



You must have Microsoft Office 2003 or later to use this feature.

Import / Recover

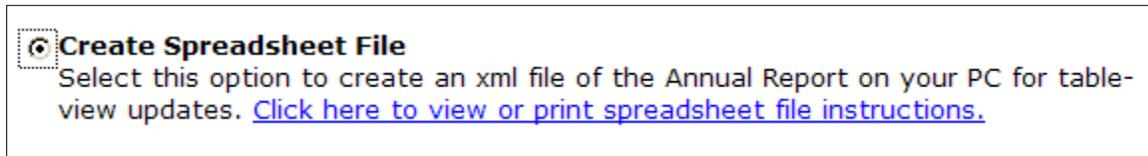
1. On the Annual Report – Import/Recover/Delete/Export screen, select the “Import from Employer File” or “Recover from TRS Annual Report” option and press the “OK” button to perform an import or recover.



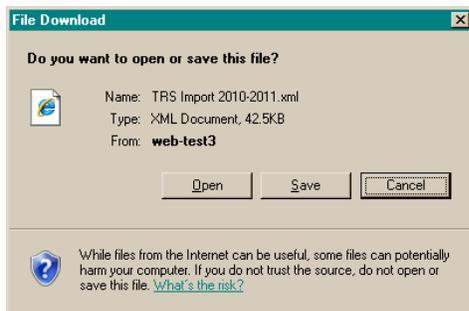
2. You may continue after you receive the email that the import or recover was completed.

Create Spreadsheet

3. On the Annual Report – Import/Recover/Delete/Export screen, select the “Create Spreadsheet File” option and press the “OK” button.



4. On the File Download screen, press the “Save” button.



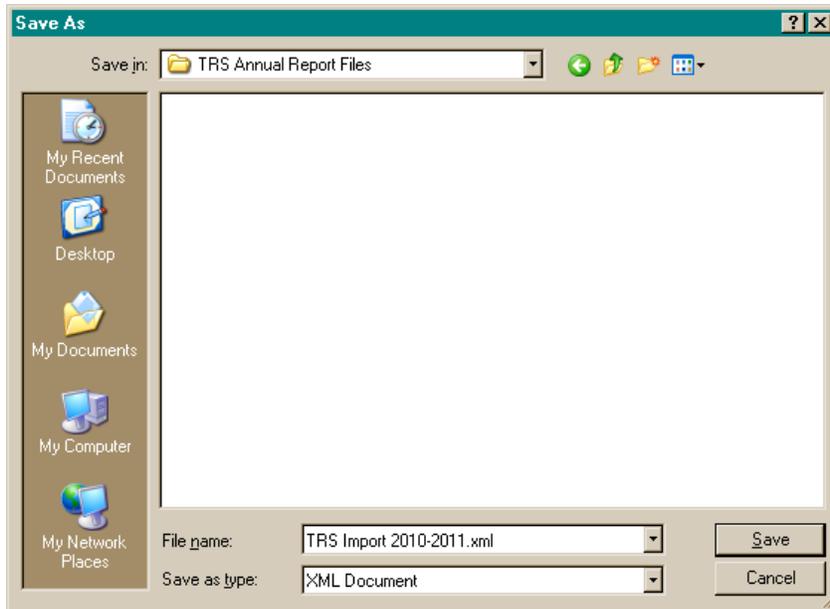
OR



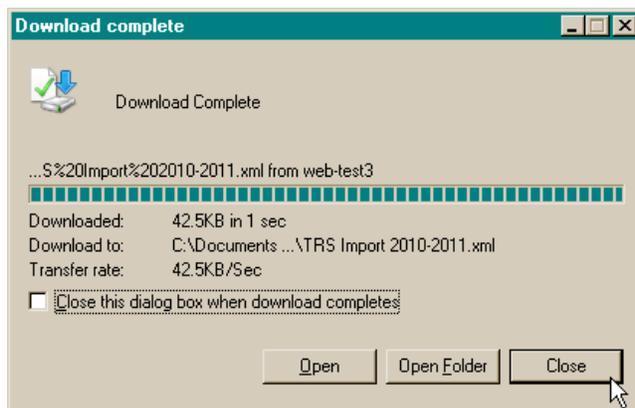


Spreadsheet File Instructions

5. On the Save As screen, select a directory and press the “Save” button.



6. If the Download complete dialog box does not close automatically, press the “Close” button.



OR

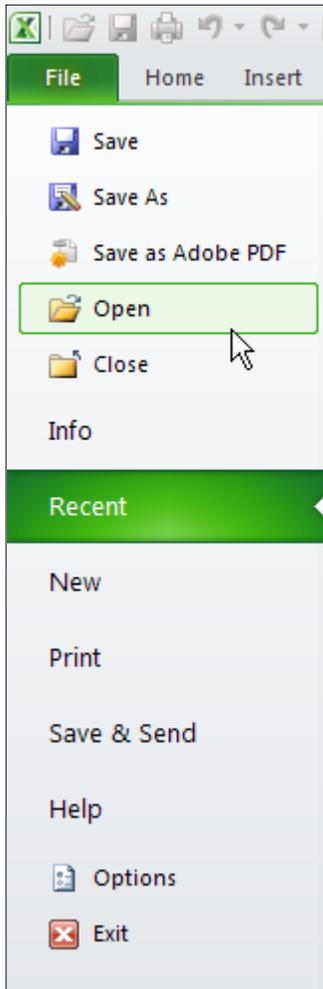




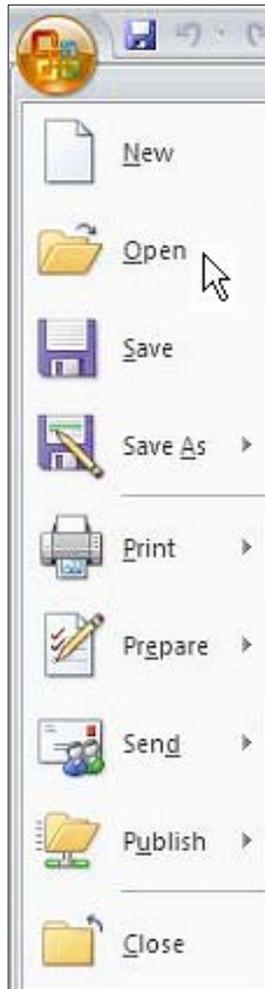
Open the XML File in Excel and Edit the Data

7. Open Microsoft Excel.
8. Select “File – Open” from the Excel menu. For Microsoft Office 2007, select the Office button and select “Open” from the Excel menu.

Microsoft Office 2003 & 2010:



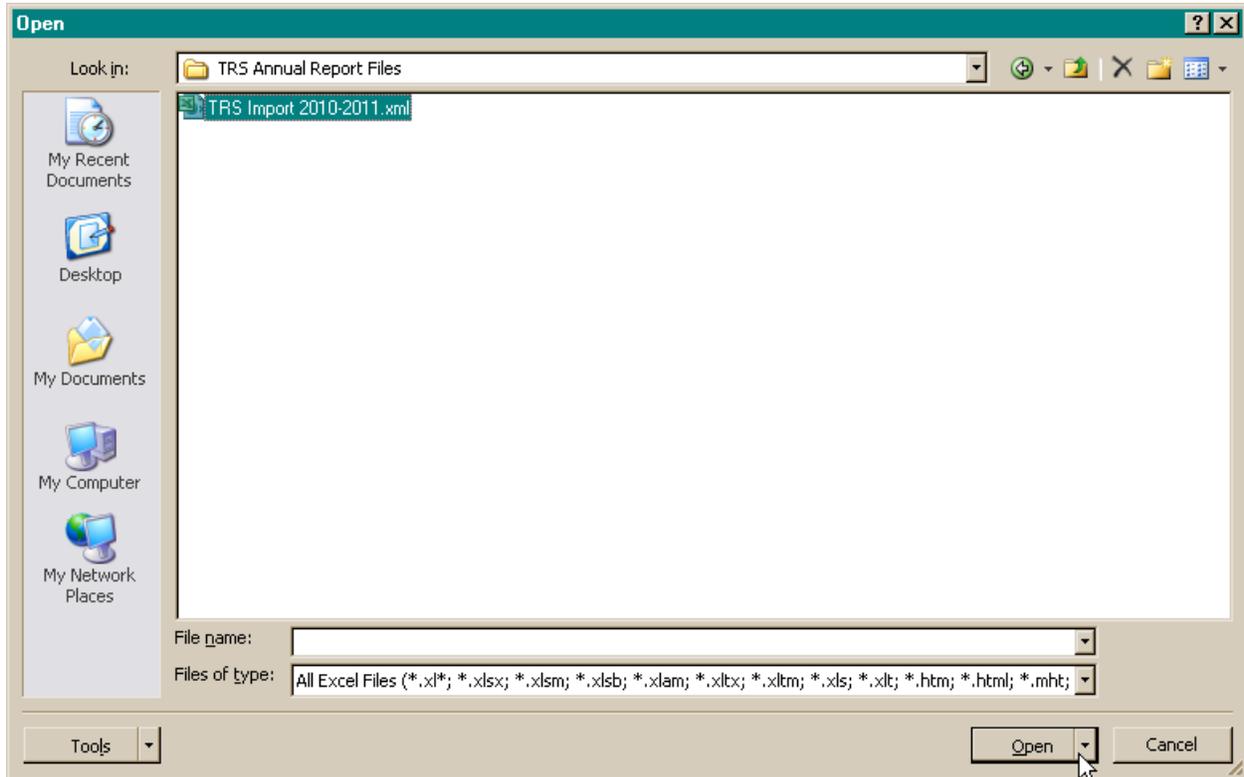
Microsoft Office 2007:





Spreadsheet File Instructions

- Navigate to the directory where you saved the XML file in Step 5 and press the “Open” button.



- The data is loaded into Microsoft Excel.

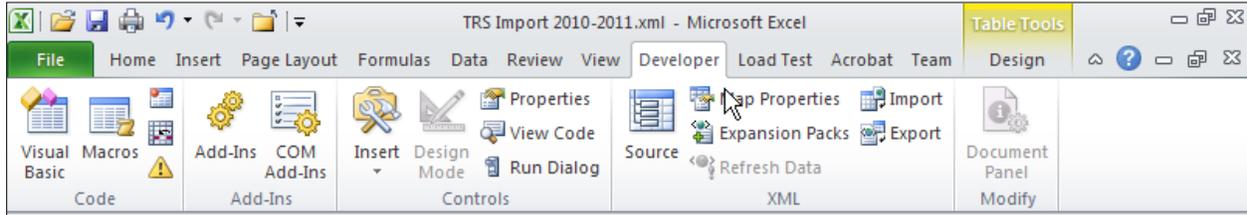
	TIN	Name	GenderCode	BirthDate	EmployTypeAbbrev	ContractDays	DaysPd	Rate	Earn	MbrContrib	FedFund
1	999999999	Last, First Name	F	01/01/1968	F	180					
2	999999999	Last, First Name	F	01/01/1968	F	180					
3	999999999	Last, First Name	F	01/01/1968	F	180					
4	999999999	Last, First Name	F	01/01/1968	F	180					

- Using Microsoft Excel functionality, complete any changes, additions or deletions to the data.



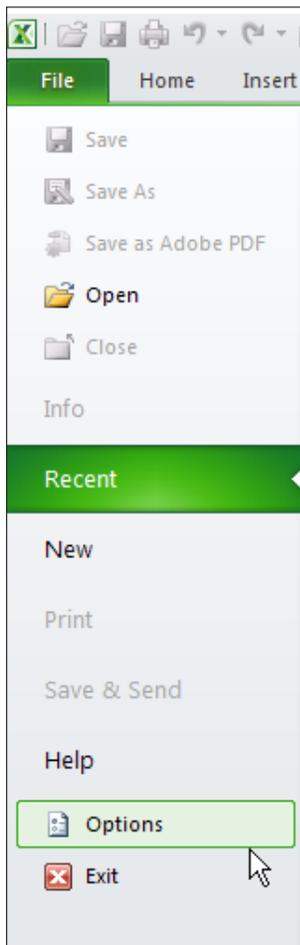
Export the XML File from Excel

12. If you have the Developer ribbon, skip to Step 18.



If you have Microsoft Office 2010:

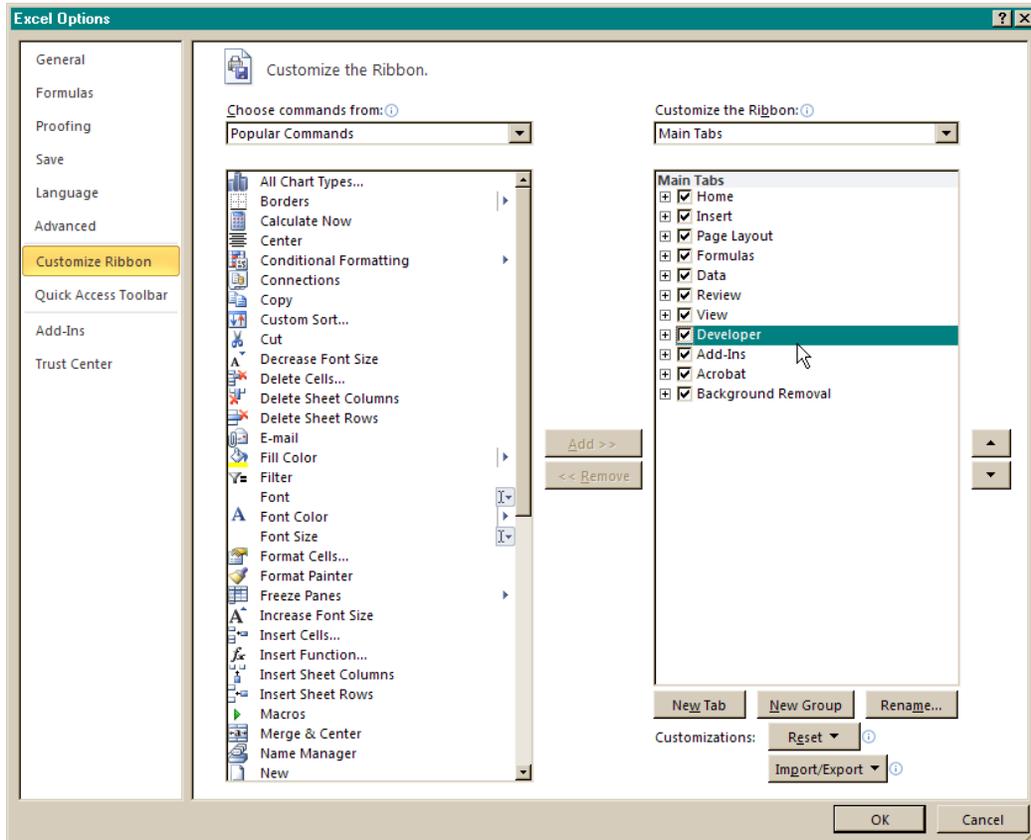
13. Select "File – Options" from the Excel menu.





Spreadsheet File Instructions

14. On the Excel Options dialog box, select the “Customize Ribbon” option. In the right list box, select the “Developer” checkbox and press the “OK” button.



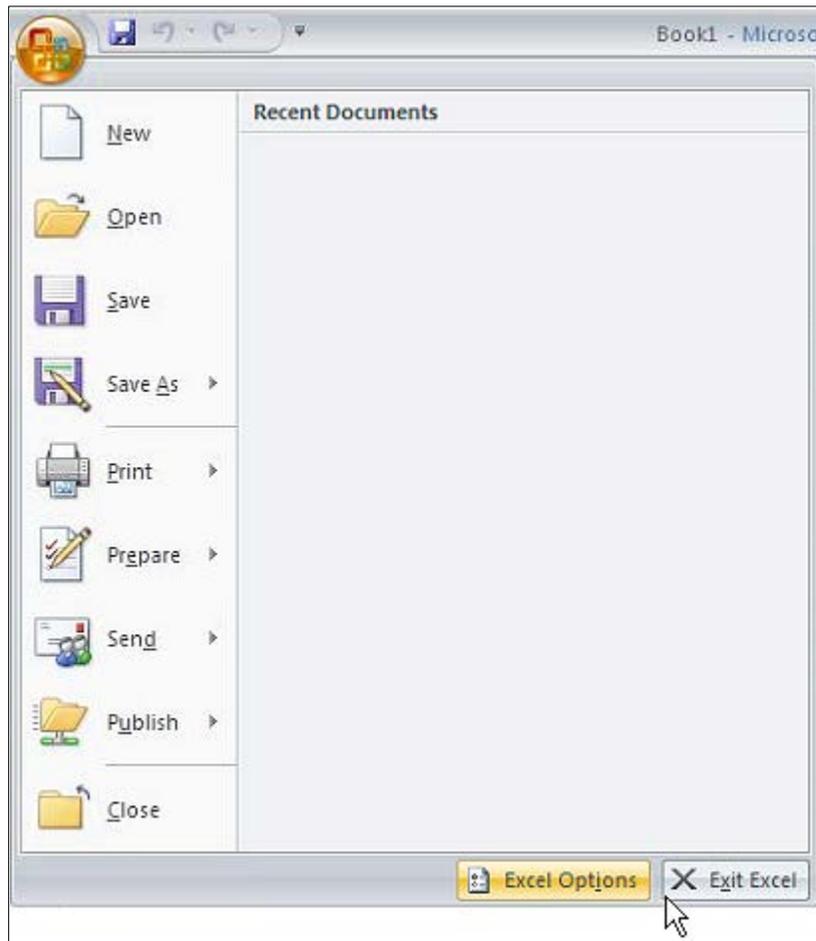
15. Continue with Step 18.



Spreadsheet File Instructions

If you have Microsoft Office 2007:

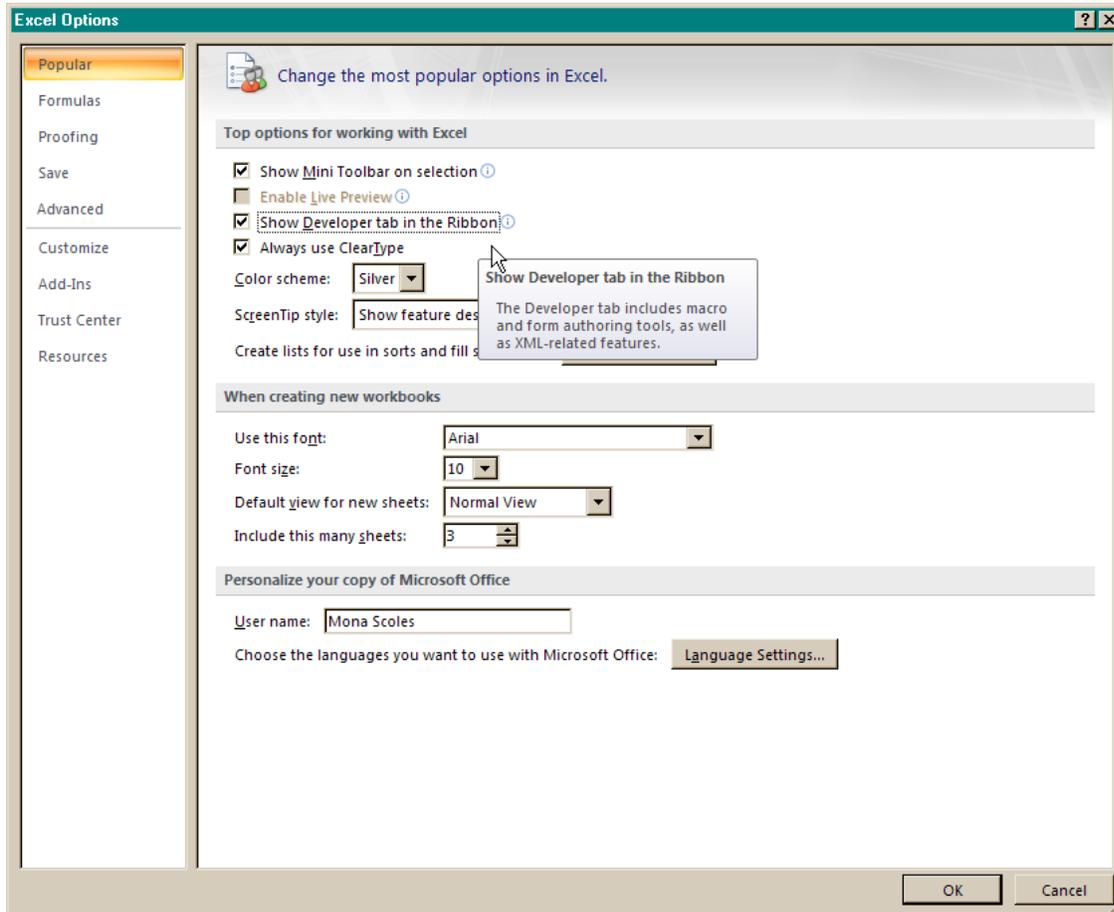
16. Select the Microsoft Office button, and then press Excel Options.





Spreadsheet File Instructions

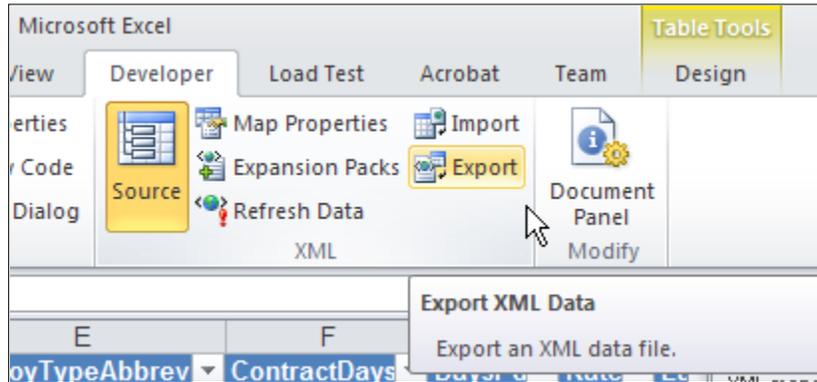
17. In the Popular category, select the “Show Developer tab in the Ribbon” check box and press the “OK” button.





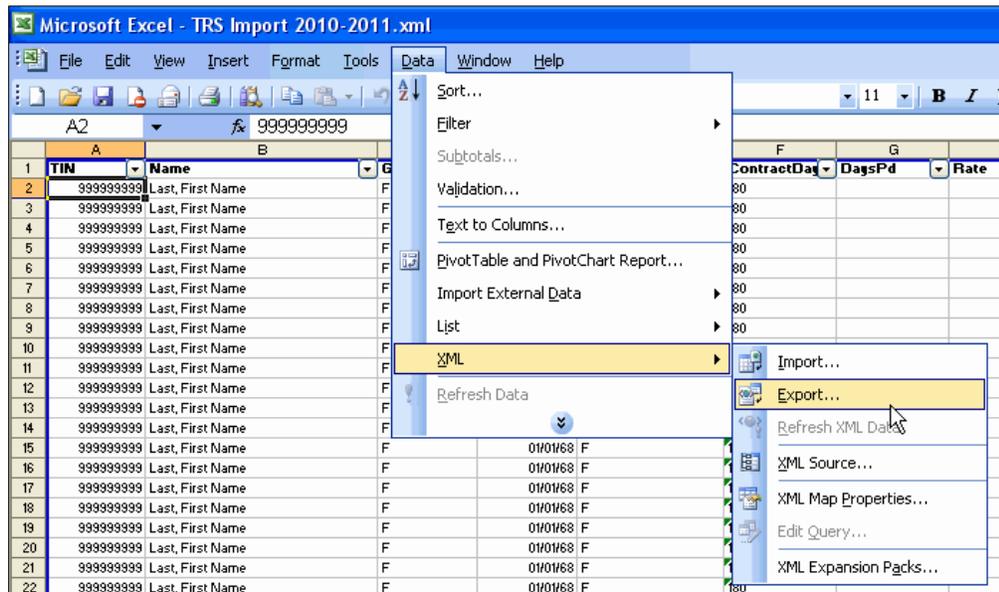
If you have Microsoft Office 2010 or Microsoft Office 2007:

18. On the Developer ribbon, press the “Export” button.



If you have Microsoft Office 2003:

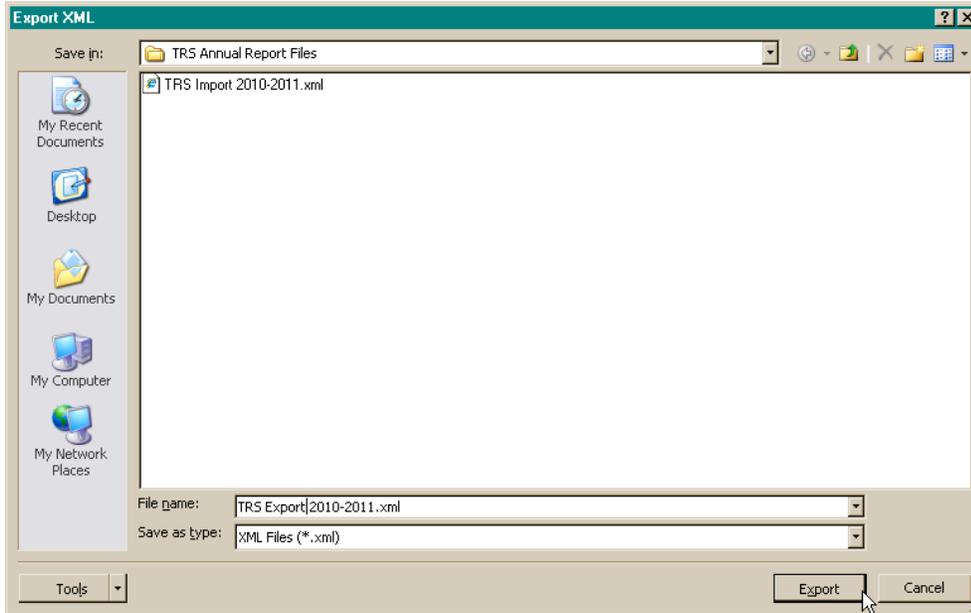
19. Select Data - XML – Export from the Excel menu.





For all versions of Microsoft Office:

- On the Export XML dialog box, select the directory and name of the file to export the new data to and press the “Export” button.



Delete All Employees from the Annual Report

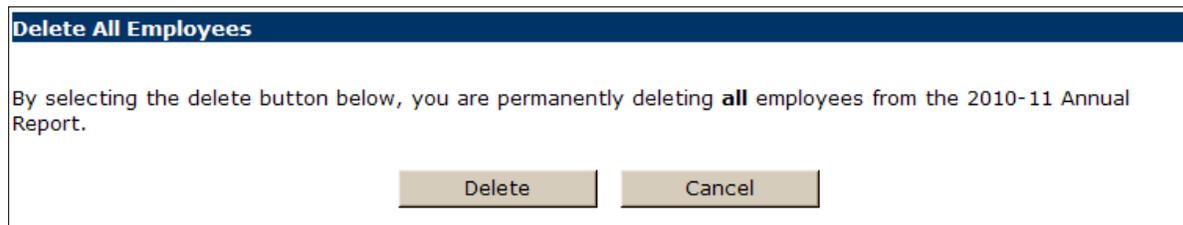
- Return to the Annual Report – Import/Recover/Delete/Export screen. Before importing the new data, you will have to delete the existing employees from the Annual Report so the new employee data can be imported. Select the “Delete All Employees from the Annual Report” option and press the “OK” button.



Delete All Employees from 2010- 11 Annual Report

Select this option to delete all employees' records from the 2010- 11 Annual Report.

- On the Delete All Employees screen, press the “Delete” button.

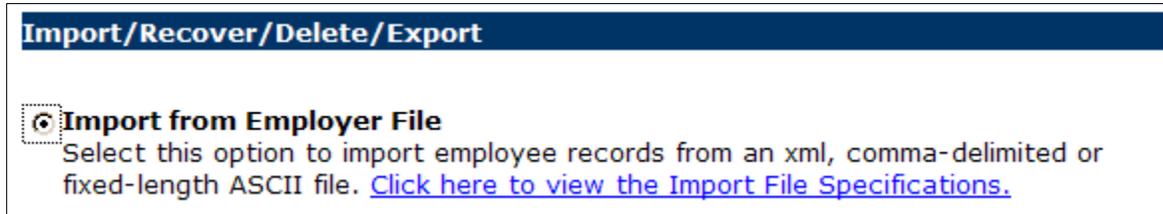




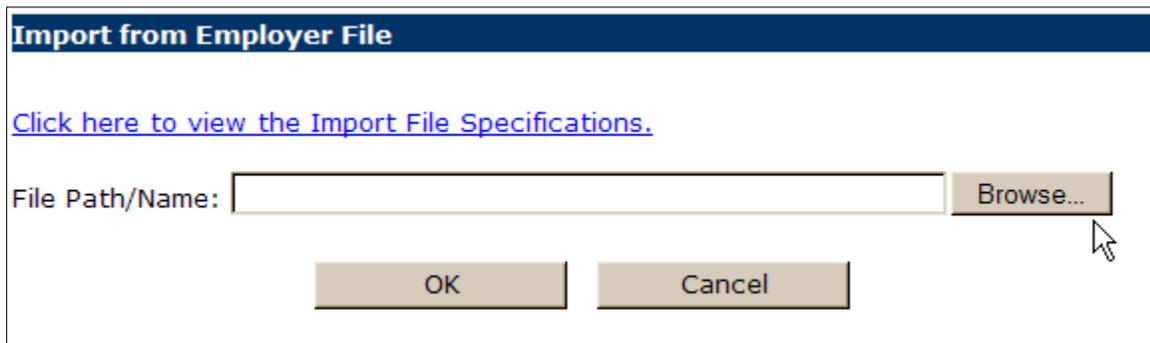
Spreadsheet File Instructions

Import the XML File to the Web Site

23. On the Import/Recover/Delete/Export screen, select the “Import from Employer File” option and press the “OK” button.

A screenshot of a web application window titled "Import/Recover/Delete/Export". The window has a dark blue header bar with the title in white. Below the header, there is a radio button selected next to the text "Import from Employer File". To the right of this text is a paragraph of instructions: "Select this option to import employee records from an xml, comma-delimited or fixed-length ASCII file. [Click here to view the Import File Specifications.](#)"

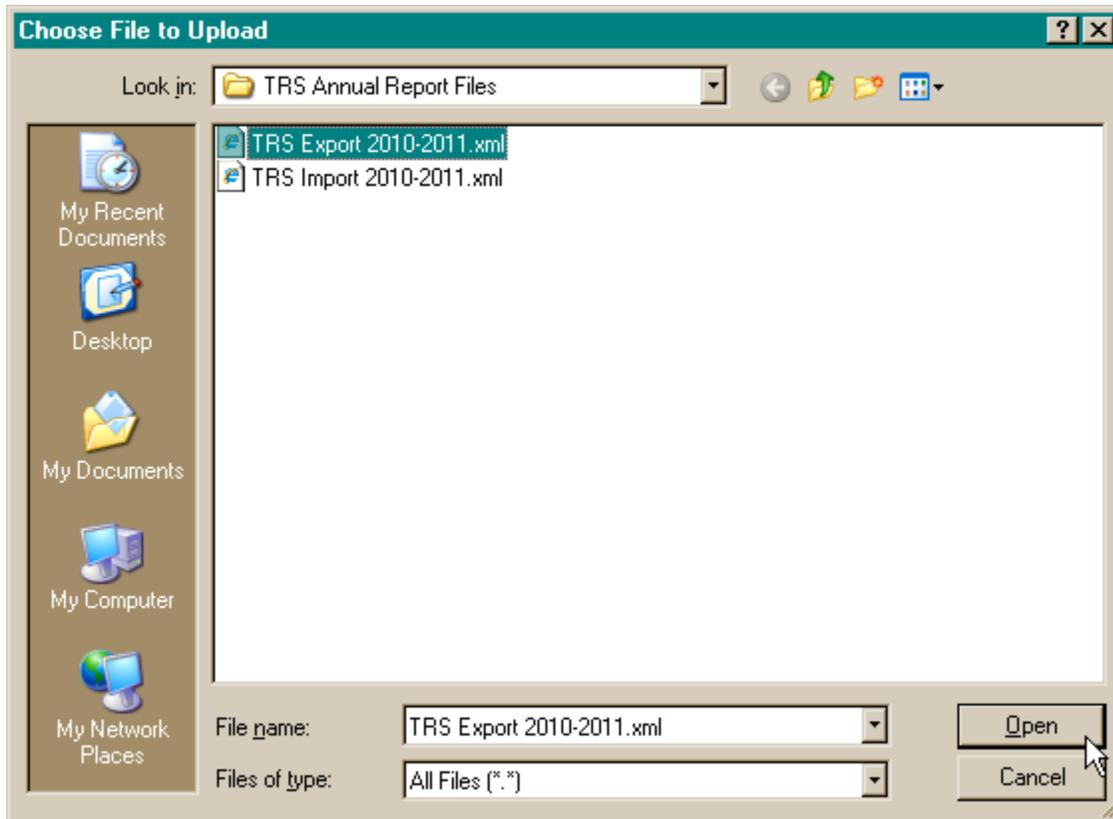
24. On the Import from Employer File screen, press the “Browse...” button.

A screenshot of a web application window titled "Import from Employer File". The window has a dark blue header bar with the title in white. Below the header, there is a blue hyperlink: "[Click here to view the Import File Specifications.](#)". Below the link is a text input field labeled "File Path/Name:" followed by a "Browse..." button. At the bottom of the window, there are two buttons: "OK" and "Cancel". A mouse cursor is pointing at the "Browse..." button.

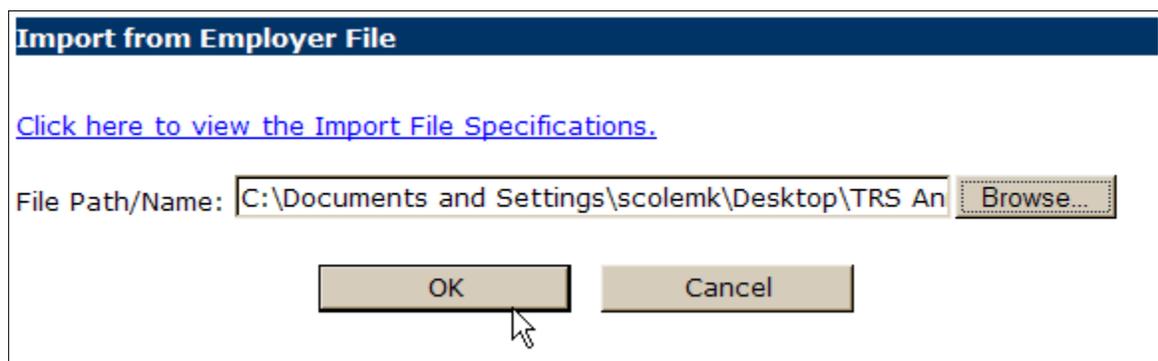


Spreadsheet File Instructions

25. On the Choose File to Upload screen, navigate to the directory where you saved the XML file in Step 25 and select the file, then press the “Open” button.



26. On the Import from Employer File screen, press the “OK” button.



27. When you receive the email that the import was completed, then you can review the employees that were imported through the Employee List screen.