Aesop Data Import: Employee Load

from AppliTrack (GeneralASP)

Updated: July 2009

Data Import

Aesop allows you to import your own data from many sources. In this case, AppliTrack provides a pre-formatted spreadsheet for you to import new Employees into Aesop.

Menu Bar

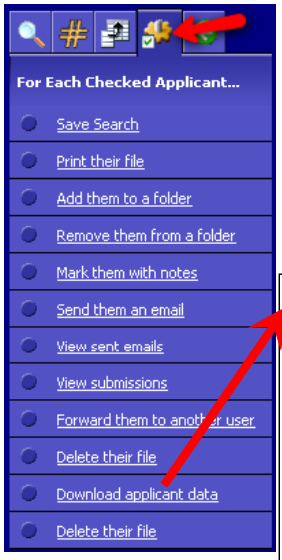
Downloading and Adding Necessary Data

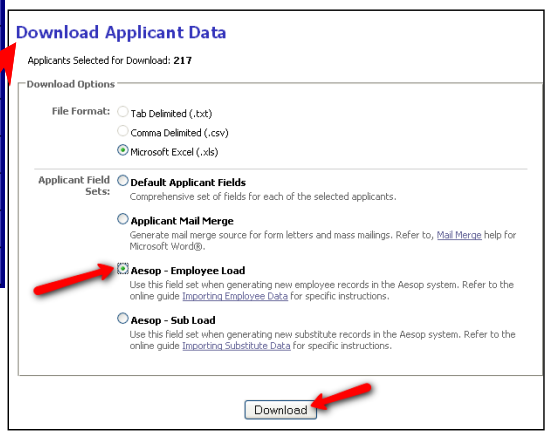
The **Employee Load** allows you to add multiple employees at once rather than entering them one at a time and to make changes to current employees.

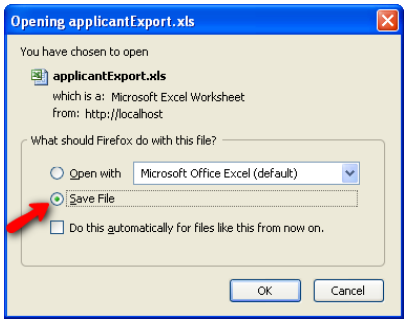
In AppliTrack, use the **Batch Actions and Tools** functionality in AppliTrack to **Download Applicant Data** into a pre-formatted Excel spreadsheet. Choose the **Aesop - Employee Load** field set and click **Download**. Choose the **Save File** option as not "Open With..."

There will be a few Aesop-specific fields for you to enter before importing.

These fields are highlighted **orange** in the table on the next page.







Save the file before advancing

So that you don't lose your data, please save the file to a desktop location. You'll thank us later!

Employee Load Template (Required fields for New employees only)

Field Name	Description	Max Length	Required
Identifier[1]	Social Security Number (123456789 or 123-45-6789)	n/a	**Required**
LastName	Last Name	30	**Required**
FirstName	First Name	30	**Required**
MiddleName	Middle Name	10	
Title	i.e. Grade 2 or Grade 9 Social Studies or Nurse	30	**Required**
Phone	i.e. 1234567890 or (123) 456-7890	n/a	**Required**
Pin	Suggestion: use last or first 4 or 5 digits of SSN or Phone	4 or 5	**Required**
Inst_ExternalID	**External Number** from School's **General Information** page	n/a	**Required**
ClearPreviousInsts	**Y** or **N** (**Y** will delete current school list and replace with new school(s) OR **N** will add new school(s) to current school list)	1	
WorkerType_ExternalID	**Description** from Employee Type (must match a current Employee Type in district's reference table)	n/a	**Required**
NeedsFulfillment[2]	**N**=Never requires sub; **Y** = Always requires sub; **O** = Can decide if sub is required		**Required**
Report Location	Where should the sub report to work? (recommended: MAIN OFFICE so that the sub reports to school's office first)	20	**Required**
ExternalLoginID[3]	Alternative Numeric Login ID (8 digits, or 11-20 digits in length)	20	
E-mail	joedoe@email.com	80	
Street1		50	
Street2		50	
City		40	
State	i.e. PA	2	
Zip	i.e. 12345 or 12345-6789 or 123456789	n/a	
ExternalEmpID	Alpha-numeric field to hold reference data on employee	20	
ExternalEmpID2	Alpha-numeric field to hold reference data on employee	20	
ExternalEmpID3	Alpha-numeric field to hold reference data on employee	20	
DefaulStartTime[4]	Start time of job (i.e. 8:15 or 08:15)	4 or 5	
DefaultEndTime[4]	End time of job (i.e. 15:30 – **In Military time**)	5	
HalfDayBreak_1	i.e. 12:15 Half Day point	5	
HalfDayBreak_2	i.e. 12:16	5	

Employee Load Template continued

Field Name	Description	Max Length	Required
Deleted	**Y** or **N**	1	
Active	**Y** or **N**	1	
ReportLocation	Where should the sub report? Default is 'Main Office'	20	
CanAssignSub[5]	**Y** or **N**	1	
CanCancel[6]	**N** = Never; **U** = Cancel only unfilled; **B** = Can Cancel both filled and unfilled absences	1	
CanUpload	**Y** or **N** – Will you allow your teacher to upload attachments to absences?	1	
CanHoldAbsr	**Y** or **N**	1	
CanHoldAbsrTill	In hours		
TimeToCallPref[7]	(1 – 3) How many times will Aesop exclusively call the Employee's Pref. List before moving to subsequent call lists?	1	
Notes		50	
Budget_ExternalID	**External ID** from Budget Codes	30	
Birthdate	i.e. 1/1/84 or 01/01/1984	n/a	
Employment_StartDate	i.e. 1/1/84 or 01/01/1984	n/a	
Employment_EndDate	i.e. 1/1/84 or 01/01/1984	n/a	
PinExpired	**Y** or **N** – Would you like Pins to expire?	1	
PinExpiresDate	i.e. 1/1/84 or 01/01/1984 – When will it expire?	n/a	
PrefListEdit[8]	0,1,2,3,4,6,7	1	

Notes:

[1] – If you are using fake SSNs you must contact Aesop Client Services for a range of unused SSNs. It is unwise to randomly "create" fake SSNs. (Not recommended if you are using Aesop to interface with a payroll system or you intend to in the future).

[2] - **N** = this employee never requires a sub; **Y** = this employee always requires a sub; **O** = this employee has the option to choose for each individual absence whether or not they require a sub.

[3] – Default Login ID is either the individual's SSN or Phone Number. This Login ID can **only** be a minimum 8 digits or 11-20 digits in length. **It cannot be 9 or 10 digits in length.**

[4] – If left blank Aesop will default to the school's start/end and half break times

[5] – This feature is for prearranged assignments. Aesop will **not** contact a sub assigned to an absence.

[6] – **N** = this employee cannot cancel absences; **U** = this employee can only cancel unfilled absences; **B** = this employee can cancel both unfilled and filled absences.

[7] – Exclusively contacts this list first before moving to subsequent call lists

[8] – **0** – Use Default Setting at School Level; **1** = do not display list; **2** = display list only; **3** = Edit List (Basic); **4** = Edit List (Adv.); **6** = Edit List (Basic) – No Exclude; **7** = Edit List (Adv.) – No Exclude

Employee Load Default Settings

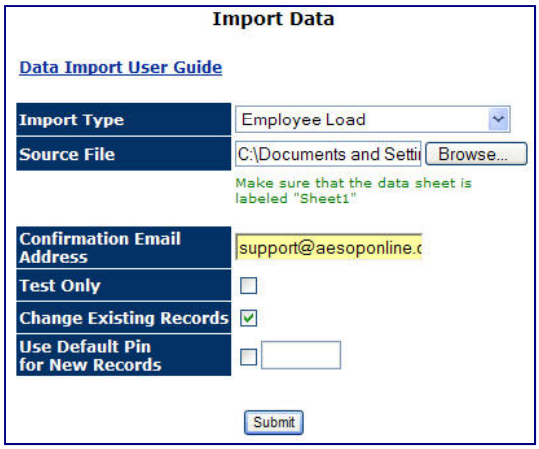
If the field names listed below are left blank then Aesop will default to the following settings:

Field Name	Default Setting
ClearPreviosInsts	**N** = Aesop will not clear this employee's school location(s) and will add the new schools to the current list of schools
Start/End/ Half Day Break Times	Will default to the school's Start/End and Half day break times
Deleted	**N =** Worker is not deleted
Active	**Y** = Worker is active
NeedsFulfillment	**Y** = This employee always requires a substitute
CanAssignSub	**N** = Worker cannot assign a sub to their absence request
CanCancel	**N** = Worker cannot cancel absence request
CanHoldAbsr	**N** = Worker cannot hold the absence request
CanHoldAbsrTill	**0** = Zero hours
TimesToCallPref	**1** = Call Employee Pref list once through exclusively then move to subsequent call lists
PinExpired	**N** = Worker's Pin will not expire

Need to update information on employees currently in Aesop? The ONLY required information is the Identifier field and whichever other field(s) you need to change. This helps Aesop identify the employee thus allowing the other submitted information to be updated/changed.

Steps for loading Employee Data

1. **OPEN THE EXCEL FILE YOU HAVE DOWNLOADED FROM APPLITRACK.**
2. Make sure you have filled in the **required** fields (for new employees only. All other fields are optional):
   a. Identifier
   b. LastName
   c. FirstName
   d. Title
   e. Phone
   f. Pin
   g. Inst_ExternalID
   h. Work_TypeExternalID
   i. NeedsFulfillment



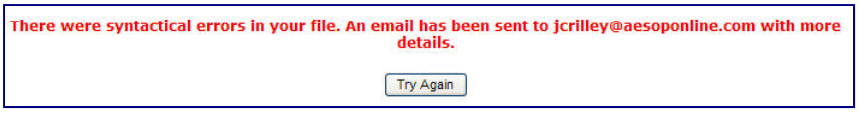
3. **Save** your file.
4. Open the **Web Navigator**.
5. On the **Menu** bar, click **Extract / Import**.
6. Click **Import Data**.
7. In the **Import Type** drop-down window, click **Employee Load**.
8. In the **Source File** box, click the **Browse** button and select your file.
9. In the **Confirmation Email Address** box, input your email address.
10. **Test Only**
    a. **Checked** - rows are validated but no records are added or changed.
    b. **Un-checked** - all valid rows will be added or changed.
11. **Change Existing Records**
    a. **Checked** - adds new employees and updates any current employees.
    b. **Un-checked** - only adds new employees.
12. **Use Default Pin for New Records**
    a. **Checked** – Enter a 4 or 5-digit Pin that would be automatically assigned to all new records
    b. **Un-Checked** – you will not use the Default Pin feature
13. Click **Submit**.
14. Click **Yes** to submit your file for processing.

Do not change the Header names nor the Sheet1 tab name

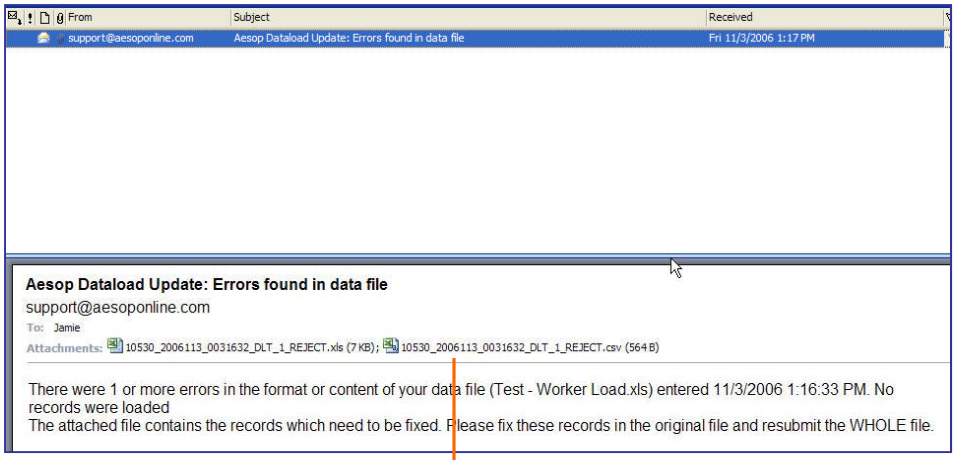
Syntactical Validation of Data

Aesop will validate your data. If Aesop identifies any data not meeting it's criteria the data will be rejected. (For example: phone number is 10-digits). If all data is *syntactically* correct then Aesop will allow you to run the data load.

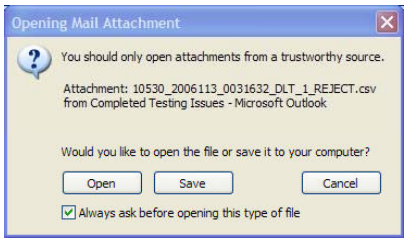
Your file fails the test.

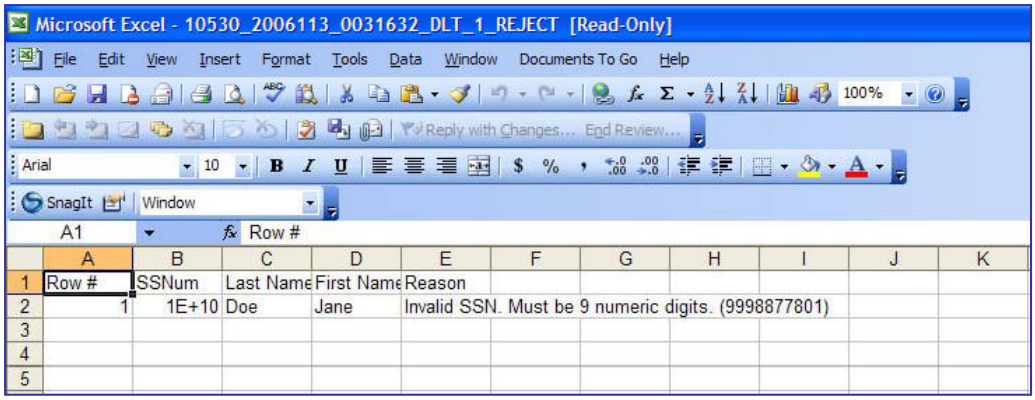


This is the e-mail you will receive. Click the **last attachment** to view the record(s) that failed the syntactical verification.



Click **Open**



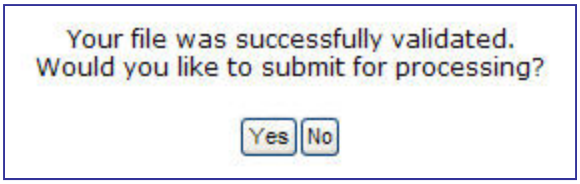


Aesop will tell you the **Row #** (note: Row 1 = Row 2 on your Excel file – the Header row is not counted) and the **Reason** why the record failed. Open the Excel file and make the required changes and then re-submit.

Syntactical Validation of Data continued

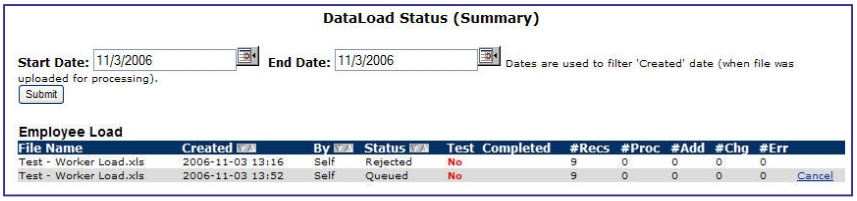
Your file passes the test.

Click **Yes** to process.

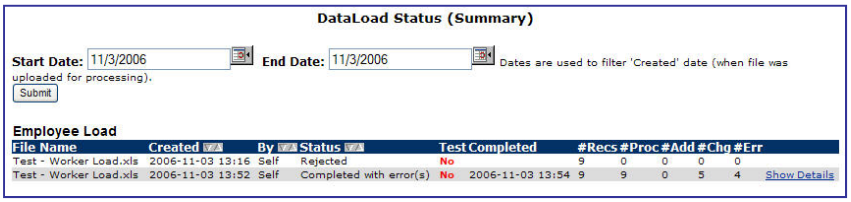


Data Load Status screen. When the data is first submitted it's *Status* is **Queued**.

It may take a number of minutes to run the report depending on how many requests have been made.

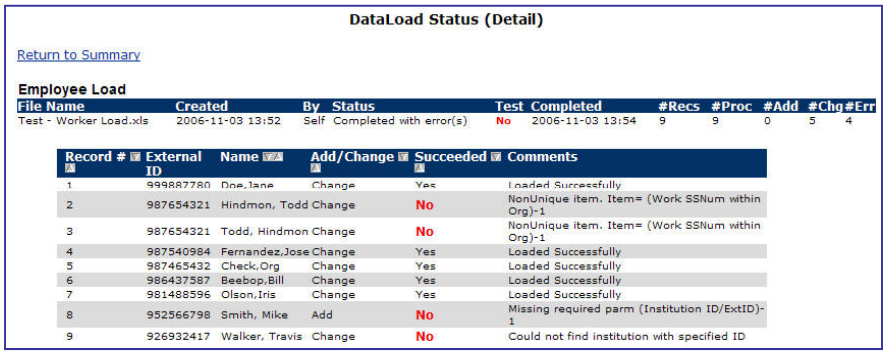


Data Load **Completed**. Aesop will break down how many Records were submitted, Processed, Added, Changed, and Error.



Click the **Show Details** link. Aesop will show you every record; whether they were successfully processed, and the comments.

If you have errors – make the appropriate changes in your Excel spreadsheet and re-submit.



Re-submitting your file

After you make your changes you can re-submit the *entire* file again. You do not need to "pull out" the failed data and put it into a separate Excel spreadsheet. Simply – make your changes, Save, and then re-submit.