Use this Quick Reference Guide (QRG) to create a pipe delimited text file (txt) from a comma separated values (csv) file to upload information into the Employer Reporting and Management (ERM) application.

These instructions are for working with an Excel workbook/spreadsheet.

Setup Microsoft XP Control Panel

Pipe Delimited Text File Topics Covered

- Setup Microsoft XP Control Panel
- Export from Excel
- Save as Text File from Notepad
- 1. Left click on the **Start** button to open the *Windows Start Menu Figure 1: Access the Control Panel in XP* and left click on the **Control Panel** (Figure 1).
- If the Control Panel screen looks like Figure 2, click Switch to Classic View (Figure 3).
- 3. Select **Regional and Language Options** from the *Classic View* screen (Figure 3). The Regional and Language Options screen, Regional Options tab displays (Figure 4).

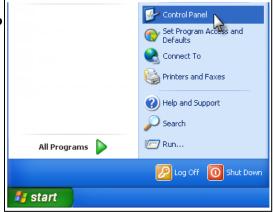


Figure 3: Control Panel, Classic View, Regional and Language Options

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- 4. On the *Regional and Language Options* screen, the default tab is the **Regional Options**. Click the **Customize** button (Figure 4).
- 5. The Customize Format screen displays.
- 6. Select the **Numbers** tab (Figure 5).
- 7. In the List separator field, enter the pipe symbol (). This sets up Windows to work with a pipe-delimited file.
- 8. Click **Apply**, then click **OK**.



Figure 2: Control Panel, Category View

Figure 4: Regional and Language Options, Regional Figure 5: Regional and Language Options, Numbers Options Tab Tab

Regional and Language Options	Customize Format
Standards and formats This option affects how some programs format numbers, currencies, dates, and time.	Numbers Currency Time Date Example Positive: 123,456,789.00 Negative: -123,456,789.00
Select an item to match its preferences, or click Customize to choose <u>vour own formats:</u> English (United States) <u>Customize</u>	Decimal symbol:
Samples Number: 123,456,789.00 Currency: \$123,456,789.00	Digit grouping symbol: , Digit grouping: 123,456,789
Time: 8:40:50 AM Short date: 5/3/2011	Negative sign symbol:
Long date: Tuesday, May 03, 2011	Display leading zeros: 0.7
Location	Measurement system: U.S.
To help services provide you with local information, such as news and weather, select your present location:	Standard digits: 0123456789
United States	Use native digits: Never
	Click Reset to restore the system default settings for Reset numbers, currency, time, and date.
OK Cancel Apply	OK Cancel Apply

NOTE: For other files that need to be comma delimited, return to the **List separator** field and change it back to show a comma (,).

Export from Excel

- 1. Launch Excel. For the purposes of this exercise Figure 6 is the Excel file.
- 2. Save the file as a delimited file by clicking the Office button and selecting **Save As** and choosing **Other Formats** from the *Save a copy of the document* list (Figure 7). The *Other File Types* list displays. (Figure 8).
- 3. From the Other File Types list, select CSV (Comma delimited) from the list (Figure 8).

Figure 6: Excel File

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4	80	9000000	PERF	2222222222		Spark	1300.00		39.00	81.90		10012008	10312008	R
5	80	9000000	PERF	3333333333		Taylor	1300.00		39.00	81.90		10012008	10312008	R
6	80	9000000	PERF	44444444		Baker	1300.00		39.00	81.90		10012008	10312008	R



Figure 7: Save As Options



Figure 9: Save As screen

XI Save As × ~ Ō Search Under Construction by... 🔎 -Organize 🔻 New folder 2 Name Date 📌 Quick access Approved in PPM 2/26/ X Microsoft Excel Archive 2/13/ Comparison 2/7/2 This PC EPPA Letters 2/12/ 🎒 Network Old or Not Developed Documents 2/27/ Reports 2/12/ 🏅 Screenshots & Training 2/12/ Support Documents 2/12/ > File name: PipeDelimitedFile Save as type: CSV (Comma delimited) Authors: Willard, Lindsey Tags: Add a tag Tools Save Cancel Hide Folders

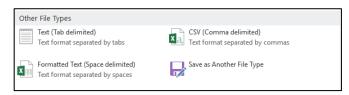
Save as Text (*.txt) File from Notepad

This can be done two ways.

- 1. Launch Notepad and choose File > Open and select the csv file that was saved.
- 2. Highlight the csv file that was saved and right click. Select Open with > Notepad.



Figure 8: Other File Types



- After selecting CSV (Comma delimited) from the Other File Types (Figure 8), the Save As screen displays (Figure 9).
- 5. On the *Save As* screen, select the directory where the file is to be saved.
- 6. Enter the File name.
- 7. Select **CSV (Comma delimited) (*csv)** from the *Save as type* drop down list if it has not already defaulted to that.
- 8. Click Save.

The results are the same, the csv file opens in Notepad (Figure 10).

Notice the pipe delimiters () between the fields and at the end of each record. There are also pipe delimiters beyond the data. In order to remedy this, do the following:

- 1. Highlight the populated lines in Notepad, stopping with the last delimiter at the end of the last populated field.
- 2. Use File > Copy or Ctrl + C to copy the selected data to the clipboard.
- 3. Close Notepad choosing **Do not save**.
- 4. Open Notepad again.
- 5. In Notepad click Ctrl + V to paste the data into the file.
- 6. Click File > Save as. The Save As window displays.
- 7. Make sure the correct directory is selected.
- 8. Make sure the **File name** is correct.
- 9. Make sure that Save as type is Text Documents (*.txt).
- 10. Click Save.

Figure 10: *.csv File in Notepad

Figure 11: Save As, Text Docume	ents (*.txt)
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Network	- Personal	3/1/2018 12:49 PM	File folder	
Network	📙 Voya Meetings	9/19/2017 4:00 PM	File folder	
	Communications	2/14/2018 6:31 AM	Shortcut	1 KB
	📑 EPPA Procedures	6/9/2017 8:04 AM	Shortcut	2 KB
	Functional Requirements	5/31/2017 1:11 PM	Shortcut	3 KB
	Future State Procedures	1/25/2018 12:33 PM	Shortcut	3 KB
	📄 Helpdesk Assistant	6/6/2017 2:15 PM	Internet Shortcut	1 KB
	🔝 INPRS Style Guide	12/19/2017 5:02 PM	Shortcut	2 KB
	MOT Manuals	9/21/2017 11·36 AM	Shortcut	1 KB
File name: Pip	eDelimitedFile			
	: Documents (*.txt)			
Save as type: Text	Documents (.txt)			

Provided all the data fields are present in the export, this file is now in the format required to use in the ERM upload.

