

HRtrax – Data Exchange Install & Setup Procedure

Downloading and Installing the Data Exchange Programs and Support Files:

The XPR Install package contains the programs and files necessary to install, setup, and run the HRtrax to Millennium Data Exchange Package. Note that these files must be installed before any data can be moved between HRtrax and Millennium.

Before you Begin:

Millennium: Make sure the Millennium Payroll application has already been installed and is available to the local workstation. Also, make sure the company tables have already been setup in the Millennium payroll system.

HRtrax: Make sure the HRtrax application has been installed or that a HRtrax directory has been setup and is available to the local workstation. Verify that there is a HRT_XPR folder within the HRtrax folder – you may need to add this folder if it does not already exist (this is where the data exchange programs will be installed).

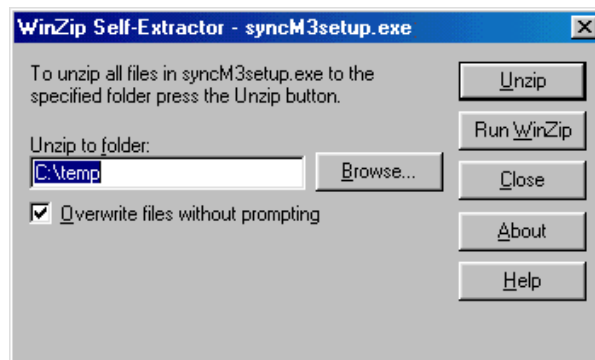
Download the Data Exchange Install Package:

Locate the Data Exchange Install Package and download it to a temporary folder on the workstation (for example C:\temp). The install package can be found at:

<http://Michaelsoft-HRtrax.com/Downloads/Downloads.htm>.

Unzip the Data Exchange Install Package to a Temporary Folder:

Locate the Data Exchange Install Package (syncM3setup.exe) downloaded in the previous step and double-click on it. This will start the self-extracting zip program that will unzip the Data Exchange installation components.



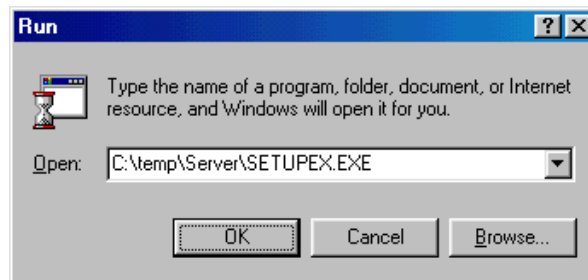
Verify that the appropriate temp folder is selected in the Unzip to folder text box then click on the Unzip button to unzip the package. This process will create two new folders (Server and wstation) within the temporary folder you selected.

At this point the Data Exchange Install Package has been downloaded & unzipped and is ready for installation (see next page for install instructions).

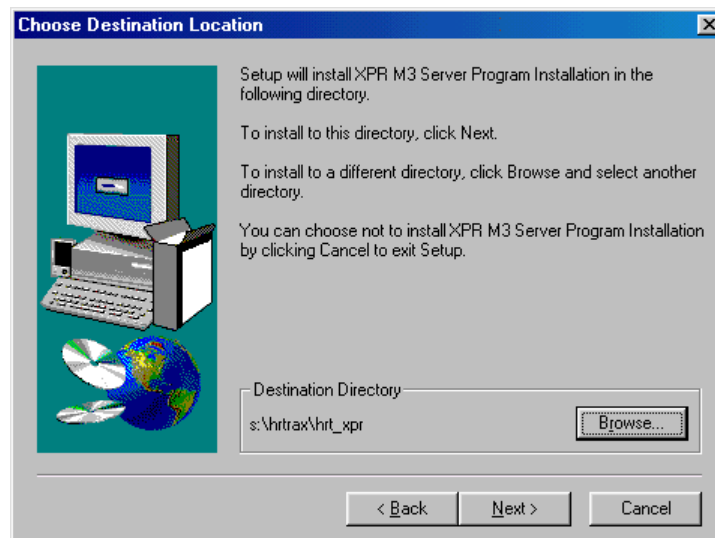
HRtrax – Data Exchange Install & Setup Procedure

Install the Data Exchange Programs and Files (Server folder):

Use the Windows Start > Run dialog box to execute the setupex program located in the Server folder that was unzipped in the previous step. To find this program click on the Browse.. button, navigate to the Server folder, highlight the SETUPEX program, then click on the Open button. The Run dialog box should look similar to the following sample:



Click on the OK button to start the installation process. The Welcome dialog box will be one of the first screens to appear. Click on the Next button to move to the Choose Destination Location dialog box. This is where we must specify the location to install the Data Exchange programs and files.



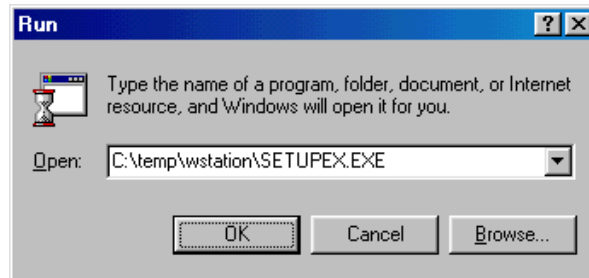
At the Choose Destination Location dialog box, click on the Browse.. button and navigate to the HRT_XPR folder within the HRtrax folder on the server or local workstation where these directories have been setup. This is the location that we want to install the Data Exchange programs and files. Highlight the HRT_XPR folder and click on the OK button to return to the Choose Destination Location dialog box. The Choose Destination Location dialog box should look similar to the above sample.

Click on the Next button and continue to follow the prompts until the programs are installed and the setup is finished.

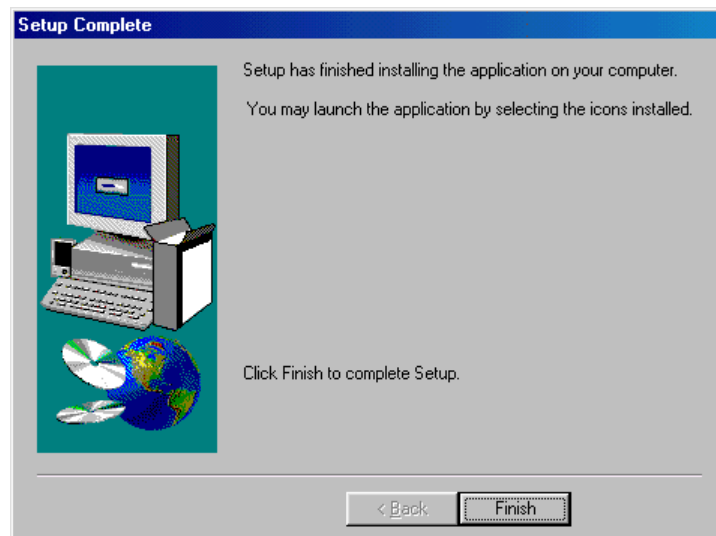
HRtrax – Data Exchange Install & Setup Procedure

Install the Data Exchange Supporting Libraries (wstation folder):

Use the Windows Start > Run dialog box to execute the setupex program located in the wstation folder that was unzipped previously. To find this program click on the Browse.. button, navigate to the wstation folder, highlight the SETUPEX program, then click on the Open button. The Run dialog box should look similar to the following sample:



Click on the OK button to start the installation process. Simply follow the prompts until the installation is finished. This step must be performed on each workstation that will be running the Data Exchange Programs.



(note that you may need to run the MDAC_TYP.exe or VFPODBC.msi programs to load additional data access drivers depending on the version of Windows your workstation is running – these programs can be found within the wstation folder of the temp folder)

At this point the Data Exchange program files and support libraries have been installed and are ready to be setup for operation (see next page for setup instructions).

HRtrax – Data Exchange Install & Setup Procedure

Setting-up the Data Exchange Program for Operation:

Set the Payroll Interface Code and Path in the HRtrax Company Registry Screen:

On the HRtrax Company Registry screen 1, enter “XPR” in the Payroll code field for the company that you wish to setup for Data Exchange processing. The system will automatically populate the Path field (..\HRTRAX\HRT_XPR\) as this location is fixed when using the Data Exchange interface. Click the Save button to save these new entries, and then page-down to screen 4 of the Company Registry.

Company Registry - 1 of 4

Company **00990** NW Training
DBA Northwest Training Company
Address 107 Ferry Dock Road

City, State, Zip Country Edmonds, WA 98026 USA

Company Phone (425) 793-2158
Company Fax (425) 792-8229
Line of Business + SIC Testing Labs 2157

Federal Employer ID 91-05601.3
State Employer ID WA3456.C6
HRtrax Database Path D:\MILLHRT\HRTRAX\HRT00990\

Interface
Payroll-Path **XPR** D:\MILLHRT\HRTRAX\HRT_XPR\
Time Clock-Path
Auto Assign Card No.?
Next Time Card No. Card Number Increment by
Label for Card No.

Sub-Code for Payroll Interface:

On Company Registry screen 4, enter “MILL” in the Sub-Code for Exchange field. This will inform the Data Exchange module that the company will be interfaced to the Millennium Payroll system. Also, this code will instruct HRtrax to activate the additional sub-screens and fields necessary for the Millennium system. Click the Save button to save this new entry.

Company Registry - 4 of 4

00990 NW Training

Sub_code for Payroll Interface: MILL

Multiple Company F2 PopUp Link? Yes No

Using Mass Deductions Update Function? Yes No

Terminated Employees List at Bottom While F2 PopUp? Yes No

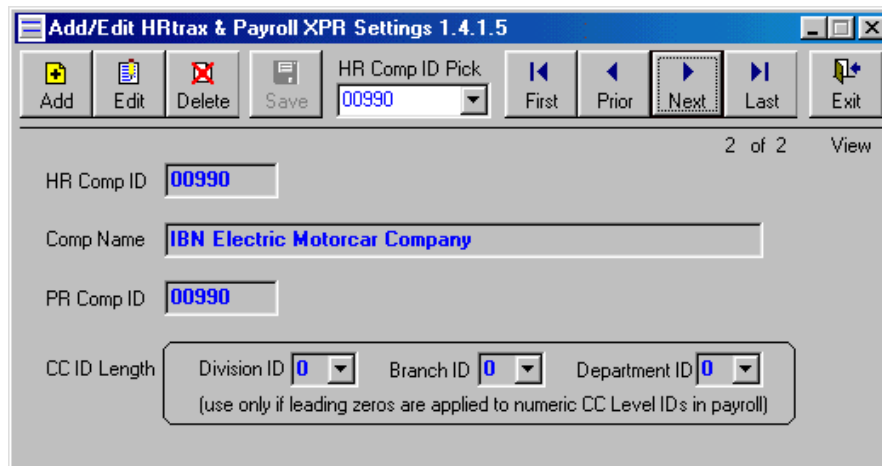
Add Loa Days to the Employee's Seniority Date? Yes No

HRtrax – Data Exchange Install & Setup Procedure

Setting-up – continued...

Set the HRtrax Source and Millennium Target Company IDs and Options:

Use Windows Explorer to locate the HRPRSet.exe program within the ..\HRtrax\hrt_xpr\ folder and double-click on it. This will start the maintenance program that allows you to add new and/or maintain existing source/target company ids and options for each company that will be using the Data Exchange process. Once the program has been started a screen like the following will be displayed:



Adding New Source/Target Company ID Records:

To add a new source/target company id record, click on the **Add** button at the top of the screen to clear and activate the fields for the new entries. Once the fields are clear, enter the new HRtrax Company ID in the HR Comp ID field for the company you wish to add to the Data Exchange process. Next, enter the Company Name in the Comp Name field. This will help identify the company during the data exchange process. Now enter the Millennium Company ID in the PR Comp ID field. Many times this will be the same Comp ID as was entered in the HR Comp ID field, yet in some situations it may be slightly or even completely different. When all entries for this new record are complete click on the **Save** button to write the record to the HRPRSet table within the XPR database.

Important! Make sure that the correct PR Comp ID is entered for each HR Comp ID. The Data Exchange program will update the Payroll Company ID with data from the HRtrax Company ID. If the correct values are not entered in these two fields the Payroll Company ID will be updated with data from the wrong HRtrax Company ID!

CC ID Lengths for Division/Branch/Department IDs: These fields are required only when leading zeros have been added to one or more numeric cost center levels within the payroll system. When this is the case each code for the specific cost center level must be equal in length. Select the length for the specific cost center level (division/branch/department) from the appropriate drop-down list at the bottom of the screen. This will instruct the Data Exchange program to also add leading zeros to the cost center level code when necessary.

Remember – leave the CC ID Length field at 0 if any of the following conditions are true:
The specific cost center level is not used in HRtrax or Payroll
Leading zeros are not applied to the specific cost center level in Payroll
Alpha codes are used for the specific cost center level in Payroll

HRtrax – Data Exchange Install & Setup Procedure

Setting-up – continued...

Changing Path Location Records:

To change an existing source/target company id record, click on the **Edit** button at the top of the screen to open the **Comp Name**, **PR Comp ID** and **CC ID Length** fields for editing. The **HR Comp ID** field can not be edited while in this mode. Move to the field you wish to change and enter or select the new field value. When the changes for this record are complete click on the **Save** button to update the record.

Deleting Path Location Records:

To delete an existing source/target company id record, move to the record you want to delete and then click on the **Delete** button. A message box will be displayed to ask if you really want to delete this record. Click on the **Yes** button to delete the record. Click on the **No** button to cancel the delete operation.

Creating a Desktop Icon to Run the Data Exchange Program

In order to run the Data Exchange program with the easiest method possible, setup a desktop icon that will point to the location of the **HRsyncM3.exe** program for each user who will be responsible for performing this procedure. Right-Click on the Windows Desktop and select **New > Shortcut**. Navigate to the location of the **HRsyncM3.exe** program file on the server and then give it an appropriate description such as “**HRtrax to Millennium Sync**” or “**Sync HR to M3**” or something similar.

Note: Try to move or copy this shortcut down to the Windows launch-bar next to the Start button. When the sync program shortcut is in that location it will be available within both the HRtrax and Millennium systems.



This will provide the easiest and most convenient access to the sync program.