

With the direct API integration with the Netsuite system being removed we have worked to ensure that the system still provides a way to export the Time and Pay Adjustment data that you will need to import into the Netsuite system. The process of exporting and importing the time will be different but the end result should be the same.

Running the Export(s)

From the Standard Exports section of the Reports tab open the report options for the “Netsuite Manual Time Export”

The screenshot shows the 'Standard Exports' section of the Netsuite interface. The 'NetSuite Manual Time Export' report is selected. The form includes the following fields and options:

- Export Type:** A dropdown menu with 'Timecards' selected. A red circle with the number '1' is next to it.
- Exclude From:** A checkbox labeled 'Exclude From' with a dropdown menu showing 'Timecards' and 'Pay Adjustments'.
- Department:** A dropdown menu with '1' selected.
- Location:** A dropdown menu with '2' selected. Red circles with numbers '2', '3', and '4' are next to it.
- Class:** A dropdown menu with '3' selected.
- Salaried Export Code:** A text input field containing 'REG'. A red circle with the number '5' is next to it.
- Regular Hours to Export for Salaried Employees:** A text input field containing '80'.
- Export OT Hours for Salaried Employees:** A checkbox.
- Export Non Work Hours for Salaried Employees:** A checkbox. A red circle with the number '6' is next to it.

At the bottom, there is a note: "If Locations are enabled in Netsuite, each record must have a valid Location."

1. The Report Options page will open. At the top of it select the Type of Export that you are running (Time Entries and Pay Adjustments must be imported separately, so a separate file must be generated for both.
 - If you select Pay Adjustments, the remaining options will become inactive and you can skip to selecting the Time Range you wish to run the report for. Some default values will be filled in but will not be included on the Pay Adjustment export
 - If you select Timecards you will fill out the remaining section of the Export options in the same way that you did previously
2. & 3 & 4. Choose how the Department, Location and Class values should be mapped (again, this should be configured in the same way as it was previously)
5. & 6 If you wish to export a fixed # of hours for salaried employees set the code and # of hours that they should receive.

Finally, select the time range you wish to generate the Export for, and run the report. If you need to export Pay Adjustments you will need to run the export twice, once for Time Entries, and once for Pay Adjustments.

Once the Files finish generating you can download them to your hard disk by clicking on the report name on the right side of the screen under “Generated Exports”

Importing the Files into Netsuite

It is important to note that this is only a guide, and we advise you work with Netsuite support to ensure that your import templates are properly configured.

To create an Import Template in Netsuite to import files start by selecting “Setup” → “Import/Export” → “Import CSV Records”



Importing Time Entries

1. From the Import CSV Records Page select an Import Type of “Employees” and a Record Type of “Track Time”. The file that the Time system generates will be Comma separated so there is no need to change the CSV Column Delimiter. Finally, upload the file that you will be importing.

Import Assistant

A screenshot of the Netsuite Import Assistant interface. The 'STEPS' sidebar on the left shows '1 Scan & Upload CSV File' as the current step. The main area is titled 'Scan & Upload CSV File' and contains several dropdown menus: 'IMPORT TYPE' set to 'Employees', 'RECORD TYPE' set to 'Track Time', and 'CHARACTER ENCODING' set to 'Western (Windows 1252)'. Below these is a 'CSV COLUMN DELIMITER' dropdown set to 'Comma'. At the bottom, there are radio buttons for 'ONE FILE TO UPLOAD' (selected) and 'MULTIPLE FILES TO UPLOAD'. A 'Select...' button is visible, along with a file icon and the name 'NetSuite-Manual-Time-Export.csv' with a 'REMOVE' link.

2. On Step 2 – select “Add” as we are going to be adding Time Entries to the system when the import completes.

STEPS

- ✓ 1 Scan & Upload CSV File
- 2 Import Options
- 3 File Mapping
- 4 Field Mapping
- 5 Save mapping & Start Import

Import Options

Data Handling

ADD

UPDATE

ADD OR UPDATE

▶ Advanced Options

3. Fill out the Mapping you wish to use for the template.
 - a. The Import Field Mapping for our demo account was configured as follows. We mapped Employee ID to map to the Employee (we did have to click on edit icon next to Employee ID and select that it should map to the External ID”.
 - b. The “Payroll Item Code” is set in Stratustime in the Export Matrix.
 - c. In Our example we set all time to go to a specific location by clicking on the edit icon next to it. The value exported from Stratustime will be the Labor Level Code.

Field Mapping

Your Fields

NetSuite-Manual-Time-Export.csv

- Employee ID
- First Name
- Last Name
- Hours
- Location Code
- Department Code
- Class Code
- Payroll Item Code
- Date

Employee ID	↔	Time : Employee (Req)	⊗
Hours	↔	Time : Duration (Req)	⊗
Boston	↔	Time : Location (Req)	⊗
11/12/2020	↔	Time : Date (Req)	⊗
Payroll Item Code	↔	Time : Payroll Item	⊗
⊗	↔		⊗
⊗	↔		⊗
⊗	↔		⊗
⊗	↔		⊗
⊗	↔		⊗
⊗	↔		⊗

4. Once you are satisfied with the mapping you can move to the next step, name the Import and begin running it.

Save mapping & Start Import

Your CSV files are ready to be imported into your NetSuite account. You can save your Field Mapping to be used again later (optional). To work with a saved import, go to the "saved Imports" page under the Setup > Import/Export Tab.

IMPORT MAP NAME

Provide a unique Import Map name to save the current mapping choices for future imports.

DESCRIPTION

(Optional) Provide a useful description for this Import Map.

5. Once complete, the Time Entries values can be viewed in the same place that they would show previously.

_Time Details	System Notes	Active Workflows	Workflow History		Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total	
Customer:Job	Task	Service Item	Payroll Item		22	23	24	25	26	27	28	80:00	80:00
Totals					0:00	0:00	0:00	0:00	0:00	0:00	80:00	80:00	

Importing Pay Adjustments

1. From the Import CSV Records Page select an Import Type of “Employees” and a Record Type of “Employees”. The file that the Time system generates will be Comma separated so there is no need to change the CSV Column Delimiter. Finally, upload the file that you will be importing.

The screenshot shows the 'Scan & Upload CSV File' step. On the left, a 'STEPS' sidebar lists: 1 Scan & Upload CSV File (selected), 2 Import Options, 3 File Mapping, 4 Field Mapping, and 5 Save mapping & Start Import. The main area contains the following settings:

- IMPORT TYPE:** Employees (dropdown)
- RECORD TYPE:** Employees (dropdown)
- CHARACTER ENCODING:** Western (Windows 1252) (dropdown)
- CSV COLUMN DELIMITER:** Comma (dropdown)
- CSV File(s):** ONE FILE TO UPLOAD, MULTIPLE FILES TO UPLOAD

A 'Select...' button is located at the bottom.

2. Pay Adjustments are added to the Employee records as Earnings entries, so select the option to handle the data with “Update”, as we are not going to be adding employees – only updating their records with this new entry.

The screenshot shows the 'Import Options' step. The 'STEPS' sidebar on the left lists: 1 Scan & Upload CSV File (completed with a green checkmark), 2 Import Options (selected), 3 File Mapping, 4 Field Mapping, and 5 Save mapping & Start Import. The main area is titled 'Import Options' and contains:

- Data Handling:** ADD, UPDATE, ADD OR UPDATE
- Advanced Options:** (indicated by a right-pointing arrow)

3. Set the mappings for the import. The export will include the Pay Adjustment Code as set in the Stratustime system so be sure to map the earning type accordingly. The import mapping will draw from “Employee” and “Employee Payroll Earnings”

The screenshot shows the field mapping interface. On the left, under 'Your Fields', is a list of fields from the 'NetSuite-Manual-Time-Export (1).csv' file:

- Employee ID
- Last Name
- First Name
- Amount
- Payroll Item InternalID
- Date

On the right, a table shows the mapping of these fields to system fields:

Employee ID	↔	Employee : ExternalID	⊗
Date	↔	Employee Payroll Earnings 1 : Effective Date	⊗
Amount	↔	Employee Payroll Earnings 1 : Rate	⊗
Payroll Item InternalID	↔	Employee Payroll Earnings 1 : Earning	⊗
	↔		⊗
	↔		⊗
	↔		⊗

- + Employee**
- + Employee Payroll Accrued Time
- + Employee - Address
- + Employee Payroll Contributions
- + Employee Currencies
- + Employee Payroll Deductions
- + Employee Direct Deposit
- + Employee Payroll Earnings**
- + Employee Emergency Contacts
- + Employee Education
- + Employee Roles
- + Employee Subscriptions

If Pay Adjustments should always go to a specific Earning type you can set a default value as appropriate.

Default Value

Select a value to use for field Earning and click OK. Default value options are determined by the field's type (boolean, string, etc.).

Provide Default Value
 Set Value to Null

PayAdjust

Search

Hourly Wages
 HW
 Overtime Wages
 PayAdjust
 Salary

Done Cancel

4. Finally, on the last page of the import set a name for the new CSV template that has been created, and then run the import.
5. The imported value will show under the Earnings section of the employee record as a Earning with an effective date of the day that the entry was added in Stratustime.

EARNING	DERIVED FROM	RATE MULTIPLIER	RATE	PRIMARY	DEFAULT HOURS	INACTIVE	DEFAULT	EFFECTIVE DATE	EXPIRATION DATE
Hourly Wages			1					1/1/1970	12/31/9999
HW			1					9/3/2017	12/31/9999
PayAdjust			32					11/28/2020	12/31/9999

Once you have created templates, you can re-run them with new files at any time by selecting Setup → Import/Export → Saved CSV Imports, and then selecting the appropriate import



Saved CSV Imports

New

FILTERS

RECORD TYPE

All Records

ID	NAME	TRANSLATE	FIELD MAP	DESCRIPTION	TYPE
25	Import Time from Stratustime	Translate	View		Track Time
27	Import Earnings Adjustments From Stratustime	Translate	View		Employees