



STROMBERG

*Enterprise Solutions for Time and
Employee Management*

Stromberg Enterprise 4.0
Reference Manual
Chapter 8 – Modules Menu

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CHAPTER 8: MODULES MENU

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Chapter 8: Modules Menu

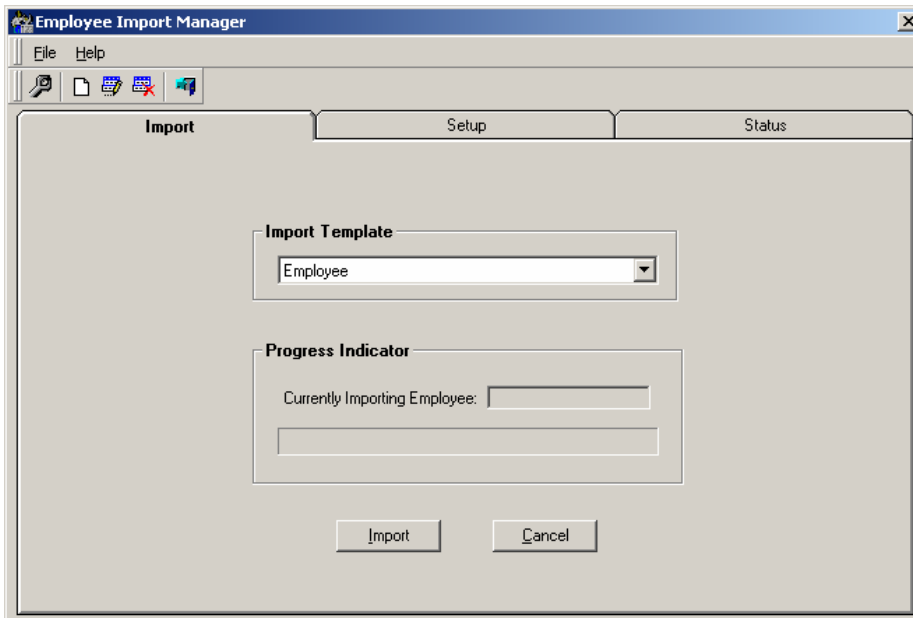
The Modules Menu contains the Employee Import Manager in addition to other optional companion modules for use with *Stromberg Enterprise*. An example of this menu appears below.



Employee Import Manager

The Employee Import Manager option will transfer employee information from your ASCII import file (Comma Delimited or Fixed Length) into the appropriate fields within the Employee File Maintenance section. This process saves time by eliminating the need to re-key all of the information and allows you to load new employees into your existing database from your payroll or HR program.


The Employee Import Manager incorporates the use of an interactive wizard to assist you in preparing the module for use. Selection of the Employee Import Manager option from the Modules menu displays the following screen.



Preparing the Employee Import Manager

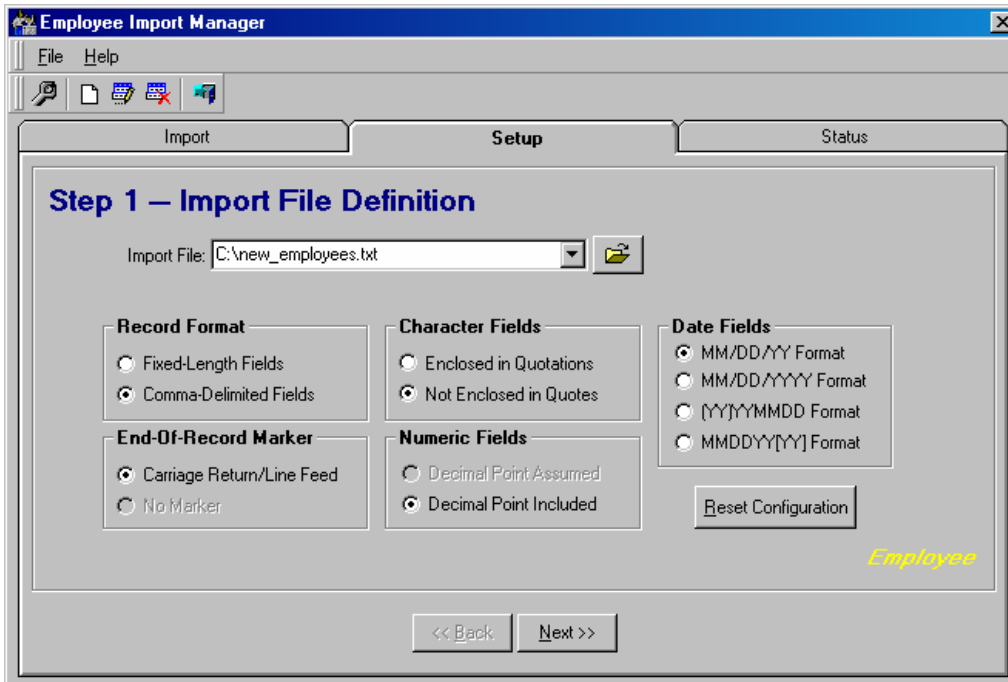
Before using the Employee Import Manager, you must first map the location of each type of field in your file and choose which information you need to import in the Setup tab.

The Setup tab of the Employee Import Manager contains a Setup Wizard. This wizard takes you through each step in preparing your module for use. You may display the Setup Wizard in one of two ways.

Selecting the Setup icon , located just under the File option.

Clicking the Employee Import Manager Setup tab.

The Setup Wizard



The screenshot shows the 'Employee Import Manager' application window with the 'Setup' tab selected. The window title bar includes 'File' and 'Help' menus. The 'Import' tab is also visible. The main area is titled 'Step 1 – Import File Definition'. It features an 'Import File:' text box containing 'C:\new_employees.txt' and a file selection icon. Below this are five configuration sections, each with radio button options:

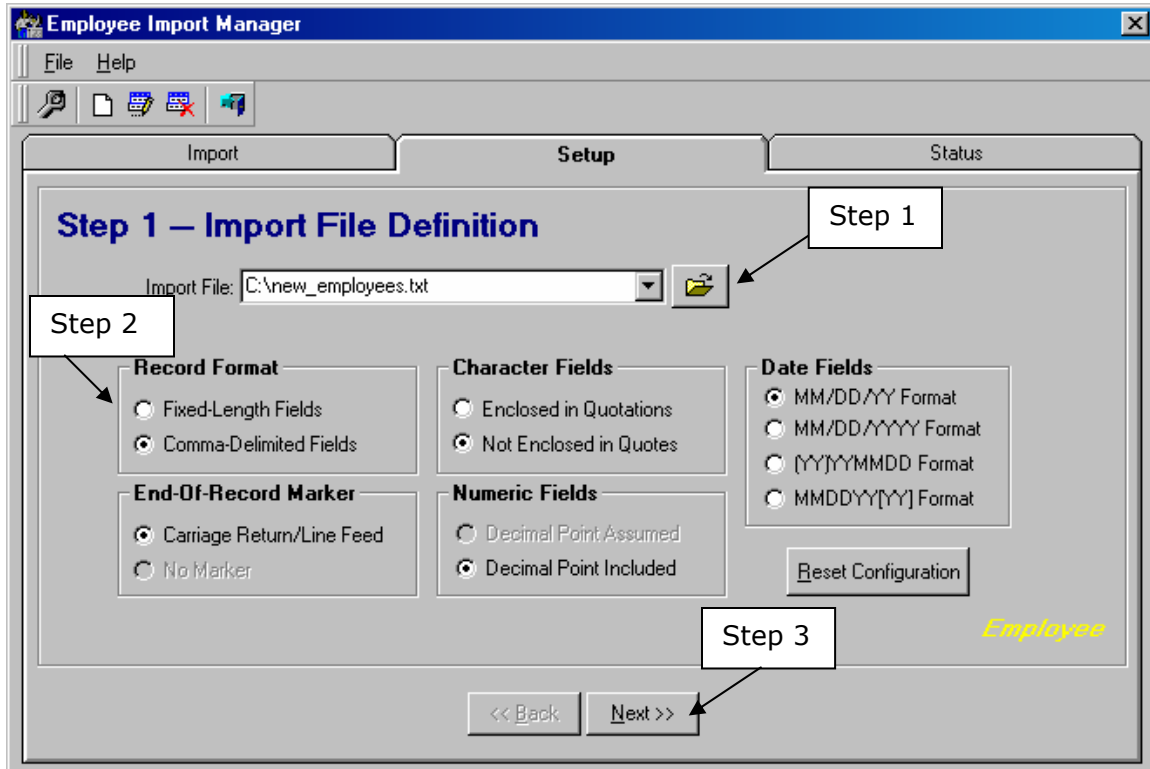
- Record Format:** Fixed-Length Fields, Comma-Delimited Fields
- Character Fields:** Enclosed in Quotations, Not Enclosed in Quotes
- Date Fields:** MM/DD/YY Format, MM/DD/YYYY Format, [YY]YYMMDD Format, MMDDYY[YY] Format
- End-Of-Record Marker:** Carriage Return/Line Feed, No Marker
- Numeric Fields:** Decimal Point Assumed, Decimal Point Included

A 'Reset Configuration' button is located to the right of the Numeric Fields section. At the bottom of the wizard are '<< Back' and 'Next >>' buttons. The word 'Employee' is written in yellow in the bottom right corner of the main area.

Import File Formats

Field Name	Type	Width	Description
Employee Number	Character	10	Employee Number
Full Name (Last, First)	Character	30	Last Name, First Name (must be last name followed by a comma, a space, then the first name)
*First Name	Character	Variable	Employee First Name
*Last Name	Character	Variable	Employee Last Name
Department Number	Number	15	Department #
Payroll Rule Name	Character	10	Payroll Rule Name
Clock Name	Character	10	Name of Clock
Restriction Name	Character	10	Name of Restriction
Supervisor Number	Character	03	Number of Supervisor
Auto-Schedule Name	Character	10	Automatic Schedule Name
Badge Number	Number	10	Employee Badge Number
Wage Rate	Number	08	Wage Rate (assumed 4 decimal)
Employee Status	Character	01	Status: A=Active; I=Inactive; S=Salary; T=Terminated
User Field 1 - 12	Character	33	User Fields 1 -12
Hire Date	Date	08	Hire Date (MM/DD/YY)
Holiday Credit After Date	Date	08	Holiday credits after this date (MM/DD/YY)
Non-Home Dept. 1 - 9	Character	15	Non-home department
Non-Home Wage 1 - 9	Number	04	Non-home wage rate (assumed 4 decimal)
Hrs worked per week	Number	04	Salary hours (assumed 2 decimal)
Email Address	Character	100	Email address
Address 1	Character	50	Address 1
Address 2	Character	50	Address 2
City	Character	30	City
State	Character	02	State
Zip Code	Character	10	Zip Code
Telephone Number	Number	20	Telephone Number
EBT Rule	Character	10	EBT Rule
eAccess/eKiosk Login	Character	20	e-Access/e-Kiosk Login Name
eAccess / eKiosk Password	Character	20	e-Access/e-Kiosk Password
Offset Hours	Number	04	Hours to offset clock
PC Entry	Character	01	PC entry access (either E for eAccess, K for eKiosk or B for both)
Can Use Telephone Attendance Module	Character	01	TAM access (Y or N)
NT Login Name	Character	25	NT Login Name

Employee Import Manager Setup Procedure



To setup the Employee Import Manager, use the following procedure:

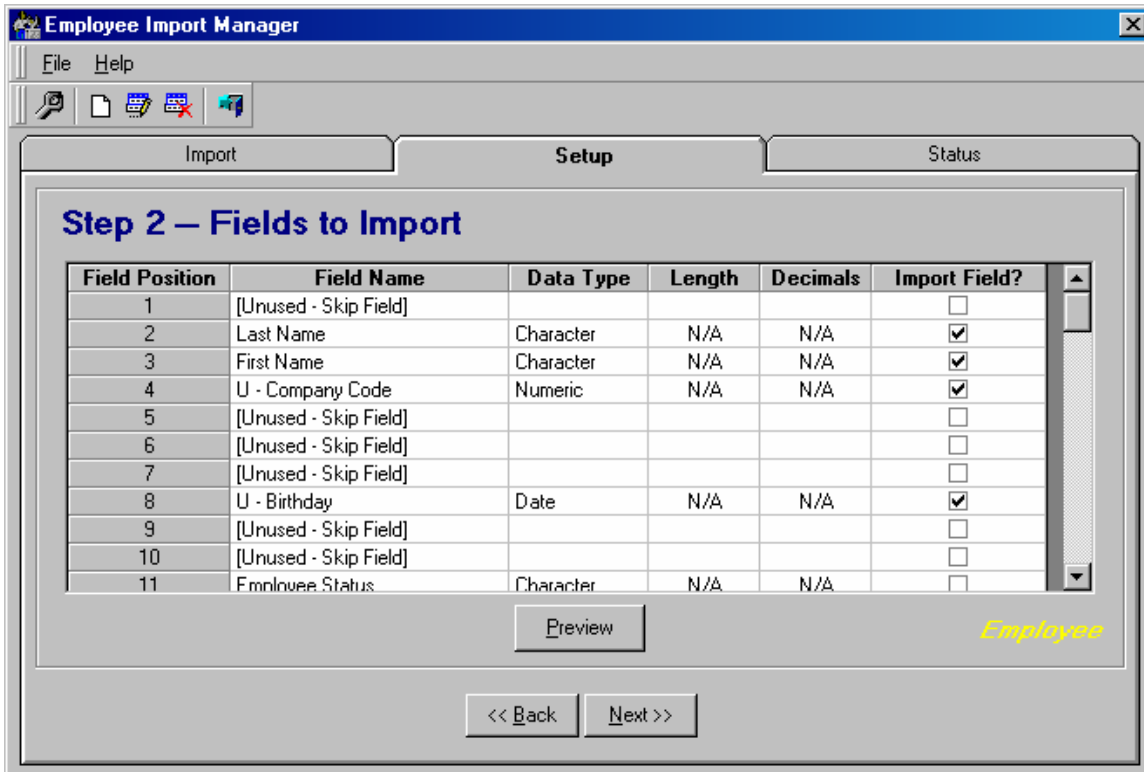
Enter the complete path for the Import File including the drive, directory and file name. Enter this path manually, or browse to the location by clicking the Browse icon to the right of the field.

Select the specifications for the Record Format, Character Fields, Date Fields, End-Of-Record Marker and the Numeric Fields that match your import file.

Note: You must select an End-Of-Record Marker. Generally, the default of Carriage Return/Line Feed is the correct setting to use.

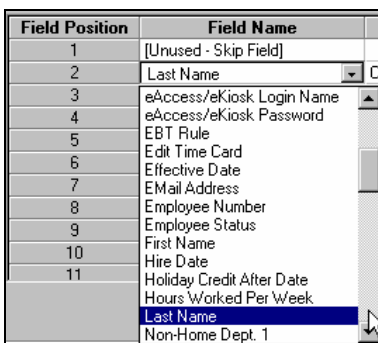
- Please note that Fixed Length Fields is the default and if no selection is entered, this default will be assigned by the program.
- Some programs export ASCII Character Fields enclosed in quotation marks. If you are using this type of ASCII file, make the appropriate selection. If not, choose the Not Enclosed in Quotes option.
- If you need the program to assume a decimal point location in the number, specify the Decimal Point Assumed option.
- The Date Fields option selected determines the display format for the dates.
- Selection of the Reset Configuration button restores the system defaults. Do not use this button unless you want to clear the settings and start again.

Continue setting up the module by clicking the Next button. This action displays the Fields to Import screen of the Wizard, as shown below.



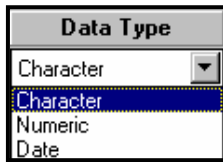
Use the Fields to Import screen to define the information for each field in the file you want included in the import. If you have specified Comma Delimited Fields, any decimal information contained in numeric fields must include the decimal. If you have selected the Comma Delimited option for the Record Format, the program will not permit you to enter Field Length and Decimal information in the Fields to Import screen. Select the field information contained in the import file and link the ASCII file information to the appropriate fields using the drop-down lists. Make sure you define each field in the Import File in the correct order without skipping any consecutive fields. If your Import File record contains any blank fields, make sure they display as (Unused - Skip Field) in the Field column.

Display additional fields by selecting the Page Down button.



Enter the field information for the Import File. To streamline the process of defining the relationship between the ASCII file fields and the Employee File Fields, a dialog box is provided. Use these options to associate the ASCII file field information with the field of the Employee File in the *Stromberg Enterprise* system, which is designated to receive the information. Click the down arrow to the right of the field description to display the dialog box (shown on the following page) from which you can make your selection.

Note: Selection of the Field automatically fills in the Data Type for the Import based on your Import File Definition setup. Once filled in you may change the Data Type by selecting from the drop-down list.



Suppose your ASCII file contains Employee Number, Last Name and First Name information in the first three fields. You would select Employee Number from the dialog box on the ASCII Field #1 line, Last Name from the dialog box on the ASCII Field #2 line, and First Name from the ASCII Field #3 line. To correctly link the data, you must know the precise layout of the import file.

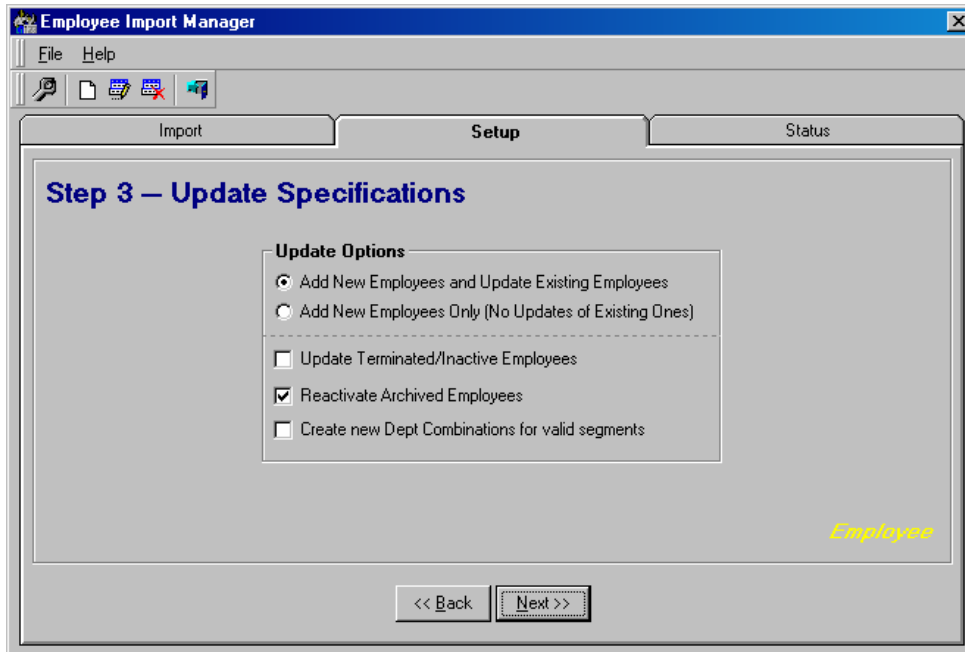
Display a Preview of the Import by clicking the Preview button. This Preview screen displays actual data as it appears in the Import. If the data does not align correctly in the screen view displayed, simply adjust your field lengths and use the Preview until the data correctly aligns.

Enter the actual Length (width) of the field, in the space provided.

Length	Decimals
0	0

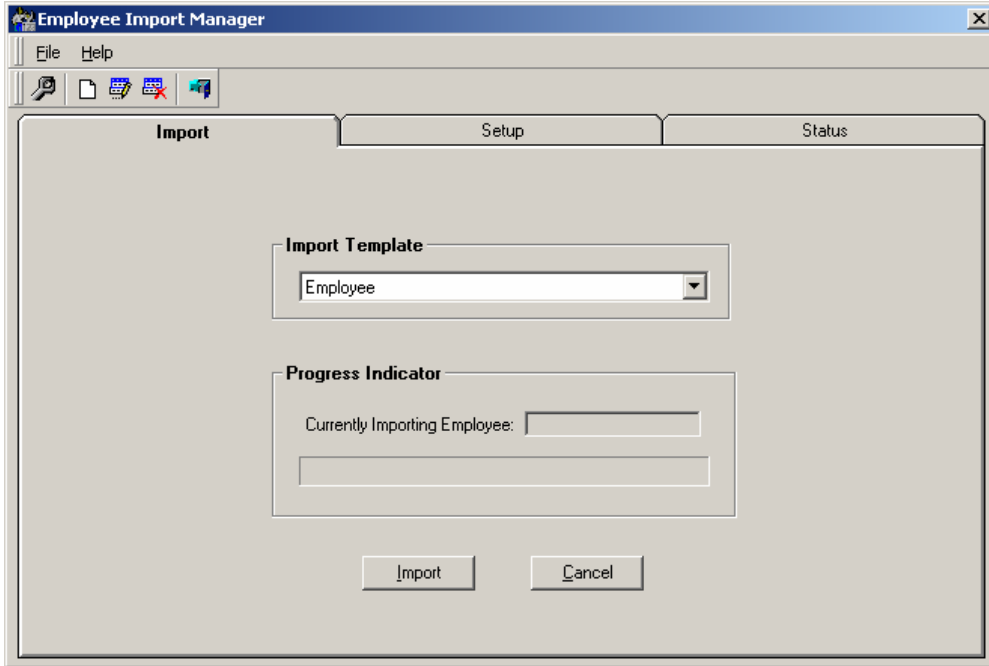
If you have selected your Import File Definitions as a Comma Delimited file, you will not be given access to the Length parameter. If your field is numeric, enter the number of Decimal places that are contained within the field information. For example, if the field contained the information 12345 and you want the data to be interpreted as 123.45 you would enter the Length as 5 and the Decimal as 2. If the field contained the information 123.45, you would enter the Length as 6 (including the decimal as a place) and the Decimal as 2. Continue the setup by clicking the Next button to display the File Specifications screen of the Setup Wizard shown on the following page. Please note that Department Number, Payroll Rule Name and Clock Name are required fields. You must check these three fields in this screen even if you plan to use the default entries that will be provided by the Import Module. You have the option of choosing not to import or update certain fields, even if they are contained in the ASCII file and defined in the Import File Specification. Include or exclude these fields by selecting or deselecting the field name in the File Specifications screen. Selections made here apply to the default as well as the imported fields.

Continue the setup process by selecting the Next button, which displays the Update Specifications tab, shown below.

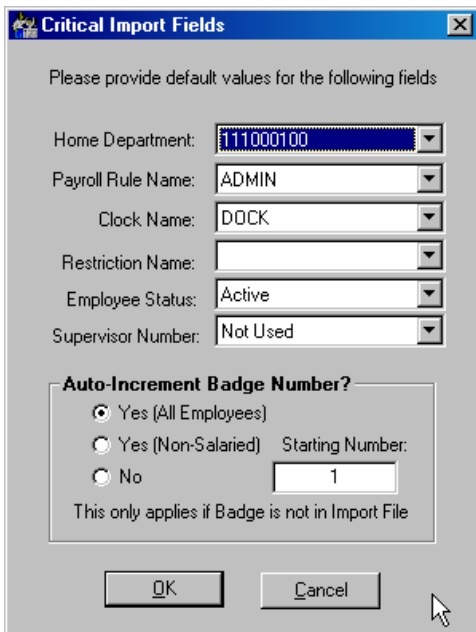


The Update Specifications tab provides options that define the update criteria for the import. These options enable you to add new employees and update existing employees or to only add new employees. If you want to update terminated or inactive employees, reactivate archived employees or create new Department Combinations for valid department segments, activate those options by placing a check in the corresponding box.

Select the Update Options you want then click the Finish button to return to the Import tab, as shown below.



Once the Import tab appears, select the Import button to display the Critical Import Fields screen.



The program requires that certain fields contain valid information for proper operation. Therefore, you must assign a default Home Department, Payroll Rule, and Clock Name in the Critical Import Fields screen. However, you may omit the

Restriction Name field by selecting "Not Used" in the dialog box, if your system does not use this feature.

If you have selected Employee Status in the File Specifications of the Import file, the status of the employee will be contained in the import. If no default is selected, then all employees will be given the status of Active. If desired, you may choose a default Supervisor and reassign a different Supervisor after employees have been imported. If desired, you may elect to have the program automatically assign the Badge Number by choosing the Auto-Increment option and entering the starting number for the sequence. Selection of these options will automatically assign a Badge or Employee Number to employees who do not already have one assigned to them. Please note that the Auto Increment of Badge Numbers should only be used if you have not selected Badge Numbers in the File Specifications of the Import File.

You may choose any existing value for each field to "plug in" this Default Value for the corresponding field in the Time & Attendance system. If the field information does not exist in the import file, the information contained in the program uses the Default Value field specified here. To eliminate unnecessary editing, when choosing default settings, choose settings that will be used by the majority of employees.

Select Ok to begin the import process. The Progress Indicator at the bottom of the screen will advise you of the status of the import.

Note: When exiting the program, a prompt appears asking if you wish to save the Current Configuration as a template. If you choose Yes, the next time you enter the Employee Import Manager all settings established will be available in the Template drop-down list.

Data Loader Module

The Stromberg Data Loader is a companion module included with the program and designed for use with external scheduling sources. Combining both Schedule and Transaction loading functionality, the Data Loader Module contains the Schedule Loader and Transaction Loader tabs. Through settings contained in these tabs, employee schedules and transactions created from an outside source may be loaded directly into the program in the form of an ASCII Text File.

Creating Schedules

When importing schedules from an external source the format should be comma-delimited and must be in the following sequence:

Employee Number - 10 Characters,

Employee Number is the unique number used to identify each employee and may contain no more than 10 characters maximum.

For the import, the employee number must be front-filled with leading zeros to equal a 10-digit number.

Days In Period - Number (2-digit: 00 to 90),

This 2-digit number reflects the total days in the employee's Rollover Period. Valid entries are from 00 to 90.

ROLL - 1 CHARACTER (Y OR N),

Indicates if you want the program to roll over or re-populate the employee schedule. Enter your preference for the schedule roll over by either a Y (for Yes) or N (for No).

MEAL - NUMBER (3-DIGIT: 000 TO 120),

This 3-digit entry indicates the number of minutes for the scheduled employee's meal interval and may be in a range between 000 and 120.

Example: 030 = 30 minute meal; 120 = 2 hour meal.

Schedule - Characters as follows:

Date (10), (08/01/2000) *Must include slash to separate numbers.

Type (1), (1=Temp 2=Permanent)

In1, (Start time 8:00am or 0800)

In2, (Dept 2 Start time)

In3, (Dept 3 Start time)

In4, (Dept 4 Start time)

In5, (Dept 5 Start time)

Out, (End time)

Reclassifier (1)

Dept1 (15), (1st Department Transfer)

Dept2 (15), (2nd Department Transfer)

Dept3 (15), (3rd Department Transfer)

Dept4 (15), (4th Department Transfer)

Dept5 (15), (5th Department Transfer)

Shift (1), (1, 2, or 3)

Please note that the maximum character value is displayed in parentheses. For example, a maximum character value of 15 will be displayed as (15).

Note: You may enter all Start and End time values as well as Department Transfer times in either HH:MM or 24-hour time formats (08:00am / 0800; 4:30pm / 1630). However, in our example below we have used the 24-hour time format.

Example:

```
0000001234,14,Y,030,08/01/2001,2,0800,1030,1330,0000,0000,1800,A,123456789
012345,098765432109876,102938475609812,135790864212345,24680975312345
6,1
```

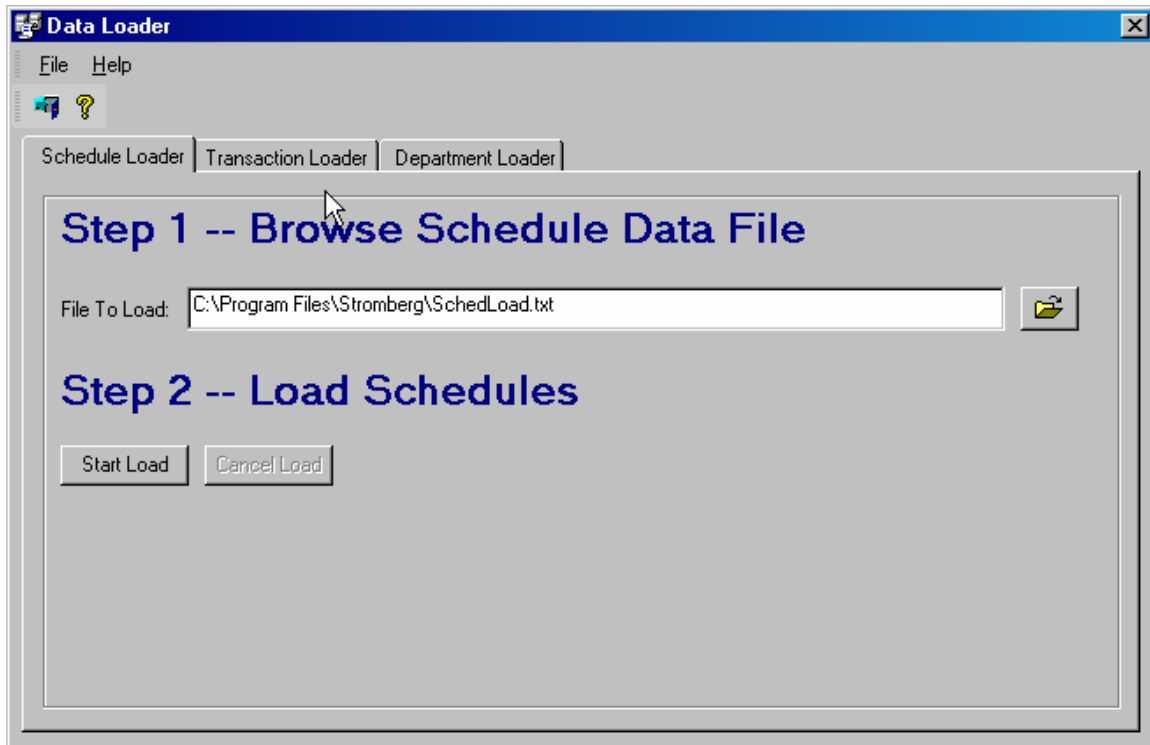
To further illustrate our example, the following is a breakdown of the file contents shown above. Please note that each in punch must have a department number associated with it.

```
0000001234, - Employee Number
14, - Days in Period
Y, - Roll Over
030, - Meal
08/01/2001, - Schedule Date (Must be in this format)
2, - Schedule Type
0800, - Start Time Dept 1 (In) (08:00am)
1030, - Start Time Dept 2 (In) (10:30am)
0330, - Start Time Dept 3 (In) (01:30pm)
0000, - Start Time Dept 4 (In) (not used)
0000, - Start Time Dept 5 (In) (not used)
1800, - End Time Out (05:00pm)
A, - Reclassifier
123456789012345 - Department 1
098765432109876 - Department 2
102938475609812 - Department 3
135790864212345 - Department 4
246809753123456 - Department 5
1, - Shift
```

Note: If a schedule does not have a matching employee number from the employee table or if the schedule date is not valid, that schedule will not be added.

Loading Schedules

Once you have created your schedules, they must be imported into the program from the external source using the Schedule Loader.



1. Select the Data Loader option from the Modules menu and select the Schedule Loader tab to display the screen above.
2. Enter the complete path for the location of the external schedule file (including drive letter, directory and filename. You may also browse to the location by clicking the folder icon to the right of the File To Load field.

After specifying the correct path for the file that you want to load, select the Start Load button to load the schedule into the program.

Creating Transactions

When importing transactions from an external source the format should be comma-delimited and must be in the following sequence:

Example -

0000617397, 1110749-5306, 5/22/2002, Y, 01, -800, 456, H

Employee number - 10-characters

The Employee Number must be front-filled with leading zeros to equal a 10-digit number. This number is validated against existing employees if not a current employee, the transaction will be written to a log file.

Department Number – 15-characters or less

The program will only validate if it contains 15 or less characters.

If you exceed the 15-character limit, the program will write an error message to a log file.

Transaction Date

If this is a valid date, the program will validate it.

The Transaction Date is a required field.

If not a valid date the program will write it to log file.

Overtime - 1-character (Y or N)

If nothing is passed, the program assumes there is no Overtime.

This is not a required field.

If this is not the expected data, an error message will be written to a log file.

Category Name – (8 character)

The program validates this number against existing categories

If it is not an existing category, it will be written to a log file.

Transaction Value (Amount)

Depending upon the Category, the program allows Time, Dollar or Count transaction type. If Time, whatever value is passed is converted from hours to minutes. If it fails, the program will write it to a log file. If Dollar, the program checks if it is a number and formats the data using the format "0.00" (max size 6 characters to the left of the decimal point and 2 to the right). If it fails, the program will write it to a log file. If Count, the program checks if it is a number and formats the data using the format "5" (max size 7 characters). If it fails, the program will write it to a log file.

Supervisor - 3-character

The program checks if the number of characters is greater than 3 and validates against existing supervisor.

If no data is passed, it assumes the supervisor is the currently logged supervisor.

If this is not an existing supervisor, an error message will be written to a log file.

Holiday

H or T, H = Holiday, T = non-Holiday.

If nothing is been passed, assumes a T.

Field is not required. You can have:

0000656611, 1110749-5306, 9/12/00, Y, 01, 800, 456,

H

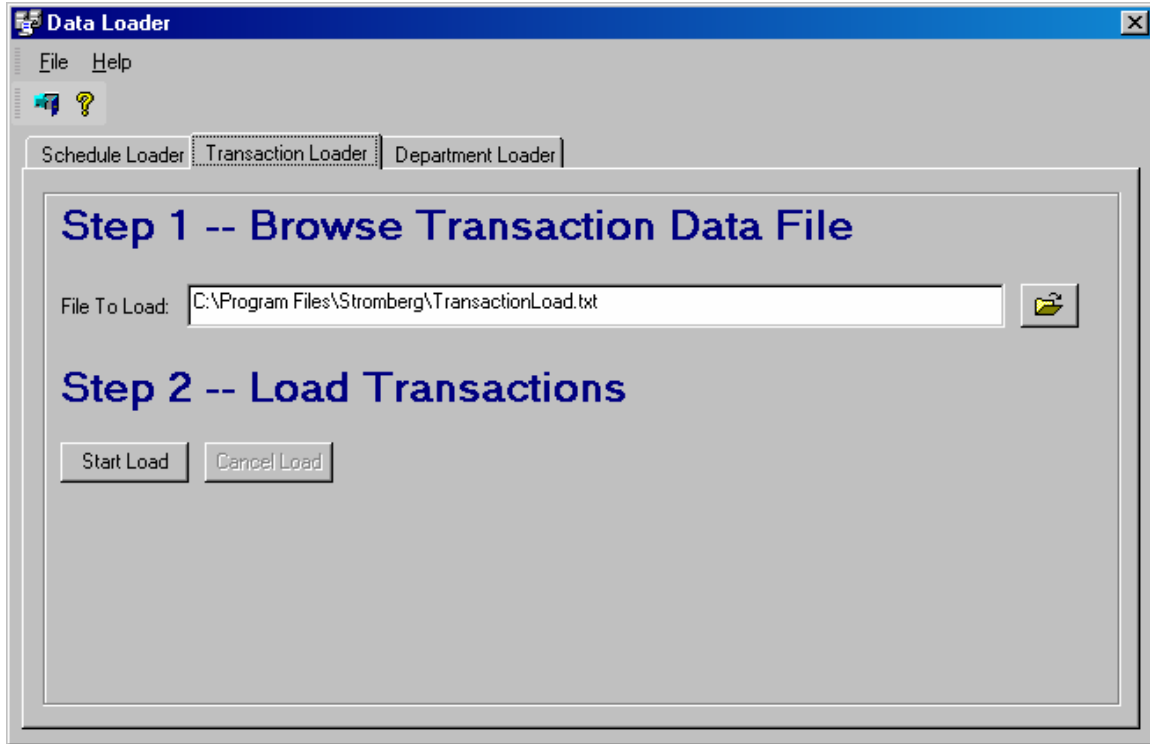
0000656611, 1110749-5306, 9-12-00, Y, 01, 08:00, 456

Assumes is T

0000634265, 1110749-5306, 9/11/2000, Y, 01, -800, 456, Assumes is T

Loading Transactions

After creating transactions, you must load them from the external source using the Transaction Loader.



To load a transaction from an external source, use the following procedure.

Select the Data Loader option from the Modules menu and select the Transaction Loader tab to display the screen above.

Enter the complete path for the location of the external schedule (including drive letter, directory and filename). You may also browse to the location by clicking the folder icon to the right of the File To Load field. After specifying the correct path for the file that you want to load, select the Start Load button to load the schedule into the program.

Creating Department Import Files

Department Loader accepts a comma delimited text file that must be in the following format:

"Dept", "Desc"

Dept – Department Number

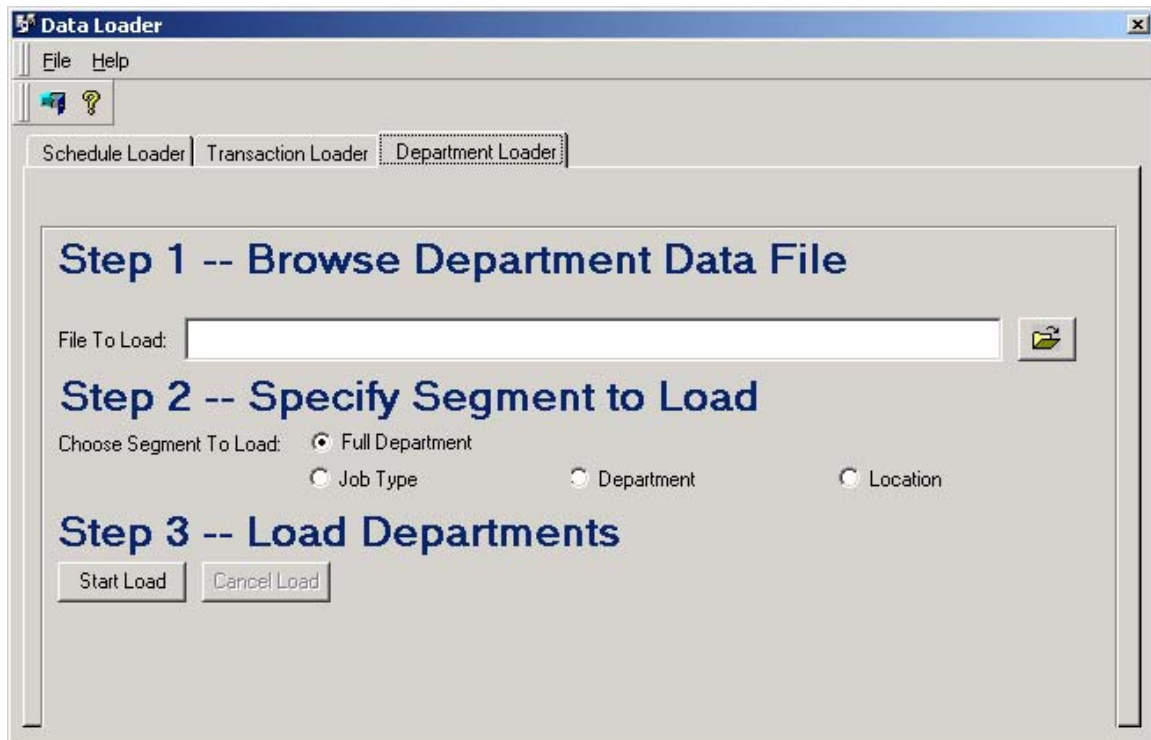
A maximum of 12 characters for an individual department segment.
15 characters for the full department.

Desc – Department Description

A maximum of 30 characters for an individual department segment.
35 characters are allowed for the full department.

Loading Departments

See "Creating Department Import Files" for details on the required import file format.



- Import Departments from a comma-delimited source
- Browse to the location of your import file.
- Select whether you are importing full departments or a specific department segment.
- Select "Start Load" for the departments to begin loading.