

Importing Staff IDs into Vendor Payroll Systems for Staff UID

Last Updated 01/12/2010 (updated instructions due to change in SunPac UI)

Overview

This document contains instructions on how to import the file of assigned Staff IDs into the SunPac or ISIS payroll system.

After the LEA/Charter uploads the monthly UID Staff file into UID Staff system and

- ✓ has fixed all data errors,
- ✓ has resolved all near matches, and
- ✓ has confirmed the ID assignment process has been completed,

the LEA/Charter must download from UID Staff a file of the IDs that were assigned to the staff records and import them into their payroll system.

Instructions for importing the file of assigned Staff IDs into the payroll system vary depending on which payroll system (SunPac or ISIS) the LEA/Charter is using.

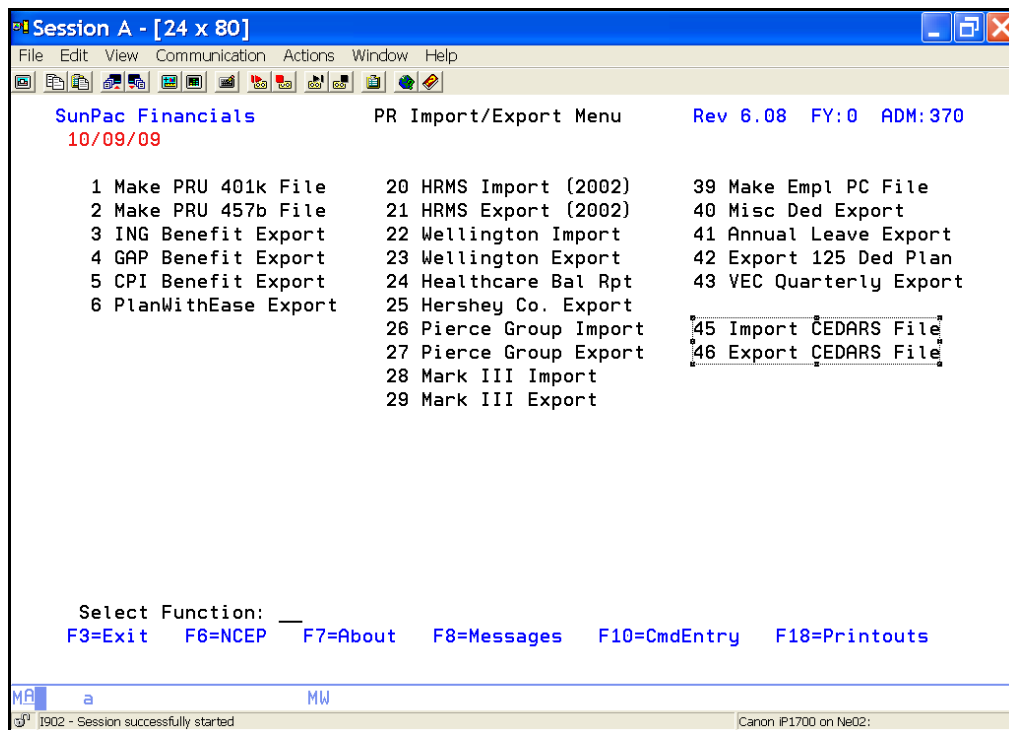
If you have any questions about the process of importing the assigned Staff IDs into the SunPac or ISIS payroll system, please contact:

- NC DPI Service Desk at dpi.incidents@its.nc.gov or 919-807-4357

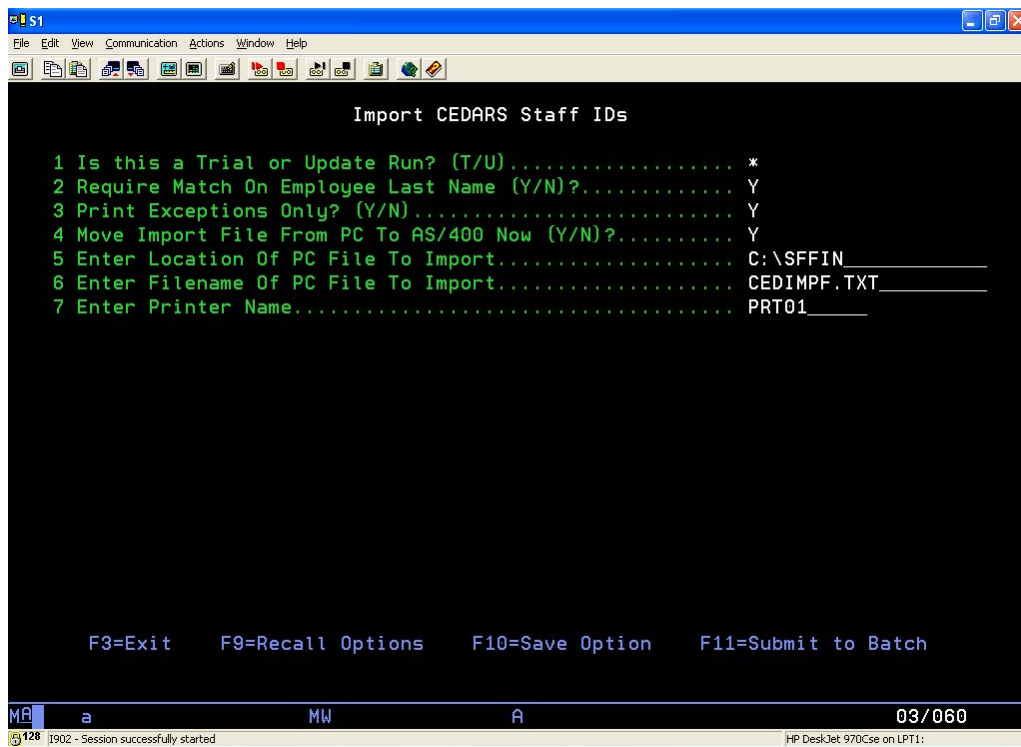
Importing the Assigned CEDARS Staff IDs into SunPac System (Sartox Vendor)

SunPac 6.08.01 Release (or later release)

- This latest version includes the following CEDARS updates:
 1. The ability to import the file of assigned CEDARS Staff IDs into the SunPac payroll system and save the assigned IDs. (The UID Staff User must first download the file of assigned Staff IDs from UID Staff production system.)
 2. The ability to extract the assigned Staff IDs from the SunPac payroll system and include them in the UID Staff file when it is generated during month-end processing. (This will reduce the number of near matches when the UID Staff file is uploaded into UID Staff.)
- Steps for Importing the File of Assigned Staff IDs into the SunPac Payroll System (release 6.08.01 or later)
 1. The CEDARS file of assigned Staff IDS must be downloaded first.
 - This is the file of assigned IDs that is downloaded **from** the UID Staff application; **not** the UIDStaff file that is uploaded **into** the UID Staff application.
 - The file name must be 20 characters or less, including the .txt file extension.
 - The file name should not contain any special characters (\$, _, #, @, etc.)
 - Ensure your FTP server has been started
 2. From the *Payroll Main Menu*, select *PR Import/Export Menu (Option #36)*, then select *Import CEDARS File (Option #45)*. **Make sure you have access to the *Import CEDARS File* option.**



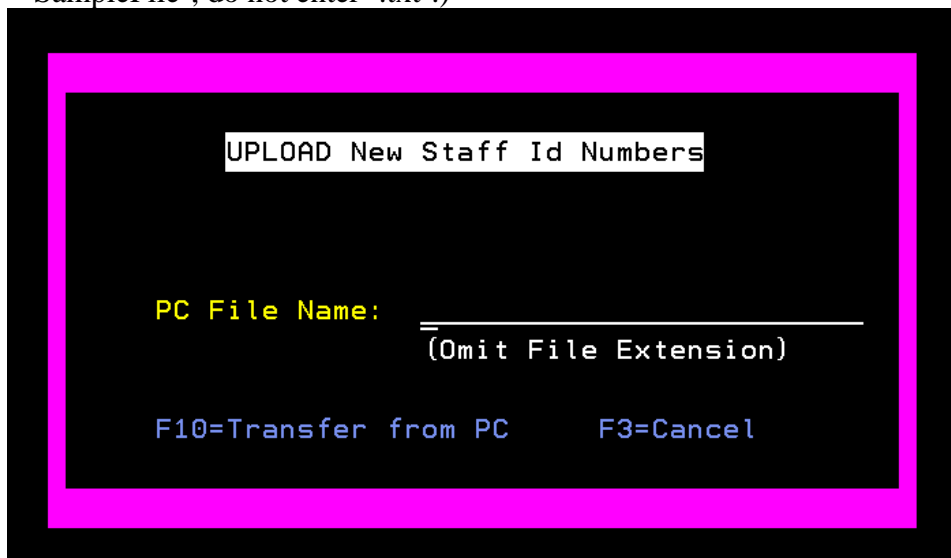
3. On the *Import CEDARS Staff IDs* screen,
 - #1. Indicate if this is a trial run (report only, no updates) or an update (report and update). Enter a 'T' for trial; otherwise, enter 'U' for update
 - #2. Accept default 'Y' if you want to include match on last name. 'N' will match on SSN only.
 - #3. Accept default 'Y' if you only want to see exceptions that were detected by the import process. Enter 'N' if you want to see all report details.
 - #4. Accept default 'Y' if you want to copy the file to the AS/400 with this run. If you previously copied the file for a trial run, then you do not need to copy it again. In that case, you would enter 'N'. However, you may copy the file to the AS400 more than once.
 - #5. Identify the file location. This is where the downloaded file of CEDARS Staff IDs is currently located.
 - #6. Identify the filename. This is the current name of the CEDARS Staff IDs file.
 - #7. Accept default 'QPRINT' or enter other printer name.



4. Press 'Enter' to execute the import function. The file identified in #5 is copied to the AS/400 (unless #3 set to 'N') where a process imports the CEDARS Staff IDs into the SunPac payroll system and saves them. (Note: Pressing 'Enter' starts the import process on the AS400 in interactive mode. Pressing 'PF11' starts the import process on the AS400 as a batch job.)
5. The imported CEDARS Staff ID can be viewed on the *Employee Master File Update/Inquiry* Screen. (Note: Staff ID# is located to the right of the Birth Date.)

Importing the Assigned CEDARS Staff IDs into ISIS (ISIS Vendor)

- The ISIS software version for LEAs is Version 5.63 (or later).
- The ISIS software version for Charter Schools is GL 5.03 (or later) and Payroll 5.00 (or later).
- This latest software version includes the following updates:
 1. The ability to import the file of assigned CEDARS Staff IDs into the ISIS Financial System and save the assigned IDs. (The UID Staff User must first download the file of assigned Staff IDs from UID Staff production system.)
 2. The ability to extract the assigned Staff IDs from the ISIS Financial System and include them in the UID Staff file when it is generated during month-end processing. (This will reduce the number of near matches when the UID Staff file is uploaded into UID Staff.)
- ISIS LEAS: Steps for Importing the File of Assigned Staff IDs into the ISIS Financial System (release 5.63)
 1. The CEDARS file of assigned Staff IDs must be downloaded first and **saved on root C:\ drive**.
 - This is the file of assigned IDs that is downloaded **from** the UID Staff application; **not** the UIDStaff file that is uploaded **into** the UID Staff application.
 - The CEDARS UID Staff filename cannot be more than 10 characters, excluding the .txt file extension.
 - The file name should not contain any special characters (\$, _, #, @, etc.)
 2. Sign onto Payroll, year 0.
 3. Select *Utilities Menu* (Option #99).
 4. Select *Import CEDARS Staff ID File* (Option #25) which displays the 'Upload New Staff ID Numbers' screen.
 5. On the 'Upload New Staff ID Numbers' screen, enter the file name (without the file extension) of the downloaded file of assigned Staff IDs. **This file is presumed to be on the root C:\ drive**. (For example, if the file name is 'SampleFile.txt', enter 'SampleFile'; do not enter '.txt'.)



6. After entering the file name, press F10 to process the UID into the Payroll Misc File, PRMSC. FTP is used to move the file to the AS400 and is processed immediately.
7. The imported CEDARS Staff ID can be viewed on the *Employee Misc Info* Screen. (To protect other sensitive data in the PRMSC file from being seen here, only the Staff ID is shown.)

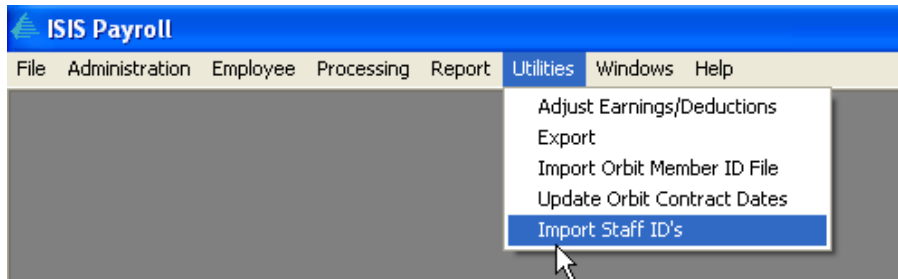
This file is accessed via two options:

- Menu option 22, Employee Profile, then F5 = MISC
- Menu option 25, Employee Inquiry, also F5 = MISC

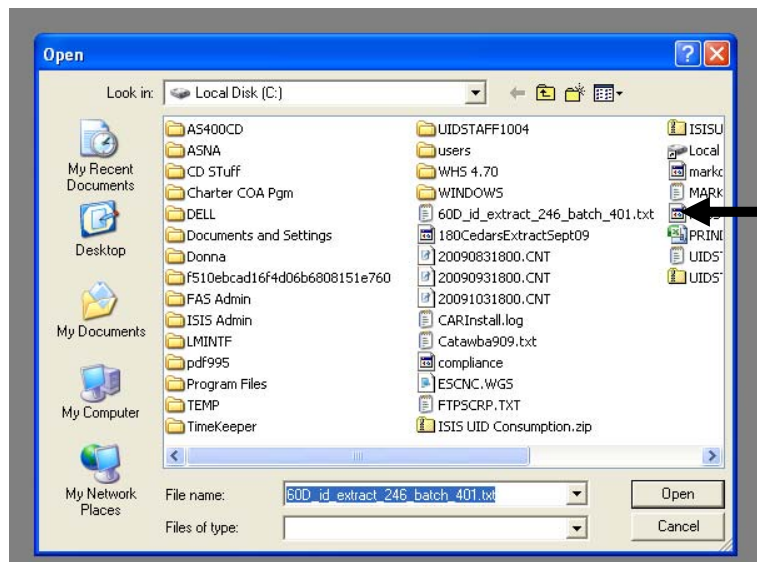
ISIS Payroll Module: Employee Misc Info

STAFF ID 1628523581

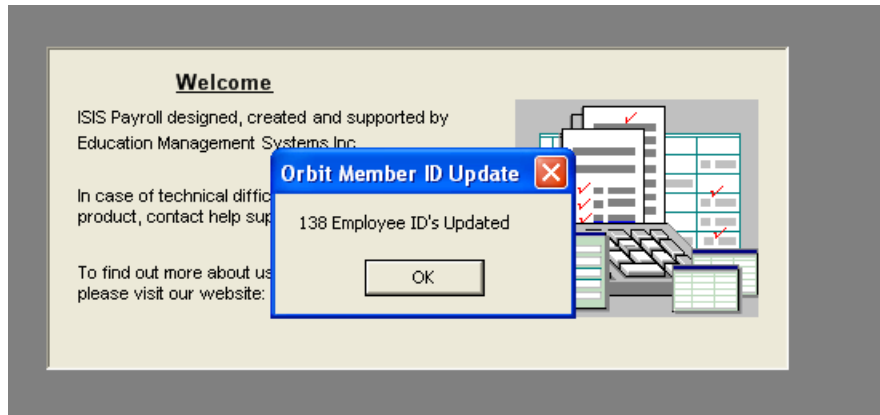
- ISIS Charters: Steps for Importing the File of Assigned Staff IDs into the ISIS Financial System (Software Release 5.03 (GL) and 5.00 (Payroll) or later releases of the software)
 1. The CEDARS file of downloaded assigned Staff IDs must be downloaded first and is presumed to be located on root C:\ drive. (NOTE: This is the file of assigned IDs that is downloaded **from** the UID Staff application; **not** the UIDStaff file that is uploaded **into** the UID Staff application.)
 2. From the ISIS Desktop Payroll Application, select the Import Staff IDs from the Utilities Menu.



3. The downloaded CEDARS file of assigned Staff IDs is presumed to be on the root C:\ drive; however with a Windows Application, there is more flexibility. The file may be anywhere on the PC, but must be accessible via the Windows 'Browse for File' dialog.

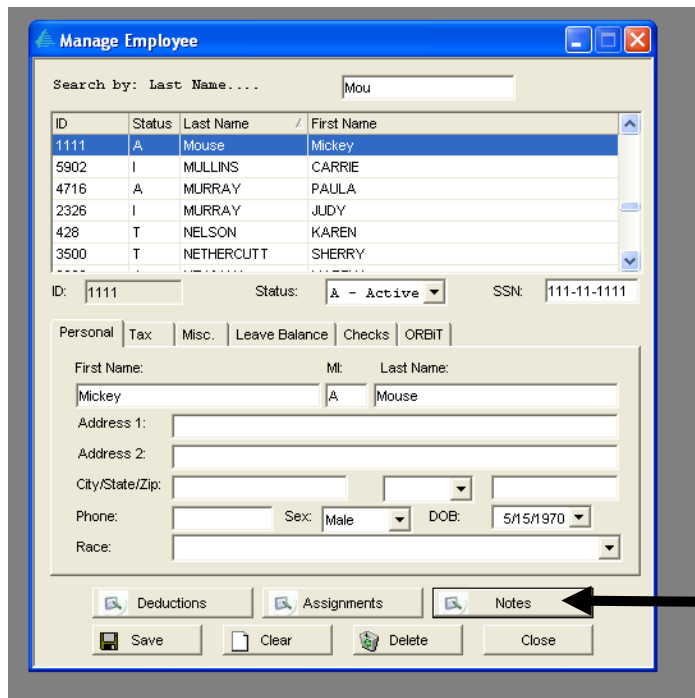


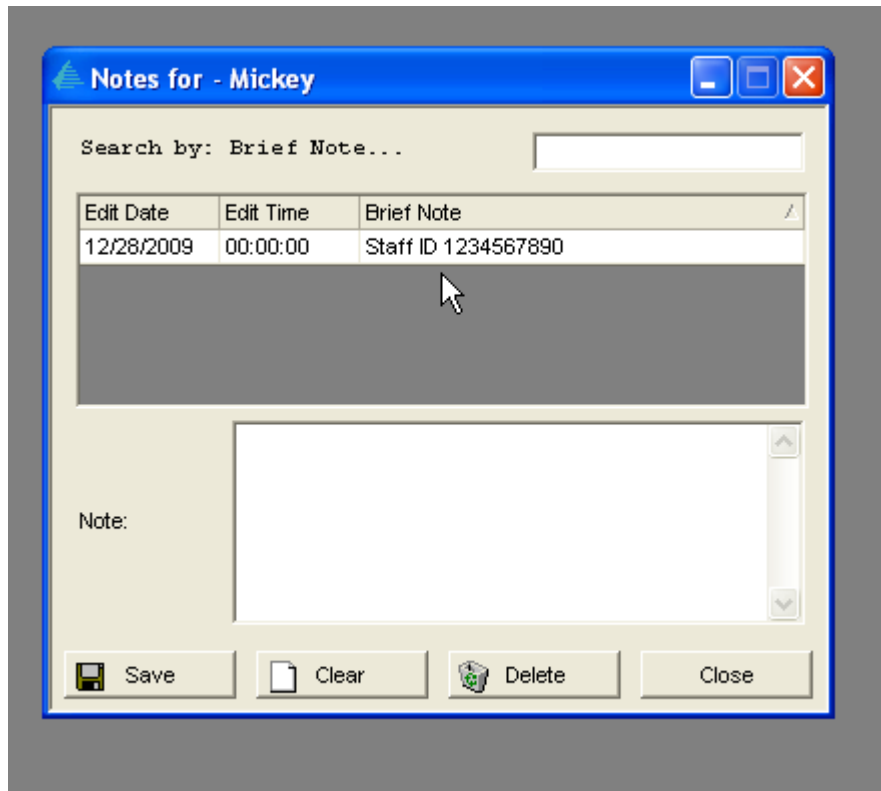
4. Select the downloaded file of assigned Staff IDs and click Open. When the file is selected, the program updates the file with the UID. The following message displays:



Note: This message will be updated in the release to read “DPI Staff Member ID” instead of ORBIT.

5. The imported CEDARS Staff ID can be viewed on the EMPLOYEE/Notes page. Click on NOTES to display the NOTES page.



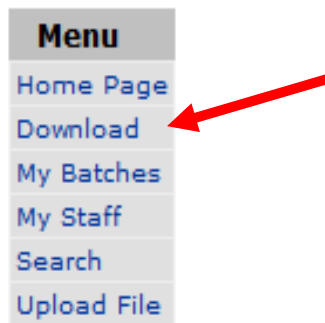


NOTES page in ISIS payroll application where the Staff ID can be viewed.

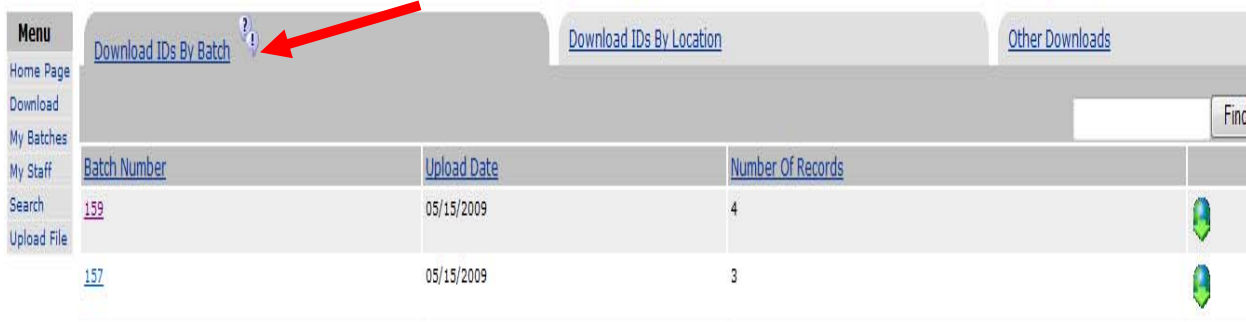
How do I download the file of assigned Staff IDs from the UID Staff application?

After all near matches have been resolved and the ID assignment process has been completed in the UID Staff application, the Staff IDs can be downloaded by using the Download Module.


To access the Download Module, click the **Download** link from the Menu to access the available download features.



The system will display the **Download** module with three tabs: Download IDs by Batch (default), Download IDs By Location, and Other Downloads.



To download identifiers by batch, the following steps should be performed:

1. Select Download IDs By Batch tab.
2. Click the  icon button for the appropriate batch to download Select 'Download IDs by Batch'. This will display the 'Extract Options' screen.


The parameters on the "Extract Options" screen must be set correctly in order to import your staff file of assigned IDs into your payroll system.

All LEAs and Charters, **except Wake and Charlotte-Mecklenburg**, should set the file upload parameters as indicated in the screen shot below.

- o Template: eScholar Uniq-ID for Staff 2.0 Template
- o Field Delimiter: FIXED
- o Field Qualifier: leave blank
- o Include Field Header: NO

See the "Upload Batch" screen shot below that includes the appropriate upload parameters for all LEAs and Charter Schools (except Wake and Charlotte-Mecklenburg).

Extract Options

* Template : eScholar Uniq-ID for Staff 2.0 Template 

* Field Delimiter : FIXED

Field Qualifier :

* Date Format : mm/dd/yyyy

* Include Field Header : Yes No

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For Wake and Charlotte-Mecklenburg, contact your IT department for the specific extract parameters required to import the staff file of assigned IDs into your payroll system.