



# HARMONY

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Employee Import User Guide

v1.0

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# Welcome to Harmony

Harmony is a hosted application available for the U.S. and Canada. The hosted nature of this software means all your data is stored on the cloud for easy access. You can access it on any modern web browser, including Microsoft Edge, Mozilla Firefox, Google Chrome, and more. Harmony conveniently lets you add and access an unlimited number of companies with a single login. Due to its modular nature, Harmony works well with a single module or with all its module, including Payroll, Time & Attendance (T&A), Human Resources (HR), and Employee Self-Service (ESS) for a comprehensive HRIS solution.

## About This User Guide

This user guide will outline the process of creating an employee import interface, preparing the file to import, and importing your employees. For information detailing the creation of a single employee, please refer to your *Harmony Company Setup Manual*.

## Pre-Requisites

- Have your employees' required information ready in the interface you will create
- Received your Harmony login credentials and able to log in successfully
- Set up your departments
- Set up your locations
- Set up your employee types



You must have met the above pre-requisites before you can import your employees, as departments, locations, and employee types are required fields. For more information, refer to your *Harmony Company Setup Manual*.

# Logging In

Paymate will provide you with your credentials to your 'supervisor' or administrative account. This account will have all read/write permissions.



Although your password is randomly generated, we strongly recommend for you to change your password with logging into Harmony for the first time.

1. Open your favorite browser and navigate to the website URL that Paymate provided you.
2. Log into Paymate with your credentials.



If you do not remember your credentials, you can use the "Forgot Password?" link. If you do not remember your registered email address, please [contact our support team](#).

A screenshot of the login page. The title is "Welcome to Harmony. Please log in." Below the title are two input fields: "Username" with the value "support@paymatesoftware.com" and "Password" with masked characters ".....". There is a checkbox for "Remember Me" and a "Login" button. A "Forgot Password" link is located below the password field.

3. Click "Login".
4. Select the company that you would like to log into.

A screenshot of the company selection page. The title is "Available Companies:". Below the title is a scrollable list box containing "Paymate Software Demo". Below the list box is a "Payroll Year:" label and a dropdown menu showing "2021". At the bottom are two buttons: "Select" and "Logout".

5. Click "Select".

# Creating Your Employee Import Interface

First, we will need to create your employee import interface. This is where you will map the columns in your file to the correct fields in Harmony.

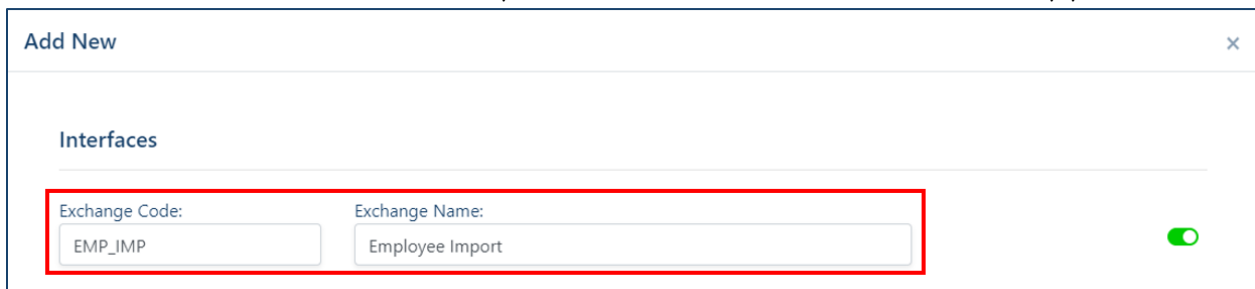


Upon request, Paymate can provide you with a standard import interface and template. This may deduct from your paid professional services hours. If so, you will not need to create your interface or template. Simply fill out Paymate's import template, import it yourself, and away you go!

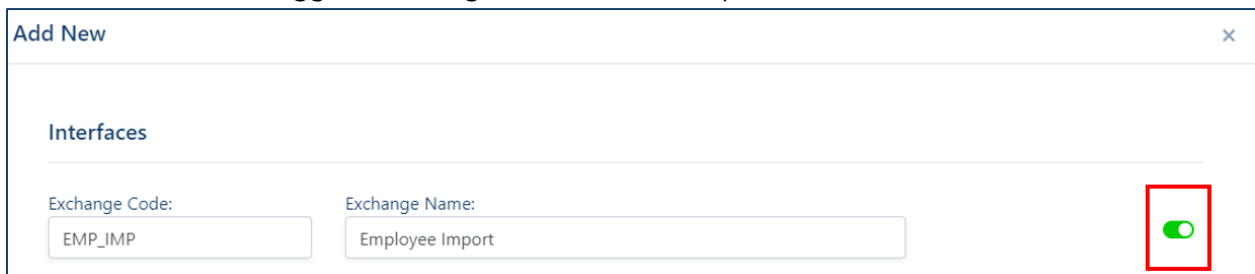
1. Navigate to Configuration > Employee > Import.
2. Click **“Click to Start”** to begin configuring and setting up your employee import interface.



3. Click **“+ New Interface”** to create a new interface.
4. Enter a “Code” and “Name” for your interface. These will be used to identify your interface.



5. Activate the toggle on the right side to activate your interface.



6. If your file will have a header, leave the “No header” checkbox unticked. If your file will not have a header, tick this checkbox.

- You will now begin mapping the fields from Harmony into the right column in your file. Click “+” to add a new field.



All required fields are listed with an asterisk (\*), so be sure to include these before saving your interface. Required fields are: Employee Number, First Name, Last Name, Gender, Date of Birth, Address 1, City, Province Code, Country Code, Social Number (SIN/SSN), Status, Start Date, Department Code, Location Code, Employee Type Code.

Add New
×

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**Interfaces**

Exchange Code:

Exchange Name:

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**Parameter Mapping**  No header

Column ID	Code	Name	Type	Date Format	Mandatory
<input type="text" value="Column ID"/>	<input type="text" value="Code"/>	<input type="text" value="Select a name"/>	<input type="text" value="Code"/>		<input type="checkbox"/>

+
-

Field Name	Description
<u>“Column ID”</u>	Refers to the column in your file. Entering “1” will mean column A in your .CSV file, or the first column in your .TXT file.
<u>“Code”</u>	Read-only field that identifies the content of the field in your database.
<u>“Name”</u>	Refers to the field name, such as the employee ID or your employee’s address.
<u>“Type”</u>	Read-only field that identifies the nature of the field in your database.
<u>“Date Format”</u>	Refers to the formatting of your date, such as “MM/dd/yyyy”. This is only required for date-specific fields, such as hire date or date of birth.
<u>“Mandatory”</u>	Read-only checkbox that identifies if the field is required or not.

- To remove a field, click “-”.
- Once you have mapped all required fields and the format is the way you like, click the save icon to save your interface.

# Setting Up Your Employee Import Template

Now that you have mapped out how your employee import template should look like, you will need to create the import template through Microsoft Excel or Notepad. You will be preparing this template to import your employees' information into Harmony with your interface.



Upon request, Paymate can provide you with a standard import interface and template. This may deduct from your paid professional services hours. If so, you will not need to create your interface or template. Simply fill out Paymate's import template, import it yourself, and away you go!

One of the most common import file types and arguably, the simplest to use, is .CSV. This file type is compatible with Microsoft Excel, Notepad, and most other applications.

1. Open Microsoft Excel.
2. In column A, enter the field according to your mapped field name in your interface that has the "Column ID" 1. Repeat this for all fields. For example, refer to the sample interface setup and import file below.

**Parameter Mapping**  No header

Column ID	Code	Name	Type	Date Format	Mandatory
1	Emp008	Employee number *	nvarchar(8)		<input checked="" type="checkbox"/>
2	Emp009	First name *	nvarchar(25)		<input checked="" type="checkbox"/>
3	Emp011	Last name *	nvarchar(40)		<input checked="" type="checkbox"/>
4	PKL002	Gender name *	nvarchar(255)		<input checked="" type="checkbox"/>
5	Emp022	Date of birth *	date	MM/dd/yyyy	<input checked="" type="checkbox"/>

Using the interface setup above, your file should look something like the file below.

	A	B	C	D	E	F
1	Employee #	First Name	Last Name	Gender	DOB	
2	101	John	Doe	Male	10/23/1984	
3	102	Jane	Doe	Female	04/01/1990	
4	103	Michael	Scott	Male	07/18/2000	
5						
6						

3. Save your file as a ".CSV (comma delimited)" file type.

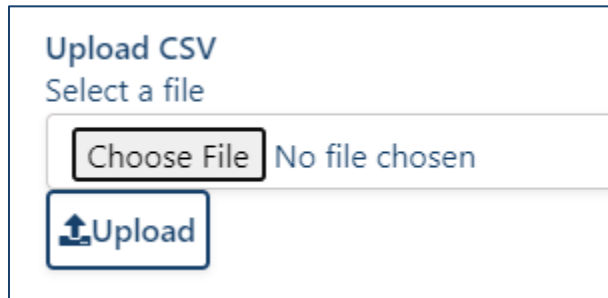


When you are saving your file, make a note of the location of where you saved your file on your local computer. You will need to know where it is when you are uploading the file to Harmony.

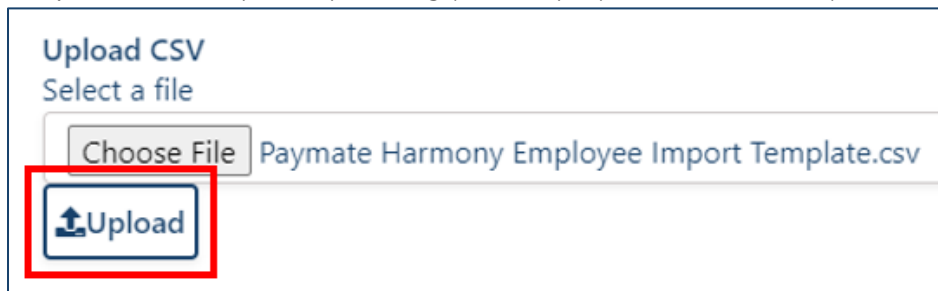
# Importing Your Employees

Your interface is set up and your file is ready for import. You will now import your employees!

1. Log into Harmony.
2. Navigate to Configuration > Employees > Import.
3. Click **“Click to Start”**.
4. Select your saved import interface that you set up earlier.
5. Scroll down to the bottom until you see the section *Upload CSV*.



6. Click **“Choose File”** to browse for your import file on your local computer.
7. Select your import file and click **“Open”**.
8. Click **“Upload”** to complete uploading your employees into Harmony.



9. Congratulations! Your employees should now be imported successfully.



If you receive any errors when importing your employees, read the error message and review your import template and/or file. Common mistakes can be that the date format was incorrect or a field was incorrectly mapped.



# Contact Paymate Support

Before you contact our support team, please refer to the below resources:

**Paymate Knowledge Base:** <https://helpdesk.paymatesoftware.com/>

Paymate's knowledge base contains a wide variety of help documents, guides, and how-to videos. We highly recommend browsing through our articles to fix an issue you may have.

If you are still experiencing difficulties or issues in setting up your employee import interface or template, please contact Paymate's support team directly. If you are still in your implementation cycle, please contact your implementation lead. We will be happy to help you and answer any questions you may have.

When contacting our support team, please include your six-digit customer ID and name of your company with a quick description of your problem.

**Email us:** [Support@paymatesoftware.com](mailto:Support@paymatesoftware.com)

**Visit us:** [www.paymatesoftware.com/contact](http://www.paymatesoftware.com/contact)