



## Set up New LEAs



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# Set up New LEAs

This checklist provides a general overview of how to set up a new LEA in ASCENDER.

<input type="checkbox"/> DBA Assistant <ul style="list-style-type: none"> <li>• Create the new database to which the data will be uploaded.</li> <li>• From the Utilities menu, click Create Database.</li> <li>• After the database is created, select the following options to complete the process:             <ul style="list-style-type: none"> <li>◦ Set Security Preferences</li> <li>◦ Set ASCENDER Preferences</li> <li>◦ Set Application Preferences</li> </ul> </li> </ul>
<input type="checkbox"/> Security Administration (sign in as an admin user) <ul style="list-style-type: none"> <li>• Create an ASCENDER user and assign the applicable role(s).</li> <li>• Under <b>Manage Roles</b>, click <b>Create New Role</b> to give the user access to the necessary applications, which must include District Administration.</li> <li>• Under <b>Manage Users</b>, click <b>New User</b> and add the new role to the new user.</li> </ul> <p>Review the <a href="#">Security Administration Overview</a> guide for additional information on managing user roles.</p>
<input type="checkbox"/> District Administration <p><a href="#">District Administration &gt; Tables &gt; District Information &gt; Campus Name/Address</a></p> <ul style="list-style-type: none"> <li>• Create non-student campuses.</li> </ul> <p><a href="#">District Administration &gt; Tables &gt; District Information &gt; Payroll Frequencies</a></p> <ul style="list-style-type: none"> <li>• Create pay frequencies.</li> </ul> <p><a href="#">District Administration &gt; Tables &gt; Receiving Addresses</a></p> <ul style="list-style-type: none"> <li>• Create warehouses.</li> </ul>
<input type="checkbox"/> Warehouse <p><a href="#">Warehouse &gt; Tables &gt; Warehouse Options</a></p> <ul style="list-style-type: none"> <li>• Create warehouses.</li> </ul>
<input type="checkbox"/> Security Administration <ul style="list-style-type: none"> <li>• Assign pay frequencies and/or warehouses to the appropriate user profiles.</li> </ul>
<input type="checkbox"/> Copy the database. <ul style="list-style-type: none"> <li>• Copy the database and the log file to a backup folder. This allows you to start over by copying it into the ASCENDER/Database folder as you may need to attempt loading your data more than once.</li> </ul>

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|--------------------------|---|
| <input type="checkbox"/> | <p>Create text files.</p> <ul style="list-style-type: none"><li>• Create text files from each of the Excel files to ensure that load files are “text” in Excel in order to preserve leading zeros.</li><li>• Delete the header row, which contains column names as it will not load to the database.</li><li>• Click <b>Save As</b>.</li></ul> <p><b>Note:</b> The following steps are for Excel 2010 or earlier. Excel 2013 will prompt you to first save the location.</p> <ul style="list-style-type: none"><li>• Change the file type to Text (Tab delimited) (*.txt) from the drop-down menu.</li></ul> <p>Do not change the file name itself. All of the load commands assume that the name of the text file is the same as the name of the Excel file (except the extension).</p> <ul style="list-style-type: none"><li>• Save the file in the root directory of the C drive, which is where the load commands search for the file. If the file name is different or if you do not save the file as a .txt file to the root directory of the C drive, the load commands will not work as they cannot locate the file. You can modify the SQL statements as needed.</li><li>• Click <b>Save</b> and ignore the incompatible features message.</li><li>• Close the Excel file and do not save it.</li></ul> <p>Repeat this process for all of the Excel files in the folder.</p> <p>Change the table name as needed, which allows you to verify if the data is displayed in the correct columns and in the correct format.</p> |
| <input type="checkbox"/> | <p>Continue with each file that you have converted from the prior vendor.</p>   |



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