
- **No comma in the name field:** Sage BusinessWorks places the text through the first space into the first name field, the first letter of the next word into the middle initial field, and all text after the next space into the last name field.

**Employee import format**

Each record consists of at least 8 fields and a maximum of 16 fields:

Field	Max Length <sup>1</sup>	Valid Entries / Format
0 Transaction Type <sup>2</sup>	N/A	Add: /A or /ADD Delete: /D or /DELETE Update: /U or /UPDATE Change: /C or /CHANGE Rename: /R or /RENAME
1 Employee ID <sup>3</sup>	12	Any text. (Lowercase letters are converted to uppercase during import.)
2 Employee Name <sup>3</sup>	57	The name can include up to a 15 character first name, 15 character middle name, 20 character last name, and 4 character suffix. Valid suffixes are: Jr, Sr, I, II, III, and IV. Other suffixes will be included as part of the last name if there is space in the 20 characters.
3 Address Line 1 <sup>3</sup>	40	Any text
4 Address Line 2 <sup>3</sup>	40	Any text
5 City <sup>3,4</sup>	40	Any text
6 State <sup>3,4</sup>	2	Any text
7 ZIP Code <sup>3</sup>	10	Any text
8 Telephone Number <sup>3</sup>	14	Acceptable phone number formats: NNN-NNN-NNNN (NNN)NNN NNNN (NNN)NNN-NNNN ( )NNN NNNN <sup>5</sup> ( )NNN-NNNN <sup>5</sup>
9 Social Security Number	11	NNN-NN-NNNN
10 Comment Line 1 <sup>6</sup>	32	Any text
11 Comment Line 2 <sup>6</sup>	32	Any text
12 Pay Type	1	H = Hourly S = Salaried C = Commission
13 Pay Period	1	W = Weekly B = Biweekly S = Semi-monthly M = Monthly
14 Pay Rate	11	Enter a number between 0.01 and 1999999.999 without commas or dollar signs. Pay Rate must not exceed \$999.99 per hour or \$1,999,999.999 per year.
15 Pay Rate Per	1	H = Hour W = Week M = Month Y = Year

<sup>1</sup> If the length of a field exceeds the maximum number of characters allowed for importing, Sage BusinessWorks automatically truncates it to the maximum number allowed.

<sup>2</sup> If adding a new employee, no prefix is required. If /U is used, Sage BusinessWorks updates an existing employee or add a new one if that employee ID does not exist. /C changes existing employees only. /D deletes an employee **only** if the employee has no historical transactions currently on file and all of the employee's totals are 0.00. (See the *Totals, Deductions, and Other Pays* windows in the *Employees / Maintain Employees* option.)

<sup>3</sup> Required fields when adding a new employee.

<sup>4</sup> Sage BusinessWorks stores city and state as two separate fields, making it possible to import and export the two fields separately. However, the import rules remain unchanged. The import can accommodate either "City, State" as one field or "City", "State" as two separate fields. The program correctly splits "City, State" into "City", "State" during the import.

<sup>5</sup> To import phone numbers using the formats "( ) NNN NNNN" or "( ) NNN-NNNN", you must first choose the INTERNATIONAL setting for Phone Number formats in the Sage BusinessWorks System Manager. (Under the *Maintenance* menu, select *System Preferences*.)

<sup>6</sup> The Comment Line 1 and Comment Line 2 are listed in the Custom Export option as UserDefined1 and UserDefined2.

## Employee import examples

(Note that <cr> and <lf> represent carriage-return and line-feed, respectively.)

1. **Adding a record.** Sage BusinessWorks adds a new record only if the Employee ID does not already exist. (The three examples below are identical in function.)

```
/ADD,"AKENS","John Akens","4321 Prospect Place",,"San Jose, CA","95129","(408) 888-9876","466-32-6655","Requested raise on 5/15/90.",,"H","W",5.45,"H"<cr><lf>
```

```
/A,"ANTHONY","Mildred Anthony","9812 North 17th St","Apt. 7C","San Francisco, CA","94116","(415) 359-6914","672-98-2716",,"C","M",0,"H"<cr><lf>
```

- Notice the extra comma after the first address line in these records. Commas are used as “place holders” to tell Sage BusinessWorks that a field is to be left blank (or unchanged in the case of an update). In these examples, a place holder is used for field 4, “Address Line 2”. Without this comma, Sage BusinessWorks would import “Randolph, IL” as Address Line 2, “60129” as the City and State, and so on.
- The city and state are surrounded with quotation marks because the field contains a comma. Without the quotation marks, Sage BusinessWorks would attempt to import “CA” into the Zip Code field, “95129” into the Phone Number field, etc.

2. **Updating a record.** If the employee ID, WRIGHT, already exists in this company, Sage BusinessWorks updates that employee with information from this import record. If this employee doesn’t exist in this company, Sage BusinessWorks adds it.

```
/UPDATE,"JOHNSON",,,,,,(215) 998-7833"<cr><lf>
```

```
/U,"WRIGHT",,"12431 Stevens Creek Blvd",,"Cupertino, CA","95014","(408) 885-3246"<cr><lf>
```

3. **Changing a record.** If the /C or /CHANGE parameter is used, Sage BusinessWorks changes a record that already exists in the company with this ID. In this example, if the employee ID “BERNSTEIN” exists, Sage BusinessWorks updates the record. Otherwise, the record is ignored during the import process.

```
/CHANGE,"BARSTOW",,,,,,(215) 998-7833"<cr><lf>
```

```
/C,"BERNSTEIN",,,,,,"Jeff is due for raise review"<cr><lf>
```

4. **Deleting a record.** Enter the “deleting” prefix followed by the ID to delete. If there are no historical transactions for the employee, Sage BusinessWorks deletes the record. The period of time Sage BusinessWorks saves historical data is set in the *Utilities / Maintain P/R Parameters* option.

```
/DELETE,"HARPER"<cr><lf>
```

```
/D,"JONES"<cr><lf>
```

5. **Renaming a record.** Enter the “renaming” prefix, original ID, and new ID. In the record below, the employee ID “BROOKS” is changed to “SMITH”.

```
/RENAME,"BROOKS","SMITH"<cr><lf>
```

```
/R,"GARCIA","HERNANDEZ"<cr><lf>
```

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### **Creating a sample file to review in Sage BusinessWorks**

If you want to examine a sample employee data import file, follow the steps below to create your own file from the Sage BusinessWorks sample data using the data transfer options.

1. Create an outline: Choose *Transfer / Custom Exports*, click *New* and assign a name to the export format.
2. Select the *PR Employees* data source and select the following fields:
  - Items to be exported - 1: <preemployee> ID
  - 2: <preemployee> Name
  - 3: <preemployee> Address1
  - 4: <preemployee> Address2
  - 5: <preemployee> City
  - 6: <preemployee> State
  - 7: <preemployee> ZIPCode
  - 8: <preemployee> Phone
  - 9: <preemployee> SocialSecurityNo
  - 10: <preemployee> UserDef1
  - 11: <preemployee> UserDef2
3. Click *Next* on the **Set Sort By** and **Set Filters** windows, then click *Done*.
4. Click the *Export* button and select "Comma-Delimited Text (CSV)" from the drop-down list and click *OK*.
5. Select the "View on Screen" radio button and click *OK*. The file displays in Excel.
6. In Excel, delete Row 1. (To delete a row or column, click its label, then right-click the mouse and select *Delete*.)
7. Select *Save as* from the *File* menu and browse to the location where you wish to store the file. (Leave the "Save as type" selection set to "CSV (Comma delimited) (\*.csv)".)

If you have successfully completed these steps, the file you created contains employee information that can be imported into Sage BusinessWorks. Examine this file using the Windows Notepad to become familiar with the required format for importing employee information into Sage BusinessWorks.