



Excel migration guide

This guide provides a list of the fields contained in the migration spreadsheet, along with any pertinent comments.

The spreadsheet is available here: https://www.smoothpaygold.com/public_html/files/gold/man/migrate.xlsx

Staff records

Each row should contain as much data as possible for each employee, including these fields (as much as possible is preferred)

| employeeID/Badge # | [compulsory] |
|----------------------|-----------------------------|
| firstname | |
| surname | |
| or First+Last name | |
| or Last + First name | |
| address | |
| town | |
| state | |
| postcode | |
| country | |
| DOB | |
| Tax# | |
| startdate | dd/mm/yyyy |
| finishdate | dd/mm/yyyy |
| phone | |
| email | |
| bankname | |
| bankaccount | |
| superfund | Australia only |
| superref (member #) | All countries except NZ |
| taxcode | NZ codes only (M, MSL etc.) |

| | |
|------------|---|
| taxrate | Expressed as cents per dollar (e.g. 0.2=20%) Only required if the employee is paying a flat percentage rather than automatically calculated tax based on their tax code (e.g. contractor/agent only) |
| paypoint | department name or code |
| position | occupation |
| employment | F,P,C for Fulltime, Part time, Casual |
| payrate | |
| salary | |
| paycycle | W,F,M,4,H for Weekly, Fortnightly, Monthly, 4-weekly, Half-monthly |

There should be ONE employee record per row and the data can be in any column order (though the above is preferred). The only mandatory field is the employee's badge number.

Pay history records

The same EmployeeID/Badge# must identify every history record required to be imported.

| | |
|--------------------|---|
| employeeID/Badge # | [compulsory] |
| batch# | |
| periodEnd | dd/mm/yyyy |
| payday | dd/mm/yyyy |
| payrate | No \$ sign or commas, e.g. 17.123456 |
| daysPaid | NZ only |
| numberOfPayPeriods | (e.g. 1 for 1 week if paid weekly, or 1 for 1 fortnight if paid fortnightly - if multiple periods are paid in a single pay then the number of normal pay cycles included) |
| periodType | (W,F,M,4,H for Weekly, Fortnightly, Monthly, 4-weekly, Half-monthly) |
| OTE | superable income |
| hours | |
| timeEarnings | |
| taxableAllowances | |

| | |
|-----------------|---|
| nonTaxable | |
| Tax | |
| superEmployee | |
| TaxCode | NZ only |
| otherDeductions | |
| superEmployer | Employer super contribution (NZ: incl ESCT) |
| netPay | |
| comment | |

There should be ONE pay record per period per employee in each row and the data can be in any column order (though the above is preferred).

This should be presented in a single excel sheet (not 1 sheet per employee as it increases the time required incrementally)

Leave balances

The same EmployeeID/Badge# must identify every balance record required to be imported and each list of balances must be grouped by leave type (e.g. all annual leave balances followed by all sick leave balances).

| | |
|--------------------|---|
| employeeID/Badge # | [compulsory] |
| leavetype | Annual, Sick, LSL, Alternative |
| UOM | (units of measure: H,D,W for Hours, Days, Weeks) |
| balance | Australia: to date balance accrued NZ: balance remaining from last anniversary Other countries: generally balance remaining from last anniversary for annually accruing leave types, otherwise balance accrued to date for leave types that accrue each pay period |

This should be presented in a single excel sheet (not 1 sheet per employee as it increases the time required incrementally), but may be presented in a separate sheet per leave type

If you have any questions please feel free to call.