

Steps for Creating and Uploading Salary Data

- 1) **Download the Salary Excel Template, Tips Sheet, and Steps for Creating and Uploading Salary 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 “Salary 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 in Word. The Tips and Steps documents are titled “Tips for Completing Salary Template” and “Steps for Creating and Uploading Salary Data”.

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

- 2) **Authorized user must request the Salary.csv file from IWAS/EIS/Request File screen.**
 - a. An authorized user must login to IWAS.
 - b. Access EIS from System Listing.
 - c. Click *Batch File* Tab within EIS.
 - d. Select the School Year and the Salary 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 Salary Template.

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

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

Note: This same name should be entered in the “SAVE AS” pop up (Name and Type fields) when creating the CSV file later in the process. This will aid in identifying the file if you should have any issues later.

- c. Enter the date the .csv file is to be uploaded to IWAS/EIS in Row 1/Column D (Ex: 09/05/2015).
- 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/position and salary data into the Salary 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.
- b. Enter the Employee’s Last Name, First Name and Middle Name.
 - i) If the full middle name is unknown, use the middle initial (no period).
- c. Use the date format – mm/dd/yyyy - for all date fields, i.e. Birth date, Position End Date.
- d. 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) 2 digit values for Funding Source
 - 3 digit values for Position code. Refer to EIS data elements for codes located at www.isbe.net/eis.
 - iii) 4 digit school year (2013 represents the 2012-2013 school years).
 - iv) 15 digit RCDTS for employer RCDTS codes

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- v) 2 digit decimal value (xxxxx.xx) for Base Salary, Annuities, Bonuses, Retirement Benefits, and Other Benefits.
- vi) Numeric Value for Vacation days and Sick days.
- vii) 2 digit decimal value for the Full Time Equivalency factor (FTE) for the employees' position.

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

Open the Salary Excel Template, or if you already have the spreadsheet open, save the Excel version (.XLS extension) to save the record's data you just entered and also, to have a backup/working document.

- a. On the File menu, click "**File >Save As**".
- b. In the File Name box, type the same file name as you typed in cell C1 excluding the ".csv".
 - i) Example: If cell C1 has Riverton.csv, type Riverton in the File Name box.
- c. Choose the location to save the file. Keep "Excel Workbook" as the *Save as type*. Click "**Save**".
- d. After saving the backup file, on the File menu click "**File >Save As**" a second time.
- e. In the *Save as type* drop-down list, select CSV (Comma delimited) to create the .csv version of the file.
- f. Click "**Save**".
- g. When a pop up box displays stating the file may contain features not compatible with CSV, click "**Yes**" to keep the workbook in the current format and finish saving the file.
- h. Close the Excel file by clicking on the "X" in the upper right corner.
 - i) When prompted again to save your changes to the CSV file, click "**No**" or "**Don't Save**".

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

6) Upload the Salary.csv file via IWAS/EIS/File Upload screen.

- a. Login into IWAS/EIS using appropriate role for uploading – RCDT/ADMIN role.
- b. Access EIS from System Listing.
- c. Click **Batch File** Tab within EIS.
- d. Click "**Browse...**" to locate the CSV Salary file you saved.
 - i) Example: Riverton.csv
- e. Click "**Open**" to return to the Upload File page.
- f. Click the "**Upload**" button to complete the transmission to EIS.
- 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 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 T and U after the file is processed and returned to you.

- a. Click "**click here**" until you see the file listed.
- b. Your Salary file will appear in the grid with a "Download" button on the right. It will be a .csv file.
 - i) Example: Riverton.csv

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- 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.**

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 in Excel, the CSV file that you downloaded and saved in previous step.
- f. Open the Salary template (XLS).
- g. Keep both the source data spreadsheet (.csv file) and the Excel template open.
- h. In the source spreadsheet, highlight the cells - Row 2/Column A through Column S and all rows with employee’s salary data.
 - i) Make sure the Result Codes and Result Messages (T and U) are not copied to the template.
 - ii) Do not highlight beyond column S (the result details or blank space following) or highlight the entire row (do not include the row number on the far left).
- i. Select “**Copy**”.
- j. Navigate to the Salary Excel Template.
- k. Click on cell Row 3/Column 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 Salary Excel template

- a. Open the original Salary 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 T (*Note: Result Codes can be found in the EIS File Format Layouts Document posted at www.isbe.net/eis.*)
- d. Change inaccurate data.
- e. When all changes are complete, create a new .csv file following the SAVE AS process.
- f. Upload the file via IWAS/EIS/Batch Files tab.