

Fast•Class File

SmartOffice

Volume 19: Employee Census Import

Before data can be imported into the **Employee Census** tab of a business record, it must be organized in a file format that can be interpreted by SmartOffice. One file type that SmartOffice can read is Comma Separated Value or .CSV. Microsoft Excel can be used to format data and save it in .CSV file format.

	A	B	C	D	E	F	G	H	I
1	Last Name	First Name	Gender	Marital	Compensatic	Hire Date	Pre-ex	DOB	Age
2	Roberts	Randy	Male	Married	45,000	10/1/1997	Diabetic	8/16/1965	38
3	Humphries	Kay	Female	Married	60,500	4/23/1986		6/22/1974	29
4	Bingman	Harold	Male	Single	75,000	3/15/1999		9/1/1960	43
5	Vasquez	Paul	Male	Married	55,000	1/24/1998		10/7/1978	25
6	O'Reily	Kate	Female	Single	40,000	3/27/2003		6/27/1980	22
7	Chang	Martha	Female	Married	43,000	7/12/2001		4/16/1969	34

Figure 1: A Formatted .CSV file ready for import.

Correct column and data organization in the .CSV file is critical for a successful import. Data must be organized so that SmartOffice can put the data in the appropriate fields and columns.

For instance, the **Total Salary** column is an integer only column. Data that will be mapped from a .CSV file to the **Total Salary** column must be in integer only format. Any symbols other than integers in a column mapped to the **Total Salary** column will cause the import of data into the **Total Salary** column to fail.

Employees in the employee census record can be organized by class type. The classes that SmartOffice uses to identify employees are as follows –

- Class 1 – Owners, Exec. Mgmt.
- Class 2 – Managers
- Class 3 – All Others

Employee Census Summary	
Class	
<input type="checkbox"/>	Class 1 - Owners, Exec Mgmt.
<input type="checkbox"/>	Class 2 - Managers
<input type="checkbox"/>	Class 2 - Managers
<input type="checkbox"/>	Class 1 - Owners, Exec Mgmt.
<input type="checkbox"/>	Class 3 - All Others
<input type="checkbox"/>	Class 3 - All Others
<input type="checkbox"/>	Class 3 - All Others
<input type="checkbox"/>	Class 3 - All Others

Figure 2: Employee Census classifications.



Employees identified by class in the .CSV file must be identified using the same classifications used in SmartOffice class data to be successfully imported to the **Class** column in the employee census.

J
Class
Class 3 - All Others
Class 2 - Managers
Class 2 - Managers
Class 2 - Managers
Class 3 - All Others
Class 3 - All Others

Figure 3: Employee Census classifications in a .CSV file before import

To create the map for an employee census import –

- From the main screen of SmartOffice, perform a search for the selected business.
- With the selected business record in focus, click on the **Employee Census** tab.

Employee Census Summary				
Class	Contact Name	DOB	Hire Date	Total Salary
<input type="checkbox"/> Class 1 - Owners, Exec Mgmt.	Antille, Eugene	12/16/1956	05/14/1993	85,000.00
<input type="checkbox"/> Class 2 - Managers	Ernst, Rosemary	09/19/1959	03/15/1995	85,000.00
<input type="checkbox"/> Class 2 - Managers	Hamamoto, Tsuyako	02/10/1955	08/04/1998	55,000.00
<input type="checkbox"/> Class 1 - Owners, Exec Mgmt.	Horley, Elan	11/10/1979	05/14/1993	120,000.00
<input type="checkbox"/> Class 3 - All Others	Johnson, Rochelle	10/06/1970	06/20/1998	41,000.00
<input type="checkbox"/> Class 3 - All Others	Porter, Steve	03/02/1970	08/14/1999	55,000.00
<input type="checkbox"/> Class 3 - All Others	Riviera, Carlos	01/31/1960	07/26/1996	63,000.00
<input type="checkbox"/> Class 3 - All Others	Smith, John	01/22/1973	05/21/1999	45,000.00

Figure 4: Employee records in the Employee Census tab.

Two different types of employee census records will be visible on the **Employee Census** tab: employee census only records (displayed on a grey background) and full contact records (displayed on a white background). Employee census only records are typically only visible on the **Employee Census** tab of a business contact and cannot be found when using the quick search function when searching for an individual contact. Full contact records can be found when performing a quick search for an individual. Employee census only records will appear in a contact search when using the **Contact Search** tool in the main menu and the **Employee Census** option is selected in the **Display Record Type** section.

- With the **Employee Census** tab selected, click on the **Employee Census Import** button in the **Employee Census** toolbar.

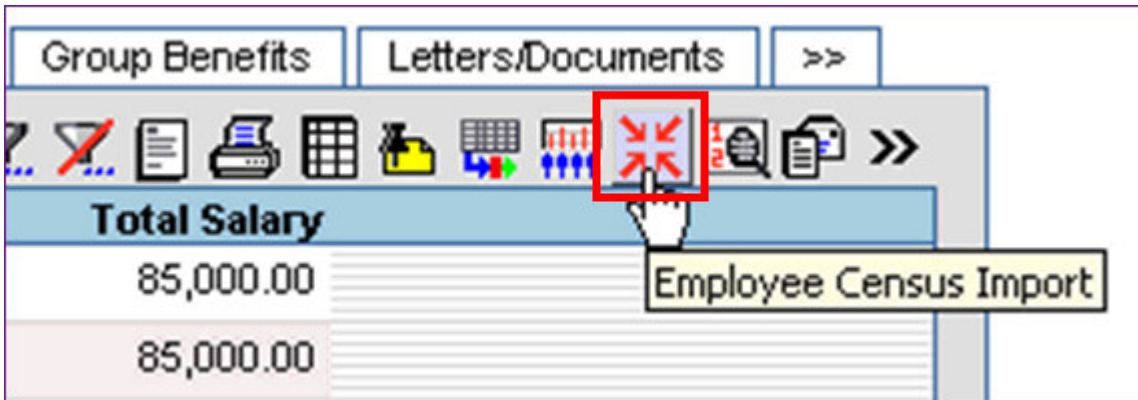


Figure 5: The Employee Census Import button.

Note: It is important to use the **Employee Census Import** tool to import employees to the **Employee Census** tab of a business record for two reasons:

1. The **Employee Census Import** tool creates a link between imported contacts and the selected business.
2. There are unique employee census columns that are only available for import when using the **Employee Census Import** tool.

After clicking the **Employee Census Import** button –

- Click the **Add** button in the **Import Setup List** screen.
- Use the **Browse** button in the **File to be used for mapping** screen to find the .CSV with the data that will be imported to SmartOffice. The data format will be entered automatically after file selection.

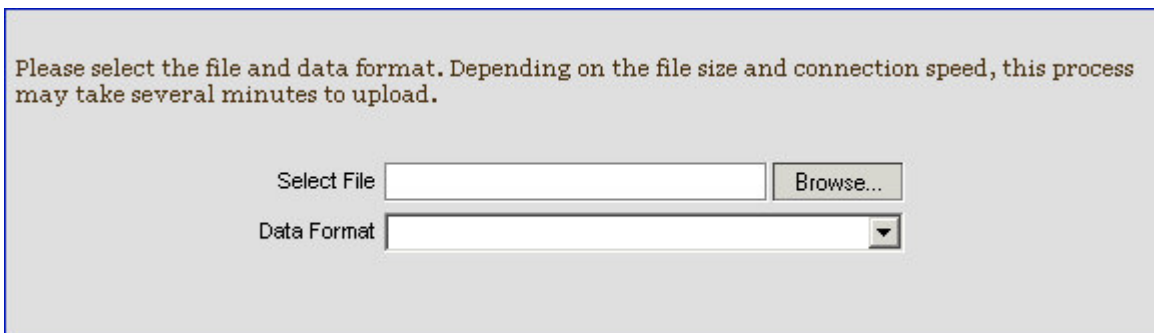


Figure 6: The File to be used for mapping screen.

- Click **Next**.
- Use the drop down fields in each column of the **Column Mapping Definition** screen to map the data in the .CSV file to the appropriate columns in the employee census.

Column1	Column2	Column3	Column4	Column5
Last Name				
Last Name	First Name	Gender	Marital	Compensation
Roberts	Randy	Male	Married	45000
Humphries	Kay	Female	Married	60500
Bingman	Harold	Male	Single	75000
Vasquez	Paul	Male	Married	55000
O'Reilly	Kate	Female	Single	40000
Chang	Martha	Female	Married	43000

Figure 7: The Column Mapping Definition screen (Column1 mapped to the data in the first column of the .CSV file).

Employee Census specific columns, such as **Total Salary**, **Pre-existing Condition**, and **Class**, are at the bottom of each drop down following the custom field columns.

- If the top row of the .CSV file has been used for column headings, select the **Has Column Headings** option on the top right section of the **Column Mapping Definition** screen. This option will prevent SmartOffice from attempting to import data from the first row into the employee census.

Column1	Column2	Column3	Column4	Column5
Last Name	First Name	Gender	Marital	Total Salary
Last Name	First Name	Gender	Marital	Compensation

Figure 8: The Has Column Heading option in the Column Mapping Definition screen.

- When each column is mapped, click **Next**.
- If phone numbers or dated information is part of the import, select the appropriate format in the **Data Format Selection** screen.

Data Format Selection	
Phone Format	US Standard
Date Format	mm/dd/yyyy
Century	

Figure 9: The Data Format Selection screen.

- After selecting format, click **Next**.
- In the **User/Value Assignment** screen, newly imported contacts can be assigned to specific users. By default, contacts imported using the **Employee Census Import** tool are identified as **Employee Census** in the **Type** field. Calendar activities (calls) can also be linked to each imported contact.

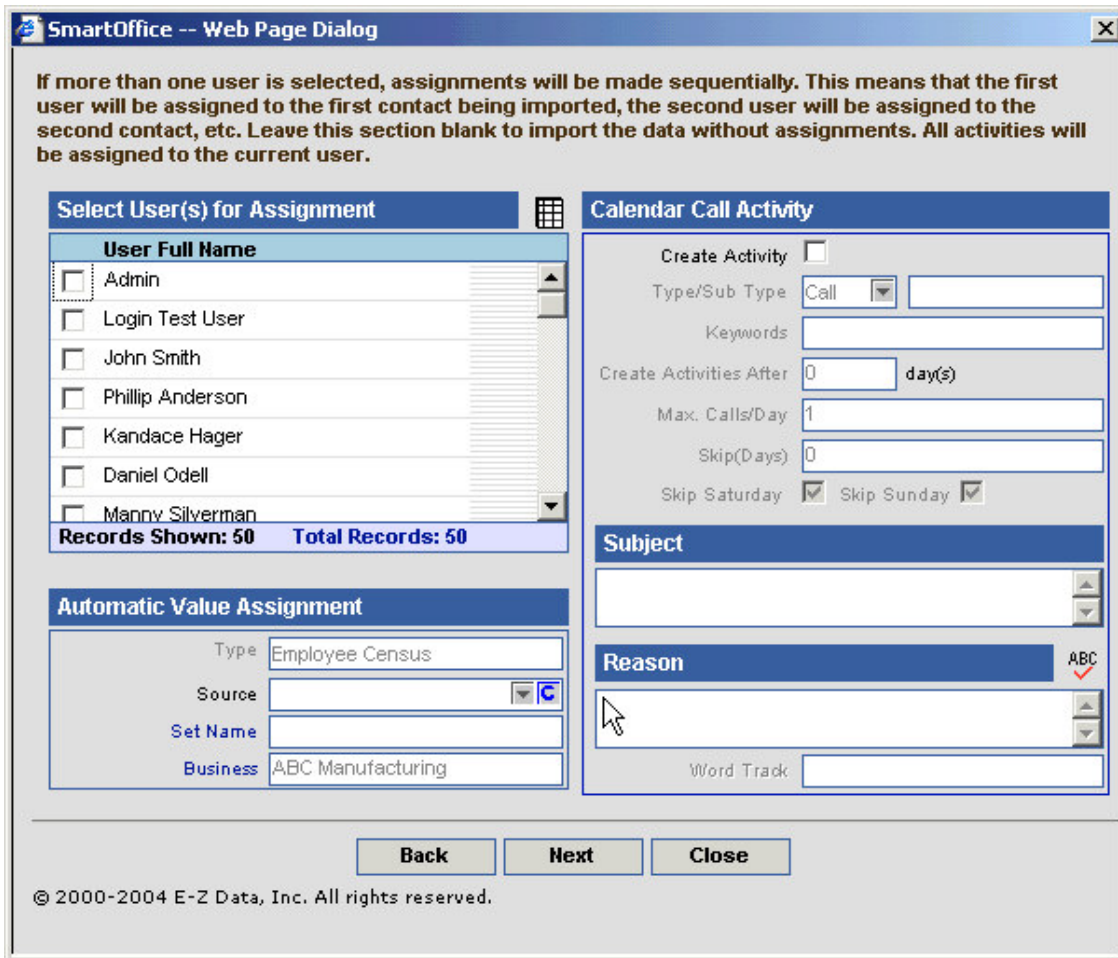


Figure 10: The User/Value Assignment screen.

- Click **Next**.
- In the final **Import Setup** screen, give the import setup a name and click **Finish**.
- The newly created setup will appear in the **Import Setup List** screen.
- Setups can be reused with multiple files provided that the files are formatted to match the mapping defined in the **Column Mapping Definition** screen of the import setup.

To import files into the **Employee Census** tab of a business record -

- In the **Employee Census** tab of a selected business, click the **Employee Census Import** button on the **Employee Census** toolbar.
- Select the appropriate setup and click the **Run Import** button.
- Use the **Browse** button in the **File to be used for Import** screen to select the appropriate file.

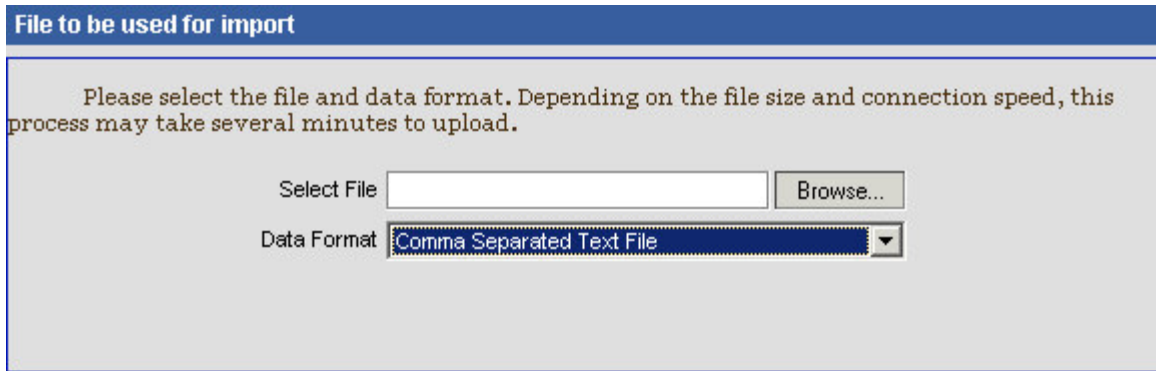


Figure 11: The File to be used for import screen.

- Click **Next**.
- Make any necessary adjustments to the **User/Value Assignment** screen.
- Click **Finish**.
- SmartOffice will display a message when the import is complete. Should any errors occur during the import, the completion message will refer you to the error log.

Contacts imported to an employee census using the **Employee Census Import** tool will be imported as employee census only contacts. To promote an employee census only record to a full contact record –

- Select the contact to be promoted.
- Click the **Convert to Contact** button in the expanded **Employee Census** toolbar.

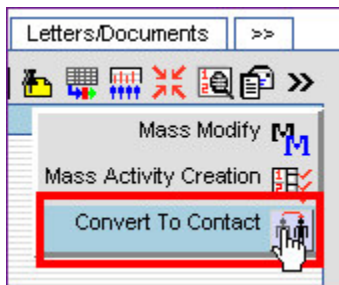


Figure 12: The Convert to Contact button in the expanded Employee Census toolbar.

The selected contact will be converted to a full contact and the entry will be displayed on a white background in the Employee Census tab.