Subscribe-HR Excel Connector

Data Uploader

Created by Yolanda French: 8/6/2014
Macintosh HD:Users:johnfrench:Dropbox (SHR Team):SHR team:TechDocs:XL
Uploader:Subscribe-HR Excel Data Uploader 211014.docx

Page 1 of 7

Table of Contents

The XL uploader is a tool developed by Subscribe-Software Pty Ltd and remains our intellectual property. It is provided to you at no cost.

Disclaimer:
If you are in doubt about any of its functionality please contact us.

We do not take responsibility for any loss of data should the upload process fail in some way irrespective as to the cause of that failure.

Make sure that your data is always backed up before you attempt an import.

Exporting any data from the system will not cause loss of data since the data exported will remain in the SHR system.

Re-importing exported data into the system may over-ride the exported data.

Created by Yolanda French: 8/6/2014   Page 2 of 7
Macintosh HD:Users:johnfrench:Dropbox (SHR Team):SHR team:TechDocs:XL
Uploader:Subscribe-HR Excel Data Uploader 211014.docx

1   Introduction

The Excel data uploader allows clients to uploader data from an XL spreadsheet into SHR system. It is a convenient and fast way to import data from excels to the Subscribe-HR system and can be performed by a person who has little technical knowledge. The tool includes a validation feature, which allows you to check the validity of the data before importing it.

This includes data time format, empty mandatory field and incorrect email format. It allows you to remedy the data before the import is executed.

There are three processes in data uploader.

1. Firstly, clients need to **login** using normal subscribe-HR system account.

2. **Click Export button** to select which objects or related objects you want to re-import.

3. After inserting or updating data in spreadsheet, **click Import** and Update button to import data to Subscribe-HR.
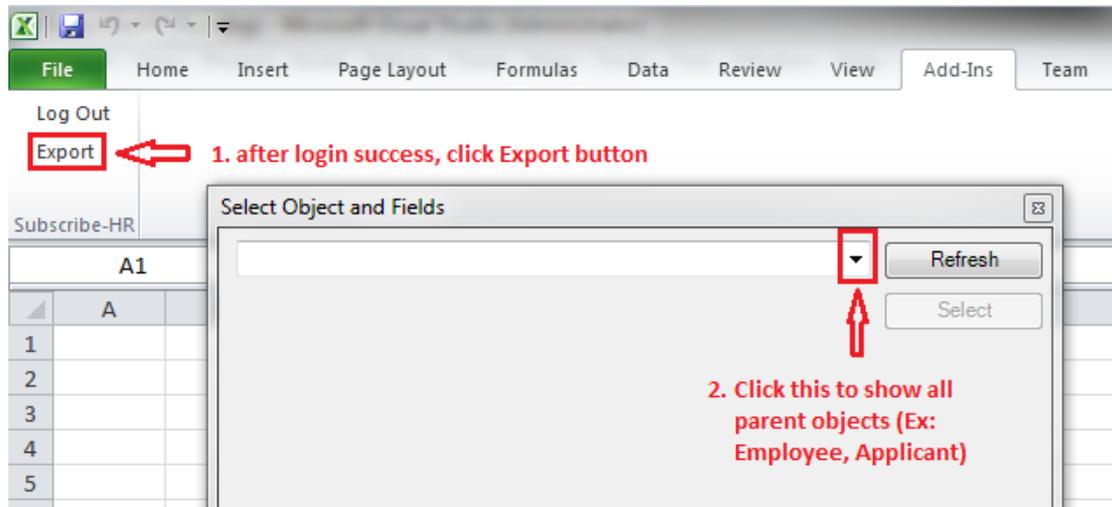
1.1   Login

Open the Excel, click 'Add-ins' => 'Login' => enter username and password in Subscribe-HR Login pop-up window, they are the same as your Subscribe-HR account.
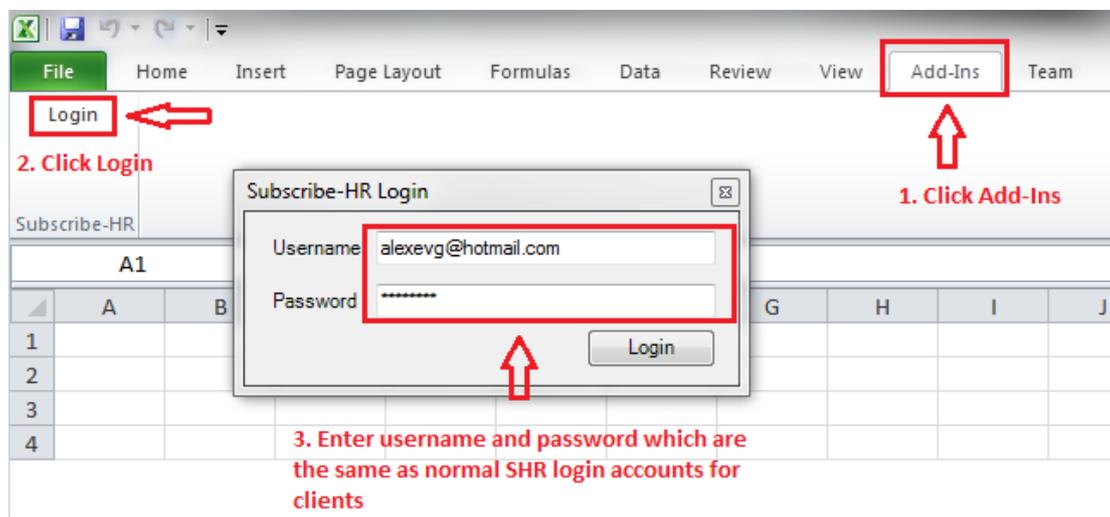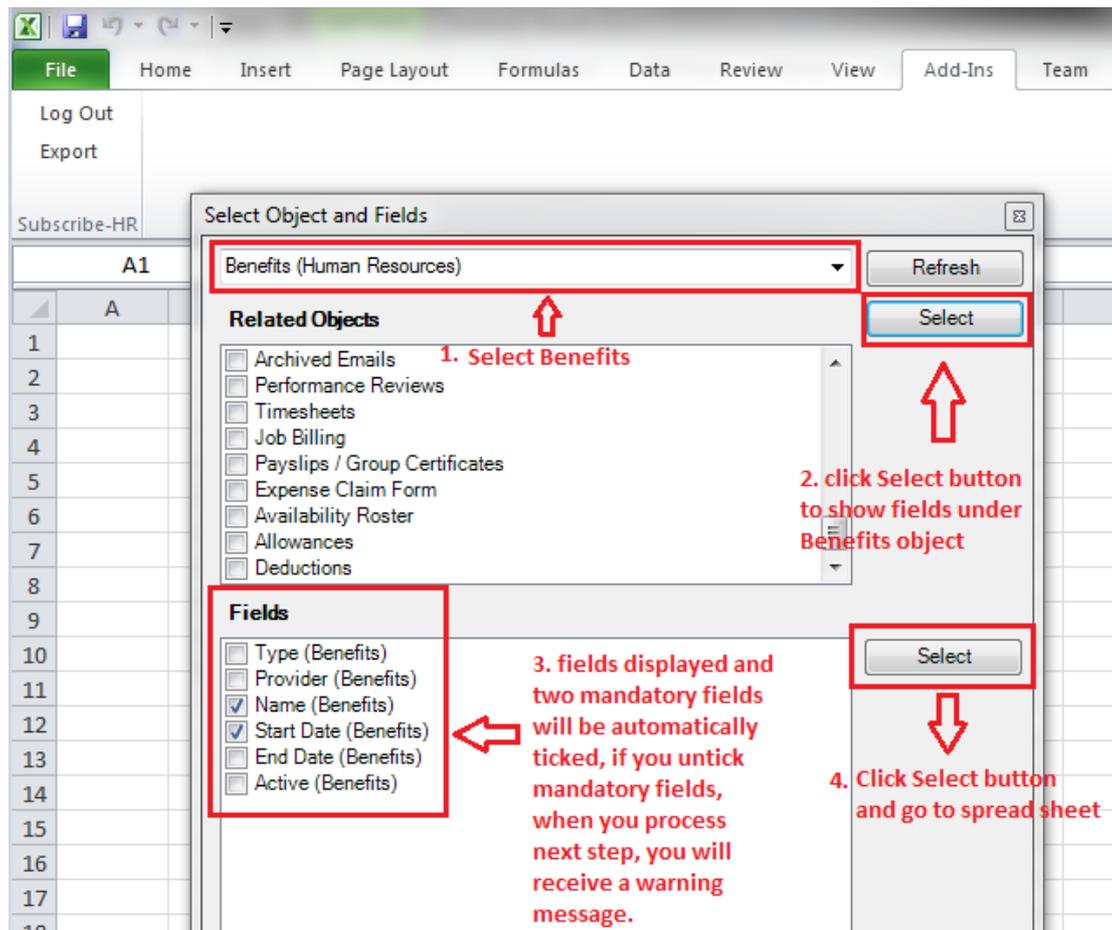

1.2   Export Existing Data From Subscribe-HR

After entering username and password in Subscribe-HR Login popup window, click Export button. You will see a popup panel 'Select Object and Fields'. You can select parent objects, related objects (child objects) and fields.

Created by Yolanda French: 8/6/2014   Page 3 of 7
Macintosh HD:Users:johnfrench:Dropbox (SHR Team):SHR team:TechDocs:XL
Uploader:Subscribe-HR Excel Data Uploader 211014.docx

1.2.1 Select Parent Objects (Single Object) and fields

The top dropdown box shows all parent objects such as Benefits.

Created by Yolanda French: 8/6/2014   Page 4 of 7
Macintosh HD:Users:johnfrench:Dropbox (SHR Team):SHR team:TechDocs:XL
Uploader:Subscribe-HR Excel Data Uploader 211014.docx

AS an example we will use Benefits for demonstration purposes. After selecting Benefits (Human Resources), you see a list of fields. Because "benefits" is a single parent object, relatives to that object do not need to be selected. In the field list, you can see there are 6 fields related "Benefits" object; two of them are mandatory fields (*name and start date*). You can select which fields you want to import from here and then click Select button to generate the spreadsheet.

1.2.2   Select Parent and Child Objects (Mutiple Objects) and fields

You want to import the parent and child objects together. For example, you have data about the employee such as medical and property information you want to import. Medical and property are the children objects of the employee object.
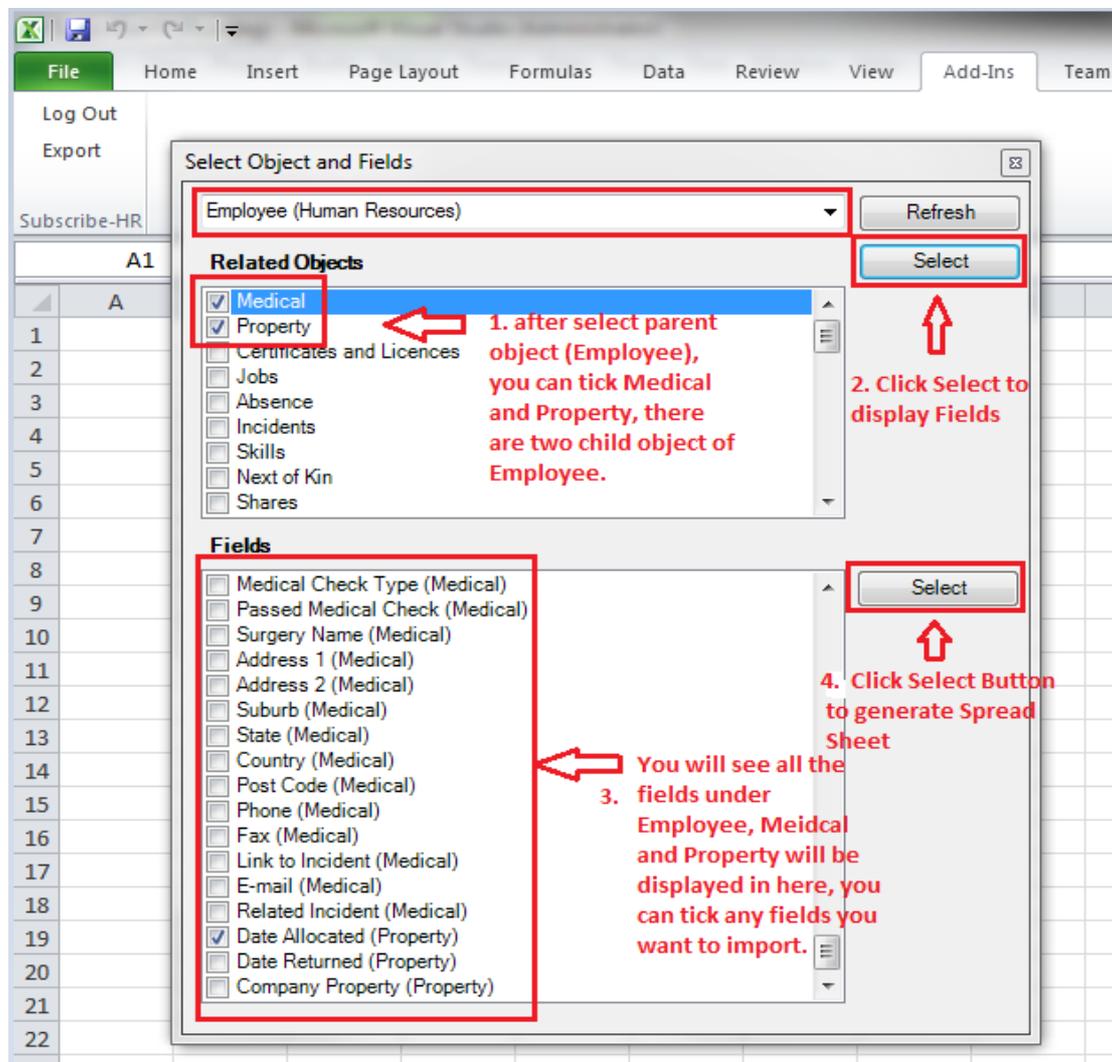
After selecting fields and clicking the Select button, a spreadsheet with existing data will be generated.

Created by Yolanda French: 8/6/2014   Page 5 of 7
Macintosh HD:Users:johnfrench:Dropbox (SHR Team):SHR team:TechDocs:XL
Uploader:Subscribe-HR Excel Data Uploader 211014.docx

1.3 Import Or Update Data From a Spread Sheet

After exporting data from Subscribe-HR to a spreadsheet, you will see the data. You can now modify and add new records in that spread sheet before Importing or updating it.

1.3.1 Import Parent Objects (Single Objects) and Fields

Make Benefits as an example:

In this spread sheet, you can see all Benefits data from row 2 to row 8. Now you can add new benefits records at the end of row 8 like row 9. When you add new records, leave the ID column as blank. The application will automatically generate an ID for these items.

1.3.2 Import Parent Objects and Child Objects (Mutiple-Objects) and fields

Let's take Employee, Employee Medical and Employee Property as an example: you can add or update any record. You do not need to touch ID fields, the application will automatically generate the ID for inserted records and existing ID for previously updated records will be locked.

Created by Yolanda French: 8/6/2014
Macintosh HD:Users:johnfrench:Dropbox (SHR Team):SHR team:TechDocs:XL
Uploader:Subscribe-HR Excel Data Uploader 211014.docx

Page 6 of 7

Created by Yolanda French: 8/6/2014   Page 7 of 7
Macintosh HD:Users:johnfrench:Dropbox (SHR Team):SHR team:TechDocs:XL
Uploader:Subscribe-HR Excel Data Uploader 211014.docx