



importstaffdemoinsurancedata

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Human Resources > Utilities > Import Staff Demo Insurance Data

This utility is used to import a comma-delimited text (.txt) file to insert insurance records to the Maintenance > Staff Demo > Insurance tab.

You must be logged on to a current year pay frequency to access this utility.

Notes:

If **Insert new records from import file.** is selected, one of the following occurs:

- If insurance plan data exists in the database but no coverage data, then new coverage rows are inserted.
- If insurance plan and coverage data exist in the database, then no new coverage rows are inserted and an error message is displayed.
- If the import file contains insurance plan data but no coverage data, an insurance plan record is inserted if it does not already exist.

If coverage data is duplicated in the file, the number of rows listed in the file are inserted with a unique sequence number to prevent duplicate rows in the database.

[File layout](#)


Insert new records:

Under **Import Option**, select one of the following options:

- **Insert new records from import file.**
- **Delete all existing records and insert all records from import file.**

Under **Employees Identifier**, select one of the following options to include as the first identifying column in the record layout:

- **Employee Number**
- **Staff ID/SSN**

Field	Description
Insurance Company Code/Name	Type the insurance company code or name. A list of matching codes is displayed in the drop down. Select the desired code, or click  to perform a search in the Insurance Company Codes directory. Only insurance company code/names that exist on the Tables > Insurance Company Codes page are displayed. If an insurance company code is selected, the selected code overwrites the code in the file. However, if the field is left blank, the insurance company code from the file is used.

Field	Description
Import Path	<p>Click Choose File. The File Upload dialog box is displayed.</p> <p>Select the desired file to upload, and click Open. The file name is displayed.</p> <p>Click Cancel to close the dialog box without selecting a file.</p>


Click **Execute** to start the import.

If any [errors](#) are encountered during the import process, the Import Staff Demo Insurance Data Error Report is displayed.


[Review the report.](#)

Review the report using the following buttons:

Click  to go to the first page of the report.


Click  to go back one page.

Click  to go forward one page.

Click  to go to the last page of the report.

The report can be viewed and saved in various file formats.

Click  to save and print the report in PDF format.

Click  to save and print the report in CSV format. (This option is not available for all reports.) When a report is exported to the CSV format, the report headers may not be included.

Click **X** to close the report window. Some reports may have a **Close Report**, **Exit**, or **Cancel** button instead.

Click **Cancel** to return to the Import Staff Demo Insurance Data page.

Click **Process**.

[Create a backup.](#)

If you click **Yes**, a pop-up window is displayed with the **Frequency** and **Export File Name**. Click **Execute** to continue. Or, click **Cancel** to not create the backup and continue.

If you click **Execute** to create the system backup, a pop-up window is displayed prompting you to enter a password for the archive. Type the password and click **OK** or click **Cancel** to cancel the process. After the process is completed, the Save As window is displayed. Select the drive location to save a copy of the export.

Click **Save**. A message is displayed indicating whether or not the process was completed. Click **Yes** or **No** to either continue or end the process.

A message is displayed indicating that the process was successful.



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