

3.2. Upload Census Data

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Once you have selected the primary census grid, to load census data into the software, select Census=>Download=>Current. Open the spreadsheet and save it on your hard drive as a .csv file, then either key data into the worksheet, or copy and paste from another source. You do need to have all your data in the worksheet in the format specified; also the columns need to be in the order of the selected grid. Prior to uploading the data into the system, we highly recommend reviewing the census data to ensure it is complete and accurate. For example, all compensation fields on the census must have compensation data.

Q.S. Tip: Select "Census", then "Edit" and add one participant to the Data Entry Grid screen that appears by entering the SSN and clicking the Add Participant button. You can then enter/select the rest of the fields and when you download the worksheet you'll have one participant's data added which will help in adding the rest. You will also see the help buttons for each data field within the grid and dropdown boxes for fields that need specific data.

Once you have all of the participant data entered into the worksheet, save it, then, select Census=>Upload. You will see a screen where you can browse for the file and select it. You also need to indicate whether you want entry dates reset, typically "Yes", and enter the number of rows to be uploaded.

Q.S. Tip: You may over-estimate the number of rows of data to submit. The system will stop uploading when a SSN/Employee ID is invalid or missing - e.g. when there's a blank line or SSN format is incorrect.

Click "Submit"; you will see a message indicating how many rows of data were uploaded. If you see an error message the most likely reason is that the file was in an incorrect format.

Q.S. Tip: The unique ID (e.g. c1eb549) associated with a grid is always in cell A3 on the worksheet that you download; when you upload, the software uses this to place the data in the correct system field. If the ID is not in the correct cell, or does not match, the upload will be aborted.
