Aesop Data Import: Substitute Load

from AppliTrack (GeneralASP)   Updated: July 2009

GENERALasp

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 Substitutes into Aesop.


Menu Bar

Downloading and Adding Necessary Data

The **Substitute 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 – Substitute 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.
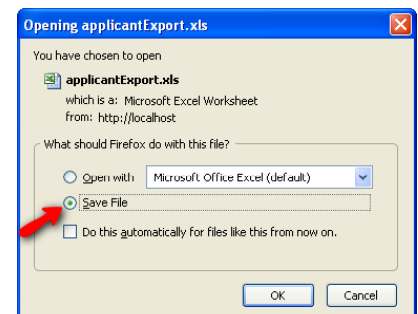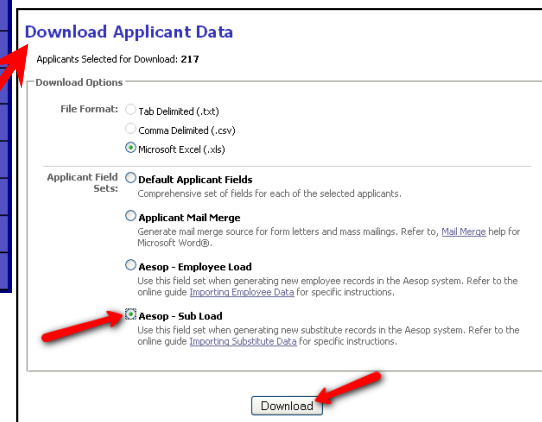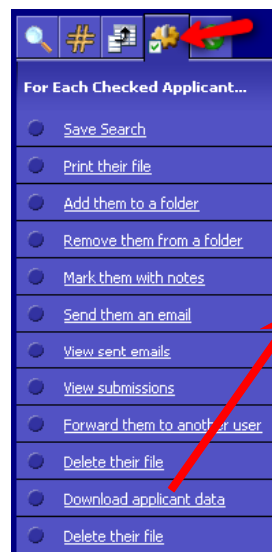
Save the file before advancing

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

Substitute Load Template (Required fields for New subs only)

Field Name	Description	Max Length	Required
Identifier[1]	Employee ID number (123456789 or 123-45-6789)	n/a	**Required**
Pin		4 or 5	**Required**
LastName	Last Name	30	**Required**
FirstName	First Name	30	**Required**
MiddleName	Middle Name	10	
Phone	i.e. 1234567890 or (123) 456-7890	n/a	**Required**
E-mail	joedoe@email.com	80	
ExternalLoginID[2]	Alternative Numeric Login ID (8 digits, or 11 – 20 digits)	20	
Active	**Y** or **N**	1	
Deleted	**Y** or **N**	1	
WebJobs	**Y** or **N** – Can the sub search the web for jobs?	1	
CanCancel	**Y** or **N** – Can the sub cancel an accepted job?	1	
InstExtID[3]	**External Number** from School's **General Information** page	n/a	
PayCodeExternalID	**External ID** from Pay Code		
Notes		255	
IsLongTerm	**Y** or **N**	1	
Sex	**M** or **F**	1	
ExternalID	Substitute Number/Identifier (i.e. Sub2553 or 566874)	20	
EarlistsStartTime[4]	XX:XX format	5	
LatestEndTime[4]	XX:XX format	5	
PinExpired	**Y** or **N** – Would you like the pin to expire?	1	
PinExpiresDate	i.e. 1/1/84 or 01/01/1984 – When will it expire?	n/a	
SubEmailJob	**Y** or **N** – Send substitute reminder job e-mail?	1	
Street1		50	
Street2		50	
City		20	
State	i.e. PA	2	
Zip	i.e. 12345 or 12345-6789 or 123456789	n/a	

Substitute Load Template continued

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] - 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.**

[3] – Assign this sub to a particular school and make them a permanent sub. The first job created at the school will be assigned to this sub automatically based on system settings. System settings are found in (Master Data | Organization Information | Permanent Substitute).

[4] – Refers to the Calendar available on the Web site.

Substitute Load Default Settings

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

Field Name	Default Setting
Deleted	**N =** Substitute is not deleted
Active	**Y** = Substitute is active
WebJobs	**Y** = Substitute can search web for jobs
CanCancel	**N** = Substitute cannot cancel accepted absence
PinExpired	**N** = Substitute's Pin will not expire
SubEmailJob	**Y** = Substitute will receive reminder e-mails for future jobs

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

Steps for loading Substitute Data

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

3. **Save** your file.

4. Open the Aesop **Web Navigator site**.
5. On the **Main Menu** bar, click **Extract/Import.**
6. Click **Import Data.**
7. In the **Import Type** drop-down window, click **Substitute 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
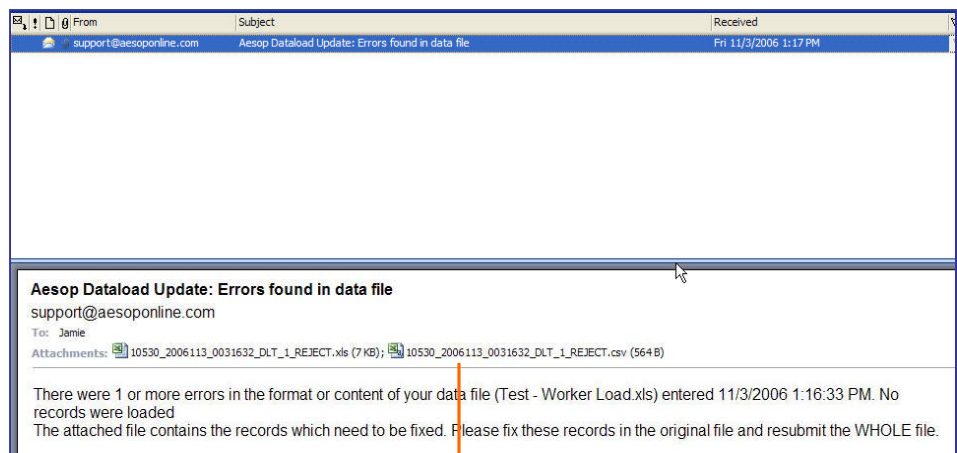
Syntactical Validation of Data

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.
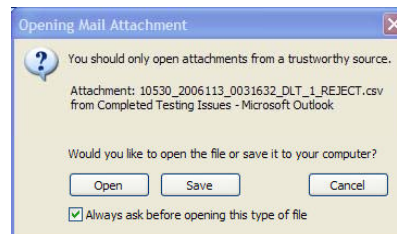
Your file fails the test.

> There were syntactical errors in your file. An email has been sent to jcrilley@aesoponline.com with more details.
>
> Try Again

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

☒	!	🗅	0	From	Subject	Received
				support@aesoponline.com	Aesop Dataload Update: Errors found in data file	Fri 11/3/2006 1:17 PM

Aesop Dataload Update: Errors found in data file
support@aesoponline.com
To: Jamie
Attachments: 📄 10530_2006113_0031632_DLT_1_REJECT.xls (7 KB); 📄 10530_2006113_0031632_DLT_1_REJECT.csv (564 B)

There were 1 or more errors in the format or content of your data file (Test - Worker Load.xls) entered 11/3/2006 1:16:33 PM. No records were loaded
The attached file contains the records which need to be fixed. Please fix these records in the original file and resubmit the WHOLE file.

Click **Open**

Opening Mail Attachment

❓ You should only open attachments from a trustworthy source.

Attachment: 10530_2006113_0031632_DLT_1_REJECT.csv
from Completed Testing Issues - Microsoft Outlook

Would you like to open the file or save it to your computer?

Open   Save   Cancel

☑ Always ask before opening this type of file

Microsoft Excel - 10530_2006113_0031632_DLT_1_REJECT [Read-Only]

File   Edit   View   Insert   Format   Tools   Data   Window   Documents To Go   Help

A1   *fx* Row #

	A	B	C	D	E	F	G	H	I	J	K
1	Row #	SSNum	Last Name	First Name	Reason						
2	1	1E+10	Doe	Jane	Invalid SSN. Must be 9 numeric digits. (9998877801)						
3											
4											
5											

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.

Your file passes the test.

Click **Yes** to process.

> Your file was successfully validated.
> Would you like to submit for processing?
>
> [Yes] [No]

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.

Substitute Load										
File Name	Created	By	Status	Test	Completed	#Recs	#Proc	#Add	#Chg	#Err
Copy of subload.xls	2006-06-30 09:21	Self	Completed successfully	No	2006-06-30 09:21	1	1	1	0	0	Show Details
Copy of subload.xls	2006-06-30 13:44	Self	Completed successfully	No	2006-06-30 13:47	15	15	15	0	0	Show Details
Copy of subload.xls	2006-06-30 13:48	Self	Completed successfully	No	2006-06-30 13:48	15	15	0	15	0	Show Details

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.

DataLoad Status (Detail)

Return to Summary

Substitute Load										
File Name	Created	By	Status	Test	Completed	#Recs	#Proc	#Add	#Chg	#Err
Copy of subload.xls	2006-06-30 09:21	Self	Completed successfully	No	2006-06-30 09:21	1	1	1	0	0

| Record # | External ID | Name | Add/Change | Succeeded | Comments |
| 1 | 126212154 | McGraw,Quick | Add | Yes | Loaded Successfully |

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.