

State of Wisconsin Department of Administration

POTT File Upload Job Aid

Version 1.1

Version History

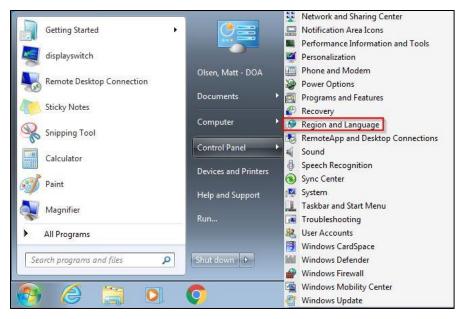
Version	Date	Editor	Description
1.0	12/9/15	Ashley Price	Initial release
1.1	11/18/19	Matt Olsen	Fluid and content update

Role: Agency Payroll Specialist

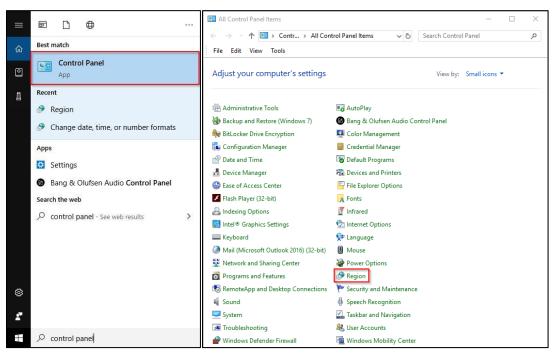
ADJUST COMPUTER SETTINGS

- 1. Navigate to the Region (and Language) window on your desktop:
 - a. Navigation: Start Menu > Control Panel > Region (and Language)

Windows 7:



Windows 10:



b. Click on Additional Settings

🔊 Region		\times							
Formats Location Admi	nistrative								
Formats Location Administrative Eormat: English (United States) Match Windows display language (recommended) Language preferences Date and time formats Short date: M/d/yyyy Long date: dddd, MMMM dd, yyyy Short time: h:mm tt Long time: h:mm:ss tt First day of week: Sunday Examples Short date: Short date: 10/11/2019 Long date: Friday, October 11, 2019 Short time: 1:19 PM Long time: 1:19:55 PM									
Match Windows display language (recommended) $\qquad \qquad \lor$									
Language preferences									
Short date:	M/d/yyyy	/							
Long date:	dddd, MMMM dd, yyyy	/							
S <u>h</u> ort time:	h:mm tt	/							
Long time:	h:mm:ss tt								
Formats Location Administrative Eormat: English (United States) Match Windows display language (recommended) ✓ Language preferences Date and time formats Short date: M/d/yyyy Long date: dddd, MMMM dd, yyyy Short time: h:mm tt Long time: h:mm:ss tt First day of week: Sunday Examples Short date: Short date: 10/11/2019 Long date: Friday, October 11, 2019 Short time: 1:19 PM									
Examples									
Short date:	10/11/2019								
Long date:	Friday, October 11, 2019								
Short time:	1:19 PM								
Long time:	1:19:55 PM								
	A <u>d</u> ditional settings								
	OK Cancel	Apply							

c. Highlight the List Separator field in Customize Format window

Numbers Currency Time Date						
Example Positive: 123,456,789.00	Negative: -123,456,789.00					
Decimal symbol:	. ~					
No. of digits after decimal:	2 ~					
Digit grouping symbol:	, ~					
Digit grouping:	123,456,789 ~					
Negative sign symbol:	- ~					
Negative number format:	-1.1 ~					
Display leading zeros:	0.7 ~					
List separator:	I ~					
Measurement system:	U.S. ~					
Standard digits:	0123456789 ~					
Use native digits:	Never ~					
Click Reset to restore the system defa numbers, currency, time, and date.	ault settings for Reset					

d. Type a Pipe in the keyboard by using Shift + Backslash

e. Click Apply to save the changes

FORMAT UPLOAD FILE

Deduction POTT

- 1. Open a *new* Excel spreadsheet
- 2. Enter data values in the following column order and format with no headers or footers:

Column Code	Column Name	Additional Instructions
EMPLID	Employee ID	
EMPL_RCD	Employee Record Number	Should match primary job
PLAN_TYPE	Deduction Plan Type	
BENEFIT_PLAN	Benefit Plan	
DEDCD	Deduction Code	
DED_CLASS	Deduction Class	A, B, N, or T
DED_CALC	Deduction Calculation	Always is A
PU_AMT	Amount	XXX.XX (positive value only)
ONE_TIME_CD	One Time Code	A, O, or R
SEPCK	Separate Check Number	Always is 0

NOTE: If copying data from an existing spreadsheet, make sure to use Paste Values in the new spreadsheet.

3. Enter all rows of data to be included in POTT

	А	В	С	D	E	F	G	Н	Т	J
1	10000011	0	10	DEAN	MEDIC	В	Α	108.5	Α	0
2	10000011	0	10	DEAN	MEDIC	Ν	Α	673.9	Α	0
3	10000011	0	20	BASSUP	BASLIF	в	Α	1.75	Α	0
4	10000011	0	20	BASSUP	BASLIF	Ν	Α	0.82	Α	0
5	10000011	0	25	SDL1U	DEPLIF	Α	Α	1.25	Α	0
6	10000012	0	10	HUMANE	MEDIC	в	Α	108.5	Α	0
7	10000012	0	10	HUMANE	MEDIC	Ν	Α	895.9	Α	0
8	10000012	0	12	EPIC	EPIC	в	Α	19.77	Α	0
9	10000012	0	14	VISION	VISION	в	Α	3.27	Α	0
10	10000012	0	30	ICIB1A	ICI	Α	Α	30.28	Α	0

- 4. Click File on the menu bar
- 5. Click Save As option to display in new window
- 6. Select location where file will be saved

- 7. Enter name for file in the File Name Field
- 8. Select CSV (Comma delimited) in the Save As Type list
- 9. Click Save

Earnings POTT

- 1. Open a *new* Excel spreadsheet
- 2. Enter data values in the following column order and format with no headers or footers:

Column Code	Column Name	Additional Instructions
EMPLID	Employee ID	
EMPL_RCD	Employee Record Number	
ERNCD	Earnings Code	
OTH_HRS	Hours	XX.XX (negatives allowed; decimals optional)
PU_AMT	Earnings Amount	XXX.XX (negatives allowed; decimals optional)
ONE_TIME_CD	One Time Code	Always is A
SEPCK	Separate Check Number	Always is 0

NOTE: If copying data from an existing spreadsheet, make sure to use Paste Values in the new spreadsheet.

3. Enter all rows of data to be included in POTT

	Α	В	С	D	E	F	G
1	10000001	0	DMC	0	2500	Α	0
2	10000002	0	DMC	0	2500	Α	0
3	10000003	0	DMC	0	2500	Α	0
4	10000004	0	DMC	0	2500	Α	0
5	10000005	0	DMC	0	2500	Α	0
6	10000006	0	DMC	0	2500	Α	0
7	10000007	1	DMC	0	1500	Α	0
8	10000008	1	DMC	0	1500	Α	0
9	10000009	0	DMC	0	2500	Α	0
10	10000010	0	DMC	0	2500	А	0

- 4. Click File on the menu bar
- 5. Click Save As option to display in new window
- 6. Select location where file will be saved
- 7. Enter name for file in the File Name field
- 8. Select CSV (Comma delimited) in the Save As Type list

9. Click Save

VERIFY FILE FORMAT

- 1. Locate file to be verified on your PC
- 2. Right click on file
- 3. Select Open With menu option
- 4. Select Notepad option

EarningsUpload	Open Print Edit Convert to Adobe PDF Convert to Adobe PDF and EMail Scan for Viruses Convert to Share	oft Excel C 1 KB
	Open with >	🔀 Excel
	Give access to Restore previous versions Send to Cut Copy Create shortcut Delete Rename Properties	 Notepad WordPad Search the Store Choose another app

5. Verify values are displayed with pipes (|) in between each field and no values are missing

<i>[</i>]] E	arning	jsUpload	- Note	epad	
File	Edit	Format	Viev	v Hel	р
1000	0000	1 0 D	1C Ø	2500	A 0
1000	0000	2 0 D	1C Ø	2500	A 0
		3 0 D			
1000	0000	4 0 DM	1C Ø	2500	A 0
1000	0000	5 0 D	1C Ø	2500	A 0
1000	0000	6 0 D	1C Ø	2500	A 0
1000	0000	7 1 D	1C Ø	1500	A 0
1000	0000	8 1 D	1C Ø	1500	A 0
1000	0000	9 0 D	1C Ø	2500	A 0
1000	0001	0 0 D	1C 0	2500	A 0

6. Save if any changes are made and close file

ENTER POTT

- 1. Navigate to Enter POTT By Batch page
 - a. Navigation: Workforce Administrator Homepage > Payroll Dashboard > Payroll Processing Tile > POTT Folder > Enter POTT – By Batch
 - b. Click Add a New Value
 - c. Enter Company, Pay Group, Pay Period End Date
 - d. Select Transaction Type
 - e. Click Add
- 2. Click Attach or View Supporting Documents
- 3. Click Add
- 4. Select file to be uploaded and click Upload
- 5. Check the Process File checkbox
- 6. Click Yes in the popup box to confirm this file

Are you sure th	is is One Time	e Transactior	n data file ? (0,0)
	Yes	No	

- 7. Click Save
- 8. Click Run WI_PY_1TIME (AE)

	Attach or View Su	pporting D	ocuments (1)			Run - WI_PY_1TI		Search Process Mo	nitor							
Personalize Find View Ali 🖾 🔛 First 🚯 1 of 1 🚯 Last																
	Comments	Seq#▲	*Empl ID	Empl Rcd	Name		Pay Status	Erncd	Description	Oth Hrs	Amount	*One Time Cd	Sepchk#			
1	P	1		Q 0	Q			Q		0.00	0.00	~	0] 3		
	Validate Submit							ated: 0 Error: 0 Kows: 0								
	Save F Notif	((👍 Add	Update/Dis	play

NOTE: This process may take several minutes to run depending on the file size and number of rows. When finished, you will see rows loaded on this page.

- 9. Click Validate
- 10. Fix any rows with errors
- 11. Click Submit