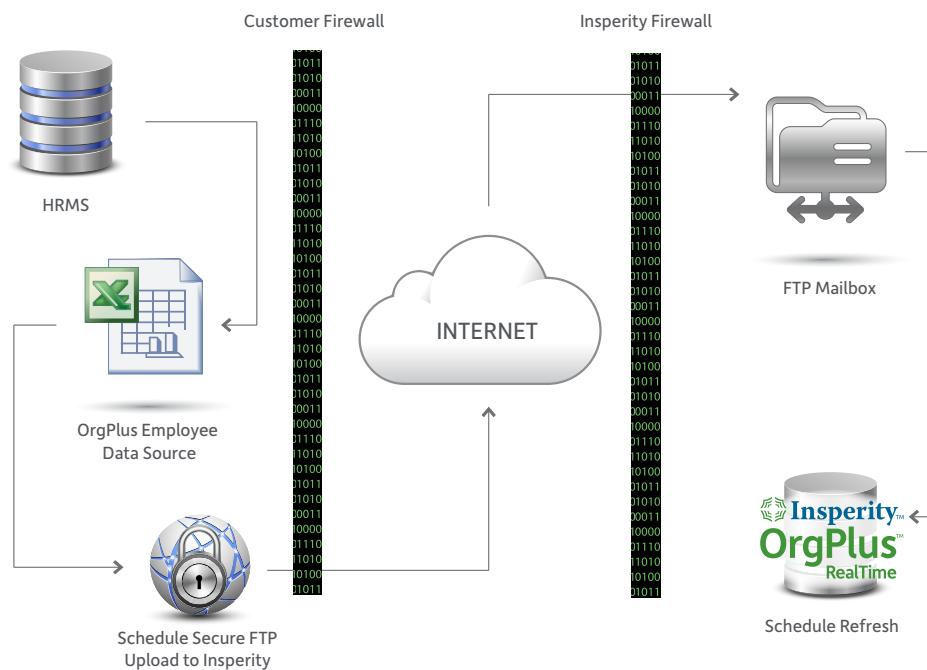


Insperty™ OrgPlus™ RealTime

Scheduling employee data updates

This application note describes how to set up and verify the OrgPlus RealTime scheduler feature. The scheduler is a convenient and secure method for your OrgPlus RealTime administrator to automatically refresh your employee data. Using the scheduler is secure, saves time, and ensures that the employee data and photos remain current.

Employee data transfer to OrgPlus RealTime



Export employee data from your HRMS

The first step is to export your employee data from your HRMS. It's likely that your HRMS can be configured and scheduled to export your employee data to a file formatted for OrgPlus RealTime. Many customers export their employee data weekly.

OrgPlus RealTime supports the following employee data source file formats: .txt, .csv, .xls, and .xlsx.

Once you've exported the employee data from your HRMS, you will need to set up your FTP client and built-in scheduler to automatically transfer your employee data source to Insperty's FTP mailbox.

Set up the secure FTP transfer to the Insuperity FTP mailbox

The FTP transfer is accomplished using a secure and managed file transfer application. This application may be an installed client application or a cloud application depending on the vendor and product you choose. Once configured, the FTP client will transfer the employee data source file to your unique Insuperity FTP mailbox at the scheduled time.

If you're like many customers, you'll want to use your employee photos. We suggest setting up the FTP client scheduler now to transfer your photos to Insuperity's FTP mailbox.

OrgPlus RealTime supports the following photo file formats: .bmp, .jpg, and .png.

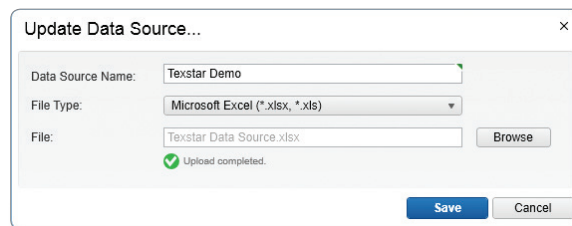
Your Insuperity FTP mailbox size is limited to 500MB for employee data and photos.

Setup

Our setup steps below are applicable for the Ipswitch WS_FTP secure FTP client. Your setup wizard may vary slightly depending on the FTP client your organization uses.

1. Install the FTP client on the OrgPlus RealTime administrator's PC. The FTP client must reside on the OrgPlus RealTime administrator's PC.
2. Create a label or site name.
 - a. Example: OrgPlus RealTime Employee Data.
 - b. Example: OrgPlus RealTime Photos (optional).
3. Set the connection type to FTP.
4. Enter the server address: oprtftp.orgplus.com.
5. Enter the username and password.
 - a. The username and password must be associated with the OrgPlus RealTime administrator.
 - b. If you change the OrgPlus RealTime administrator's password, remember to update the password in your FTP client.
6. Verify the information and connect.
7. Open the data folder on the right-hand side (destination).
8. Choose the employee data source file or photo files (source).

Please note that your employee data source file name must match the file name of the data source originally uploaded for the domain. See the dialogue box below.



Tip: Most FTP clients allow incremental transfers for only new files or files that have changed.

9. Configure the FTP client scheduler in accordance with the application used. Remember to set up the scheduler so the FTP transfer occurs shortly after the employee data has been exported from your HRMS.

Set up the OrgPlus RealTime scheduler

The OrgPlus RealTime scheduler will automatically refresh your employee data from your Insperty FTP mailbox.

1. Sign in to the application. The user must have a security role that allows access to the administration settings.
2. Navigate to **Administration > Data Management > Domains**.
3. Select the desired domain.
4. Click **Edit**.
5. Click the **Import and Refresh** tab.
6. Check the **Schedule** box to enable the scheduler.
7. Choose the desired frequency and time of day to refresh your employee data. Reminder: For best results, the day/time chosen should be shortly after the employee data source has been exported from your HRMS and transferred to the Insperty FTP mailbox.
8. Click **Save**.

Verify that your employee data has been updated

1. Sign in to OrgPlus RealTime. The user must have a security role that allows access to the administration settings.
2. Navigate to **Administration > Data Management > Domains**.
3. Observe the column titled "Refresh Status." The date and time stamp for the applicable domain should be updated each time your employee data has been refreshed.
4. Identify an expected change in the employee data exported from your HRMS and confirm that the change is reflected in OrgPlus RealTime.