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# Data Transfer

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User Guide – V 12.0

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# Importing Employee Information

## File Description

1. FILE NAME            PARKLANE.DAT or *myfile.txt*
2. FORMAT              Fixed length, no delimiters
3. FILE KEY             Social Insurance Number/Social Security Number. If a duplicate SIN/SSN is encountered, the record with the latest date of Employment will be used. An option is available to use the employee number as the file key. Contact *Parklane* for further information
4. RECORD LENGTH    1101 Characters

Any field, except Social Insurance Number/Social Security Number, Record Identifier, Department Code, Surname, Position and Status may be left blank.

For Numeric fields only: Numeric fields that are blank may be filled with all zeros or all spaces.

Alpha-Numeric (A/N) fields only: Fields with all zeros or all spaces will not replace data currently in your system.

## Important

Employees can be manually entered into your system before the initial *Data Transfer* is done. Make sure that the SIN/SSN has been entered for each employee prior to the update, allowing the *Data Transfer* to identify these employees and avoid duplication.

## General

Create a file containing all employees.

First time, there are tools in the application that allow you to print a sample of the records from the import file to ensure the field alignment is correct. In addition, you may request a trial run that will perform all procedures, but will NOT update the application files.

During the first live run, the system will add all employees to the database. Any employee records had been entered manually (including the SIN/SSN) will be updated.

On subsequent runs, the *Data Transfer* will update the employee records by SIN/SSN and add employee records where a match is not found.

The *Data Transfer* is updated by field. A field filled with all spaces (or all zeros) will not delete data on the *Personal Data* file.

The *Data Transfer* may be activated manually from the system, or automatically through the use of an O/S scheduler.

## Departments

The Department Codes on the Data Transfer file must match the Department Table in the system.

If you cannot provide a valid Department Code, use the code you have available. Subsequently you have one of the following options:

- When running, a warning will be given, along with the department code that was used. At that point, you can enter the department name and the system will enter the department into the table.
- Before running the *Data Transfer*, set up a department with an abbreviation of XXXXXXXXXX; the full description can be anything you wish such as, "From Data Transfer". From this point on, when the *Data Transfer* encounters an invalid department, it will put that employee under *Department XXXXXXXXXX*. After the *Data Transfer* is done, the departments may be corrected manually.
- Translations for each department on the *Import File* can be set up prior to running the *Data Transfer*. You provide the department code that will be on the import file along with the resulting department code in the system. For more information, contact our Support Center.
- On the *Import File*, there is a field called Department Description. By completing this field, the system will automatically update the Department table with the Department Code and the Department Description from the *Import File*. If the Department Code currently exists in the table, the description will be updated with the department description on the *Import File*. When this field is left blank, the system will validate the department code on the *Import file* with the current department table.

If you require assistance, contact our Support Center.

## Procedure

1. If the system currently has employee records that were manually entered, the user must ensure that all records have a SIN/SSN. (Report, Missing Fields, is available in the Personal Data module which shows employees with SIN/SSN missing.) This is a crucial step; otherwise the result will be duplicate employee records.
2. Once an Import File has been created, start the system and select the Data Transfer option. To ensure that your system is able to read the file, there are two preliminary steps that can be taken before running the actual update:

There is a report that can be requested. It will print the entire Import File (or the first four records) showing the alignment of fields. All fields are printed and labeled. Using this report, you can verify that the Import File is compatible.

A trial update run can be requested. At this point, your system will simulate an update and generate a report showing any warnings and errors that could occur. The files in the system are not updated.

## Automatic Update

You may run the *Data Transfer* after hours with no user intervention. In order to accomplish this, you must have the appropriate tools on your network to start the *Data Transfer* automatically. If you have the *Parklane* multi-company option, follow the procedures under Creating One Import File for All Companies.

1. To start the update, call the batch file PSRUN.BAT (found in the HS folder).
2. The path name of the *Data Transfer* file must be HS\PARKLANE.DAT

All errors encountered will be put to the Data Transfer Log (Auto Run) located on the Maintenance menu as well as the PARKLANE\_LOG.TXT file found in the HS folder. Any critical errors that cause the *Data Transfer* to terminate abnormally will appear and remain on the screen.

Contact our Support Center for more information.



## Updating Multi-Company Systems

If your system has more than one company, you have two options:

- Create one file for each company and run the *Data Transfer* against each company.
- Build one *Import File* and update all companies in one run. Using this method, you may activate the *Data Transfer* manually from the *Maintenance Menu* or using the *Automatic Update*.

## Creating One Import File for All Companies

The *Parklane* System has assigned a number to each company in your system. To determine the number of each company:

- At the Main Menu of the Parklane System, click Go To, then Switch Companies.
- The list of companies will appear with the company number to the left of each name. Make note of each company and the corresponding number.
- Create an Import File using the record layout described in this document. The sequence of the file should be, by company. Insert a company record in front of each group of company records.

A company record looks like this: >001

Where > in Column 1 indicates company record 001 in Columns 2,3,4 is the company number and must be left zero filled.

When the *Data Transfer* is running, each time the system encounters a company record; the records following will be applied to that company until another company record is encountered.

Example 1:

>001

Record 1 for company 1

Record 2 for company 1,Etc...

>002

Record 1 for company 2

Record 2 for company 2,Etc...

Example 2:

>005

Record 1 for company 5

Record 2 for company 5,Etc..

>003

Record 1 for company 3

Record 2 for company 3,Etc...

Example 3:

>005

Record 1 for company 5

>003

Record 1 for company 3

>006

Record 1 for company 6

>003

Record 2 for company 3, Etc...

### Note to users with the Consolidation option:

Never update Consolidation Company 001 using the *Data Transfer*. There is no need to do so and the system won't allow it.

## Record Description

**\*\*Fields Requirements**

Mandatory: Application will not create a record if one of these fields is missing

High: Required for government legislative forms

Medium: Required for effective statistical reporting

Low: Has no effect on forms or reporting

	Field Requirements** Yes=Mandatory, High, Medium, Low				Field Description	Pos	Length	Alpha /Num	Remarks	
	Yes	High	Medium	Low						
1	Yes				S.I.N./S.S.N.	1	9	A/N	This field must be completed.	
2	Yes				Record Identifier	10	1	A/N	Must be “#” (special character number sign).	
3	Yes				Department Code	11	10	A/N	Should match the system.	
4	Yes				Surname	21	25	A	Must be completed for a new employee	
5		High			Given Name	46	20	A	Must be completed	
6		High			Address	66	30	A/N		
7		High			City & Province	96	30	A	If required, country may be entered into Field No. 44	
8		High or n/a			Postal Code	126	7	A/N	Zip Code, when applicable, is entered into Field No. 45. (In this case, leave Postal Code blank.)	
9		High			Area Code	133	3	N		
10		High			Telephone Number	136	7	N	Where applicable, foreign telephone numbers may be entered into Field No. 46.	
11		High			Birth Date	143	8	N	Format = ddmmyyyy	
12			Med		Marital Status	151	1	A	S = Single M = Married D = Divorced	W = Widowed X = Separated C = Common-law
13		High			Gender	152	1	A	F = Female M = Male T = Other (ON only)	
14	Yes				Position (effective date is field #50)	153	24	A		



15	Yes				Status	177	1	A	A = Leave of Absence B = Lay-off C = Casual Help D = Deceased E = Temporary Help F = Full Time G = Recall H = On Hold I = Job Share J = Student K = Restrictions Apply L = Long Term Disability	M = Maternity Leave N = On Call P = Part-time Q = Quit R = Retired S = Classified T = Terminated U = Unclassified V = Volunteer W = On WCB X = Contractor Y = Crown Z = Seasonal Help
16		High			Employment Date	178	8	N	Format = ddmmyyyy	
17		High			Start of Shift	186	4	N	Format = xx:xx (hours & Min.) (Colon is implied)	
18		High			End of Shift	190	4	N	Format = xx:xx (hours & min.) (Colon is implied)	
19				Low	Long-term Disability Commencement Date	194	8	N	Format = ddmmyyyy	
20				Low	Leave of Absence Start Date	202	8	N	Format = ddmmyyyy	
21				Low	Leave of Absence Stop Date	210	8	N	Format = ddmmyyyy	
22				Low	Maternity Estimated Delivery Date	218	8	N	Format = ddmmyyyy	
23				Low	Maternity L.O.A. Start Date	226	8	N	Format = ddmmyyyy	
24				Low	Maternity L.O.A. Stop Date	234	8	N	Format = ddmmyyyy	
25		High			Employee Number	242	9	A/N	If used, must be unique for each record	
26				Low	Health Insurance Number	251	12	A/N		
27		High			Years' Experience	263	2	N		
28		High			Salary (access to view is determined in Security)	265	8	N	Format = 999999.99 (Decimal is implied.)	
29		High			Salary type	273	1	A	H = Per Hour D = Per Day W = Per Week M = Per Month A = Annual B = Bi-Weekly	

30		High			Salary Date	274	8	N	Format = ddmmyyyy (Effective date of salary)
31		High			Language	282	1	A	E=English F=French B=Bilingual
32				Low	Miscellaneous	283	25	A/N	Can be used for any miscellaneous information. There are 2 additional miscellaneous fields below.
33			Med		Union	308	20	A/N	
34		High			Termination Date	328	8	N	Format = ddmmyyyy
35		High			TD1 Exemption Amount (Federal)	336	5	N	
36		High			TD1 Exemption Code	341	2	N	
37		High			Hours Worked Per Day	343	4	N	Format = xx:xx (hours & Min.) (Colon is implied)
38		High			Hours Worked Per Week	347	4	N	Format = xx:xx (hours & Min.) (Colon is implied)
39		High			Provincial TD1 Exemption Amount	351	5	N	(Leave blank if not applicable to your jurisdiction)
40		High			Provincial TD1 Exemption Code	356	2	N	Valid Codes: 1,2,3,4,5,6,7,8,9,01,02,03,04,05,06,07,08,09,10,0E,0X,X
41				Low	Multiple locations	358	1	A	Y = Employee works in multiple departments or positions.
42				Low	Alternate Location or Department or Position	359	25	A	If employee works in multiple departments or positions, you may optionally enter the employee's alternate department or position. This field is treated as a Comment field and is not validated.
43				Low	Second Alternate Location or Department or Position	384	25	A	If employee works in multiple departments or positions, you may optionally enter the employee's alternate department or position. This field is treated as a Comment field and is not validated.
44				Low	Country	409	30	A	Can be used as a third line of address or country, if employee works in a foreign country.
45		High or n/a		Low	Zip Code	439	20	A/N	If used, leave Field No. 8 blank.
46				Low	Cell, Pager or Foreign Telephone	459	25	AN	If employee has a foreign number exchange, use this field rather than Field No.10.

47				Low	Miscellaneous Fields #2	484	30	AN	Can be used for any miscellaneous information.
48				Low	Miscellaneous Fields #3	514	30	AN	Can be used for any miscellaneous information.
49			Med		Seniority Date	544	8	N	Format = ddmmyyyy
50			Med		Effective date of Position	552	8	N	Format = ddmmyyyy
51				Low	Emergency Contact	560	28	A/N	
52				Low	Emergency Contact#2	588	40	A/N	
53				Low	Contact Area Code	628	3	N	
54				Low	Contact Telephone	631	7	N	
55				Low	Additional Contact Information	638	40	A/N	
56				Low	Physician	678	28	A/N	
57				Low	Physician Part 2	706	40	A/N	
58				Low	Physician Address 1	746	28	A/N	
59				Low	Physician City.Prov./State	774	28	A/N	
60				Low	Postal/Zip Code	802	7	A/N	
61				Low	Physician Area Code	809	3	N	
62				Low	Physician Telephone	812	7	N	
63				Low	Employment Status Type	819	1	A/N	Blank P = Permanent T = Temporary N = Not Applicable
64		Hi			Business email Address	820	50	A/N	If no email account enter the two characters NA.
65				Low	Department Description	870	25	A/N	This field would normally be left blank and used with a departmental reorganization or, on an initial import. When completed, the department on this record will be added or, the description changed, in the Department Table. For more information, see Point #4 under Departments above.

66				Low	Business Telephone Area Code	895	3	N	
67				Low	Business Telephone	898	7	N	
68				Low	Business Extension	905	5	N	
69			Med		Supervisor	910	9	A/N	Employee Number (not SIN)
70				Low	Province Code	919	2	A/N	Prov Code (ON, BC, .., YK)
71				Low	Bar Code or Badge	921	100	A/N	Employee Bar Code or Badge
72					Personal email address	1021	80	A/N	If no email account enter the two characters NA.

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