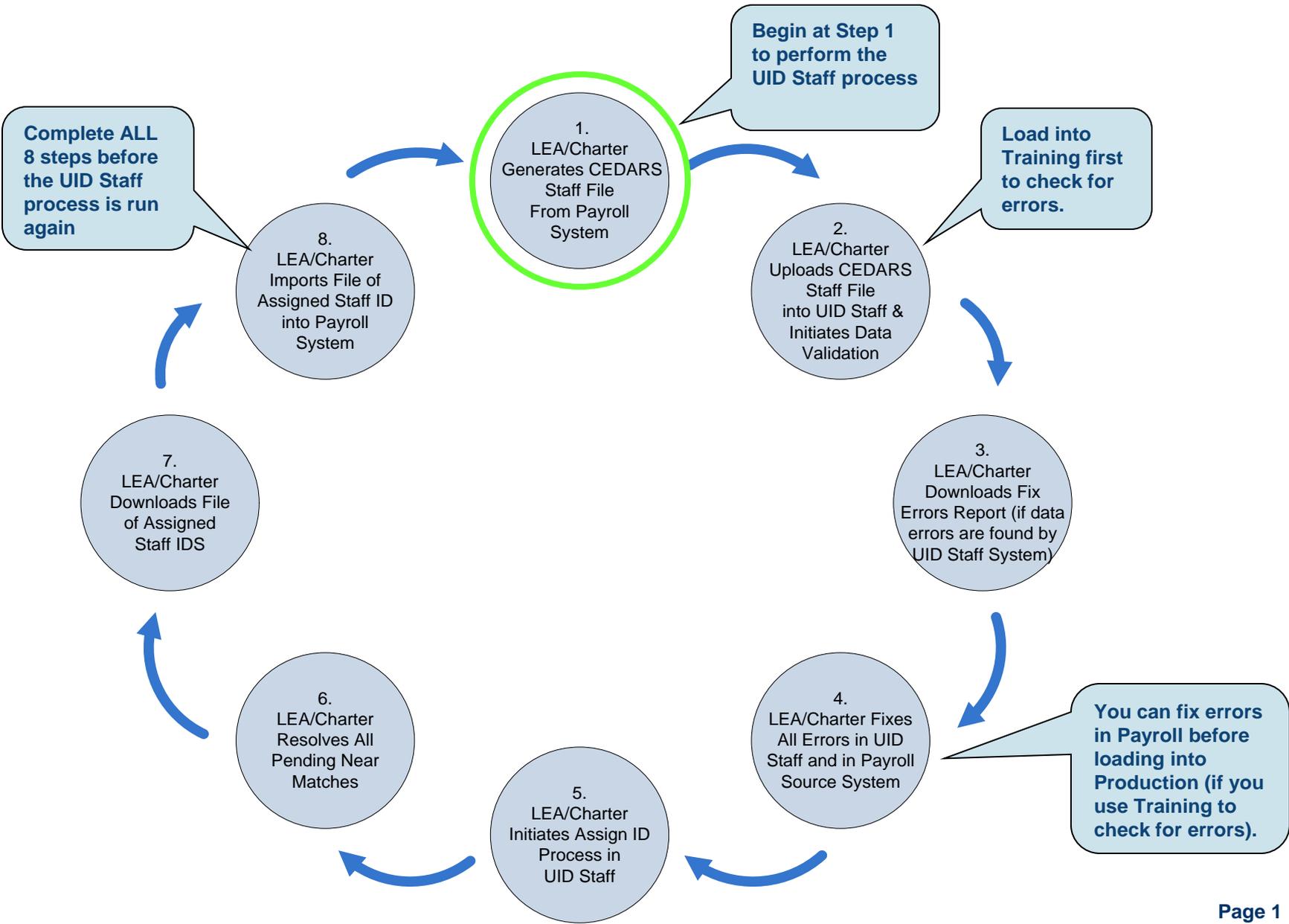


UID Staff Process Quick Reference Guide

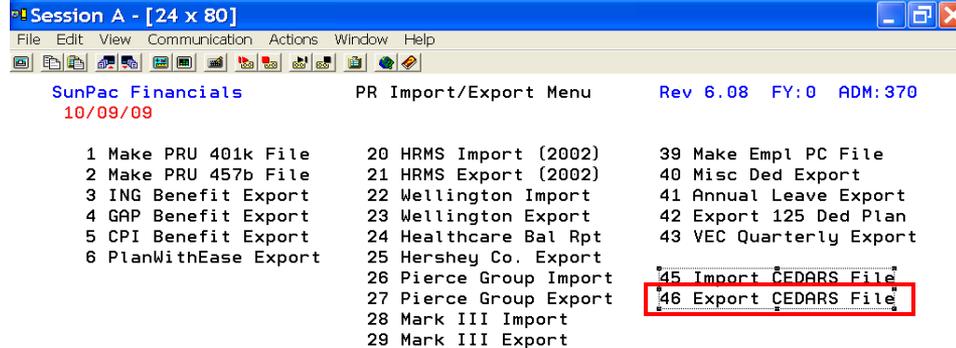


UID Staff Process Step 1 - Generate CEDARS Staff File - Sartox

How to generate the CEDARS Staff file - Sartox

1 From the *Payroll Main Menu*, Select **Option #36 Import/Export Menu**.

2 Select **Option #46 Export CEDARS File**. The *Export CEDARS File* screen is displayed.



Select Function:
F3=Exit F6=NCEP F7>About F8=Messages F10=CmdEntry F18=Printouts

3 Fill in the parameters on the *Export CEDARS File* screen:

- Enter Fiscal Pay Period to Process.....01 (or appropriate pay period)
- Move Export File To PC Now (Y/N)?.....Y
- Enter Destination For Exported PC File... C:\SFFIN_____

4 Run the export. The UID Staff file, named UIDStaffYYPP.txt, where YY=fiscal year and PP=fiscal pay period, is copied to the C:\SFFIN directory on the PC that initiated the export.

Key Items to Remember

★ Ensure you are using the correct version of software - SunPac 6.08.06 (or later).

★ File destination MUST be C:\SFFIN.

Common Problems

UID Staff Process Step 1 - Generate CEDARS Staff File - EMS/ISIS

How to generate the CEDARS Staff file - ISIS LEAs

- 1 Sign onto *Payroll, year 0*.
- 2 Select menu option **99** to open the Utilities Menu.
- 3 Select **Option 26 = Export CEDARS/UID File**
- 4 Enter the CALENDAR month and press F10.
- 5 The file (UIDStaffYYPP.txt) is automatically dropped to the root C:\ via FTP. Users do not have options for placing the file elsewhere.

How to generate the CEDARS Staff file - ISIS Charters

- 1 Sign into your **FY 10 General Ledger** system.
- 2 Select the **State Reporting** Option. 
- 3 Select the **'Staff File'** Option - this will create the CEDARS file and move it to the location where the file was last saved with the file name of UIDSTAFFYYPP.txt where YY is the fiscal year and PP is the pay period.
- 4 The user has a choice of where to save these files; however the default is to save them to the root C:\ drive.

Key Items to Remember

- ★ Ensure you are using the correct version of software.
 - LEAs - Version 5.70 (or later) AS400 platform.
 - Charters - (GL - 5.03 or later) and (Payroll - 5.00 or later).

Common Problems

UID Staff Process Step 2 – Uploading CEDARS Staff File into UID Staff

How to upload the CEDARS Staff file into UID Staff

- 1 Locate the CEDARS Staff file created by HR / Payroll Systems Vendor.
- 2 Login to UID Staff and select the **Upload File** link from the Menu.
- 3 On the *Upload Batch* page, specify the file details based upon your file structure. Browse for file UIDStaffYYPP.txt, where YY=fiscal year and PP=fiscal pay period.

Upload Batch

* Template : eScholar Uniq-ID for Staff 2.0 Template

* Field Delimiter : FIXED

Field Qualifier :

Ignore First Row : Yes No

* File : Browse...

Upload

- 4 Click the **Upload** button. If the file successfully uploads, the system will display an *Upload Success* screen.

Upload Success - Batch Number: 3622

The file submitted file3_10k.txt has been uploaded. Click the button below to start validation process.

Validate

- 5 If the file contains errors, take appropriate action and upload the file again.

NOTE: If you do not have any data errors, you may proceed to Step 5: Initiate Assign ID Process.

Key Items to Remember

- ★ **Best practice:** upload into Training to check your results prior to uploading into Production.
- ★ Do not upload the same file more than once **successfully** into Production. This will cause duplicate work.
- ★ Make sure you are uploading the current staff file. (Check the naming convention to make sure the date is correct).
- ★ ISIS, SunPac, & NHA will always select **FIXED** for field delimiter, **BLANK** for field qualifier, & Ignore first row: **NO**.

Common Problems

- ★ Check file extension & ensure extensions for known file types are not hidden. (My Computer, Tools)
- ★ Incorrect template - Always select: **'eScholar Uniq-ID for Staff 2.0 Template'**.
- ★ Incorrect field delimiter.
- ★ The file contains an incorrect number of columns. One or more fields have been omitted from a record.
- ★ Data errors exceeded maximum.

UID Staff Process Step 4 – Fix Data Errors

How to fix data errors in UID Staff

- 1 From the Home Page, click the  for the particular batch with a **Data Errors Pending** status. The system will display all records that have data errors for the selected batch.
- 2 Click on the  in the right-most column to correct the data errors for that record.
- 3 The system will display the staff information in a Fix Error Record form with an invalid message in red under each data issue.
- 4 Correct all data errors on the page.
- 5 After all data errors are corrected, select the **Update Staff Record** button.
- 6 The system will display a confirmation message after the record has been updated.
- 7 After the record has been updated, click the **Back To List** button to return to the list of data issues or move to the next record in the list by clicking **Next Error Record** button.

How to fix data errors in the vendor payroll system

- 1 Use the 'Errors to Fix' and the 'Canceled' reports (UID Staff Process Step 3) to fix data errors in your payroll system.

Key Items to Remember

-  Select **Back to List** button if you decide not to update the record.
-  Future Hire Dates are not supported in UID Staff and will be flagged as errors. Fix all data errors on the Fix Error Record form, leave the Future Hire Date blank, and update the record.

Common Problems

-  Update Staff Record button is not displayed – Scroll down to the bottom of the page.
-  If the salary field is flagged as an error, blank out the salary field and update the record.

UID Staff Process Step 5 – Initiate Assign ID Process

How to initiate the Assign ID process from the main menu

- 1 Click the  for a particular batch with a **Load and Validation Complete** status. The Staff ID assignment process will begin.

| My Batches Currently Processing  | | | |
|---|---------------|-------------------------------------|---|
| Batch Number | Date Uploaded | Batch Status | |
| 494 | 12/28/2009 | DATA ERRORS PENDING |  |
| 493 | 12/28/2009 | NEAR MATCHES PENDING |  |
| 492 | 12/28/2009 | LOAD AND VALIDATION COMPLETE |  |

[Show me all my batches](#)

- 2 The system will display an Assignment in Progress dialogue box.
- 3 An Assignment Completed page will be displayed after the assignment process has completed.

| Assignment Completed - Batch Number: 147  | |
|--|--------|
| The file submitted Staff_with_no_errors.csv has completed the ID assignment process. The file contained records for human review. Click the button below to view pending near matches. | |
| Assignment Statistics | |
| New ID Assigned - No Matching Record Found | 2 |
| Ready to Resolve Near Matches/Duplicates | 1 |
| Total Records | 3 |
| Percentage Completed | 100.0% |
| <input type="button" value="View Pending Near Matches"/> | |

NOTE: If you do not have any near matches to resolve, you may proceed to Step 7: Download File of Assigned IDs.

Key Items to Remember

- ★ Batch statistics are refreshed every 30 seconds or when the **REFRESH BATCH STATISTICS** button is selected.
- ★ The Start ID Assignment process can be initiated from any of the following:
- From the main menu.
 - From the validation screen. (successful import without data errors.)
 - Immediately after resolving all records in the batch with data error(s).

Common Problems

UID Staff Process Step 6 – Resolve Near Matches

How to resolve near matches – Page 1 of 2

1 Login to UID Staff and from the Home Page, click the details icon for the particular batch with a **Near Matches Pending** status that you wish to resolve near matches for.

2 Select a record to view the near matches by clicking the details icon  in the far right-hand column.

| Resolve Near Matches - Batch: 383 | | | |
|---|-------------------|-----------|------------|
| District Code | School Code | Last Name | First Name |
| <input type="checkbox"/> 300 - Davie County | 314 - Mock School | Phillips | Kelly |
| <input type="checkbox"/> 300 - Davie County | 314 - Mock School | Anderson | Jennifer |

Displaying 1 to 2 of 2

First Prev Next Last

3 The **Resolve Near Matches Summary** page will display the submission record and potential match record details. Click the **Compare** button to view additional information.

| Resolve Match for Staff Member : 1279424 | | | |
|---|---------------------------------------|--|------------|
| Submission Record | | | |
| First Name: Kelly | Middle Name: B | Last Name: Phillips | Suffix: Jr |
| Gender: Female | Date Of Birth: 01/09/1990 | Ethnicity: White (Not Hispanic) | SSN: |
| <input type="button" value="Create New"/> | <input type="button" value="Cancel"/> | <input type="button" value="Back To Batch Details"/> | |
| Potential Match (Staff Id: 3212784733 - Probability: 88.0%) | | | |
| First Name: Kelly | Middle Name: | Last Name: Winchester | Suffix: |
| Gender: Female | Date Of Birth: 01/09/1990 | Ethnicity: White (Not Hispanic) | SSN: |
| <input type="button" value="Compare"/> | | | |

Key Items to Remember

★ To return to the Home Page at any time, click the **Home Page** hyperlink from the main menu.

★ The **Batches Pending – Near Matches** section is in the lower right-hand corner of the screen. This section lists the three most recent submissions with near matches.

★ If you are working on a particular batch, make note of the batch number so you can easily search for it using the **Find Batch** section on the Home Page.

Common Problems

★ If the batch you are looking for is not listed in **Batches Pending – Near Matches** section, select the **Show me all batches pending match resolution** hyperlink to see all the batches in a Near Matches Pending status.

UID Staff Process Step 6 – Resolve Near Matches

How to resolve near matches – Page 2 of 2

4 Examine the details of each Staff member on the **Near Match Details** page and determine if it is a match or not.

5a If one of the potential near matches is a match, select the **Assign ID** button to assign the staff ID from the Near Match record to the Record to be resolved.

| | Record to be resolved | Near Match |
|-------------------------------|--|--|
| Near Match Details. | Submission Record: 1279424 | Potential Match: 3212784733 (View Staff Profile) |
| General Information | | |
| Staff ID: | | <i>3212784733</i> |
| First Name: | Kelly | Kelly |
| Middle Name: | <i>B</i> | |
| Last Name: | <i>Phillips</i> | <i>Winchester</i> |
| Suffix: | <i>Jr</i> | |
| Full Name: | | |
| Previous Last Name: | <i>Winchester</i> | |
| Personal Information | | |
| Gender: | Female | Female |
| Date Of Birth: | 01/09/1990 | 01/09/1990 |
| SSN: | | |
| Ethnic Code: | White (Not Hispanic) | White (Not Hispanic) |
| Ethnicity Subgroup: | | |
| Highest Degree Earned: | | |
| Address1: | | |
| Address2: | | |
| City: | | |
| State: | | |
| Zip Code: | | |
| Vocational Information | | |
| District Code: | 300 - Davie County | 300 - Davie County |
| School Code: | 314 - Mock School | 314 - Mock School |
| Job Class: | | |
| Annual Salary: | | |
| Hire Date: | | |
| Alternate Staff ID: | 2 | 2 |
| Active: | Yes | Yes |
| | <input type="button" value="Assign ID"/> | <input type="button" value="Back"/> |

5b If the records are not a match, select the **Back** button to return to the **Near Match Summary** page and click the **Create New** button.

6 Press the **Next Record** button and repeat steps 2-5 for all the records in the batch.

Key Items to Remember

When determining if a potential near match is a match in step 4, be sure to carefully review both records in detail. Differences are highlighted in yellow and italicized.

To exit the *Near Match Details* screen without assigning the ID, click the **BACK** button to return to the *Resolve Near Matches Summary* page where you can do one of the following:

- Click the **Create New** button to assign a new ID to the record to be resolved.

- Click the **BACK to BATCH DETAILS** button to skip this record and move to the next record. (Record can be resolved later).

If a match is determined, the data from the submission record (**Record to be resolved**) will overwrite the data on the potential near match record (**Near Match**). The **Near Match** record data will become history.

UID Staff Process Step 7 – Download File of Assigned Staff IDs

How to download file of Assigned Staff IDs

- 1 Login to UID Staff and select the **Download** link from the Menu.
- 2 Select **Download IDs By Batch** tab.
- 3 Click the  icon for the appropriate batch to download. Note: batches with data errors or near matches to resolve will not be displayed.
- 4 On the Extract Options page, specify the file details based upon your file structure.

Extract Options

* Template : 

* Field Delimiter :

Field Qualifier :

* Date Format :

* Include Field Header : Yes No

- 5 Click the **Download** button.
- 6 The system will display a download prompt after the file extraction is complete. Click the **Download** button.
- 7 Click the **SAVE** button to save the file on your local PC.

Key Items to Remember

- ★ You may click the **Refresh Extraction Statistics** link anytime to refresh Percentage Completed.
- ★ SunPac & ISIS will always select **FIXED** for Field Delimiter, **BLANK** for Field Qualifier, **mm/dd/yyyy** for Date Format, & **No** for Include Field Header.
- ★ ISIS MUST save the file to the PC root C:/ drive & the file MUST be named less than or equal to 10 characters, excluding .txt extension.
- ★ Sartox MUST save the file to the SFFIN folder & the file MUST be named less than or equal to 20 characters.
- ★ File names may not contain special characters (\$, #, _, @, etc.)

UID Staff Process Step 8 – Import Assigned Staff ID File – EMS/ISIS

How to import file of assigned IDs into ISIS - LEAs

-  Select **option #99** to open the Utilities Menu.
-  Select **Import CEDARS Staff ID File (Option 25)** which displays 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 must reside on your PC root C:\ drive.**
-  After entering the file name, **press F10** to start the import process that copies the file of assigned IDs to the AS400 and then consumes the IDS into the Payroll Misc File, PRMSC.
-  The imported CEDARS Staff ID can be viewed on the *Employee Misc Info* Screen.

How to import file of assigned IDs into ISIS - Charters

-  From the ISIS Desktop Payroll Application, select the **Import Staff IDs** from the *Utilities Menu*.
-  Select the downloaded file of assigned Staff IDs and click **Open**.
-  When the file is selected, the program updates the file with the UID. A message displays: "DPI Staff Member ID" with the number of IDs updated.
-  The imported CEDARS Staff ID can be viewed on the EMPLOYEE/Notes page.

Key Items to Remember

-  **Never** import Staff IDs from the training environment.
-  The CEDARS file of assigned Staff IDs must be downloaded first.

Common Problems

-  Your FTP server is not running.
-  You do not have access rights to the Import CEDARS File option.
-  Incorrect CEDARS file length.
-  The file name contains special characters (@, \$, #, etc.)
-  The CEDARS file was saved to an incorrect location on PC. Verify the Staff ID file path and file name you are attempting to upload matches the path and file name used in the download process.

UID Staff Process Step 8 – Import Assigned Staff ID File – **Sartox**

How to import file of assigned IDs into **Sartox**

-  1 From the Payroll Main Menu, select option #36 *Import/Export Menu*.
-  2 Select *Option #45 Import CEDARS File*.
-  3 Select whether this is a trail or update run. Enter 'T' = Trial Run (report only, no updates) 'U' = Update (report and update)
-  4 Require Match on Employee Last Name? Accept default 'Y' if you want to include match on last name. 'N' will match on SSN only.
-  5 Print Exceptions Only? 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.
-  6 Move Import File from PC to AS400 Now? Y/N
-  7 Identify the file location. This is where the downloaded file of CEDARS Staff IDs is currently located: C:\SFFIN.
-  8 Identify the file name. This is the current name of the CEDARS Staff IDs file.
-  9 Accept default 'QPRINT' or enter other printer name.
-  10 Press 'Enter' to submit the job interactively.
-  11 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.)

Key Items to Remember

-  You can copy the Staff ID file to the AS400 more than once, but **NEVER** import Staff IDs from the Training environment.
-  Errors will not be displayed on your screen with the 'F11=Submit to Batch' option.
-  The CEDARS file of assigned Staff IDs must be downloaded first.
-  Processing time will vary & depends upon the size of the file and the job currently running on the AS400.

Common Problems

-  Your FTP server is not running.
-  You do not have access rights to the Import CEDARS File option.
-  Incorrect CEDARS file length or the file name contains special characters (@, \$, #, etc.)
-  The CEDARS file was saved to an incorrect location on PC. Verify that the Staff ID file path and file name you are attempting to upload matches the path and file name used in the download process.