ImportExpress for Shareworks®

Table of Contents

Introduction

ImportExpress is a new feature that allows the import of various data files automatically into the Shareworks™ database. Client systems send data files to Shareworks via a sFTP server. The sFTP server is a secure, encrypted location that is specific to each client, used only for the transfer of files. Inside the sFTP server, there are folders set-up for each type of required data file. When the files are detected by Shareworks inside each folder, they are queued for import, checked against predefined data integrity checks and updated to the database.

Import Types

Type of Import	Description
Demographics	Import participant demographics including address, phone numbers, email, employee groups, terminations, year to date tax amounts and personal tax rates, etc. New participant records can be created or existing participant records updated.
Employee year to date amounts	Import year to date withheld amounts into Shareworks. Employee number is a required field. Optional fields include year to date withholding amounts for CPP, FICA and supplementary income. This type of import overwrites the existing record in the system.
Please contact your Account Administrator for any additional data imports.	

Steps for ImportExpress

1. Files are sent to Shareworks via sFTP.
2. Shareworks recognizes and queues the file, and begins importing the file into the database. One of two scenarios will occur:
   - If no errors are returned, the file will be processed and Shareworks will be updated. You will receive an email confirming a successful upload.
   - If errors are returned, you will receive an email notification that an error occurred during import. Once the errors are corrected, the import process can be conducted again. This cycle will continue until all errors are addressed before Shareworks is updated. Your account administrator will contact you should the errors require your attention.

NOTE: *Shareworks is not updated until the import file is error free.*

sFTP and Folder Structure

The sFTP username, password, file types and folder structure for your company is configured by your Shareworks administrator prior to using ImportExpress. You will require the following information to import a file:

Host sFTP Server: ftp2.solium.com
Port number: 22

Username:

Password:

NOTES:
- Every time a new folder, username or password is added to the sFTP server, it takes approximately 10 minutes for the system to synchronize and the information to appear when logging into the sFTP server.
- Once a file is imported successfully into the database using ImportExpress, it will automatically be moved from the upload folder into a COMPLETED folder (on the sFTP server). The COMPLETED folder is not visible - if you wish to review a previously imported file using ImportExpress, please contact your Shareworks administrator.

Messaging

Messaging is released when ImportExpress is used depending on the import's success or failure:

1. If the import succeeds, the following email is sent to the company administrator:

   This email was sent to inform you that Shareworks has successfully finished importing the file <filename> created on <import date>.

   Please do not reply to this email as it is simply a notice of action within your account. If you have any questions or concerns please contact Solium toll free in Canada and the continental U.S. at 1-877-380-7793 or internationally at 001 + 403-515-3909.

2. If the import fails, the following email is sent to the company administrator and the Solium administrator to correct the errors before proceeding:

   This email was sent to inform you that Shareworks was unable to automatically import the file <filename> created on <import date>.

   Please be advised that your Solium Account Administrator has been notified and will be working to amend the issue. Your AA will contact you should they require any additional information.

   Please do not reply to this email as it is simply a notice of action within your account. If you have any questions or concerns please contact Solium toll free in Canada and the continental U.S. at 1-877-380-7793 or internationally at 001 + 403-515-3909.

FAQ

1. **How often does ImportExpress synchronize the sFTP server to look for newly uploaded files?**

    The sFTP server synchronizes almost immediately when a new file is loaded. The file will be put into queue for import and the import will begin as soon as the system has available resources.

2. **How secure is the location of the uploaded file?**

    The upload location is set up by Shareworks using an sFTP system. sFTP stands for Secure File Transfer Protocol. It is also referred to as Secure FTP. sFTP uses SSH (Secure Shell Protocol) to transfer files securely between two computers in different locations. sFTP encrypts both the data and the commands used to transfer files. In order to access the sFTP server, the user must know a unique username and password. All the steps of file transfer, including login file movement and logout, are encrypted and secure using data encryption technology.

3. **Who has access to loaded/imported files?**

    When a file is loaded using ImportExpress, only those people with the sFTP username and password can access the file. Once the file is imported and processed successfully, the file will be moved into a Completed folder on the sFTP server. To see the files located in the Completed folder, contact your Shareworks administrator.

4. **How often can files be uploaded? How many files can be imported at one time?**

    Files can be uploaded as often as necessary and are imported one at a time.

5. **What types of file formats can be loaded with ImportExpress?**

    The import process accepts Microsoft Excel© 97-2003 files or CSV files.