

Steps for Creating and Uploading Employment Data

1) Download the Employment Excel Template, Tips Sheet, and Steps for Creating and Uploading Employment data.

- a. Located on the EIS Website – www.isbe.net/eis
- b. Listed in Resources Box (Right of the page) – “Excel Templates”
- c. Save the files to a local computer or server.
 - i) Excel Template is named “Employment Template”. Save the template to your computer/server before opening it in Excel. For example, right-click and perform ‘Save As’ or ‘Save Target As’.
 - ii) Save the Word documents (Tip Sheet and Steps) to your computer before opening them. The Tips and Steps documents are titled “Tips for Completing the Employment Template” and “Steps for Creating and Uploading Employment data”.

If you will need your current Employment file from EIS to update, do the next step, otherwise skip to Step 3.

2) Authorized user must request the Employment.csv file from IWAS/EIS/Request File screen.

- a. Authorized user must login to IWAS.
- b. Access EIS from System Listing.
- c. Click the *Batch Files* Tab within EIS.
- d. Select the School Year and the Employment option from the drop-downs.
- e. Click the “**Request File**” button to submit your request for your school/district’s file.
- f. To view your requested file, click the words “**click here**” in the Download section, until your file displays.
- g. Click the “**Download**” button to bring up the file.

Note: Steps 3, 4, and 5 are done in your Employment Template.

3) Create the Employment.csv File Header in Row 1/ Columns B, C, D, & E.

- a. Enter the number of employee records being submitted in Row 1/Column B.
- b. Enter the name of the file plus “.csv” in Row 1/Column C (Ex: Riverton.csv).

Note: This exact same name must be entered in the “SAVE AS” pop up (Name and Type fields) when creating the CSV file later in the process.

- c. Enter the date the .csv file is to be uploaded to IWAS/EIS in Row 1/Column D (Ex: 09/05/2008).
- d. Enter your district/school 15 digit RCDTS code in Row 1/Column E.

Note: This is the RCDTS assigned to your IWAS account. This can be verified via your IWAS profile.

4) Enter the Employee’s demographic and position data into the Employment excel template.

Starting with Row 3, enter all mandatory data (see Tip Sheet for mandatory fields) and, when available, any optional data for each employee record.

- a. Enter the Illinois Employment Identification number (IEIN) in Column A.
 - i) If the employee has not been assigned an IEIN by EIS, leave blank and a new IEIN will be assigned.
 - ii) If the employee has an IEIN, the system will update employment information and/or create/update a position.
- b. Optionally, enter an employee’s Social Security Number (SSN). If no IEIN available a SSN can be used to obtain the IEIN, create the Employment/Position. *Note: SSN will not be returned in the processed file.*
- c. Enter the Employee’s Last Name, First Name and Middle Name.

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- i) If the full middle name is unknown, use the middle initial (no period).
- d. Use the date format – mm/dd/yyyy - for all date fields, i.e. Birth date, Employment Start Date, Employment End Date, Position Start Date and Position End Date.
- e. Enter the Maiden Name (last name only).
- f. Use the correct code values (See the Data Elements document located on the EIS Website – www.isbe.net/eis for code values) for the following data elements:
 - i) 1 digit values for Gender (M or F), First Year in Position Flag (Y or N), Retired Employee Flag (Y or N), Primary Location (Y or N), Remove Record (Y or N)
 - ii) 2 digit values for Race, Position Time Frame, Employment End Reason and Grade Level Assignment.
 - iii) 3 digit values for Position Code. Refer to EIS data elements for codes located at www.isbe.net/eis.
 - iv) 4 digit school year (2015 represents the 2014-2015 school years).
 - v) 15 digit RCDTS codes
 - (1) The Employer RCDTS code will have the same first 11 digits as the district code with different last 4 digits which identify the school building.
 - (2) The Work Location RCDTS may be the same as the Employer or different.
 - vi) 3 digit value for Bilingual Language.
 - vii) 2 digit decimal value for the Full Time Equivalency factor (FTE) for the Serving school.

5) Save the Employment Excel Template as a Comma Separated Values (.csv) file.

- a. Save the Excel version (.XLS extension) to keep the employee record details just entered and to keep a backup/working document.
 - i) On the File menu click "**File > Save As**".
 - ii) In the File Name box type the same file name as you typed in 1-C excluding the ".csv". (Example: If 1-C has Riverton.csv, type Riverton in the File Name box.)
 - iii) Look at the **Save in:** and either take note of where the file is being saved or change the location to another desired location. Keep the Save As type, Microsoft Excel Workbook. Click **Save**.
- b. After saving the backup Excel file, click again on "**File > Save As > Other Formats**".
- c. In the **Save As: Type** List, select CSV (Comma delimited) to add the .csv file version.
- d. Click "**Save**".
- e. When notified via a pop up that the file may contain features not compatible with CSV click "**Yes**" to keep the workbook in the current format and finish saving the file.
- f. Close the csv file.
 - i) When prompted to save your changes to the CSV file click "**No**".

Note: There will be 2 files at the end of these actions: the excel template and a .csv file.

6) Upload the Employment.csv file via IWAS/EIS/Batch Files tab.

- a. Login into IWAS/EIS using appropriate role for uploading – RCDT/ADMIN role.
- b. Access EIS from System Listing.
- c. Click **Batch Files** tab within EIS.
- d. Click "**Browse...**" to locate the CSV Employment named – (what you entered in 1-C).csv.
 - i) Example: Riverton.csv
- e. Click "**Open**" to return to the Upload File page.
- f. Click "**Upload**" to complete the transmission to EIS.

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- g. If you receive a message indicating your file has been accepted and will be processed shortly go on to the Download Process (Step 7).
- h. If you receive any file format errors in red, you will want to go back to your Excel Template (XLS) version to make your changes and then re-create a new CSV file.

Note: Never make any changes in the CSV version as the formatting will be lost causing records to fail.

7) Review the Result Codes and Result Messages in Columns AA and AB after the file is processed.

- a. Click "**click here**" until you see the file listed.
- b. Click "**Download**" and then click "**Open**" in the dialog box to open the file in Excel.
- c. When you click the "Download" button a small dialog box will appear at the bottom of your screen.
- d. Click "**Save**" to save the file to your pc or a server.

Note: DO NOT OPEN THE FILE AND THEN SAVE WHILE THE FILE IS OPEN. Save the file before opening in Excel. For example, right-click and perform 'Save As' or 'Save Target As'.

Once you have saved the processed csv file, import data from the returned .csv file to the existing Employment Template (to add the returned IEINs) according to the following steps.

- e. Open the CSV file that you downloaded and saved in the previous step. (DO NOT SAVE IT AGAIN).
- f. Open the Employment Template (XLS).
- g. Keep both the CSV source data spreadsheet and the Excel Template open.
- h. On the CSV file, highlight the cells - Row 2/Columns A thru Z and all rows with employee data.
 - i) Make sure the Result Codes and Result Messages columns (AA and AB) are not copied to the template.
 - ii) Do not highlight beyond column Z (the result details or blank space following) or highlight the entire row (do not include the row number on the far left).
- i. Click "**Copy**".
- j. Navigate to the Employment Excel Template.
- k. Click on cell 3-A.
- l. Select "**Paste Special**".
- m. When the pop-up box opens, select "**Values**" and click "**Ok**".

8) Make changes if corrections are required and re-submit a new .csv file to IWAS/EIS.

Reminder: All corrections are made in the Employment Excel template.

- a. Open the original Employment template to make the corrections.
- b. Do not make any changes to information in the CSV format as the formatting will be lost and errors may result when submitted.
- c. Correct all errors identified by a Result code in Column AA (*Note: Result Codes can be found in the EIS File Format Document posted at www.isbe.net/EIS*).
- d. Change inaccurate data.
- e. When all changes are complete, create a new .csv file repeating the SAVE AS process above in Step 5.
- f. Upload the file via the EIS application at **IWAS/EIS/Batch Files** tab.