

COMP Upload File Management and Processing

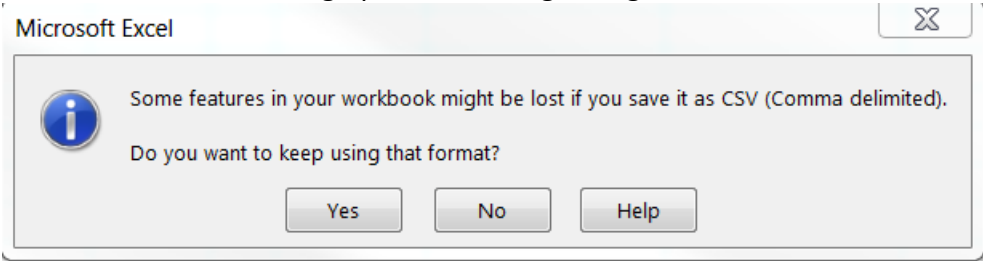
Purpose	<p>Create Compensation transactions using the MS Excel COMP UPLOAD TEMPLATE, FileZilla and the Compensation Upload process [NZPCUPL] to complete the following tasks:</p> <ol style="list-style-type: none"> 1. Accessing, Saving and Updating the MS Excel COMP UPLOAD TEMPLATE 2. Entering Required Data 3. Saving the MS Excel Worksheet with a .csv File Format 4. Using FileZilla to copy the .csv file to the FTS production file server 5. Using NZPCUPL to Create COMP Transactions from the .csv file 	
1. Accessing, Saving and Updating the MS Excel COMP UPLOAD TEMPLATES		
1.1	Accessing and Saving an COMP UPLOAD TEMPLATE	
	OPEN the appropriate COMP UPLOAD TEMPLATE located at:	
		http://www.usnh.edu/banner/training/training.htm
	SAVE the MS Excel file in a directory used by your department.	
	FILE Name	The suggested file naming convention is: comp_upload_<Campus Designation>_<Optional User Text> Campus Designations: GSC, KSC, PSU, UNH, and SYS Optional User Text: Anything meaningful to your campus like date, organization, etc.
1.2	Updating the MS Excel COMP UPLOAD file	
	Columns and Rows	<ul style="list-style-type: none"> • The first row of the worksheet will be ignored. • Optional columns have column names highlighted in White. • Required columns have column names highlighted in Yellow. <i>If a required column is missing the file will not be processed.</i> • Remove any custom columns added to the worksheet. • The order of the column defined in the COMP UPLOAD TEMPLATE must not be changed. <i>If the order of a column is changed NZPCUPL will not know how to process it and will reject the file. If you swap Effective Date and Personnel Date, the file would still process however, records may have errors.</i> • A new row is needed for each compensation change type (CCTY). • All rows, EXCEPT the first row containing column names, can be sorted in any order. • All data entered into date columns must be entered in the format: MM/DD/YYYY [01/01/2014]

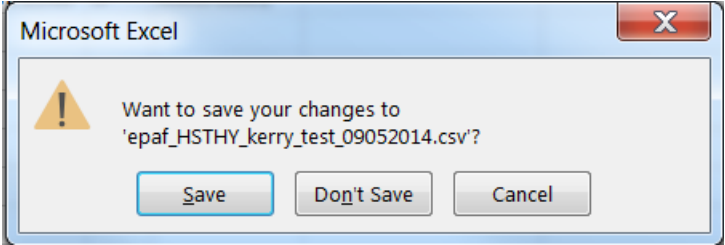




2. Entering Data		
2.1	Entering Data	The COMP UPLOAD pdf cheat table provides information on the data fields used to create the COMP transaction. See Table Below.
2.2	Entering Required Data	Each record will have columns which contain key data and are therefore required. <i>If any key data is missing or is invalid the COMP Transactions will not be processed.</i>
2.3	Percent and Amount	At least one record in each file must have a value in the Percent or Amount record columns. This value can be blank.

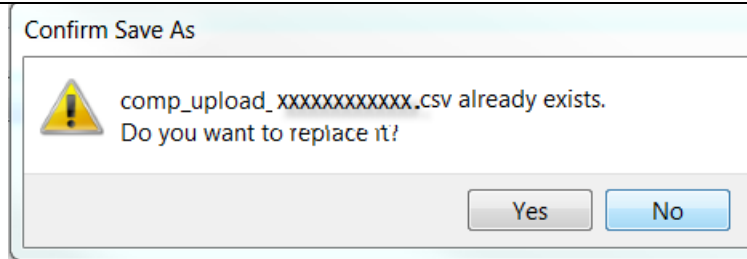
Compensation Upload [NZPCUPL]

Compensation Upload - NZPCUPL			
Purpose:	Define the data fields on the COMP Upload spreadsheet.		
	Required Field?	Column Name	If any required data is missing or is invalid compensation transactions will not be created.
	Y	ID:	USNH ID (9 digit #)
	N	LAST NAME:	Optional; not uploaded. For users reference only.
	N	FIRST NAME:	Optional; not uploaded. For users reference only.
	Y	POSN:	Position on job to be updated.
	Y	SUFF:	Suffix on job to be updated. Must be 2 character text field (needs leading zero if only 1 digit.)
	Y	ECLS:	Job ECLS on job to be updated. Must be valid ECLS-CCAT-CCTY combination for COMP Upload on PWRECOM.
	Y	TSORG:	TS Orgn Code on job to be updated.
	Y	EFFECTIVE DATE:	If action is in the current or future pay period, use actual date of action. If action is in a prior pay period use the beginning date of the current pay period.
	Y	PERSONNEL DATE:	Actual date of action, job begin date, or the contract begin date.

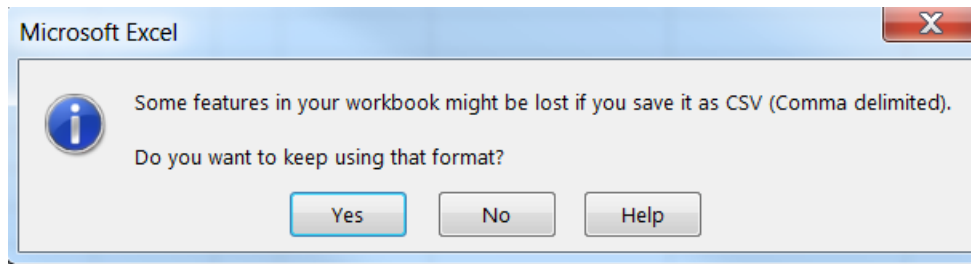
	Y	CCAT:	Compensation Category. Must be valid ECLS-CCAT-CCTY combination for COMP Upload on PWRECOM.
	Y	CCTY:	Compensation Change Type identifying reason for change. Must be valid ECLS-CCAT-CCTY combination for COMP Upload on PWRECOM.
	N	GRADE:	Optional; Needed for range changes. Must exist on NTRSALA for the corresponding Salary Group and Table. If any other transactions are being processed at the same time, Grade must be entered for all of the transactions.
	N	FTE:	Optional; must never be greater than 1.
		PERCENT:	Optional; if entered AMOUNT column must be blank.
		AMOUNT:	Optional; if entered PERCENT column must be blank.

3. Saving the MS Excel Worksheet with a .csv File Format	
	Save the MS Excel file as a .csv file only after all transactions have been entered and the file is complete.
File Directory	Save the .csv in the same department directory as the MS Excel file.
File Naming Conventions	<p>The .csv file name must adhere to the following naming conventions:</p> <ul style="list-style-type: none"> • Begin with comp_upload_ • Be all lowercase. • Never contain blank spaces. • Never contain special characters such as *, %, or #, or -. • Can contain the following characters (a-z, 1-9, _, .)
Required File Name	<p>comp_upload_<Campus Designation>_<Optional User Text>.csv Campus Designations: GSC, KSC, PSU, UNH, and SYS Optional User Text could be anything meaningful to your campus like date, organization, etc.</p>
Save as .csv File	CLICK the Microsoft Office Button.
	CLICK Save As.
	Save in: SELECT the desired directory.
	Save as type: SELECT CSV (Comma delimited) (*.csv) from the drop down list.
	File name: TYPE the file name.
	<p>CLICK Save. This will bring up the following dialog box:</p>  <p>Click "Yes"</p>

		<p>EXIT Excel and do not save changes to .csv file when prompted.</p>  <p>Click “Don’t Save”</p>
<p>EXIT Excel and do not save changes to .csv file when prompted.</p>		
<p>Managing the .csv file</p>		
	<ul style="list-style-type: none"> Review .csv file. 	<p>Open the .csv file with Notepad. NEVER open it in Excel. Note: the Icon for a .csv file is similar to a standard Excel file icon. There is an “X” in a square on the left and an “a” in the lower right. Icon examples are:  or  .</p> <p>In notepad make sure there are no problems with the csv file. Examples of problems are: a line of commas only (a blank line with no data in it,) extra commas at the end of a line. (Commas represent columns. There should be an equal number of columns per row, thus an equal number of commas per row,) no spaces before or after data.</p>
	<ul style="list-style-type: none"> Make corrections to original MS Excel file. 	<p> or  To fix the problems open the original spreadsheet in Excel (NOT the csv file) and remove the blank lines, blank columns, extra spaces from cells, etc.. and save the data as a csv file once more. If you are replacing an existing .csv file, when you go to save the .csv file make sure to overwrite it by double clicking the existing .csv file name in the Save in: window. This will insure that you are using the same file name. You will receive the following warning: The file comp_upload_xxxxxxx.csv already exists. Do you want to replace the existing file?</p>

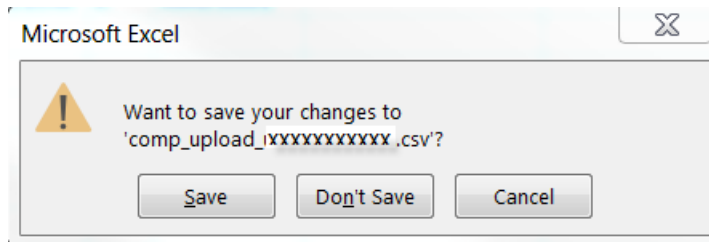


CLICK Yes to replace the existing file which will save it with the same name. Then the dialog box "Some features might be lost..." appears.





Click Yes.

Exit the file. The following dialog box pops up: (**Don't Save!**)



Click "**Don't Save**"

	<ul style="list-style-type: none">• Replacing an existing .csv file	 or  If you are saving a different .csv file, make sure to save it with a different name than the first file.
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4. Using FileZilla to copy the .csv file to the FTS production file server.									
4.1	Access the FTS File Sharing Server								
	<table border="1"> <tr> <td style="width: 20%;">Downloading FileZilla</td> <td>These instructions assume the application FileZilla [SSH SECURE File Transfer Client] has already been installed on your computer and the FTS connection has already been established. The FileZilla application and instructions for Using FileZilla with FTS are available at: http://www.usnhgateway.org/soft.html</td> </tr> </table>	Downloading FileZilla	These instructions assume the application FileZilla [SSH SECURE File Transfer Client] has already been installed on your computer and the FTS connection has already been established. The FileZilla application and instructions for Using FileZilla with FTS are available at: http://www.usnhgateway.org/soft.html						
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	<table border="1"> <tr> <td rowspan="7" style="width: 20%;">Access FTS Server</td> <td>START FileZilla.</td> </tr> <tr> <td>SELECT File from the menu bar.</td> </tr> <tr> <td>SELECT Site Manager.</td> </tr> <tr> <td>CLICK FTS.</td> </tr> <tr> <td>ENTER your User: and Account: info if it isn't already displayed.</td> </tr> <tr> <td>ENTER your password.</td> </tr> <tr> <td>CLICK Connect.</td> </tr> </table>	Access FTS Server	START FileZilla.	SELECT File from the menu bar.	SELECT Site Manager.	CLICK FTS.	ENTER your User: and Account: info if it isn't already displayed.	ENTER your password.	CLICK Connect.
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	<table border="1"> <tr> <td rowspan="6" style="width: 20%;">Access your dropoff folder</td> <td>In the Remote Site: window pane [MIDDLE RIGHT] you will see /fts/ already entered. DOUBLE CLICK the folders listed in the Filename column until you reach the last folder as defined for your group:</td> </tr> <tr> <td>GSC HR: /fts/gsc/hrs/user_dropoff/hr</td> </tr> <tr> <td>KSC HR: /fts/ksc/hrs/user_dropoff/hr</td> </tr> <tr> <td>PSU HR: /fts/psc/hrs/user_dropoff/hr</td> </tr> <tr> <td>UNH HR: /fts/hrs/user_dropoff/hr/</td> </tr> <tr> <td>USNH HR: /fts/usnh/user_dropoff/hr</td> </tr> </table>	Access your dropoff folder	In the Remote Site: window pane [MIDDLE RIGHT] you will see /fts/ already entered. DOUBLE CLICK the folders listed in the Filename column until you reach the last folder as defined for your group:	GSC HR: /fts/gsc/hrs/user_dropoff/hr	KSC HR: /fts/ksc/hrs/user_dropoff/hr	PSU HR: /fts/psc/hrs/user_dropoff/hr	UNH HR: /fts/hrs/user_dropoff/hr/	USNH HR: /fts/usnh/user_dropoff/hr	
Access your dropoff folder	In the Remote Site: window pane [MIDDLE RIGHT] you will see /fts/ already entered. DOUBLE CLICK the folders listed in the Filename column until you reach the last folder as defined for your group:								
	GSC HR: /fts/gsc/hrs/user_dropoff/hr								
	KSC HR: /fts/ksc/hrs/user_dropoff/hr								
	PSU HR: /fts/psc/hrs/user_dropoff/hr								
	UNH HR: /fts/hrs/user_dropoff/hr/								
	USNH HR: /fts/usnh/user_dropoff/hr								
4.2	Copy the .csv file to the FTS dropoff folder								
	<ul style="list-style-type: none"> In the FileZilla Local Site: window pane [MIDDLE LEFT], DOUBLE CLICK on the folders listed in the Filename column until you reach the departmental directory containing the .csv file you want to copy to your FTS dropoff folder. 								
	<ul style="list-style-type: none"> If you are replacing an existing file make sure you use the same name when copying the .csv file to FTS. If you use a different file name two separate files will exist in your dropoff folder and the NZPCUPL process will process both files. Note: you must choose View -> Refresh from the FileZilla drop down menu after processing or reloading a file. Make sure the new file is there (new date & time stamp.) Processing a file removes it from the dropoff folder but FileZilla still show it there until you refresh it. 								
	Exit FileZilla								

5. Using NZPCUPL to Create COMP Transactions from the .csv file.		
5.1	Log into ECG VPN.	
5.2	Log into Banner HR.	
5.3	The Originator running NZPCUPL should review NTRROUT to ensure all three approval levels (CC_DEA, CC_DIR and CC_APP) have been defined for the COMPCH Approval Category. These values will be used to define the routing on the COMP Transactions created.	
5.4	Run NZPCUPL.	
	In the Go To... field on the Banner main menu type NZPCUPL and PRESS Enter.	
	USE Next Block to get to the Printer Control block. <i>Confirm the Printer: field is set to DATABASE.</i>	
	USE Next Block to get to the Parameter Values block.	
	Define Parameter 01 – Audit or Commit Indicator	<p>'A' Audit When the process is run in this mode it will generate error reports but it WILL NOT create COMP Transactions for user approval and completion.</p> <p>'C' Commit When the process is run in this mode it will generate error reports and it WILL create COMP Transactions for user approval and completion.</p> <p>ALWAYS run the process in A – Audit mode first to check for errors.</p> <p>Use the Values drop down list and DOUBLE CLICK the mode to select it.</p>
	USE Next Record to navigate to the next parameter value.	
	Define Parameter 02 – Campus/BSC name	<p>Campus/BSC name.</p> <p>Use the Values drop down list and DOUBLE CLICK the Campus/BSC name.</p>
	USE Next Record to navigate to the next parameter value.	
	Define Parameter 03 – Fiscal Year	Fiscal Year associated with compensation transaction effective date.
	Submit/Run NZPCUPL	<p>USE Next Block to get to the Submission block.</p> <p>CLICK the save Icon to submit/run the NZPCUPL process. <i>The process may take a few minutes to run.</i></p> <p>WRITE DOWN the process number displayed in the BOTTOM LEFT corner of the Banner window. <i>You will use this number to select the appropriate output for review.</i></p>

	<p>Review Output Reports</p>	<p>SELECT Options menu.</p> <p>SELECT Review Output [GJIREVO].</p> <p>File Name: CLICK the drop down arrow to view the output reports. You should see the following Output File names associated with ##### being your process number:</p> <ul style="list-style-type: none"> • NZPCUPL_#####.lis1 COMP Upload Summary Report <i>This provides a summary of all the transactions in the file.</i> • NZPCUPL_#####.lis2 Comp Upload Error Report by TS ORG, Name, USNH ID <i>This report lists COMP Transactions with errors by TS Org.</i> • NZPCUPL_#####.lis3 Comp Upload Error Report by Name, USNH ID <i>This report lists COMP Transactions with errors by TS Org.</i> • NZPCUPL_#####.lis4 Comp Upload Processed Records Report by TS ORG, Name, USNH ID <i>This report lists COMP Transactions with errors by TS Org.</i> • NZPCUPL_#####.lis5 Comp Upload Processed Records Report by Name, USNH ID <i>This report lists COMP Transactions with errors by TS Org.</i> • NZPCUPL_#####.log <i>This report is a log of the processing and provides files selected and record counts.</i>
	View a Report	DOUBLE CLICK the report you want to view.
	Print a Report	<p>To print the report:</p> <ol style="list-style-type: none"> a. SELECT Options menu. b. SELECT Show Document (Save and Print File) option. c. CLICK Yes on the message displayed. d. CLICK on File menu in the browser window. e. CLICK Print.

	NZPCUPL_#####.log	<p>The log file has several pieces of valuable information:</p> <p>BANUID Banner HR User name of user who ran NZPCUPL.</p> <p>Campus The campus for which the csv file was uploaded.</p> <p>Load file The file name and path of the file loaded.</p> <p>14 lines loaded The number of lines loaded including header.</p>
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