

# Sage 50

## HR 2010

Importing information from a  
Microsoft Excel (.xls) or CSV file



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# Importing from a Microsoft<sup>®</sup> Excel<sup>®</sup> or CSV file

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Using Sage 50 HR, you can import information from Microsoft Excel (.xls or .xlsx) or CSV (Comma Separated Values) files. This document provides the details of the file formats required and the import procedure.

**Note:** In order to import Microsoft Excel (.xls or .xlsx) files, you must have Excel installed on the same PC as Sage 50 HR.

## What information can I import using Microsoft Excel or CSV files?

Using the templates available you can import:

- Employee details
- Absence details
- Appraisal details
- Disciplinary details
- Time Keeping details
- Qualification details
- Training Course Attendance details

## Import preparation checklist

Before importing information into Sage 50 HR, you must check that:

- You have backed up your current information. **If you have not already done so, we strongly advise that you take a backup of your data before starting the import procedure.** For further information about taking a backup, refer to your software's help system.
- You have access to the Import CSV Data and Advanced Data Import options.  
If these options are not available to you, because you do not have the necessary access rights set up in your security account, check with the person responsible for setting up the security in your software and, if necessary, ask them to change your access rights.  
To find out more about security, refer to the Help within your software.
- Check that the Microsoft Excel or CSV file you want to import is in the correct format. See the following section, *Notes on creating import files*, for details.

## Notes on creating import files

When creating CSV files to be imported into Sage 50 HR, you should note the following:

- The first row of each file must be a header row containing the correct column headings.
- Although the column headings are not case sensitive, the column headings must be spelled correctly in order for the import to work.
- The columns can be in any order, as you can map the data in the import file to the corresponding information in your HR software.
- Ensure that the file contains the compulsory information required by your software.  
Rows in the file without the compulsory information will cause the import to stop. For details of the compulsory items, see the section *CSV file formats* on page 7.
- All dates must be in the format dd/mm/yyyy. If you use Microsoft Excel to produce your CSV files, you must ensure that any Date columns show the date in the format dd/mm/yyyy. You must use four digits for the year in order for the import to work.
- Any blank fields in your CSV files will be ignored during the import process.

## How your software processes an import CSV file

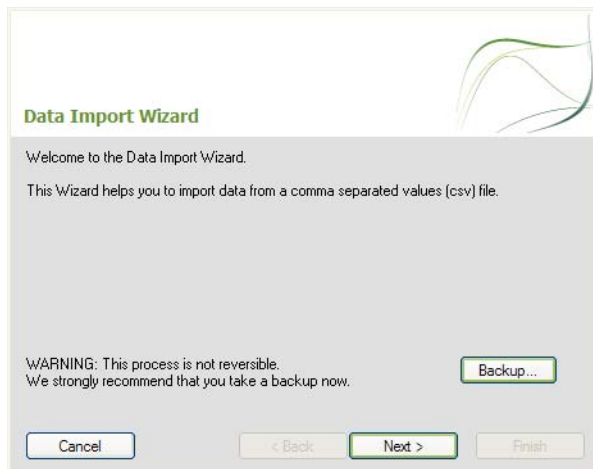
During the import, Sage 50 HR processes the CSV file as follows:

- Each employee is identified by a combination of their Surname and PPS number.
- If the import file contains a row with a new Surname and PPS number combination, the import process will create a new employee record. If the import file contains a row with a Surname and PPS number that already exists in Sage 50 HR, the existing employee information will be updated.
- All new employee records are automatically assigned to the default employee security group.
- When importing Absence, Appraisal, Disciplinary, Time Keeping, Qualification, and Training Course Attendance information, new records will be created for existing employees; existing records held by Sage 50 HR will not be altered. If the import data cannot be matched with existing employees, it will not be imported.
- Where appropriate, entries in the CSV file will be used to update options in Sage 50 HR drop-down lists.
- Entries in the CSV file that are longer than allowed in Sage 50 HR will be adjusted to the maximum length.
- Entries in the CSV file that are greater than the maximum value or less than the minimum value allowed in Sage 50 HR will be adjusted to the appropriate maximum or minimum.

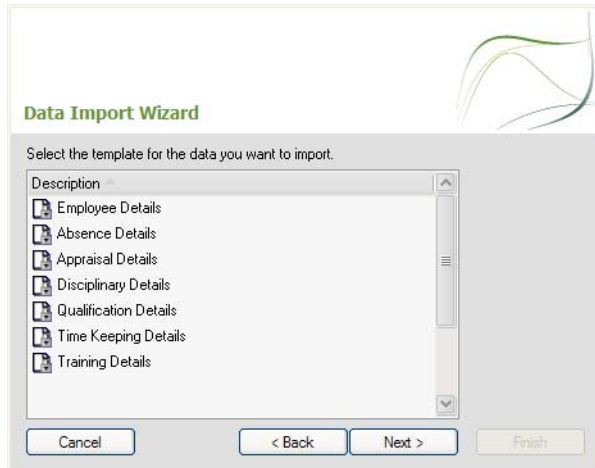
## Importing information from a CSV file

**Note:** This procedure is applicable if you are importing information from a CSV file. If you would like to import information from a Microsoft Excel (.xls or .xlsx) file, or use the Advanced Data Import features, refer to the section *Importing information from a Microsoft Excel (.xls or .xlsx) or CSV file using Advanced Import* on page 4.

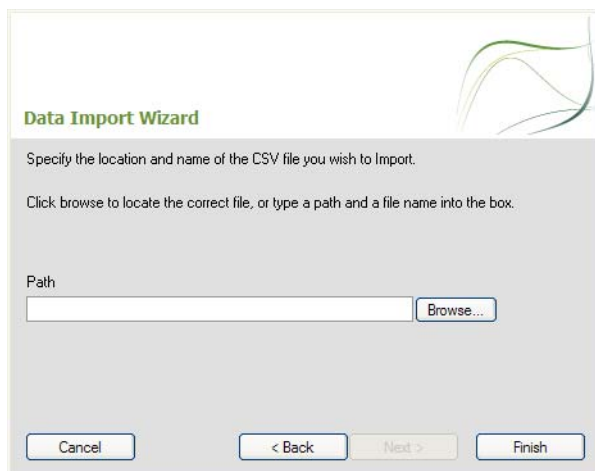
1. From the File menu, choose Data Import > Import CSV Data.  
The Data Import Wizard appears.



2. It is essential that you take a backup of your data before proceeding with the Data Import Wizard. Click Backup then follow the instructions in the Backup Wizard.  
When you have completed the Backup Wizard, the Data Import Wizard re-appears.
3. To continue, click Next.
4. Select the type of data you want to import and then click Next.



5. Select the CSV file containing the data you want to import and click Finish.



You can type the location of the file and its filename in the Path box, or click Browse and search for the file required then click Open.

The Data Import Wizard checks the format and content of the CSV file you are importing.

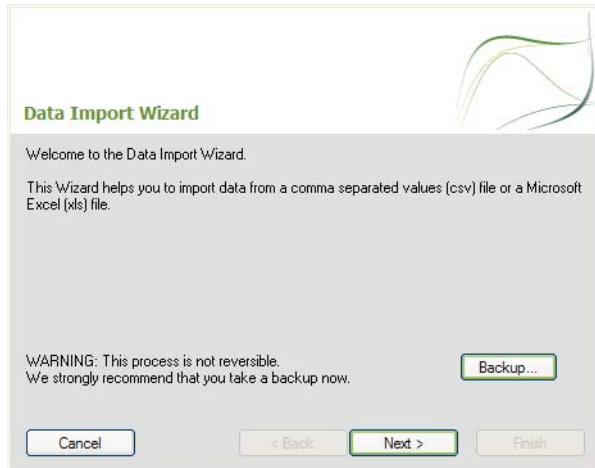
A results screen appears. This shows the records successfully imported. If there were any problems with importing the information, this is also shown.

6. Check the details you have entered. The records in the import file will be used to update the information in your software.
7. To continue, click Close.  
The data from the selected CSV file is imported into your software.

## Importing information from a Microsoft Excel (.xls or .xlsx) or CSV file using Advanced Import

1. From the File menu, choose Advanced Data Import.

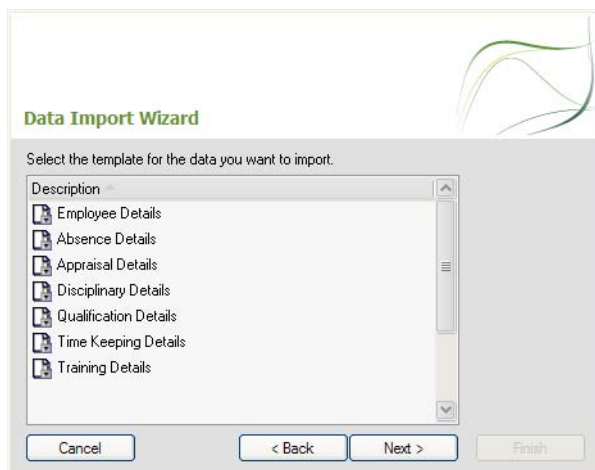
The Data Import Wizard appears.



2. It is essential that you take a backup of your data before proceeding with the Data Import Wizard. Click Backup then follow the instructions in the Backup Wizard.

When you have completed the Backup Wizard, the Data Import Wizard re-appears.

3. To continue, click Next.
4. Select the template for the data you want to import and then click Next.
5. Locate the file containing the data you want to import.



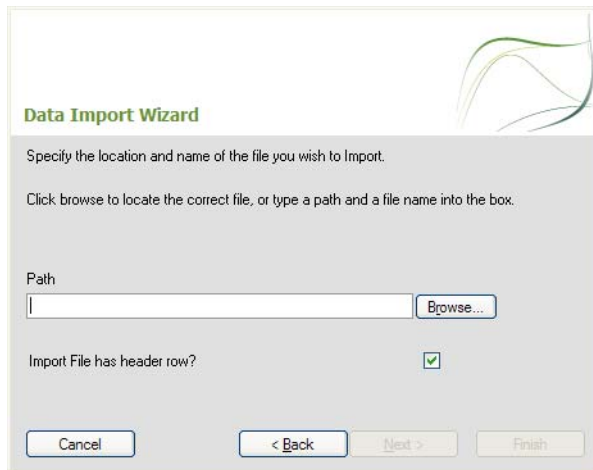
You can type the location of the file and its filename in the Path box, or click Browse and search for the required file, then click Open.

**Note:** If you are importing from a Microsoft Excel file, choose Excel files (\*.xls) from the Files of type drop-down list. This applies whether the file you are importing is of the type .xls or .xlsx.

The Data Import Wizard checks the format and content of the Microsoft Excel or CSV file that you are importing data from.

If your import file has a header row (a row of column titles identifying the data in each column), select the 'Import File has header row?' check box.

If your import file does not have a header row, clear the 'Import File has header row?' check box.

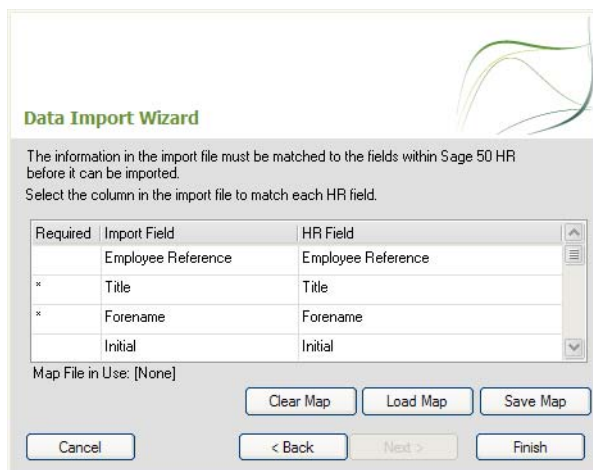


To continue, click Next.

6. If you are importing from a Microsoft Excel file which contains more than one worksheet, select the worksheet containing the data you want to import, then click Next.

**Note:** If you are importing from a CSV file, or if your Microsoft Excel file contains only one worksheet, this section of the wizard does not appear and you can skip this step in the procedure.

7. Use the next section of the wizard to match, or 'map', the data you are importing to the relevant fields in your HR software.



- If you selected the 'Import File has header row?' check box, the Import Field column is populated according to the column titles in the source file. You can now check the mapping and update any fields which are not matched correctly, or are missing.

**Note:** If you are importing from a Microsoft Excel file, the header information must be in the first row of the spreadsheet.

- If you cleared the 'Import File has header row?' check box, the Import Field column is not populated. You must map your data manually by specifying which Import Field relates to which HR Field.
- In the Import Field column, from the drop-down list, select the data field that corresponds with the information shown in the HR Field column.

For example, the first mandatory HR Field displayed is Title. In the Import Field column, select the data field in your import file that represents the title information.

- Continue to select the data fields from your import source file that correspond to the HR fields displayed.

**Note:** Fields marked with an asterisk (\*) must be completed, or your import will fail.

- Once you've matched up the data in your import file with the fields in Sage 50 HR, you can save the mapped structure as a 'map' file. This retains the matchings you have made and helps you the next time you import using the same file structure, by saving you having to match up the data again.

To save your matching as a map file, click Save Map. Specify a name and location for the map file and click Save.

- To use a map file you've previously saved, click Load Map. Locate the map file you want to use and click Open.

- When you import, the Data Import Wizard retains the map file you used during your last data import. To clear this file, for example to perform a new mapping, click Clear Map.

8. When you've mapped your data, click Finish.

The Import Results screen appears. This shows the records successfully imported. If there are any problems importing the information, these details are shown.

Check the details you have entered. The records in the import file will be used to update the information in Sage 50 HR.

## Creating files to match Sage 50 HR's data import templates

If you want to import data into Sage 50 HR, you must create a file that provides the required information in a specific format that matches the templates provided with your software.

To create a CSV file to match Sage 50 HR's data import templates, you can either:

- Use the Microsoft Excel Templates provided with Sage 50 HR. You can find these in your software's installation directory, usually C:\Program Files\Sage\HR\CSV Templates.

As the column headings in the CSV files are key to the success of the import, this ensures that you are using information with the correct format.

**Tip:** If you need help with the content of these files, move your mouse pointer over the column heading and refer to the note box that appears.

- Create your own CSV file. If you choose to use this method, you must take care to check that all column headers are spelled correctly. Misspelled headers could mean the import will fail.

### Information to note

- If the CSV file you are importing does not contain the information in the specific format required, the import will not work.
- Check that the column headers in your CSV file are correctly named. The headers must be correctly spelled for the import to work successfully.  

Note: If you created a CSV file using a previous version of Sage 50 HR, you can import information without column headers. However, you must ensure that the information is complete and in the correct format. Check the CSV templates in the following sections of this guide if you are unsure.
- If there are any blank fields in your CSV files, these will be ignored during the import process.

### To create a CSV file using the Microsoft Excel templates

1. Locate the CSV Templates folder on your computer.
2. Open the template you require in Microsoft Excel.
3. Enter the information required into the pre-defined fields. Headings for mandatory information are shown in blue. Information that is mandatory in certain situations is shown in green.  
**Tip:** All of the headings have comments associated with them. You can access the comments by holding your mouse pointer over the cell with the red triangle in the top right hand corner.
4. To save your file, open the File menu and then choose Save As.
5. Select the folder where you want to save the file and ensure you save the file as a CSV file, then click Save.  
You can now import the CSV file you have created into Sage 50 HR.



## CSV file formats

### Employee Details data format

CSV Column Title	Notes	Data Type	Size	Req'd
Title		Text	60	
Surname	Used to identify new / existing employee.	Text	30	✓
Forename 1		Text	30	✓
Forename 2		Text	30	
Known As		Text	30	
Address 1	New record created.	Text	30	
Address 2	New record created.	Text	30	
Address 3	New record created.	Text	30	
Address 4	New record created.	Text	30	
Address 5	New record created.	Text	30	
Address 6	New record created.	Text	30	
Post Code	New record created.	Text	15	
Personal Telephone	New record created.	Text	30	
Personal Mobile	New record created.	Text	30	
Personal Email	New record created.	Text	30	
Approval given for release	New record created.	Y or N	1	
Ethnic Origin		Text	60	
Nationality		Text	30	
Other Surname		Text	30	
Marital Status	If not already used in your software, a new entry will be created in the Marital Status lookup.	Text	60	
Sex	1 = Male 2 = Female	Integer	1	✓
PPS Number	Personal Public Service Number	Text	9	
Disabled		Y or N	1	
Disability Reg No		Text	30	
Date of Birth	Enter in the format DD/MM/YYYY.  For example 25th September 1975, should be entered as 25/09/1975.	Date	10	
Expected to Retire	Expected retirement date.  Enter in the format DD/MM/YYYY.  For example 1st October 2009, should be entered as 01/10/2009.	Date	10	
Car Reg No	A new record is created.	Text	30	
Driving Licence		Text	30	
Driving Licence Date	Enter in the format DD/MM/YYYY.  For example 25th September 1985, should be entered as 25/09/1985.	Date	10	
Employment Started On	Enter in the format DD/MM/YYYY.  For example 7th September 1991, should be entered as 07/09/1991.	Date	10	✓
Employment Ended On	Must be after the "Started On" date.  Enter in the format DD/MM/YYYY.  For example 1st October 2008, should be entered as 01/10/2008.	Date	10	

Importing from a Microsoft® Excel® or CSV file

CSV Column Title	Notes	Data Type	Size	Req'd
Works Number		Text	30	
Employment Type	One of the following: Indefinite Duration Fixed Term Apprentice Other  Any other entry will be recorded as "Not Specified".	Text	60	
Employment Basis	One of the following: Full-Time Part-Time Other Persons Engaged	Text		
Job Title	If not already used in your software, a new entry will be created in the Job Title lookup.	Text	60	
Grade	If not already used in your software, a new entry will be created in the Job Grade lookup.	Text	60	
On Hold		Y or N	1	
Employment Telephone		Text	30	
Employment Mobile		Text	30	
Employment Email		Text	30	
Employment Email Password		Text	30	
Pay Frequency	One of the following: Weekly Fortnightly Four Weekly Monthly Bi-Monthly Quarterly Annually Any other entry will be recorded as "Not Specified".	Text	11	
Payment Method	One of the following: Paypath Cash Cheque Giro  Any other entry will be recorded as "Not Specified".	Text	15	
Contracted Hours		Number	11 (6.4)	
Contracted Hours Period	One of the following: Week Fortnight Four Weeks Month Quarter Year	Text	10	
Salary		Number	13 (8.4)	
Bank Name		Text	30	
Bank Address 1		Text	30	
Bank Address 2		Text	30	
Bank Address 3		Text	30	
Bank Address 4		Text	30	
Bank Address 5		Text	30	
Bank Address 6		Text	30	

CSV Column Title	Notes	Data Type	Size	Req'd
Bank Post Code		Text	15	
Bank Telephone		Text	30	
Bank Fax		Text	30	
Bank Email		Text	30	
Bank Account Type	One of the following: Bank Account Credit Union Any other entry will be recorded as "Not Specified".	Text	24	
Credit Union Account Number		Text	30	
Eligible To Work In Ireland		Y or N	1	
Passport Number		Text	30	
Work Permit Number		Text	30	
Work Permit Date	Enter in the format DD/MM/YYYY. For example 1st October 2009 should be entered as 01/10/2009.	Date	10	

Notes

### Absence Details data format

CSV Column Title	Notes	Data Type	Size	Req'd
Employee Surname	Used to identify the employee record in your software that the current absence record is to be associated with.	Text	30	✓
Employee PPS Number	Employee Personal Public Service Number. Used to identify the employee record in your software that the current record is to be associated with.	Text	9	✓
Absence Type	One of the following: Authorised Unauthorised Holiday Sickness Training Medical Educational Compassionate Maternity Paternity Adoption Jury Suspension Not Specified Rows containing any other entry will not be imported.	Text	30	✓
Absence Reason	If not already used in your software, a new entry will be created in the Absence Reason lookup.	Text	30	
Absence Details		Text	-	
Work Related Accident		Y or N	1	
Doctors Note		Y or N	1	
Expires On	Date on which the doctor's note expires. Enter in the format DD/MM/YYYY.	Date	10	
Self Certification		Y or N	1	
Absence Started On	Enter in the format DD/MM/YYYY.	Date	10	✓
Started On Period	AM or PM Rows containing any other entry will not be imported.	Text	2	✓

CSV Column Title	Notes	Data Type	Size	Req'd
Absence Ended On	Enter in the format DD/MM/YYYY.  If the Absence Type is either "Holiday" or "Training", this is mandatory; otherwise an entry in this column is optional.  Rows where this date is before the "Absence Started On" date will not be imported.	Date	10	See "Notes"
Ended On Period	AM or PM.  Rows containing any other entry will not be imported.  If the Absence Type is either "Holiday" or "Training", this is mandatory; otherwise an entry in this column is optional.	Text	2	See "Notes"

## Appraisal Details data format

**Note:** A maximum of 10 appraisal factors can be imported from an appraisal row.

CSV Column Title	Notes	Data Type	Size	Req'd
Employee Surname	Used to identify the employee record in your software that the current absence record is to be associated with.	Text	30	✓
Employee PPS Number	Employee Personal Public Service Number.  Used to identify the employee record in your software that the current record is to be associated with.	Text	9	✓
Appraisal Due On	Enter in the format DD/MM/YYYY.	Date	10	✓
Appraisal Completed On	Enter in the format DD/MM/YYYY.	Date	10	
Next Appraisal Due On	Enter in the format DD/MM/YYYY.	Date	10	
Appraised By	Must be an existing employee who is a Line Manager, and who belongs to the same Organisational Unit as the import employee.	Text	60	
Reviewed By	Must be an existing employee who is a Line Manager, and who belongs to the same Organisational Unit as the import employee.	Text	60	
Appraisal Total Score		Text	20	
Consider for Promotion		Y or N	1	
Appraisal Factor 1	If not already used in your software, a new entry will be created in the Appraisal Factor lookup.	Text	30	
Appraisal Factor 1 Score		Text	20	
Appraisal Factor 2	If not already used in your software, a new entry will be created in the Appraisal Factor lookup.	Text	30	
Appraisal Factor 2 Score		Text	20	
.				
.				
.				
Appraisal Factor 10	If not already used in your software, a new entry will be created in the Appraisal Factor lookup.	Text	30	
Appraisal Factor 10 Score		Text	20	

## Disciplinary Details data format

**Note:** It is not possible to associate previously related actions.

CSV Column Title	Notes	Data Type	Size	Req'd
Employee Surname	Used to identify the employee record in your software that the current absence record is to be associated with.	Text	30	✓
Employee PPS Number	Employee Personal Public Service Number. Used to identify the employee record in your software that the current record is to be associated with.	Text	9	✓
Disciplinary Period Starts	Enter in the format DD/MM/YYYY.	Date	10	✓
Disciplinary Period Ends	Enter in the format DD/MM/YYYY. Rows where this date is before the "Disciplinary Period Starts" date will not be imported.	Date	10	
Reason for Action		Text	60	✓
Action Taken		Text	60	
Follow Up Action		Text	60	

## Time Keeping Details data format

CSV Column Title	Notes	Data Type	Size	Req'd
Employee Surname	Used to identify the employee record in your software that the current absence record is to be associated with.	Text	30	✓
Employee PPS Number	Employee Personal Public Service Number. Used to identify the employee record in your software that the current record is to be associated with.	Text	9	✓
Expected Arrival Date Time	In DD/MM/YYYY HH:MM:SS format. 24-hour clock format, with optional seconds.	Date and Time	19	
Actual Arrival Date Time	In DD/MM/YYYY HH:MM:SS format. 24-hour clock format, with optional seconds.	Date and Time	19	✓
Minutes Late	If no value is provided, this is calculated from the Expected and Actual Arrival Date Time values.	Number	6 (5.1)	
Reason		Text	-	

## Qualification Details data format

CSV Column Title	Notes	Data Type	Size	Req'd
Employee Surname	Used to identify the employee record in your software that the current absence record is to be associated with.	Text	30	✓
Employee PPS Number	Employee Personal Public Service Number. Used to identify the employee record in your software that the current record is to be associated with.	Text	9	✓
Start Date	Enter in the format DD/MM/YYYY.	Date	10	✓
Expected Completion Date	Enter in the format DD/MM/YYYY.	Date	10	
Date Achieved	Enter in the format DD/MM/YYYY.	Date	10	✓
Date Expires	Enter in the format DD/MM/YYYY.	Date	10	
Qualification Type	If not already used in your software, a new entry will be created in the Qualification Type lookup.	Text	30	✓
Subject		Text	30	✓
Grade		Text	30	
Cost		Number	10 (8.2)	
Employee Repays		Y or N	1	

## Training Course Attendance Details data format

CSV Column Title	Notes	Data Type	Size	Req'd
Employee Surname	Used to identify the employee record in your software that the current absence record is to be associated with.	Text	30	✓
Employee PPS Number	Employee Personal Public Service Number. Used to identify the employee record in your software that the current record is to be associated with.	Text	9	✓
Course Name	If not already used in your software, a new entry will be created in the Training Course lookup.	Text	100	✓
Date From	Enter in the format DD/MM/YYYY.	Date	10	✓
Date To	Enter in the format DD/MM/YYYY. Rows where this date is before the "Date From" date will not be imported.	Date	10	
Cost		Number	8.2	
Status		String	30	✓
Expiry Date	Enter in the format DD/MM/YYYY.	Date	10	