Bulk upload pay definitions, report definitions or schedules

Payments and Deductions · https://paiyroll.com/kb/bulk-upload-pay-report-definitions-or-schedules/

Follow this guide for bulk download/edit/upload in cases where:

- You created **Definitions** (Pay definitions, Report definitions etc.) in one company and you need to reuse these in other companies
- You want to change multiple Pay **Schedules** e.g. to change prompt start and prompt end dates in one company
- You created a **Shift** [Overtime, Hours] Pay Definition (Shift 1) and you need multiple shifts e.g. Shift 1. to Shift 31

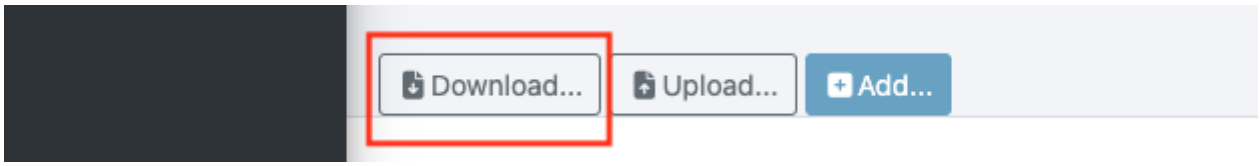
In all cases, the 3 step process is:

1. **Download** existing pay/report definitions or schedule data
2. **Edit** the data to make changes
3. **Upload** the new data

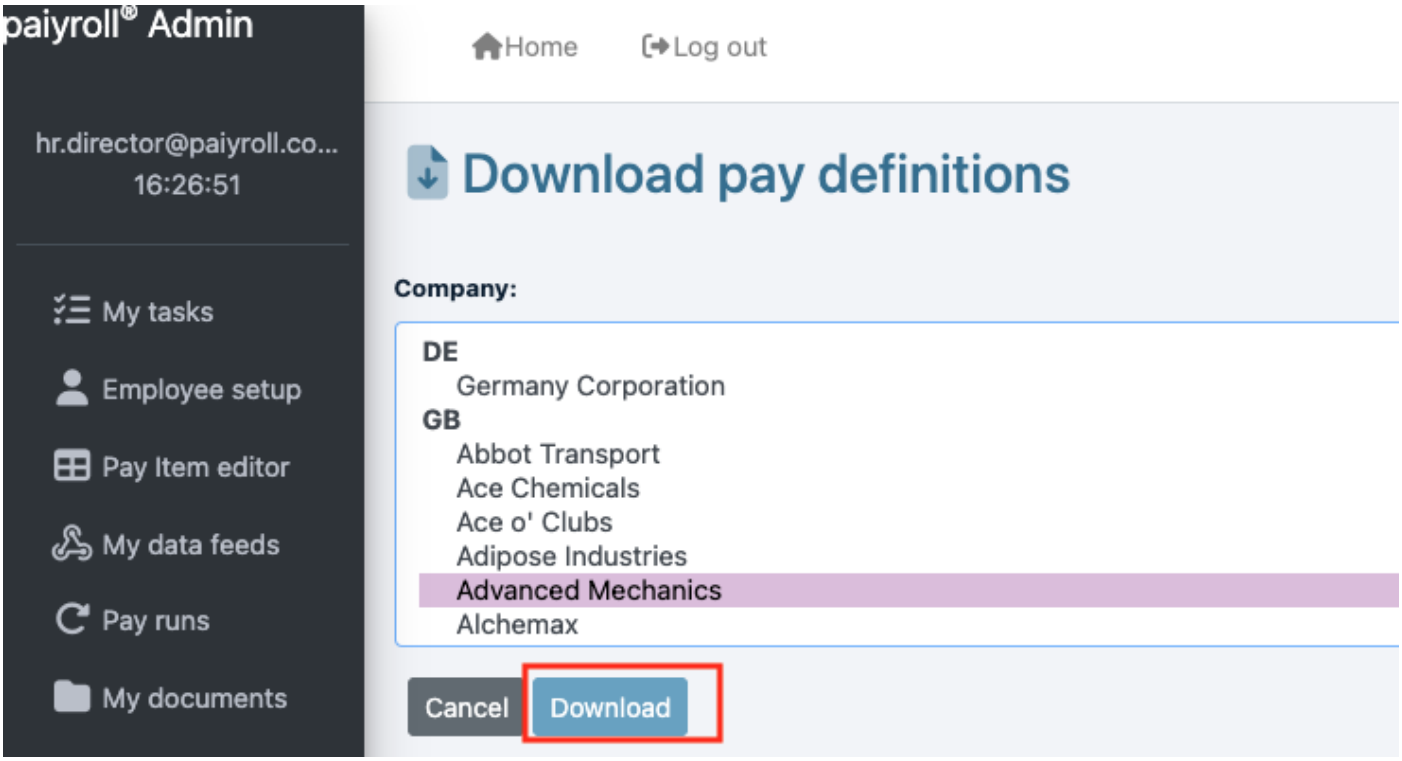
Note: some steps the example below is shown for **Pay** definitions, but the process is the same for **Report** definitions and Pay **Schedules**.

1. Download

- **Company Setup** > **Pay definitions** (or **Report definitions** or **Pay Schedules**)
- Scroll **to the bottom** of the page
- **Download...**



- Select one company, or shift-select all companies, and click **Download**:



You will have a file called something like **paydefinition - 2024-04-25T163139.108.csv** or **reportdefinition - 2024-10-17T233701.984.csv** or **payschedule.csv** in your **Downloads** folder

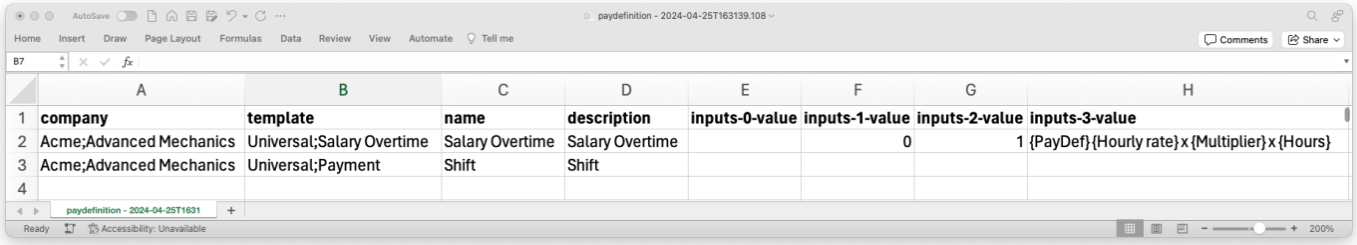
2. Edit

Edit the file using a spreadsheet editor like **Excel**.

The downloaded files will include many standard definitions or schedules. Each is on its own row.

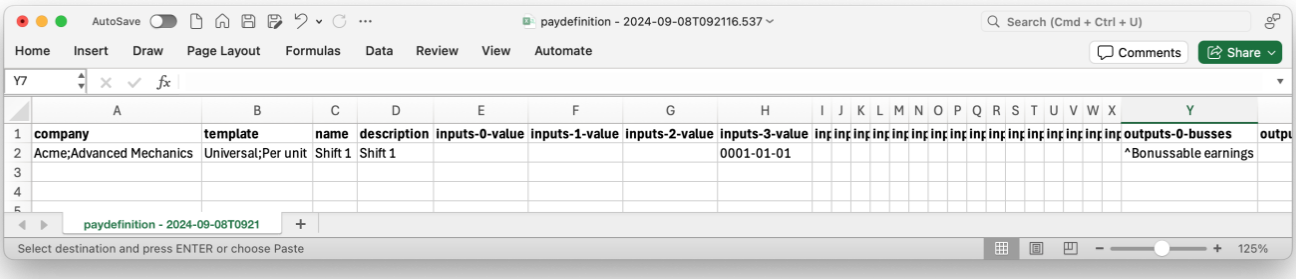
For Pay and Report Definitions, **Delete all of the rows** you do not need, and only keep the ones you wish to copy. For Pay Schedules, you will typically keep all rows.

Pay Definition Example:



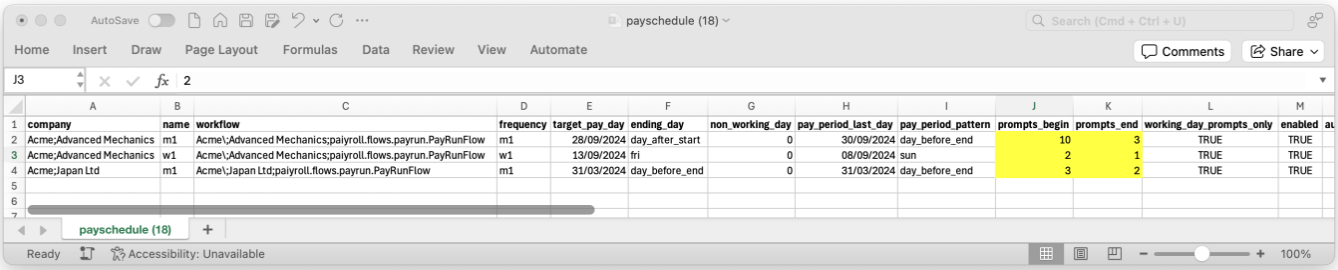
	A	B	C	D	E	F	G	H
1	company	template	name	description	inputs-0-value	inputs-1-value	inputs-2-value	inputs-3-value
2	Acme;Advanced Mechanics	Universal;Salary Overtime	Salary Overtime	Salary Overtime		0	1	{PayDef}{Hourly rate}x{Multiplier}x{Hours}
3	Acme;Advanced Mechanics	Universal;Payment	Shift	Shift				
4								

Report Definition Example:



company	template	name	description	inputs-0-value	inputs-1-value	inputs-2-value	inputs-3-value	outputs-0-busses
Acme;Advanced Mechanics	Universal;Per unit	Shift 1	Shift 1				0001-01-01	^Bonussable earnings

Pay Schedule Example:



company	name	workflow	frequency	target_pay_day	ending_day	non_working_day	pay_period_last_day	pay_period_pattern	prompts_begin	prompts_end	working_day_prompts_only	enabled
Acme;Advanced Mechanics	m1	Acme\;Advanced Mechanics;paiyroll.flows.payrun.PayRunFlow	m1	28/09/2024	day_after_start	0	30/09/2024	day_before_end	10	3	TRUE	TRUE
Acme;Advanced Mechanics	w1	Acme\;Advanced Mechanics;paiyroll.flows.payrun.PayRunFlow	w1	13/09/2024	fri	0	08/09/2024	sun	2	1	TRUE	TRUE
Acme;Japan Ltd	m1	Acme\;Japan Ltd;paiyroll.flows.payrun.PayRunFlow	m1	31/03/2024	day_before_end	0	31/03/2024	day_before_end	3	2	TRUE	TRUE

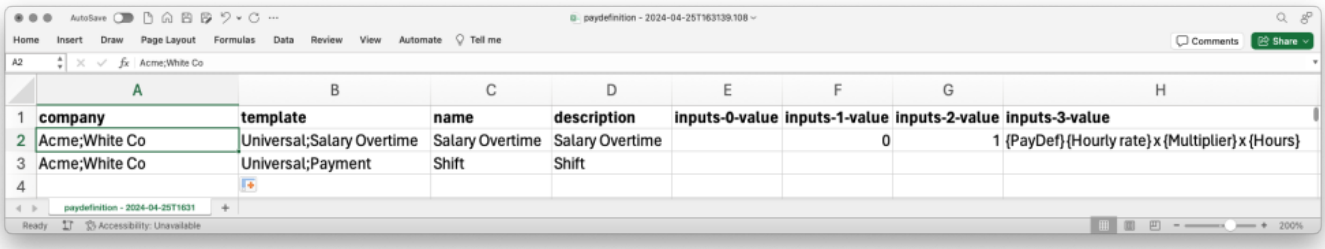
Follow the next appropriate step depending on whether you are creating definitions for a new company or duplicating/editing for an existing company.

1. Edit a New Company name

If you are creating pay definitions for a different company, then you will need to edit the company name which is in 2 parts:

- **Client; Company**.

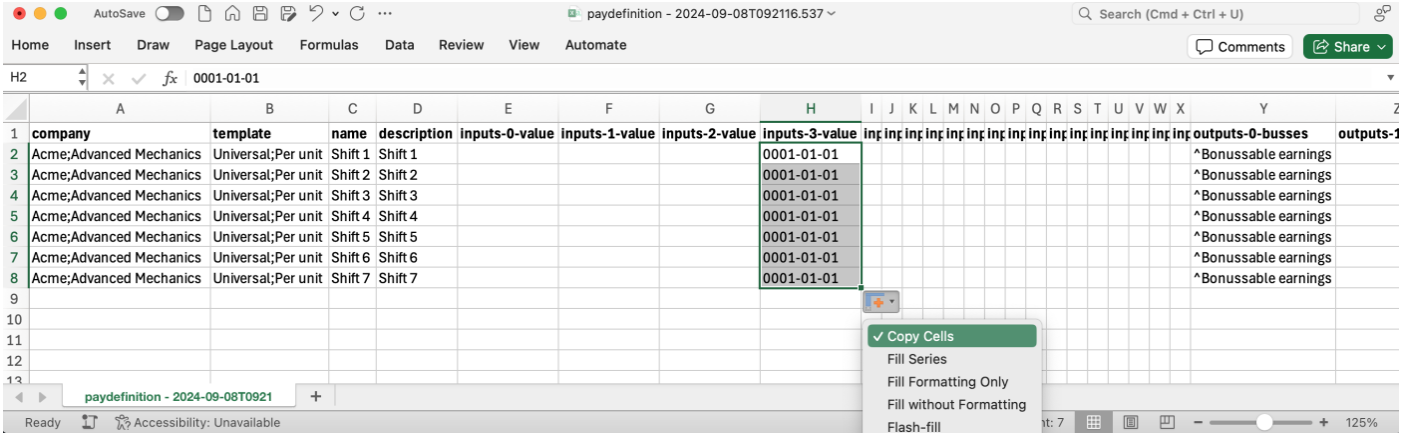
In the example above, the client is called **Acme** and the company is called **Advanced Mechanics** . Carefully change the **company** name to the new one you want to upload to. e.g. **White Co** while keeping the same client name:



company	template	name	description	inputs-0-value	inputs-1-value	inputs-2-value	inputs-3-value
Acme;White Co	Universal;Salary Overtime	Salary Overtime	Salary Overtime		0	1	{PayDef}{Hourly rate}x{Multiplier}x{Hours}
Acme;White Co	Universal;Payment	Shift	Shift				

2. Duplicate Shifts

If you need to duplicate shift items, duplicate the rows. Generally, if you auto-fill will work correctly on the name and description Shift 2 Shift 3 etc. Ensure the columns should not auto-fill - tip: Excel will display a small control after filling that can be switched to **Copy Cells:**

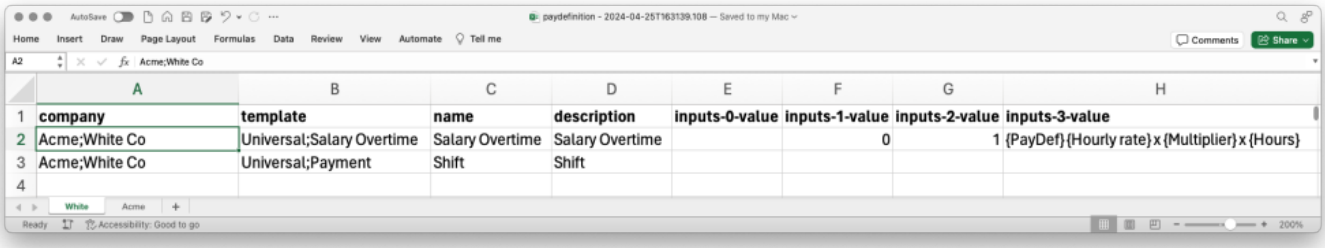


3. Edit Values.

If you are changing the Pay Schedule prompts_begin and prompts_end, simply edit the relevant cells.

Saving

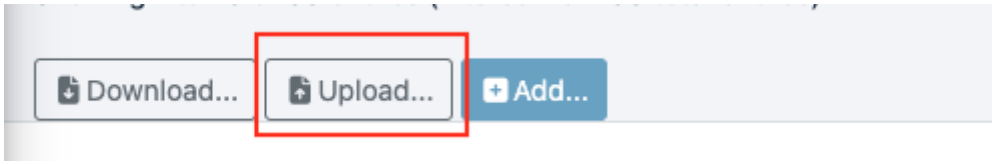
We recommend saving the file as a multi-sheet **XLSX**. This will retain formatting and allows the use of one sheet (tab) per company.



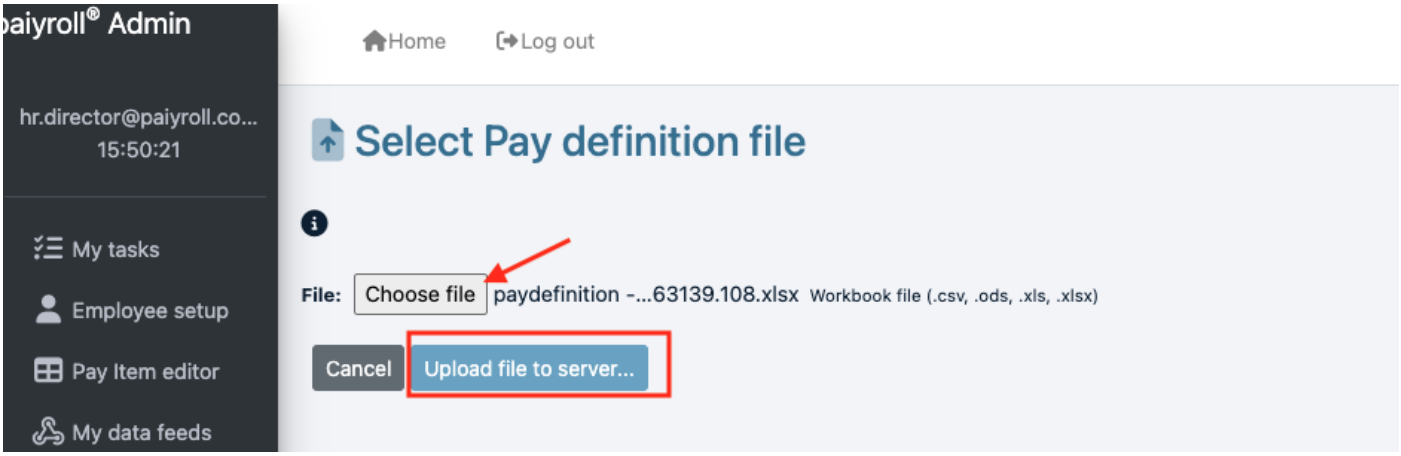
3. Upload

Use the Upload multi-page wizard to upload and verify the data.

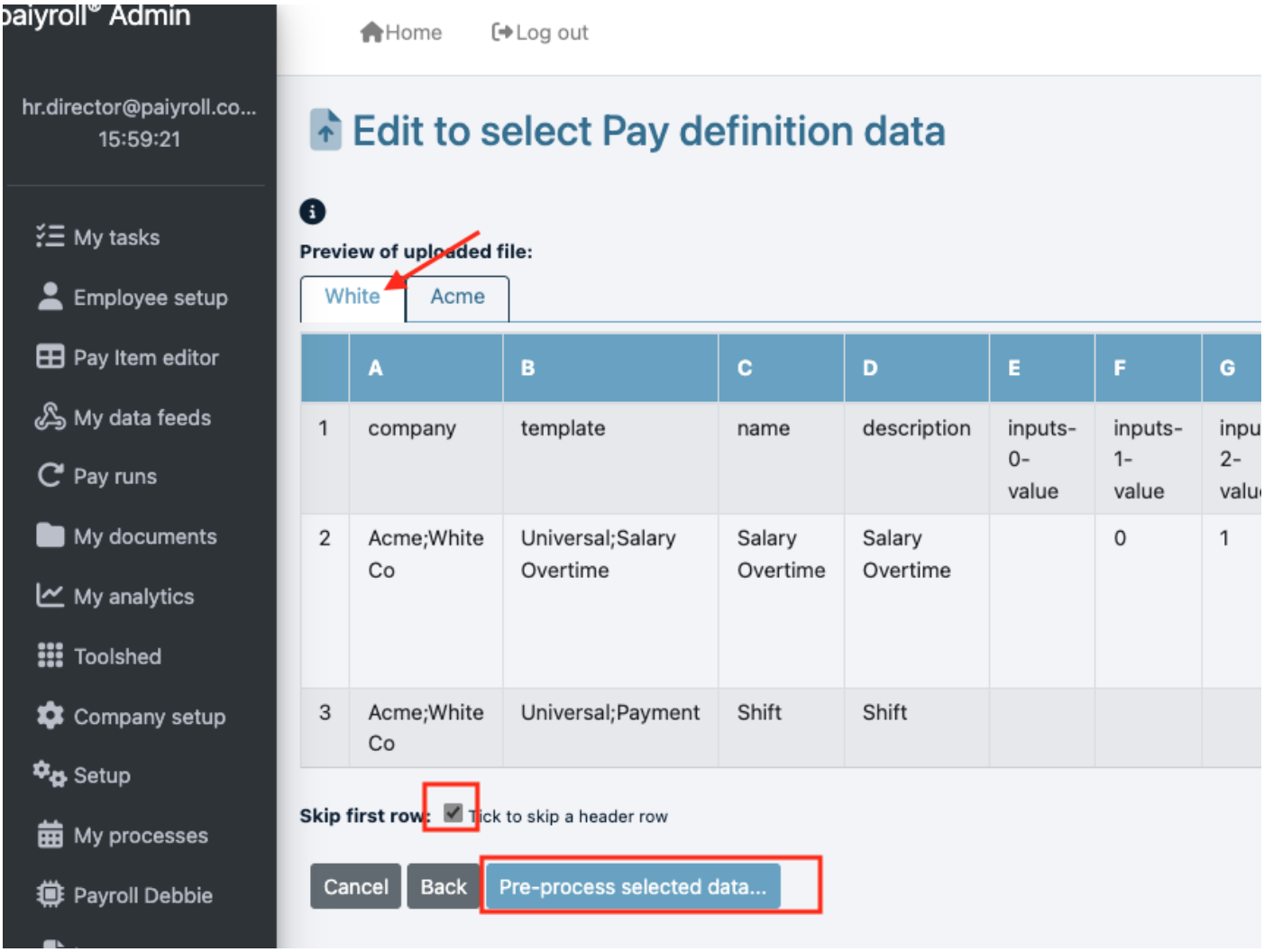
- Company Setup > Pay definitions (or Report definitions or Pay Schedules)
- Scroll **to the bottom** of the page and click **Upload...**



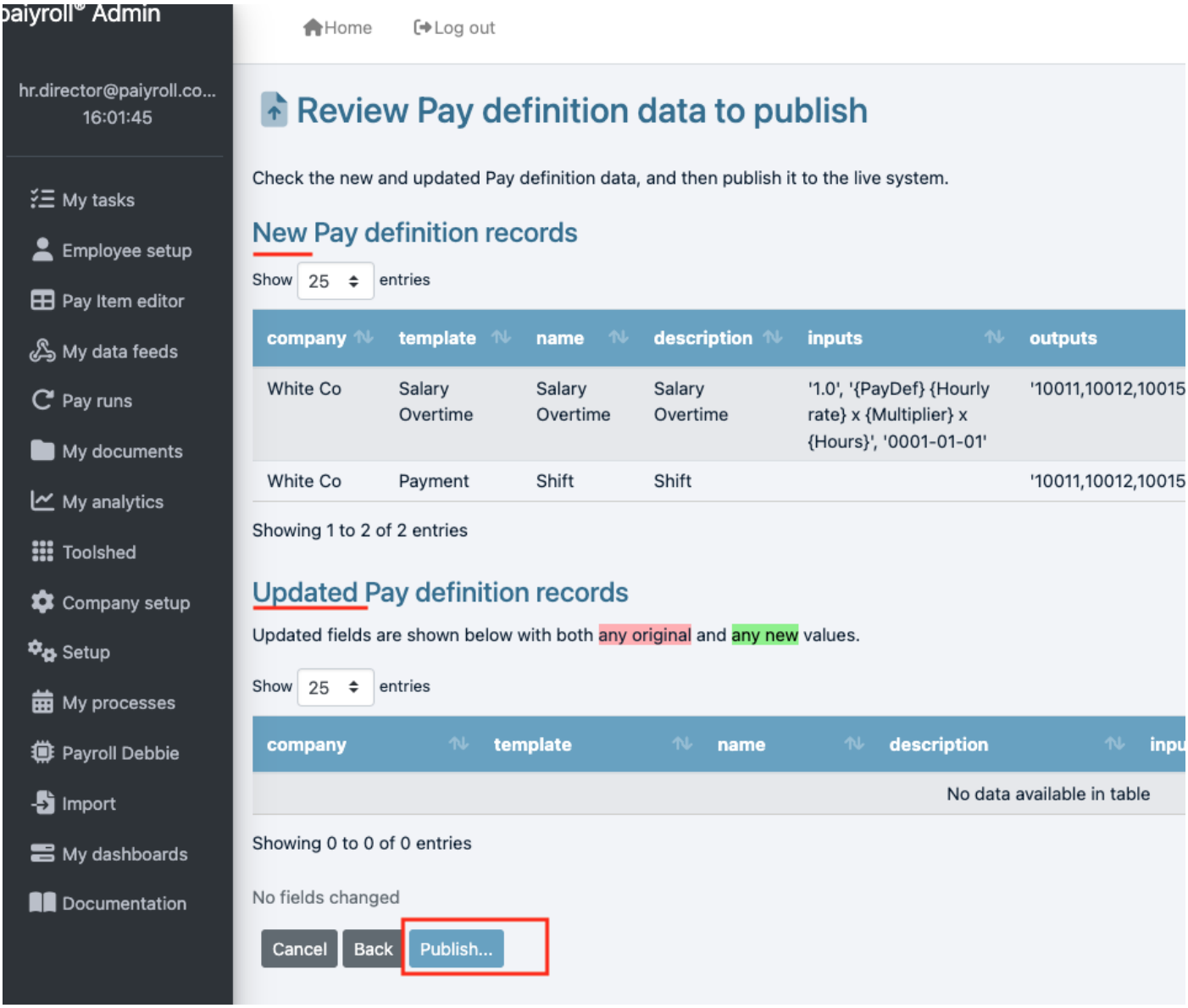
- **Choose file** and click **Upload file to server...**



- On the next wizard page, check you have the correct file (the top 3 rows are shown)!
- If you have a multi-sheet Excel, ensure you **click** on the correct sheet (tab)
- Tick **Skip the first row: Tick to skip a header row**
- Click **Pre-process selected data...**



- On the last page of the wizard, check everything that will be uploaded.
- Any **New** or **Updated** definitions or schedule changes are shown in red and green.
- Finally, click **Publish**... to complete the operation:


paiyroll® Admin
hr.director@paiyroll.co...
16:01:45
My tasks
Employee setup
Pay Item editor
My data feeds
Pay runs
My documents
My analytics
Toolshed
Company setup
Setup
My processes
Payroll Debbie
Import
My dashboards
Documentation
Home
Log out
Review Pay definition data to publish
Check the new and updated Pay definition data, and then publish it to the live system.
New Pay definition records
Show 25 entries
company
template
name
description
inputs
outputs
White Co
Salary Overtime
Salary Overtime
Salary Overtime
'1.0', '{PayDef} {Hourly rate} x {Multiplier} x {Hours}', '0001-01-01'
'10011,10012,10015
White Co
Payment
Shift
Shift
'10011,10012,10015
Showing 1 to 2 of 2 entries
Updated Pay definition records
Updated fields are shown below with both any original and any new values.
Show 25 entries
company
template
name
description
inpu
No data available in table
Showing 0 to 0 of 0 entries
No fields changed
Cancel
Back
Publish...