How To Guide…

Exporting Data

Importing Data

Wiztec Business Suite

& WizHR 5

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Imports & Exports

Export Data

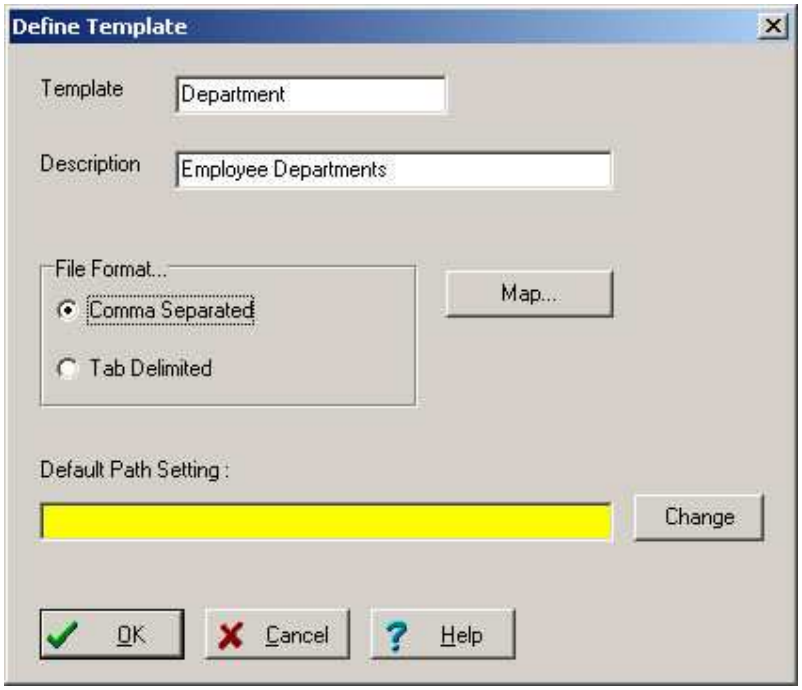
It is possible to export data from WBS using two methods. The method used will depend on the type of data you wish to export

a) Exporting all data from one screen
b) Exporting data from multiple screens with filters
c) Opening exported data in Microsoft® Excel

A. Exporting Data from One Screen

The steps below outline how to export data, using the File > Export data option. Using this option, it is possible to export data from one screen at a time ONLY. It is not possible to apply queries/filter criteria to the data which will be exported. In order to export data from multiple tables and/or apply filter criteria to the data prior to export, see section B below.

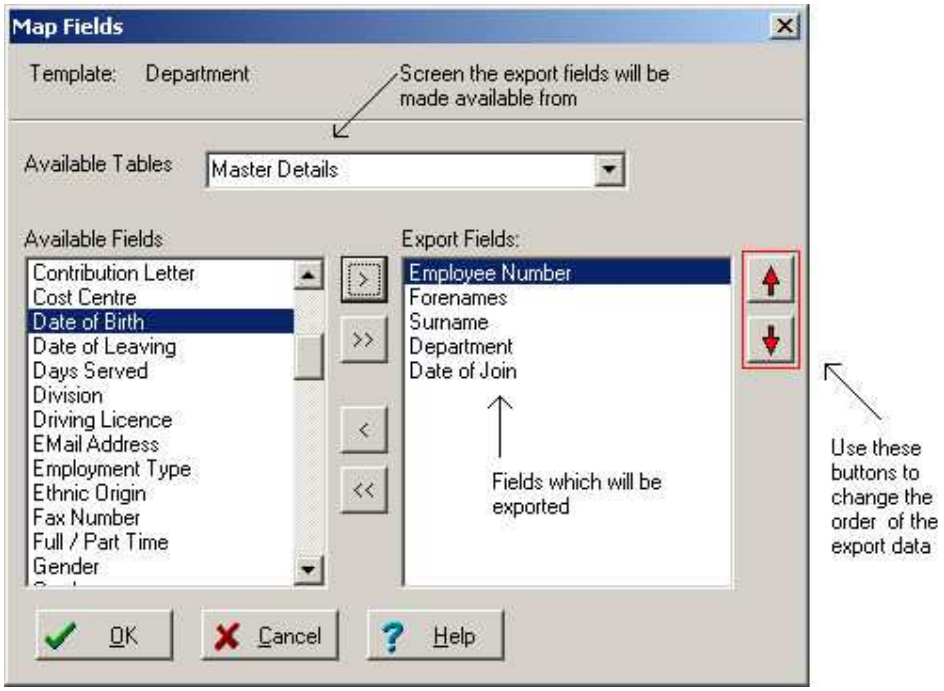
1. Click on **File**
2. Click on **Export**
3. Click on the **Add** button
4. The following screen appears:-



Note:

Default Path Setting may be used in cases where you will be exporting data to the same file and location on a regular basis (*Steps 19 and 22 below will be by-passed if you set the path of the export file here*). Click on **Change** button, select a location from the **Look In** drop down list, key in a **field name** and click on **Open**

4. Key in a **Template** name (this name will appear in the templates list when you click on Export from the File menu)
5. Key in a **Description** for the export (in the case above, Employee Departments)
6. Select a **File Format**. By default Comma Separated is selected. This is generally the file format which is easiest for import to another application (such as Microsoft® Excel)
7. Click on the **Map** button
8. Click on the drop down arrow to the right of **Available Tables**
9. Select a screen from the drop down menu (in the case below, *Master Details Master Details is also known as Employee Details*)
10. A list of fields from the screen you selected will appear on the left hand side of the screen
11. Highlight a field you want to export, use the right arrow to move the field across to the right hand side of the screen
12. Repeat for each field you want to export



13. In the case above, the employee number, forename, surname, department and date of join will be exported (in that order)
14. Click on **OK**
15. Click on **OK**

16. This will bring you back to the Export Data dialog box

17. Click on the **Export Template** you created above (in this case, Department)
18. Click on **Export**
19. The **Save As** dialog box appears
20. Select a location for the file to save to (e.g. Desktop or My Documents)
21. Key in a **File Name** (in this case, Department)

22. Click on **Save**
23. Wait a few moments for WBS to complete the Export

Importing Data

24. Click on **OK**
25. Click on **Close**

B. Exporting Data (Multiple Screens/Filters)

If you want to export data from WBS including any of the options below, use the following method

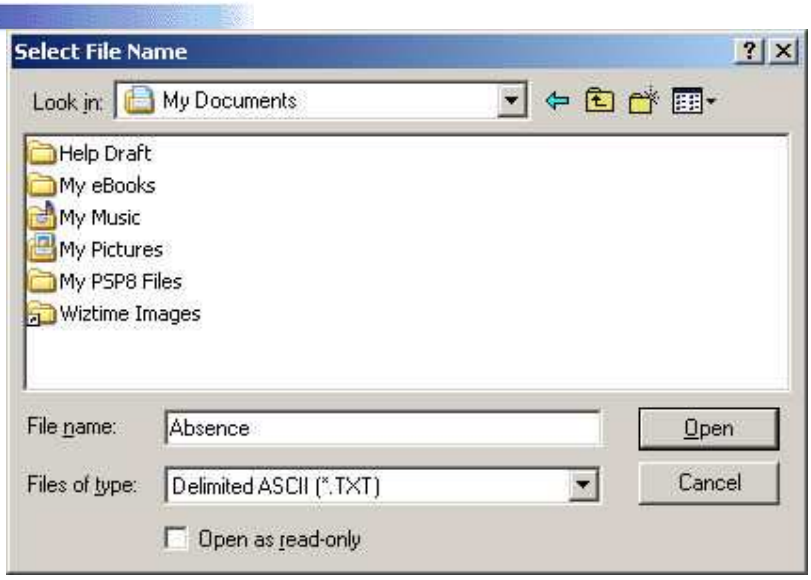
a) including data from multiple screens
b) applying filter criteria prior to export

Step 1: Create a Report

1. Create a report containing the data you wish to export to MS Excel
2. Click on **Reports** (menu bar)
3. Click on **Display Report / Graph** or **Create New Report**
4. Follow the on screen instructions
5. Use the '**Define Search**' tab to apply any filters/queries you want to apply to the report before exporting it
6. Proceed to Step 2 to export the report as a text file

Step 2: Create an Export File

1. Click on **File** (menu bar)
2. Click on **Export...**
3. The **Export to File** dialog box appears
4. Click on the drop down arrow to the right of **File Type**.
5. Click on **ASCII Delimited File** (*.TXT)
6. Click on the pick list button to the right of the **File Name** field, a dialog box appears, navigate to the folder you want to save the file to (e.g. My Documents), key in a name for the file (e.g. Absence)
7. Click on **Open**



Note:

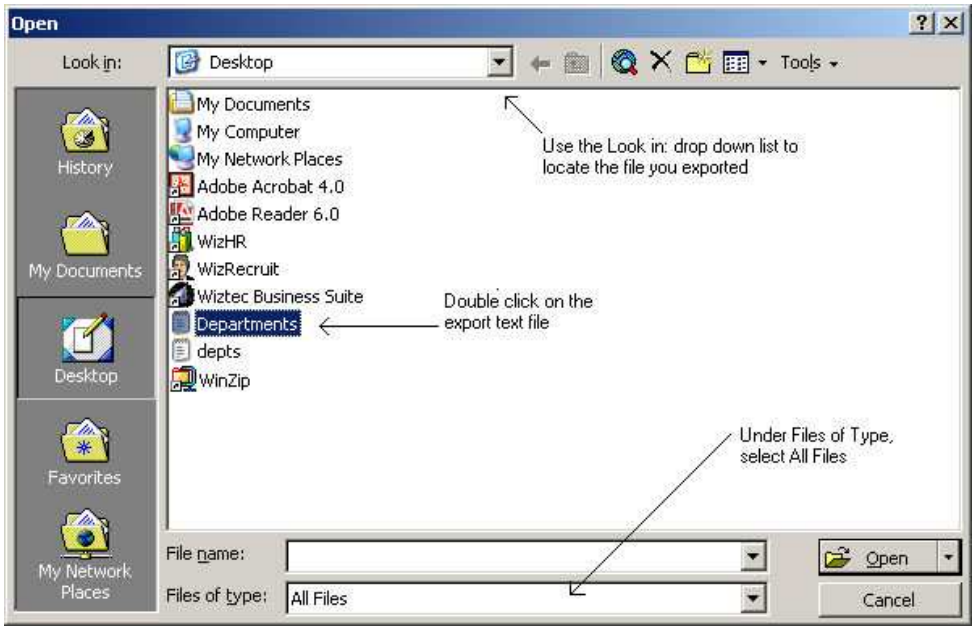
Follow file-naming conventions. Name the file by it's related topic of the data or the date the export file was created on.

8. Click on **OK**
9. A message box appears informing you that the text was successfully created.
10. Click on **OK**
11. Close the Shazam report. This will bring you back to the WBS Reporting dialog box. Click on **Cancel** and exit WBS.
12. To open the text file in Microsoft® Excel, proceed to section C below.

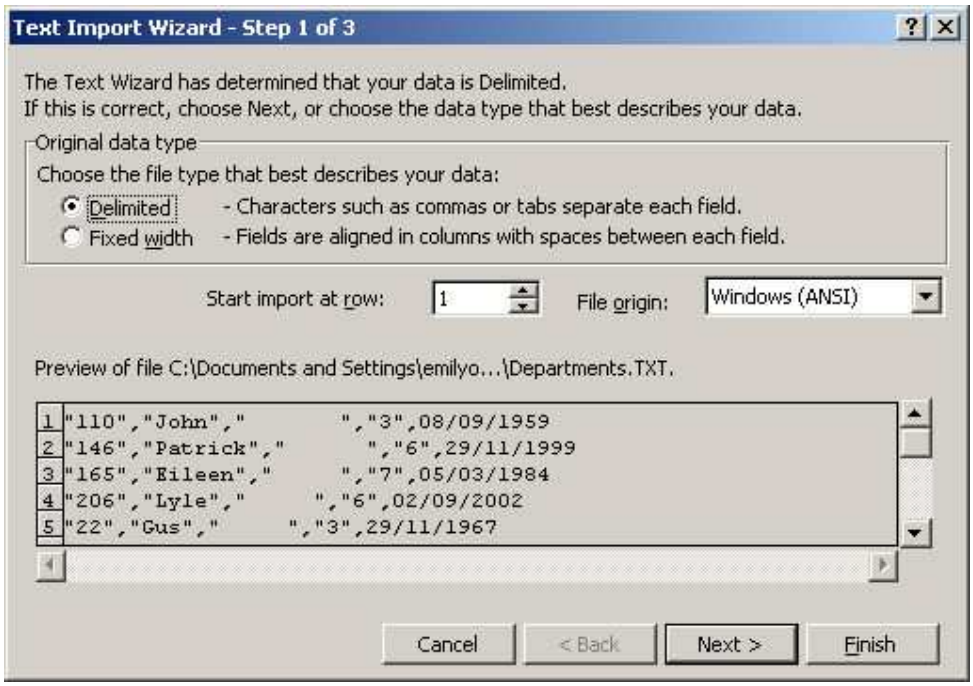
C. Opening Exported Files in Microsoft® Excel

1. Open **Microsoft® Excel**
2. Click on **File**
3. click on **Open**
4. Click on the drop down arrow to the right of **Files of type**
5. Select **All Files**
6. Click on the drop down arrow to the right of **Look In**. Navigate to the location of the file that you exported
7. Double click on the file name (the file will NOT have a Microsoft Excel logo at it is a text file)

Importing Data



8. A dialog box similar to below appears:-



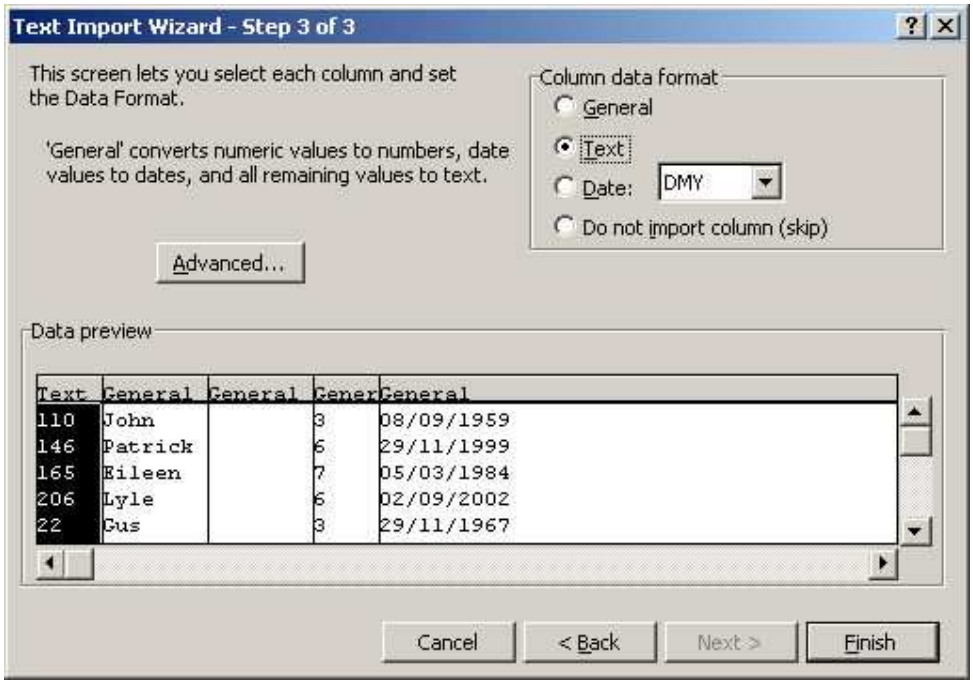
9. Select **Delimited** (if not already selected)
10. Click on **Next**

11. Select **Comma**. (Tab will be selected by default, it is not necessary to uncheck Tab)
12. Click on **Next**

This screen tries to determine the formatting of each column. By default MS Excel will attribute the General formatting to all columns. However, if you are exporting the employee numbers from WBS, and these numbers contain leading zeros, MS Excel will drop the leading zeros if the formatting remains at General (e.g. employee number 00012 will become employee number 12).

If you wish to retain the leading zeros on the employee numbers, highlight the Employee Number column, select Text (top right of the dialog box)

Importing Data



13. Click on **Finish**

- I receive a message saying that I do not have rights to export data? [have record restrictions/screen restriction]

Import Data

Purpose

It is possible to import data into WBS. Data may be imported into any WBS screen. This is particularly useful if you have data stored in spreadsheets or other databases and want to import them into WBS.

Warning:
It is strongly recommended that someone with a strong IT background complete the import and the database **MUST** be backed up before an import takes place

Note:

If you cannot see the Import option on the file menu, it is likely that you have been restricted from these menu items. Contact the WBS administrator to alter you security settings (menu rights).

Step 1: Preparing for Import

1. If you want to import data to WBS it is advisable to backup the database first
2. Take note of the total number of employees in the database prior to the import *(see status bar at the bottom of the program window*)

Step 2: Prepare the Excel Spreadsheet for Import

1. A number of conditions must be adhered to before a spreadsheet can be imported to WBS.
2. All data relating to an employee hinges on one data field, the Employee Number. Therefore any row of data, which is imported, must have an associated Employee Number. The Employee Number **MUST** match the employee number in WBS (*including leading zeros, if they exist*)
3. Data can only be imported to one WBS table (screen) at a time. If the data in the spreadsheet spans WBS tables (screens0, separate the data into different spreadsheets (*ensure that you copy the employee number to each spreadsheet you have created*)
4. Take note of the column headings and their sequence
5. Delete the column headings

Step 3: Creating a CSV file for Import

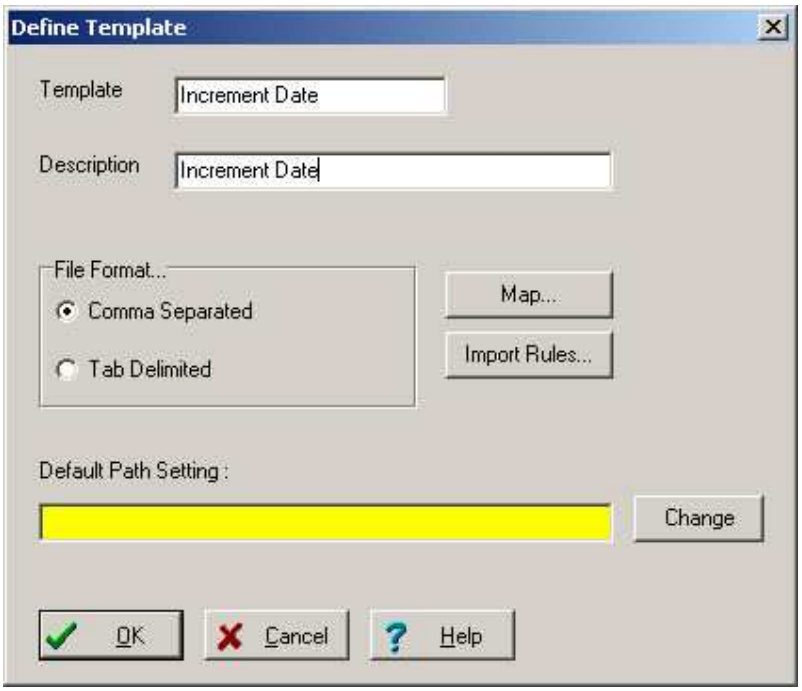
1. WBS will import data from an Excel spreadsheet directly (*due to multiple sheets which a workbook may contain*). The spreadsheet must be saved as a **Comma Separated Value** file
2. Click on **File** and **Save As**
3. Click on the drop down arrow to the right of **Save as type** and click on **CSV (comma delimited)(*.csv)**
4. Give the file a name
5. There are no restrictions on where you save the csv file to
6. Click on **Save**
7. Before data can be imported to WBS, the spreadsheet containing that data must be closed
8. Click on **File** and **Close**

Importing Data

9. A Microsoft Excel message appears, click on **Yes**
10. The **Save As** dialog box appears, click on **Save**
11. Click on **Yes**, to replace existing file

Step 4: Creating an Import Script

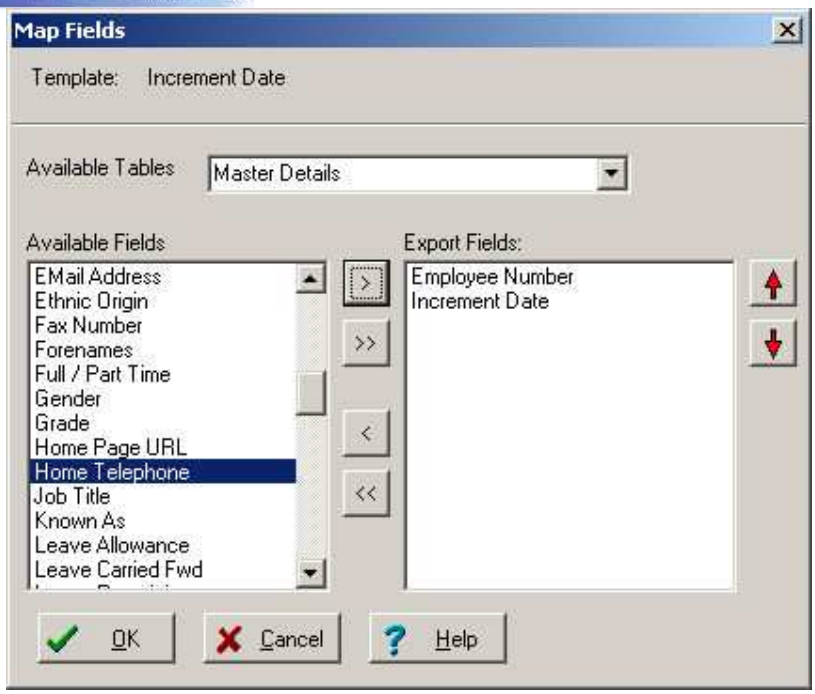
1. Maximise WBS
2. Click on **File** (*menu bar*)
3. Click on **Import Data**
4. The Import Data dialog box appears
5. Click on **Add** button
6. In the Template field, type in the **name** of the import script (*e.g. Increment Dates*)
7. In the field, type in a description for the import script (*e.g. Increment Date*)



Note:

Default Path Setting may be used in cases where you will be importing data from the same file and location on a regular basis (*Steps 19 and 20 below will be by-passed if you set the path of the import file here*)

1. Under **File Format**, select Comma Separated (*should be selected by default*)
2. Click on **Map** button
3. Click on the drop down arrow to the right of **Available tables** and select the table you want to import data to (*e.g. Master Details*)
4. A list of available fields appears on the left hand side of the table. Add required fields to the right hand side of the dialog box. The sequence you add the fields **MUST** mirror the sequence they appear in the spreadsheet



5. Click on **OK**
6. Click on **Import Rules** button
7. Select **Replace duplicates, imported fields only**
8. Click on **OK**
9. Click on **OK**
10. Click on the **Template Name** (*e.g. Addresses*)
11. Click on **Import** button
12. Navigate to the folder where you saved the CSV file. Double click on it (*this step and the next step will be skipped if you set the Default Path Setting in the Define Template dialog box*)
13. Click on **Open**
14. Wait a few moments while WBS imports data from the csv file

Step 5: Check

Check that the number of employees in the data base has not increased after the import (*esp if you are importing data for existing employees only*)

Errors During Importing

WBS will stop an import if data which is not compatible with the field type is being imported. For instance if you try to import 2,500.12 into a cost field in the Training History screen, it will generate such an error. Ensure that: -

1. All DATE fields are of the formatting DD/MM/YYYY
2. All numeric fields do not include currency symbols or commas. In the example above 2,500.12 should have been 250012.

If WBS does generate an error, it will ask if you want to proceed with the import. Click on NO to stop any further records being imported. Click on Yes to import the rest of the data. If you click on NO, all data prior to that record will have been imported. It is advisable to take note of the records which caused the difficulty, remove any records prior to that record before re-commencing the import. Otherwise you will run the risk of having duplicated records for employees

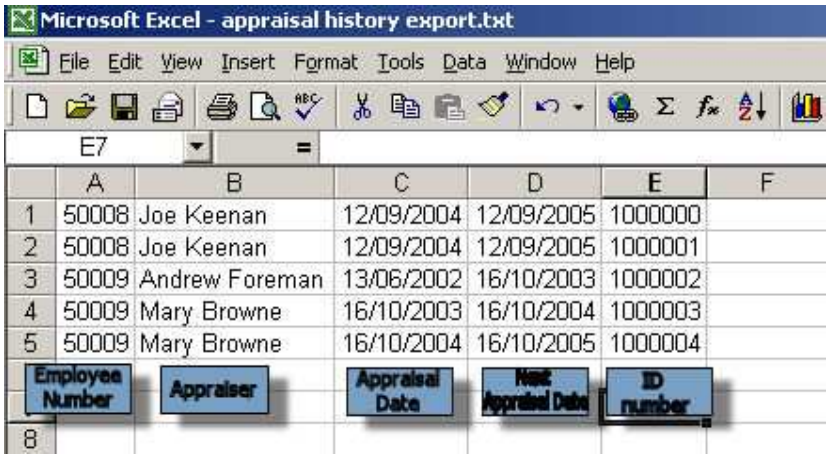
Notes on Importing to Specific Screens

Appraisal Details Screen

The appraisal details screen is divided into a number of different tables (Appraisal History, Appraisal Assessment, Appraisal Objectives Agreed and Appraisal Training Agreed).

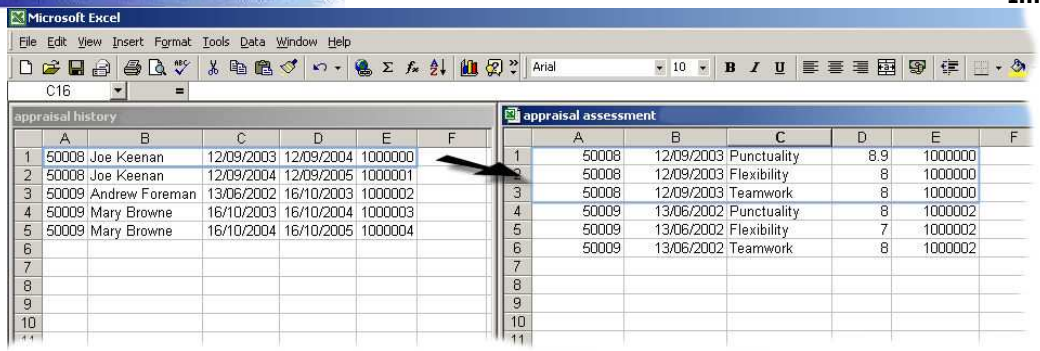
If you wish to import a new appraisal record for an employee, you must also add a column to the spreadsheet for the Appraisal ID. Otherwise the Appraisal Details will overwrite the existing appraisal record.

It is recommended that you begin the Appraisal ID number at 10000000. The ID for each individual Appraisal record MUST be unique. Below is an example of a number of spreadsheets prior to import.



In the case above employee 50009 has three appraisal histories. Each appraisal must be given a unique ID number.

Using the steps outlined above, import this data. Use a separate spreadsheet to record Appraisal Assessment. See the example below



	A	B	C	D	E	F
1	50008	Joe Keenan	12/09/2003	12/09/2004	1000000	
2	50008	Joe Keenan	12/09/2004	12/09/2005	1000001	
3	50009	Andrew Foreman	13/06/2002	16/10/2003	1000002	
4	50009	Mary Browne	16/10/2003	16/10/2004	1000003	
5	50009	Mary Browne	16/10/2004	16/10/2005	1000004	

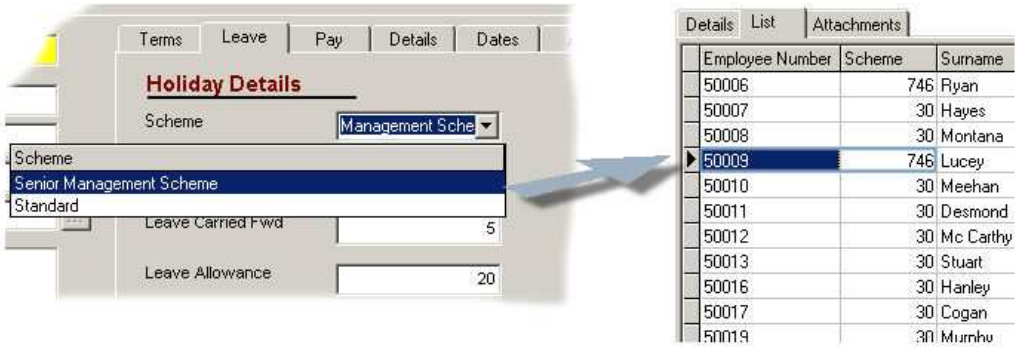
	A	B	C	D	E	F
1	50008	12/09/2003	Punctuality	8.9	1000000	
2	50008	12/09/2003	Flexibility	8	1000000	
3	50008	12/09/2003	Teamwork	8	1000000	
4	50009	13/06/2002	Punctuality	8	1000002	
5	50009	13/06/2002	Flexibility	7	1000002	
6	50009	13/06/2002	Teamwork	8	1000002	

- The Appraisal Assessment spreadsheet **must** contain the Employee Number (exactly as it is in WBS AND as it is in the previous appraisal history import.
- The second spreadsheet must also contain an Employee Number and the Appraisal ID number. The Appraisal ID number **must** match the ID number in the previous appraisal history import. (see column E in both of the above spreadsheets).
- Each Appraisal Assessment must be recorded on separate row/record.
- In the case above, employee 50008 had an appraisal on the 12/09/2003. His next appraisal is due on the 12/09/2004 (this can be seen in the appraisal history spreadsheet). This employee scored 8.9 for Punctuality, 8 for Flexibility and 8 for Teamwork at this assessment (this can be seen from the appraisal assessment spreadsheet). This appraisal has been given an ID number of 1000000.
- Follow the steps outlined above to import this spreadsheet

Employee Details/Master Details Screen

If you are importing Holiday Schemes for employees, please note the following:-

- The Holiday Scheme name is located in the Employee Details Screen in the Leave tab.
- Each Holiday Scheme is stored as a number/code and not as text. Click on the List tab to view the Scheme Number for each Holiday Scheme name. In the example below, the Senior Management Scheme is coded as 746.
- When you are importing a Holiday Scheme, use the Scheme code and NOT the Scheme name



Employee Number	Scheme	Surname
50006	746	Ryan
50007	30	Hayes
50008	30	Montana
50009	746	Lucey
50010	30	Meehan
50011	30	Desmond
50012	30	Mc Carthy
50013	30	Stuart
50016	30	Hanley
50017	30	Cogan
50019	30	Murphy

Exporting Data to Re-import

Scenario

Importing Data

You want to change the data in a master detail field for all/a large number of employees. Usually changing data, requires the user to Edit the employees records and make the alteration to the required field. However, this may be a time consuming process if you will be making the same change to all/a large number of employees.

Methodology

In this type of a situation, it is possible to export the employees data to Microsoft Excel, make the alterations in Microsoft Excel and re-import the data. Follow the steps below:-

Example

Warning:

This should be completed by an advanced PC user or the administrator the Network/Server.

In the example below, the user wishes to change the location for all employees. At the moment, the Location field in the Master Details screen, indicates that all employees are located in Galway. The user wants to change everyones location to Dublin.

Step 1: Export Data

1. Click on **File**
2. Click on **Export**
3. Click on the **Add** button
4. Key in a **Template Name** (e.g. Location Reimport)
5. Key in an export **Description** (e.g. Location Reimport)
6. Click on **Map**
7. Select a screen from the **Available Tables** drop down list (e.g. Master Details)
8. Under Available fields, select **Employee Number** and the other fields you want to change (e.g. Location)

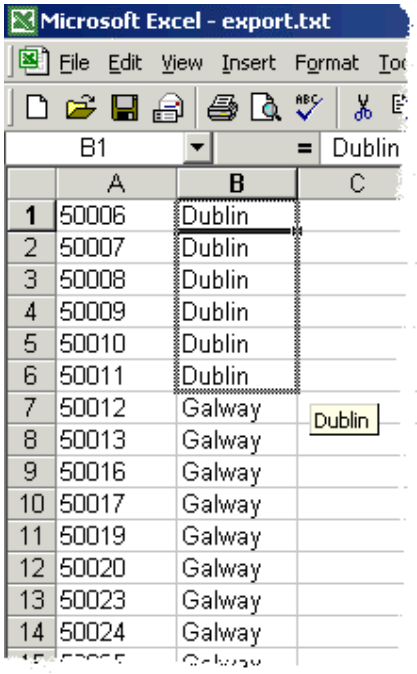
Note:

In any export for re-import, it is highly recommended that you select the Employee Number as one of your export fields, this field is required as part of any import to the system.

9. Move the selected fields into the Export Fields list (right hand side of the dialog box
10. Click on **OK**
11. Click on **OK**
12. This will bring you back to the original Export Data dialog box
13. Highlight the export template you just created
14. Click on **Export**
15. A **Save As** dialog box appears. Save the file to My Documents (or other location that is convenient), give the file a name and click on Save
16. Wait a few moments while the data is exported
17. Click on **OK**, when the 'Export Complete' message occurs
18. Click on **Close** to exit the Export Data dialog box
19. Minimise or close WBS

Step 2: Altering Date in MS Excel

1. Open **Microsoft Excel**
2. Click on **File**
3. Click on **Open**
4. Navigate to where you saved the export file to (e.g. My Documents)
5. Select **All Files** from the **Files of Type** drop down list
6. Highlight the export file (it may have a .txt extension)
7. Click on **Open**
8. A Text Import Wizard appears
9. Under **Original Data Type**, select **Delimited** (this may automatically be selected)
10. Click on **Next**
11. Under **Delimiters**, click on **comma**
12. Click on **Next**
13. Under **Data Preview**, highlight the **Employee Number** column (this should be highlighted in black)
14. Under Column **data format**, select **Text**
15. Click on **Finish**
16. Make any alterations that are necessary to the data (e.g. changing the Location to Dublin)



Note:

Do not change the employee numbers in any way

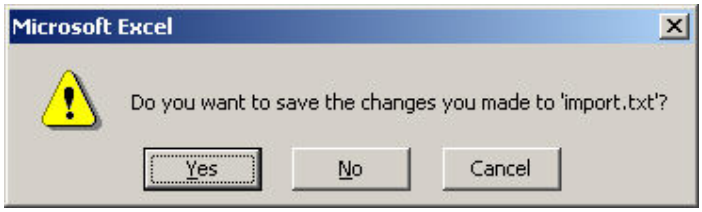
Prior to saving it is vital that you ensure that you have deleted any header row that you may have entered

17. When you have finished making alterations, click on **File**
18. Click on **Save As**
19. Save the file to a convenient location (e.g. My Documents)
20. Give the file a name in the **File Name** text box

Importing Data

21. Click on **Save**
22. A message similar to below may appears:-

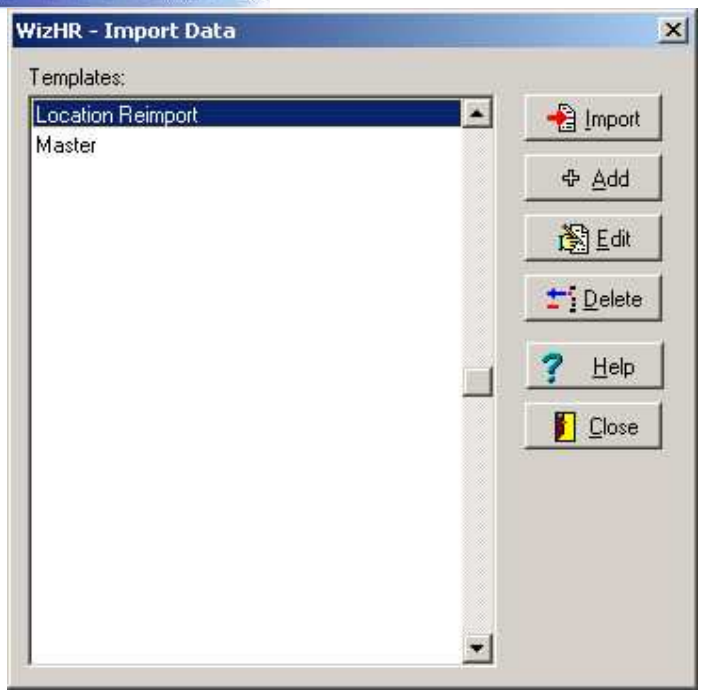
23. Click on **Yes**
24. Click on **File** and **Exit**
25. A message similar to below will appear:-



26. Click on **No**

Step 3: Re Importing Altered Data

1. Open **WBS**
2. Ensure that you are in the correct database (check the database name at the bottom left hand side of the screen)
3. Click on **File**
4. Click on **Import**
5. Click on **Add**



6. Key in the import template name (e.g. Location ReImport)
7. Key in the import template Description (e.g. Location ReImport)
8. Click on Map
9. Select a screen from the Available Tables drop down list
10. Select the relevant fields from the Available Fields list and move them across to the Export Fields text box
11. Note: It is vital that you ensure that the fields are in exactly the same order as they are in the MS Excel spreadsheet
12. Click on OK. This will bring you back to the Define Template dialog box
13. Click on OK. This will bring you back to the Import Data dialog box
14. Highlight the import you just created (e.g. Location Reimport)
15. Click on Import
16. Navigate to the location and double click on the file
17. Close the Import dialog box when the import has finished

Duration	Reason	Deduct from Leave Allowance?	Deduct from Service Days	%age on Cost	Additional Cost	Notes
Number of days the employee was absent (Number field)	Reason for the absence (Text Field)	Absence days to be deducted from the employees leave entitlement (Logic Field)	Absence days to be deducted from the employees service		E.g. Monies spent on hiring temp employee which this employee was absent	Additional Notes on the Absence
3	23 Influenza	FALSE	FALSE			
3	2 Stomach bug	FALSE	FALSE			Employee notified supervisor
3	2 Influenza	FALSE	FALSE			Employee notified supervisor
3	5 Pre Booked Leave	TRUE	FALSE			

ver, each absence must have a row of its own

Master Details Template

Address 2	Address 3	Address 4	Start Date	Date of Leaving	Birth date	Gender	Job Title	Division	Department	Location	Contract Type	Contract End Date	Full/Part Time	WTE
Text	Text	Text	dd/mm/yyyy	dd/mm/yyyy	dd/mm/yyyy	Text	Text	Text	Text	Text	Text	dd/mm/yyyy	text	Numbe

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Douglas	Cork	Co.Cork	01/01/1996		01/01/1960	Male	Grade III Administration	Human Resources	Dublin	Permanent		Full Time	1
Cork	Co.Cork		01/01/1997		01/01/1962	Male	Grade III Administration	Human Resources	Dublin	Permanent		Full Time	1
Cork	Co.Cork		01/01/1998		01/01/1964	Male	Grade III Administration	Human Resources	Dublin	Permanent		Full Time	1
Carrigaline	Cork	Co.Cork	01/01/1999		01/01/1966	Female	Grade III Administration	Human Resources	Dublin	Permanent		Full Time	1
Ennis	Co.Clare		01/01/2000		01/01/1968	Female	Grade III Administration	Human Resources	Dublin	Contract		Part Time	0.5
Douglas	Cork		01/01/2001		01/01/1970	Female	Grade III Administration	Human Resources	Dublin	Contract		Part Time	0.6
Glanmire	Cork	Co.Cork	01/01/2002	31/12/2003	01/01/1972	Female	Grade III Administration	Human Resources	Dublin	Fixed Term	31/12/2003	Part Time	0.1

mber, but not essentially.

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