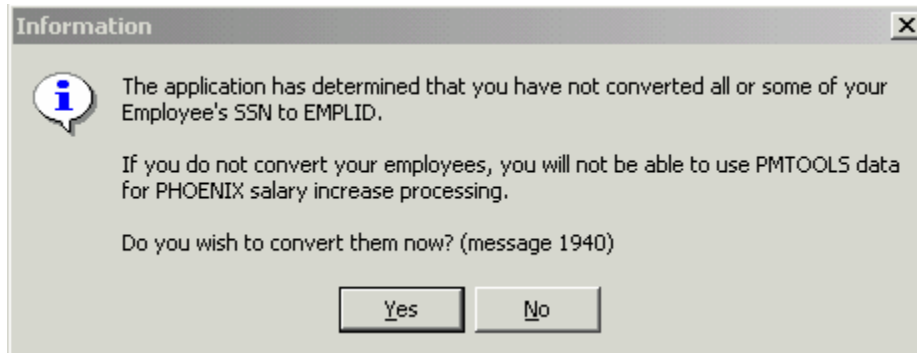


Converting Earlier Version PMTools Data from Social Security Number to Phoenix Employee ID in Ver. 2.0a

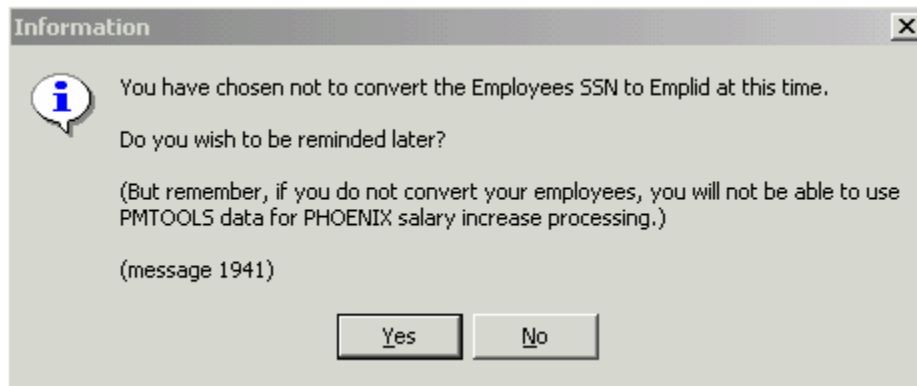
Conversion of PMTools data from Employee SSN to employee PHOENIX EmplID is applicable only to those users who have imported data into PMTOOLS Version 2.0a from a previous version.

While signing on to the new PMTOOLS, if the application detects any SSNs, it will prompt you with following message



If you chose to convert the data, click Yes.

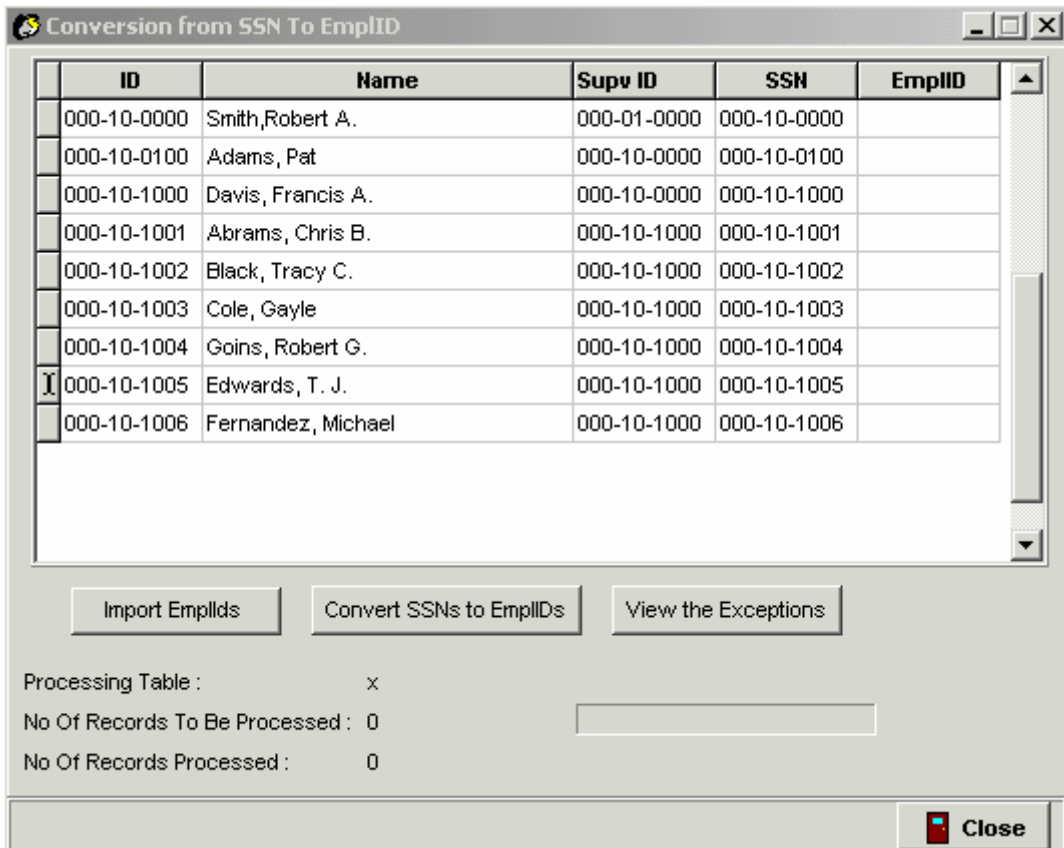
If you click 'No' you will be prompted with the following message.



This gives you an option for a reminder, until all your data has been converted to reflect EmplIDs and not SSNs.

THE CONVERSION.

If you chose to convert your data, the following screen will be displayed.



There are two methods for converting from SSN to EmplID:

- Manually entering the EmplIDs on the screen shown above, or
- Importing the data from a file

In either case, it will be most convenient if you run the PeopleSoft/Phoenix query - 0HR007_EmplId_SSN_XREF and send it to an Excel spreadsheet.

To Enter the Data Manually

Assuming you are using the query data, print the Excel spreadsheet. Then go to the screen above and click on the Column Title NAME to sort the data in the same order as the spreadsheet. Go through the list on the screen and enter the Emplid of the employee in the EMPLID Column. Use the up or down arrow key to go down the list.

To Import the Data from a File

Using the Excel spreadsheet from the query you can create a text file of SSNs and Emplids to import into the conversion. The text file must be in the format [SSN no dashes][EMPLID]. For example:

```
87439271600657153
79844830900741492
```

To create the file from the query Excel spreadsheet:

1. Delete all the columns except ID and SSN
2. Reverse the order of the columns in the spreadsheet (SSN first, ID second)
3. Delete the header row with the SSN and ID labels

4. Go to [File][Save As], select the location to save the file and the File Name, then change the “Save as Type” to **Formatted Text (Space delimited)**
5. Go to the conversion screen above and click the “Import EmplIDs” button at the bottom left, then locate and open the file you saved in Step 4. The data file will be imported.

Completing the Conversion

When you have finished manually entering or importing Emplids, click the ‘Convert SSN to Emplid’ at the bottom center of the screen to begin the process of conversion. THE CONVERSION ATTEMPTS TO CHANGE ALL SSNs ANYWHERE IN THE PMTools DATABASE TO A CORRESPONDING EMPLID. The processing time totally depends on the number of employees in the database.

If a corresponding EmplID cannot be found for an SSN in any part of the database, an exception will be recorded. A single missing EmplID may produce numerous exceptions (for example, in the employee record and the supervisor record if the SSN is for a supervisor). A report of exceptions can be viewed by clicking on ‘View the exceptions’ button.

Exceptions do not have to be corrected immediately. The basic functions of PMTools will continue to operate correctly without this information. **However, all exceptions related to current, active employee records must be corrected before completing and printing Performance Plans, MRFs or PMFs, and before the data can be used for salary increase processing in PeopleSoft/Phoenix.**