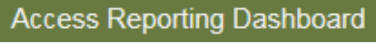



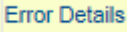






# Validate a Legacy Regular File Upload Report


This quick guide shows you (as an employer reporting uploader) how to correct formatting errors using the legacy reporting format within *Retirement Online*. After you upload a regular legacy report file, you must correct any formatting validation errors, and then upload a new file with the errors eliminated.

“Legacy” refers to the current format used when submitting reports through Retirement Internet Reporting (RIR).

Step	Action
1	<p>On your <i>Retirement Online Account Homepage</i>, click the <b>Access Reporting Dashboard</b> button</p> 
2	<p>The <i>Employer Reporting Dashboard</i> page will appear.</p>
3	<p>To view a list of all your available location codes, click the <b>Look Up Location</b> icon next to the location field.</p> <p>If you have access to more than one location code, one will display by default, but you may select a different code to report for a different location. If you only have access to one location code, it will be entered automatically. This is a required field. </p>
4	<p>The Look Up Location pop-up box will appear.</p>
5	<p>Click an option from the list for the location that you want to report.</p>
6	<p>Click the <b>Go</b> button. </p>
7	<p>A list of reports that have previously been submitted for this location will appear. In the ‘Submission Status Details’ section, click the <b>Refresh</b> button. </p>
8	<p>Any updates to the uploaded file will appear in the <b>Run Status</b> column. Currently, the report is in ‘Processing’ status, indicating <i>Retirement Online</i> is still processing the file.</p> <p>In the <b>Run Status</b> column, the status of the legacy file you uploaded will show either: Processing, No Success, Failed with File Errors, or Ready for Submission.</p>
9	<p>If the <b>Run Status</b> indicates Failed with File Errors, you will need to fix them before moving forward. Click the <b>Error Details</b> link. </p>
10	<p>The <i>File Upload Error Details</i> page will appear.</p> <p>The ‘Control Errors’ section deals with discrepancies between your uploaded file and the control totals entered on the <i>File Upload</i> page. Control errors only appear after Report errors are resolved.</p> <p>The ‘Report Errors’ section contains format errors within the uploaded report — such as spacing being off within the uploaded file.</p>

Step	Action
11	Click the <b>Download Report</b> icon to view all errors and save them for your records. 
12	Once you have viewed the report errors, you must upload a corrected file to <i>Retirement Online</i> . Click the <b>Return to Dashboard</b> link. <a href="#">Return to Dashboard</a>
13	To upload your corrected report, click the <b>File Upload</b> button. 
14	The <i>File Upload</i> page will appear. The location code will carry over from the <i>Employer Reporting Dashboard</i> page. All fields on this page are required.
15	The Report Type will default to regular. Click the <b>Regular</b> button. 
16	Click the <b>Choose a date</b> icon next to the <b>Report Date</b> field. You can also manually enter a date in the <b>Report Date</b> field without using the Choose a date icon. You must choose the last date of the month for which you are reporting. 
17	Click in the <b>Total Days</b> field. <input type="text" value="0"/>
18	Enter the total days you are reporting for your employees on this report in the <b>Total Days</b> field. You cannot leave this field blank as this is a required field.
19	Click in the <b>Total Earnings</b> field. <input type="text" value="\$0.00"/>
20	Enter the total of all the earnings you are reporting for your employees on this report in the <b>Total Earnings</b> field. You cannot leave this field blank as this is a required field.
21	Click in the <b>Total Contributions</b> field. <input type="text" value="\$0.00"/>
22	Enter the total contributions you are reporting for all your employees on this report in the <b>Total Contributions</b> field. You cannot leave this field blank as this is a required field.
23	Click in the <b>Total Loan Payments</b> field. <input type="text" value="\$0.00"/>
24	Enter the total of all loan payments you are reporting for your employees on this report in the <b>Total Loan Payments</b> field. You cannot leave this field blank as this is a required field.
25	Click in the <b>Total Service Credit Payments</b> field. <input type="text" value="\$0.00 x"/>
26	Enter the total of all the service credit payments you are reporting for your employees on this report in the <b>Total Service Credit Payments</b> field. You cannot leave this field blank as this is a required field.

Step	Action
27	Click in the <b>Total Payments</b> field. <input data-bbox="704 184 1019 218" type="text" value="\$0.00 x"/>
28	Your entry in the <b>Total Payments</b> field should equal the sum of all contributions, loans, and service credit payments. You cannot leave this field blank as this is a required field.
29	Click in the <b>Total Record Count</b> field. <input data-bbox="753 405 844 438" type="text" value="0"/>
30	Enter the total number of rows (or employees) you are reporting in the file in the <b>Total Record Count</b> field. This does not include headers, footers or blank rows as these should be removed before the file is uploaded. You cannot leave this field blank as this is a required field.
31	To select the file you would like to upload, click the <b>Browse</b> button. <input data-bbox="1101 659 1276 693" type="button" value="Browse"/>
32	The File Attachment pop-up will appear.
33	Click the <b>Browse...</b> button. <input data-bbox="623 869 786 903" type="button" value="Browse..."/>
34	The Choose File to Upload pop-up will appear.
35	Click the <b>file name</b> of the report file you are uploading. <i>Retirement Online</i> will only accept the following file formats for legacy reports: .prn, .txt, .rpt, .dat, and .csv.
36	Click the <b>Open</b> button. <input data-bbox="574 1243 743 1285" type="button" value="Open"/>
37	You will return to the File Attachment pop-up.
38	Click the <b>Upload</b> button. <input data-bbox="597 1453 708 1495" type="button" value="Upload"/>
39	A Message pop-up will appear confirming the file has been successfully uploaded.
40	Click the <b>OK</b> button. <input data-bbox="545 1663 685 1705" type="button" value="OK"/>
41	Click the <b>Initiate Report</b> button. This will upload your report to <i>Retirement Online</i> . <input data-bbox="289 1810 509 1852" type="button" value="Initiate Report"/>

Step	Action
42	The <i>Employer Reporting Dashboard</i> page will appear. You will see the uploaded report display as the top row in the 'Submission Status Details' section at the bottom of this page.
43	Click the <b>Refresh</b> button to see the status of the report you've just uploaded. 
44	When the <b>Run Status</b> column switches to a value of 'Ready for Submission', this indicates the file was uploaded with no errors.
45	<p>You have successfully corrected formatting errors on a legacy regular report.</p> <p>The next step will be to address business validation errors on the report, which can be found in the Correct Business Validation Errors for a Legacy File Upload Report guide.</p> <p><i>End of Procedure.</i></p>