



The Power Of Exchange



2023 Asure Reseller Partner Conference





This is an overview on how to leverage Exchange to streamline your file transfer operations.

We'll show step-by-step examples of how to save time by automating your data and processes.

This approach can help you reduce data entry, errors, and will safeguard processes to reduce risk.

Speaker Introduction



Paul Trahan

Vice President Asure Implementations

Led former Evolution Reseller, PayData for over 30 years. Experienced with building teams, solutions and processes that lead to growth, efficiencies, and increased revenue.

Lisa Wilson

Implementation Specialist III

Lisa Wilson has more than 27 years of payroll experience including 23 years of working directly with the Evolution application. She has worked for Asure since the acquisition of the PayData service bureau in 2021 and is based in Burlington, Vermont.

Christian Franklin

Product Owner - Dev

Christian Franklin has over 15 years of experience in payroll and using the Evolution application. He is part of the Asure Product Team and is helping to build the Asure Marketplace.

Session Agenda

KEY FEATURES REVIEW

01

Why Exchange?

02

What types of imports can be done?

03

Using the Task Scheduler to automate imports



Why Exchange?

- **Speed** - Quickly add information into Evolution without having to manually enter all the data fields.
- **Accuracy** - Uploading information from a data file greatly cuts down the likelihood of making manual keying errors.
- **Automation & Notifications** - The ability to set up a scheduled task to have file imports done automatically without having to manage imports individually. Import notifications include, Always, Successful or with Exceptions.
- **Customization** - Define parameters in the mapping of the file to change values to match what Evolution requires without having to manually edit your file every time.
- **Flexibility** - Determine what fields come in, the layout of the file, the frequency of imports and how to manage exceptions.

What Data Can Be Brought In?



Basic Employee Data

This would include your standard fields of Name, Address, pay rates, tax withholdings, Start Dates, etc.



Scheduled ED's

This is used for bringing in Scheduled Deductions, Direct Deposits and Child Support details.



Time Off Accrual Balances

Very useful to quickly bring in time off balances for employees.



HR Data for ACA Dependents/ Benefits

The fields for this import bring in Evolution HR Module fields. Perfect for ACA Dependent uploads.



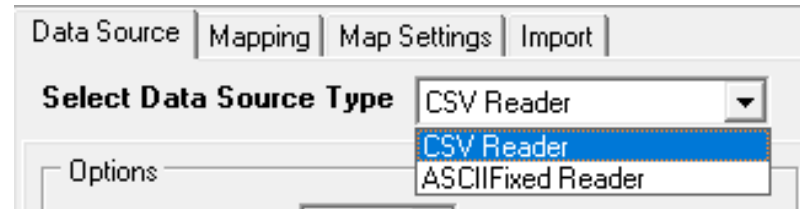
Payroll Data

You have the option of doing a Setup Type payroll for prior wage data or Regular/Correction type payrolls

What File Types Can Be Used?

There are 2 types of files that can be imported.

- Excel based CSV files
- Fixed length TXT files

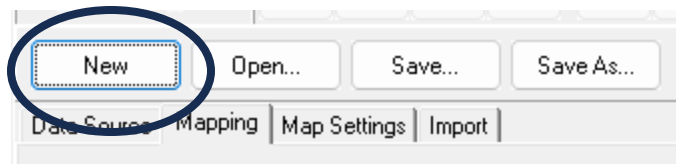
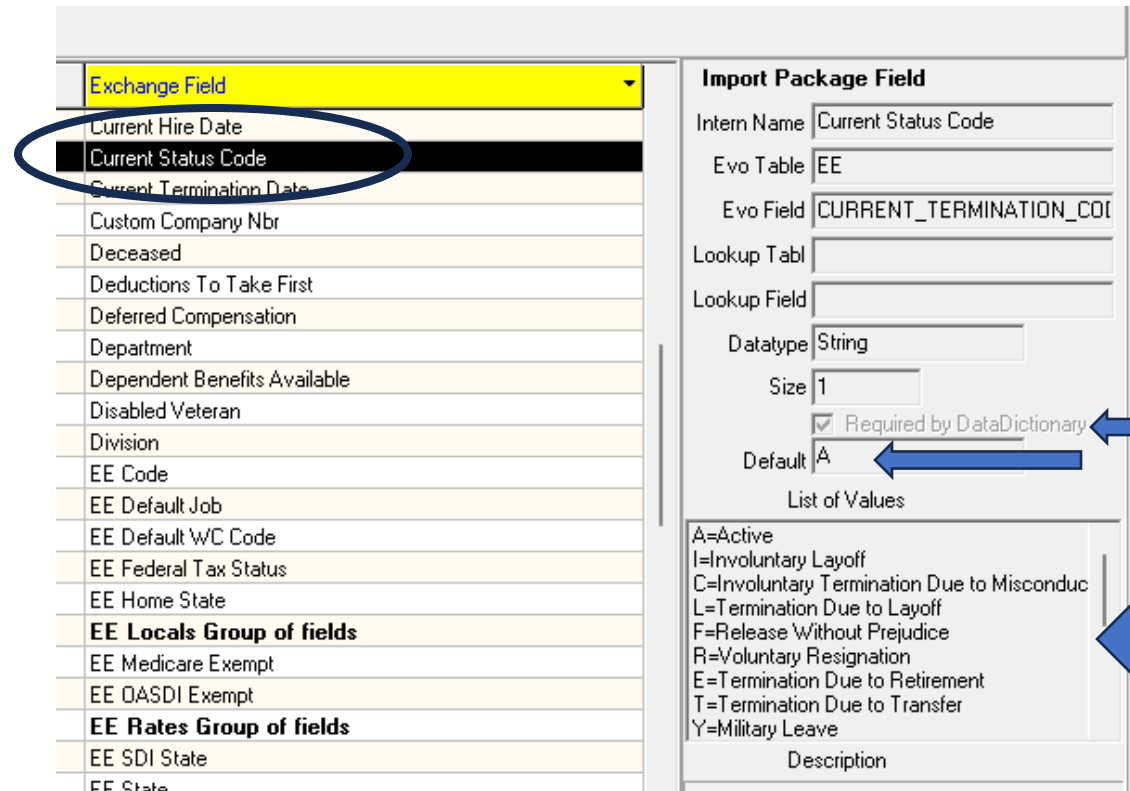
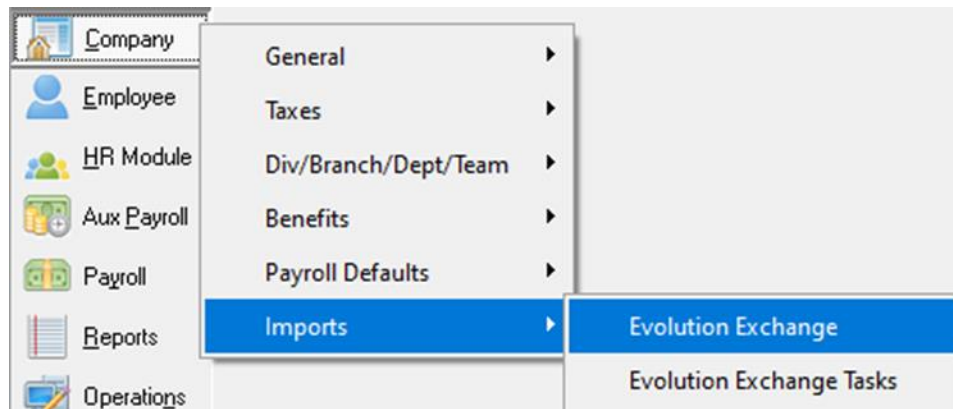


Pro Tip: Use the excel based CSV file. This allows for greater flexibility in working with the data. You aren't limited to a defined number of characters per field.

Pro Tip: Prior to building your files, its best to open Exchange to review the following:

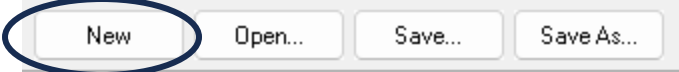


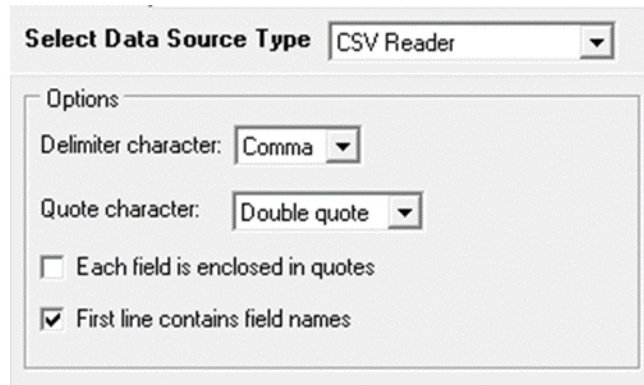
- Reference what data fields are required via the Import Package Field.
- Understand the default field values that will be populated, if no override field value exists in your file.
- Data field validation to Evolution's required data field values.



Step 1 - Data Source

Once your spreadsheet is complete, open Exchange - Data Source.

- If this is the first time importing this file, click New. 
- Make sure you have the correct Data Source Type, as well as the correct Options for your file. If you have a header line, make sure you check off that the First line contains field names.



Select Data Source Type: CSV Reader

Options:

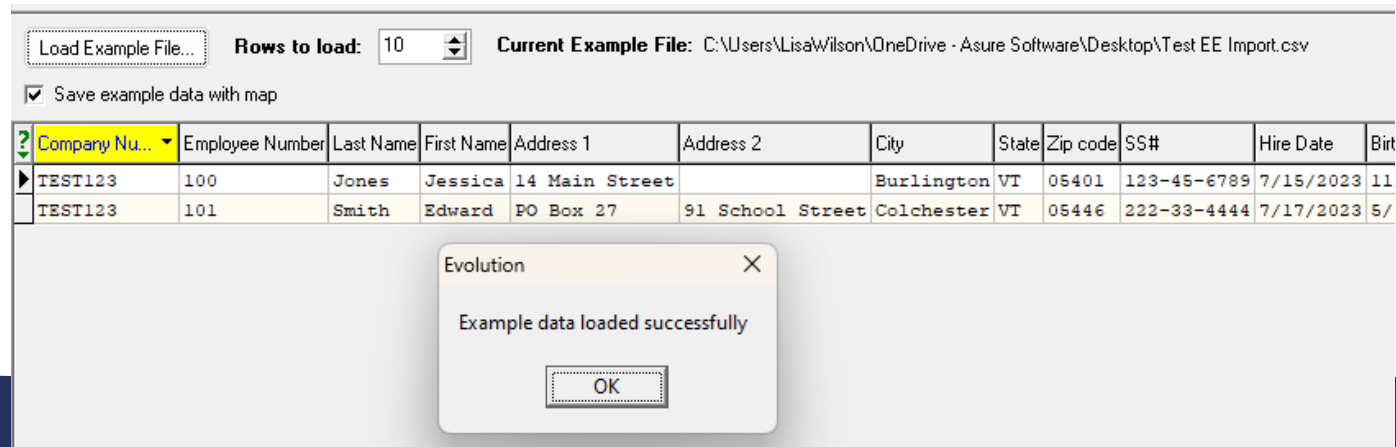
Delimiter character: Comma

Quote character: Double quote

Each field is enclosed in quotes

First line contains field names

- Under the Load Example File, select your file. Pro Tip: If you can't find it, make sure it is saved as a CSV file.



Load Example File... Rows to load: 10 Current Example File: C:\Users\LisaWilson\OneDrive - Asure Software\Desktop\Test EE Import.csv

Save example data with map

| Company Nu... | Employee Number | Last Name | First Name | Address 1 | Address 2 | City | State | Zip code | SS# | Hire Date | Birth |
|---------------|-----------------|-----------|------------|----------------|------------------|------------|-------|----------|-------------|-----------|-------|
| TEST123 | 100 | Jones | Jessica | 14 Main Street | | Burlington | VT | 05401 | 123-45-6789 | 7/15/2023 | 11 |
| TEST123 | 101 | Smith | Edward | PO Box 27 | 91 School Street | Colchester | VT | 05446 | 222-33-4444 | 7/17/2023 | 5/ |

Evolution

Example data loaded successfully

OK

Step 2 - Mapping

- Select the Mapping tab.
- The Input Fields on the left represent the data fields from your file. Select the data field from your file that you wish to map.

| Field Name | Ass... | Example |
|-----------------|--------|----------------|
| Address 1 | 0 | 14 Main Street |
| Address 2 | 0 | |
| Birth Date | 0 | 11/1/1990 |
| City | 0 | Burlington |
| Company Num... | 0 | TEST123 |
| Employee Num... | 0 | 100 |
| First Name | 0 | Jessica |
| Hire Date | 0 | 7/15/2023 |

- The Mapped Fields on the right represent the Evolution data fields. Select the data field on the right that you wish to map your field to.

| As Of Date | Exchange Field | Import Package Field |
|----------------|---------------------|-----------------------|
| Not Applicable | Address 1 | Intern Name Address 1 |
| Not Applicable | Address 2 | Evo Table CL_PERSON |
| Not Applicable | Alternate Address 1 | Evo Field ADDRESS1 |
| Not Applicable | Alternate Address 2 | |

- Once both data fields are highlighted, click the Map Field button. You have now mapped your data field for import.



- Repeat these steps until all data fields that you wish to import have been mapped.

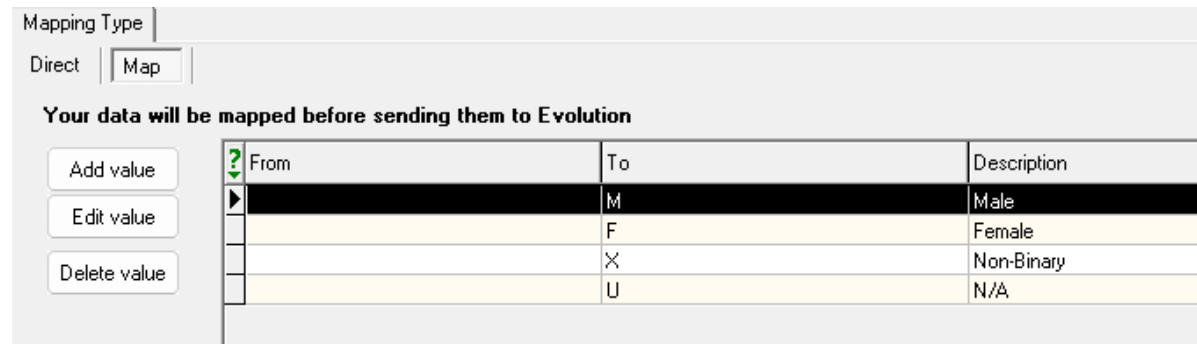
Step 3 - Direct vs Custom Mapping

Direct: the data field value in the import file **matches exactly** to the Evolution data field value

Custom Map: the data field value in the import file **does not match exactly** to the Evolution data field value

An example of a custom map field: Your import file has Gender listed as Male. Evolution requires this to be M to correctly import.

- Once the data field is mapped, select Map under the Mapping Type tab below.



Mapping Type

Direct | **Map**

Your data will be mapped before sending them to Evolution

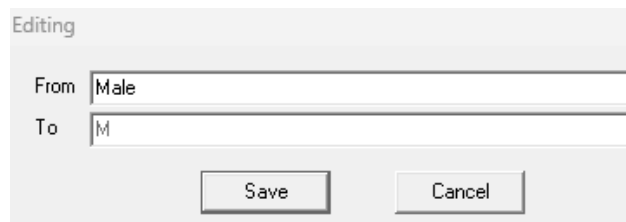
Add value

Edit value

Delete value

| From | To | Description |
|------|----|-------------|
| ? | M | Male |
| | F | Female |
| | X | Non-Binary |
| | U | N/A |

- Highlight the line you want to edit. Select Edit Value and define the From Value (what is in your import file) and save.

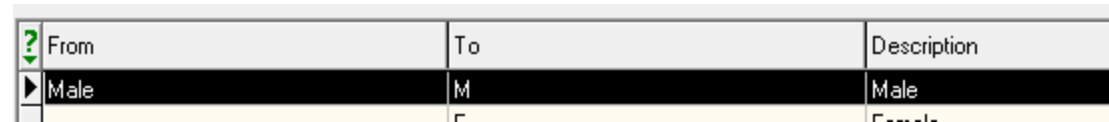


Editing

From: Male

To: M

Save Cancel

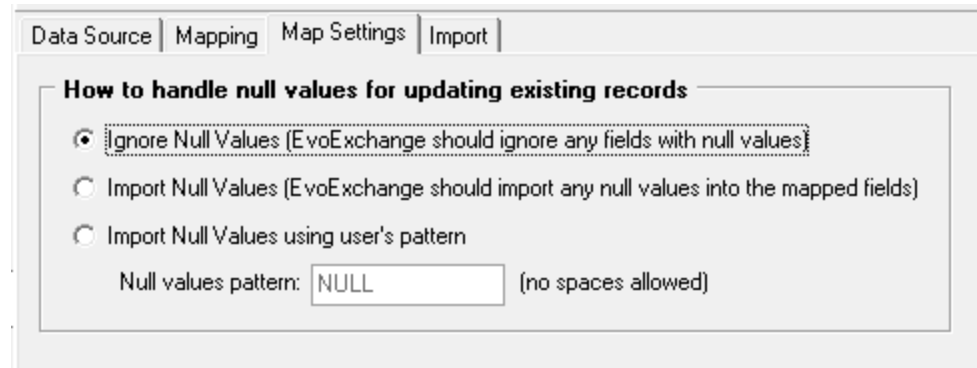


| From | To | Description |
|------|----|-------------|
| Male | M | Male |
| | F | Female |
| | X | Non-Binary |
| | U | N/A |

Step 4 - Map Settings

Map Settings are used to manage and define how null values found in your import file are to be handled. Generally, a Null or empty field can be ignored. However, there are times when you may want the system to import in that Null value and add it to a field. The most common option is going to be to “Ignore.”

For example, if you don't have Address 2 on all employees, then you don't want the system to import in blank fields. You just want it to move past that field and leave it empty.



The screenshot shows a software interface with four tabs: "Data Source", "Mapping", "Map Settings", and "Import". The "Map Settings" tab is active. Below the tabs is a section titled "How to handle null values for updating existing records". This section contains three radio button options:

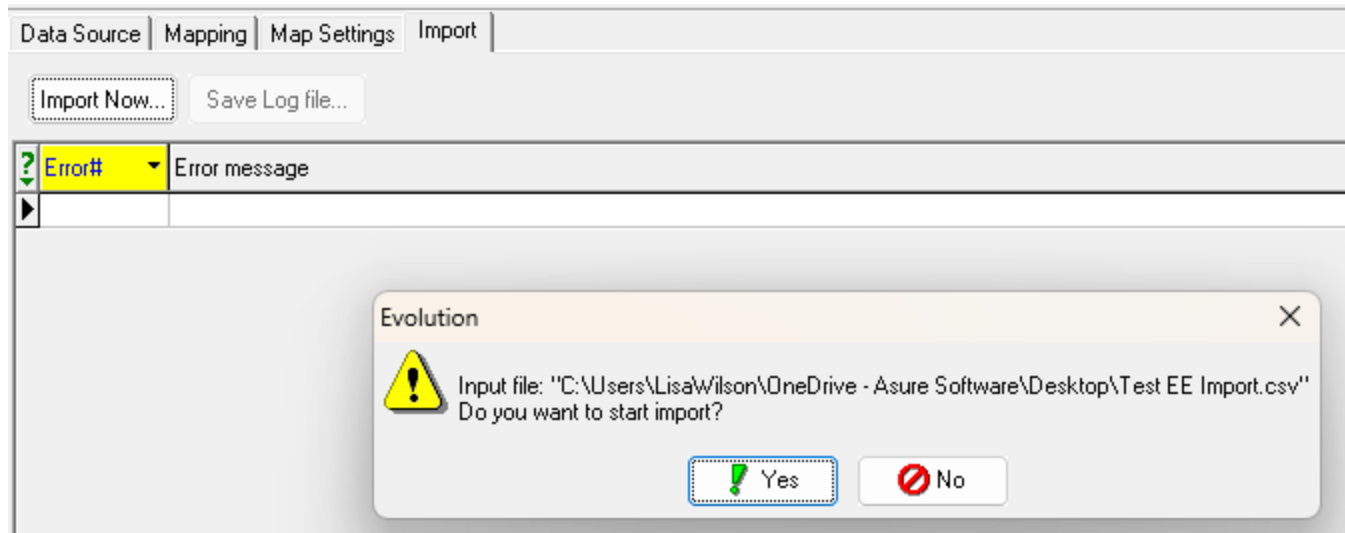
- Ignore Null Values (EvoExchange should ignore any fields with null values)
- Import Null Values (EvoExchange should import any null values into the mapped fields)
- Import Null Values using user's pattern

Below the radio buttons is a text input field labeled "Null values pattern:" containing the text "NULL", followed by the instruction "(no spaces allowed)".

Step 5 - Importing Your file

Now it's time to import your data field.

- From the Import tab, select **Import Now**.
- Select the file you want to import then click Open.
- The system will confirm that you want to start the import. If you are ready, click Yes



Step 6 - What do I do if I get an error?



Exchange will notify you if there is a problem with the import.

These messages will provide the Company Code, Employee Code and details as to what needs to be addressed.

Some messages will mean that your data file needs to be fixed. In this example, the company number I'm importing into doesn't match any company in Evolution. I need to fix my file so I'm importing into the correct company.

| | Error message |
|---|---|
| 1 | Row#1 CustomCo "TEST123" EECODE "100" Error: Company not found. CUSTOM_COMPANY_NUMBER='TEST123' |
| 2 | Row#2 CustomCo "TEST123" EECODE "101" Error: Company not found. CUSTOM_COMPANY_NUMBER='TEST123' |

Some messages mean that your mapping is off, or you need to add in some custom mapping conversion.

| | Error message |
|-------|---|
| Row#1 | CustomCo "PDAHR2" EECODE "100" Error: Package field "Gender" has impossible value: Female |
| Row#2 | CustomCo "PDAHR2" EECODE "101" Error: Package field "Gender" has impossible value: Male |

Other messages mean that you are missing data field values that are required in Evolution.

| | Error message |
|-------|--|
| Row#1 | CustomCo "PDAHR2" EECODE "1000" Error: "EE" table. Division is required due company's DBDT setup |
| Row#2 | CustomCo "PDAHR2" EECODE "1101" Error: "EE" table. Division is required due company's DBDT setup |

Step 6 - Saving Your Map Template for Future Use



Pro Tip: Once your mapping is complete and successful, save it for future use and/or scheduled importing. Note: scheduled importing requires a saved map file.

At the top of the screen, click on the Save As option. Provide a file name and save it. If at any point, you go in and update the mapping, click Save and it will update that map file automatically.



To use this mapping file again, when opening Exchange, instead of clicking New, click Open and pull in the saved map file.

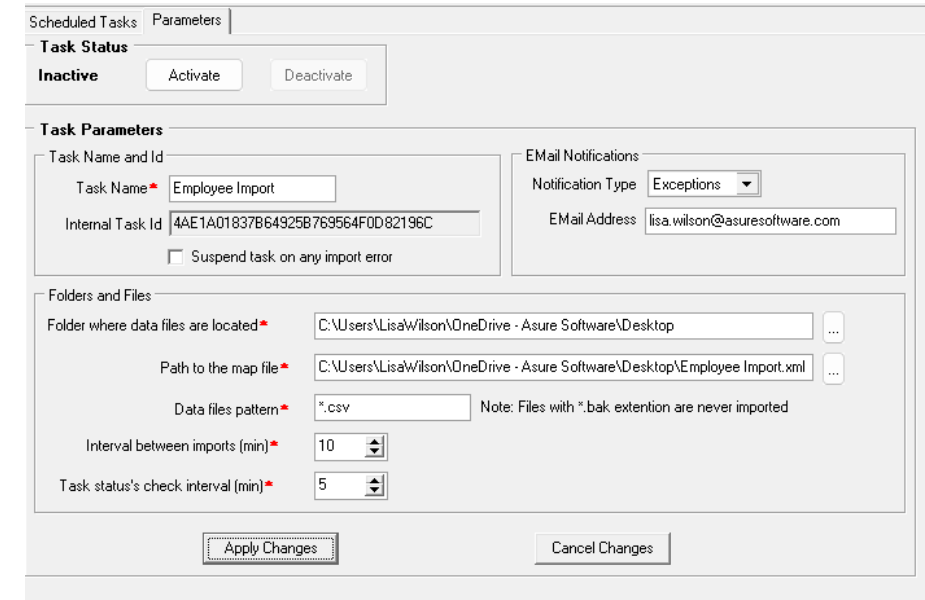


Step 7 - Setting Up a Scheduled Import Task

From the Evolution Exchange Tasks section, start by clicking New Task.



- Select the Parameters Tab and make sure the following items have been completed.
 - Task Name - Give your import a name. This should reference the type of import, the source and/or company ID if this is specific to one company.
 - Email Notifications - Define the notification type when the scheduled import task runs, as well as the email address to use for this notification.
 - Under Folders and Files
 - Select the location that your file is going to be saved.
 - Select the location where the map file is saved.
 - Determine how often you want the schedule import task to run.
 - Once your settings are complete, click Apply Changes.
 - To activate your schedule import task, click the Activate button.

A screenshot of the 'Scheduled Tasks Parameters' form. The 'Task Status' is 'Inactive' with 'Activate' and 'Deactivate' buttons. The 'Task Parameters' section includes: 'Task Name and Id' with 'Task Name' set to 'Employee Import' and 'Internal Task Id' set to '4AE1A01837B64925B769564F0D82196C'; 'Email Notifications' with 'Notification Type' set to 'Exceptions' and 'Email Address' set to 'lisa.wilson@asuresoftware.com'; and 'Folders and Files' with 'Folder where data files are located' set to 'C:\Users\LisaWilson\OneDrive - Asure Software\Desktop', 'Path to the map file' set to 'C:\Users\LisaWilson\OneDrive - Asure Software\Desktop\Employee Import.xml', 'Data files pattern' set to '*.csv', 'Interval between imports (min)' set to 10, and 'Task status's check interval (min)' set to 5. There are 'Apply Changes' and 'Cancel Changes' buttons at the bottom.

Pro Tip: Your scheduled import task will not be active unless you activate it.

Tips, Tricks & Best Practices



In preparing your import file, use excel and save as an excel file and not as a CSV file. Always keep a version of your import file in excel.

For example, when you open a csv file, it often reformats fields, including fields that have preceding zeros. If you are working with a direct deposit file and find you are missing a field, reopening that file can strip out any of the leading zeros in the routing and account numbers which will cause you to import incorrect data.



Importing of Exchange files will bring data into Evolution Classic. If you have a client that has already been setup in Advanced/Essential HR, then you **should not** use Exchange to import data files. **This can result in corruption of data.**



Always review the required fields in the Import Package Fields when building out your data import file.



Using the Ctrl-E to quickly update existing employee information. Export current employee data to excel, add the company ID, and data import fields you want to update and import using exchange.

Key Takeaways: The Power of Exchange

01

Speed

Quickly add information into Evolution without having to manually enter all the data fields.

02

Accuracy

Uploading information from a data file greatly cuts down the likelihood of making manual keying errors.

03

Scheduled Tasks & Notification

The ability to set up a scheduled with email notification.

04

Customization

Define parameters in the mapping of the file to change values

05

Flexibility

Determine what fields come in, the layout of the file, the frequency of imports and how to manage exceptions.

Resources & Contact



(802) 655-8347 x3



support@evolutionhcm.com or submit a case through
the Support Portal.

Have questions? Need Help?

Reach out to your Asure Support team and they will be able to work with you directly.



Q & A



Thank You!



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