SimplyMerit

SimplyMerit Import / Export Guide - Namely

Overview

This guide will walk you through the process of moving data between Namely and SimplyMerit for your merit and/or bonus processes. SimplyMerit has specific import and export processes that support Namely's naming and data formatting conventions. However, because Namely is so highly customizable, you may need to replicate those customizations in the data file that is moved between the two platforms.

Importing Data into SimplyMerit from Namely

The general flow to import data into SimplyMerit from Namely is…

Run Profile Report In Namely → Add Extra Columns → Download Report as CSV File → Adjust for Customizations → Import into SimplyMerit
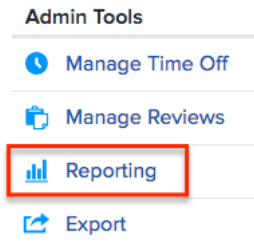
Step 1: Run Profile Report in Namely

1. Log into your Namely environment and click on "Home" at the top of the screen.

2. Along the left-hand menu, click on "Reporting" to access Namely's Reports.

3. Click on the "Create New Report" button.

4. Select the Profile report type using the "Profile Default" template.

Select Report Type

◉ Profile

Report Template

Profile Default ▼

5. Click on the "Create Report" at the bottom of the Report Type list.

Create Report

Step 2: Add Extra Columns

1. Click on the "Edit Columns" drop down and select the following columns to add to the report.

Edit Columns ▼	
Search Fields	GUID
	Job Tier
PROFILE	Company Start date (Years Since)
● Guid	Company Start date
● First Name	Departure date
Middle Name	Employee number
● Last Name	Home Country Name
Preferred Name	Reports To Email
● Job Tier	Job Title
Job Change Reason	Current Performance Rating
● Company Start Date (Years Since)	Departments
Company Start Date (Days Since)	Current Salary
● Company Start Date	Current Salary Amount
Departure Date (Years Since)	Current Salary Frequency
Departure Date (Days Since)	Current Salary Type
● Departure Date	Current Salary Currency
● Employee Number	
● Company Email	
Personal Email	
Age (Years)	

2. Additionally, the following fields are also supported by SimplyMerit if they are available in your particular Namely implementation:

IS_ADMIN	Identifies employees with HR Administrator rights within SimplyMerit. Valid values: yes, no
enable_invitation	Identifies whether manager should receive a SimplyMerit log-in invitation. Valid values: yes, no, blank – blank is equivalent to "yes"
rehire_date	Date the employee was rehired
total_years_working	Number of years working at this company
merit_percent_exception	Preload an employee-level exception on Configuration | Exceptions page
merit_percent	Preload each employee's merit percentage value for managers
reports_to_job_level	Manager's job level
job_grade	Job grade
weekly_standard_hours	Number of hours per week considered standard for this employee. Combine with "Employee type" for part-time hourly employees.
job_function	Major job families
job_class	Typically worker's comp class codes
job_code	Unique identifier for the job
division_code	Division ID – Must be a unique identifier
division_name	Division name
market_min	Market salary range minimum for the job
market_mid	Market salary range mid-point for the job
market_max	Market salary range maximum for the job

Step 3: Download Report as CSV File

1. Click on the download link on the top right of the report.

Step 4: Adjust for Customizations

Because the Namely platform is so highly customizable, you may need to adjust for customizations that were made to your particular Namely implementation. This typically involves renaming column headings to match the column headings that SimplyMerit expects based on a default Namely implementation. Please note that the import process is case-sensitive with the naming of the column headers.

Specifically, those columns should be:

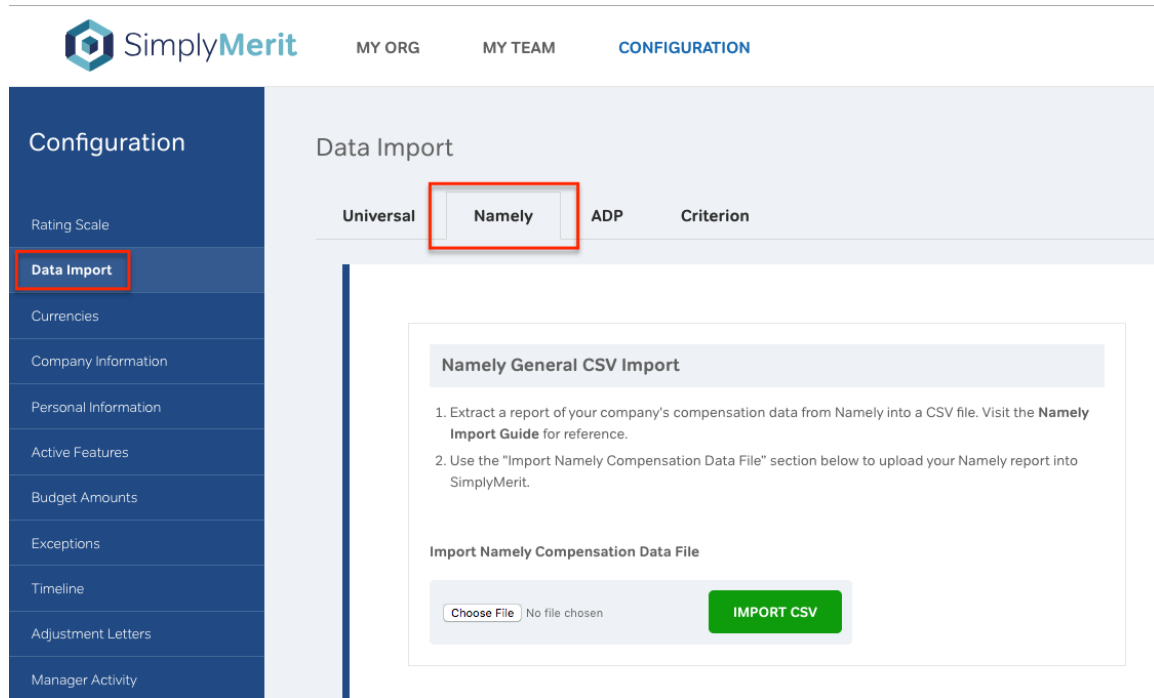| Namely "Profile" Report Data Fields	Notes
First name	
Last name	
Email	This is used as the employee ID in SimplyMerit
Start date	MM/DD/YYYY
Employee type	"Full Time" or "Part Time"

Add These Extra Fields to Report	Notes
GUID	Not used in SimplyMerit but imported so that it's available on the export
Job Tier	"4-Manager"
Start date (Years Since)	SimplyMerit Insights does factor in years working at the company
Departure date	MM/DD/YYYY
Employee number	Not used in SimplyMerit but imported so that it's available on the export
Home Country Name	
Reports To Email	Used as manager's employee ID; Used to build reporting hierarchy
Job Title	
Current Performance Rating	
Departments	
Current Salary	Annual salary amount (always annual even for hourly workers)
Current Salary Amount	Period-level salary for Current Salary Type = "yearly," hourly rate for "hourly"
Current Salary Frequency	Defines period
Current Salary Type	Defines "exempt" or "non-exempt"
Current Salary Currency	

Step 5: Import into SimplyMerit

Now that you have created the CSV data file that will be imported into SimplyMerit, it's time to log into SimplyMerit as the HR Administrator.

On the Configuration | Data Import screen, choose the Namely tab in order to import your CSV file.

 On this screen, click on "Choose File" to locate the CSV file and then click the "Import CSV" button. Refer to the "Getting Started Guide for HR Admins" documentation available by clicking on the "Need Help?" button on any of the Configuration screens and choosing the FAQ link.

Subsequent Imports

With SimplyMerit, you may refresh your data from Namely at any time. Simply follow these steps:
1. Log into Namely and run your SimplyMerit report
2. Save to CSV

3. Import the updated file into SimplyMerit making sure to have first selected the Namely tab on the Configuration | Data Import tab.

Additional notes about Subsequent Imports:
- Take care to not import any "preload" fields that may have been modified by managers already unless you intend to override their work. These are any of the fields that managers edit like Merit %, Promotion %, Bonus Performance Factor, etc.

  These "preload" fields are not typically part of the Namely export anyways. However, if you've added them to the CSV, make sure that they are not present (unless intended) in the subsequent import files.

- You do not have to import all of your employees on subsequent imports. In fact, it's recommended that you include only the employees who need to be updated to speed up the import process.

- You may also include only the fields that need to be updated on subsequent imports. You will want to make sure to include the Email column as SimplyMerit uses the email address as the unique identifier for each employee (Namely data only).

If you have any questions, please contact us at support@morganhr.com or +1-847-719-9060 x3.