



# **Positions and Assignments Migration Utilities**

## **User's Guide**

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# Introduction

This User's Guide explains the Position-Assignment Migration Export and Position-Assignment Migration Import utilities. The Guide shows you how the export and import utilities in the Salary Negotiations module work for redefining and migrating your positions and assignments.

You may find that the processes described in this Guide make more sense if you have experience:

- Creating Salary Negotiations plans, positions, and assignments.
- Using the Washington Feature Set Reports.
- Working with Excel spreadsheets.

Detailed information about conversion changes is outside the scope of this Guide. The Advanced User Mode for the Position-Assignment Migration Import utility is also not discussed in this Guide.

To ensure that this software is compatible with your workstation, please refer to the document "WESPaC and IEPOne Workstation Guidelines" on the WSIPC Infrastructure Services SharePoint site. If you don't have access to that site, please contact your Data Center.

# Overview of the Migration Process

As a result of WSIPC's Position and Assignment Restructure Project, WSIPC's clients can now define their own positions and assignments that are not SPI Code-defined. To take advantage of this new functionality, you must migrate your Positions and Assignments.

Once the migration is complete, you'll be able to manage your positions and assignments data with more flexibility and control. Position accounting management will improve, and a less-complicated assignment organization will be possible. Human Resources staff will be able to process assignment changes more efficiently and accurately and more effectively manage staffing levels.

Budget preparation time is the best time to migrate from the old SPI Code-defined position structure to the new agency-defined position structure. You can migrate your positions and assignments one plan at a time, or you can migrate several plans together into one new plan. Once you have migrated a plan and like the results, you can continue the personnel budgeting process working in the newly migrated plans.

WSIPC has created two utilities for the Position-Assignment Migration process:

- Position-Assignment Migration Export Utility
- Position-Assignment Migration Import Utility

The combined export and import processes create Position Control from existing Salary Negotiations plan assignments. Assignments are migrated automatically to new Position Control Records. Unique individual assignments can be used alone to create Position Control Record Candidates. Multiple unique assignments can be linked to group the assignments to a single Position Control Record Candidate.

Before you perform the migration process, you must decide what you want your new positions and assignments to look like. You can get started by brainstorming ideas with staff, comparing what you currently have with what you wish you had, and looking at how you advertise job openings.

## **Deciding on New Structure**

Key members of the Human Resources, Payroll, and Budget staff should reach consensus about the new positions and assignments structure. Does the new structure make sense to everyone involved? Will the new structure work well with job applicants and with the potential future use of the Fast Track module (applicant tracking)? You may prefer an assignment focus if you want assignments to be similar to what contracts were in legacy. You may prefer a position focus if you want to manage FTE and staffing levels through the position.

## Determining How to Migrate Plans

You may want to process an entire Salary Negotiations plan at once, or process portions of a plan using selection parameters. Each selection will become one Salary Negotiations plan after it is imported. You can review what your existing Salary Negotiations plans look like now. Are your plans already grouped by types of employees or by bargaining units that already work for you? You can try the export process on a small set of data from a plan and show the information to key staff during discussions. You can try the export several times with various options until you find the specific options that you feel work best for you. Some examples are included in the Appendix of this Guide.

## Configuring Screen Labels

Before migrating your positions and assignments, you must change the Employee Management Configuration. Unless you previously changed it, Program is the Positions label 1<sup>st</sup> code and Activity is the Assignments label 2<sup>nd</sup> code. You must change screen labels from Program and Activity to Position and Assignment. These changes are agency-specific and must be changed by someone with security to Financial Management Configuration.

After you configure the labels, the new labels will appear on the Position Control dialog box and on the Assignment Maintenance dialog box. Figure 1 shows the Employee Management Configuration screen after the labels for the 1<sup>st</sup> and 2<sup>nd</sup> Codes on Positions have been changed.

The screenshot shows the 'Employee Management Configuration' dialog box. The title bar reads 'SA\FM\FM - 717 - Employee Management Configuration'. The dialog is divided into several sections:

- Payroll Import Options (top):** A table with two columns: 'Label for 1st Code on Positions' and 'Heading'. The values are 'Position' and 'Position'. Below it, 'Label for 2nd Code on Positions' is 'Assignment' and 'Heading' is 'Assignmnt'. For certifications, 'Label for 1st Code on Certifications' is 'Class' and 'Heading' is 'Class'. 'Label for 2nd Code on Certifications' is 'Endorsement' and 'Heading' is 'Endorse'.
- Payroll Import Options (middle):** 'During import to payroll merge assignments based on:' with radio buttons for 'Employee, Pay Code' and 'Employee, Pay Code, Assignment Start/Stop, Contract Start/Stop, Frequency, Calendar'. Checkboxes for 'Allow Calculation of Selected Deductions' and 'Use Contract Paid to Date Totals when Calculating Pay Record Amounts' are checked.
- Years of Experience Labels (right):** A list of 'Do Not Use' labels with checkboxes, all of which are checked.
- Calculation Options (bottom):** Checkboxes for rounding amounts and salaries. A section for 'Select how to calculate assignments FTE value...' with radio buttons for 'Keep the assignment FTE value as is...' and 'Automatically recalculate the FTE value...'.

At the bottom right, there are 'OK' and 'Cancel' buttons. The 'OK' button is highlighted with a green checkmark. A 'SkyDoc' logo is visible in the bottom right corner.

Figure 1 – Employee Management Configuration screen after the codes have been changed

1. Go to SA\FM\FM Config.
2. Click Employee Management.
3. Type Position in the Label for 1<sup>st</sup> Code on Positions box.
4. Type Position in the Heading box.
5. Type Assignment in the Label for 2<sup>nd</sup> Code on Positions box.
6. Type Assignmt in the Heading box.
7. Click OK to exit the Employee Management Configuration dialog box.
8. Click Close to exit the Financial/Human Resources Configuration dialog box.

## Moving Add-ons to Main Assignment Utility

This utility moves Assignment Add-ons to the main Assignment. Moving add-ons allows you to:

- More easily maintain assignments on the main screen.
- Use the mass process utilities on assignments that you cannot use on add-ons.
- Possibly avoid some SPI warnings about the add-ons.

The application produces Exception and Verification reports before the process modifies any data. This utility cannot move Add-ons to the main Assignment if more than one Add-on exists for an Assignment or if there is money on both the main Assignment and the Add-on.

1. Go to HR\SG.
2. Click WSIPC.
3. Double-click Move Add-ons to Main Asn.
4. Click Reset. This clears any current parameters.
5. Click Yes.
6. Click OK.
7. Click Sal Neg Plans in the Report From Plan Type.
8. Select the correct year in the Plan Year box. All plans for the selected plan year appear in the Selected Plans list.

9. Select one plan or many plans. You can:

- Select and add Plans one-by-one.
- Select multiple plans at once by holding down the Ctrl key on the keyboard and clicking the plans in the Selected Plans list.
- Click Edit and Add the plans to the Selected Plans list on the Plans Selection dialog box.

Click OK to exit the Plans Selection dialog box.

10. Click Run and select Screen in the Output box.

11. Select the Print title page check box. This option prints a page showing you which options you used.

12. Click OK.

13. Click Save and Exit.

14. Update information in the Report Title box or any other fields that your agency may use.

15. Click Save.

16. Select Screen in the Output box, select the Print title page check box and click OK.

17. Click Save and Exit.

18. Update the information in the Report Title box or any other fields that your agency may use.

19. Click Save.

20. Click Yes. The Process Complete dialog box appears with the number of assignments processed.

21. Click OK.

22. Click Close to exit the Move Add-ons to Main Assignment dialog box.

23. Click Close to exit the Reporting menu.

24. Click Close to exit the Salary Negotiations Main Screen dialog box.



In Figure 2, add-ons will be moved for the two selected plans (highlighted in blue) shown in the Selected Plans list.

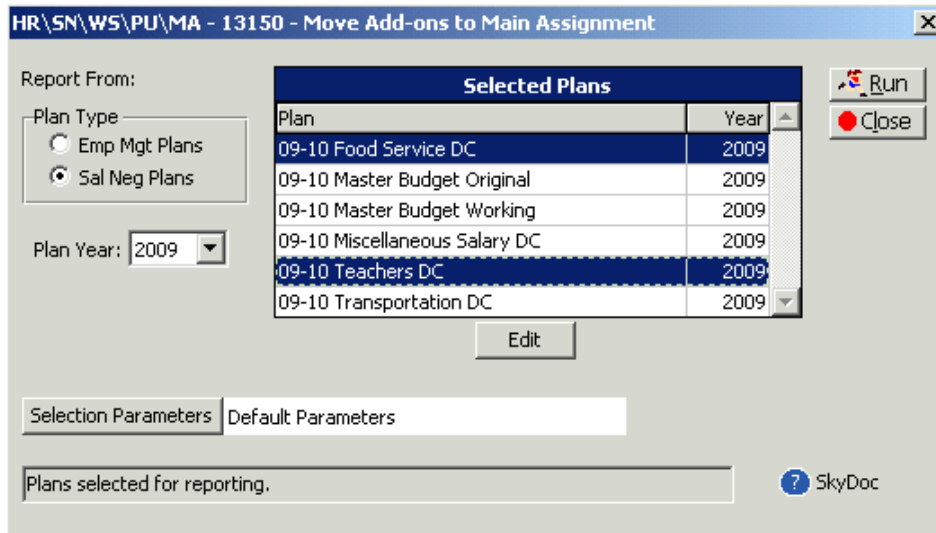


Figure 2 –Add-ons are moved to Main Assignment

## Creating Reports for Later Comparison

Before you migrate positions and assignments, you should run reports so that you can compare the old and new Salary Negotiations plans. A variety of reports are available; which reports you use depends on what you feel will work best for your comparison.

### WESPaC State Reports

- Mix Factor Report (HR\SG\WS\SR\MF)
- S-275 Report (HR\SG\WS\SR\SR)
- SPI Salary Exhibit Reports (HR\SG\WS\SR\SS)

You can find details and a tutorial about creating these WESPaC State Reports in SkyDoc.

### Excel option on Assignments tab

You may prefer this option for selected Salary Negotiations plans. Although this can take quite a bit of time if the plan has a significant amount of data, Excel allows you to sort, total, and save data for before-and-after comparisons.

### Employee Management Report

You can find this report by going to HR\SN\RE\PR\EM. The Employee Management Report prints each assignment in the current plan that meets the selection parameters. This report is designed to display most of the data that is in an assignment record.

# Using the Position-Assignment Migration Export Utility

The Position-Assignment Migration Export Utility (HR\SN\WS\PU\PE) utility creates a .CSV (comma-separated values) spreadsheet file from existing Salary Negotiations plans based on your selections. Use the file to define your positions, assignments, and Position Control Records. This utility doesn't export specific employee information and doesn't modify existing Salary Negotiations plans or data.

A Position Control Record is a master record containing Position, Assignment, and any or all of the following values: Building, Group, Job Type, Department, Grade From, Grade To, Calendar, Start date, Number of Days, End date, Total Hours, or Total Minutes. You can see this information on the Position Control dialog box (HR\SN\PM).

Before using the export utility, use the Audit Assignment Salaries (HR\SN\CA\AA) process on each Salary Negotiations plan to verify that there are no exceptions.

## Position-Assignment Migration Export Screen Overview

On the Position-Assignment Migration Export screen (Figure 3), you'll select an Export Set, select Fields to Export, select Plans to Export From and make parameter selections.

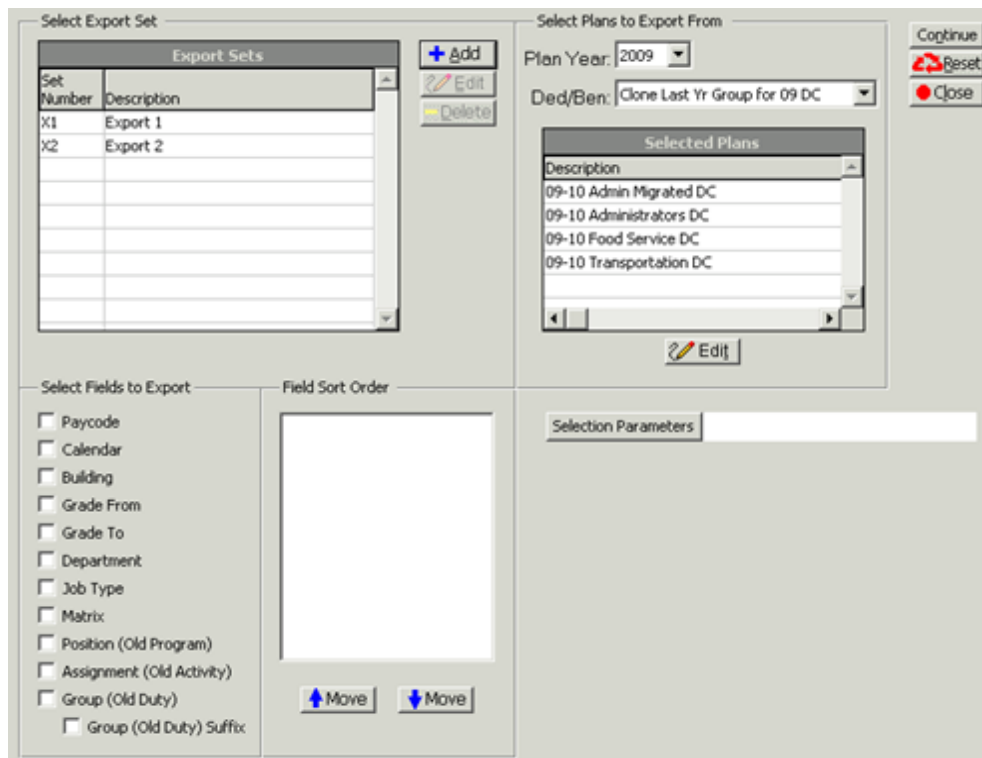


Figure 3 – Position-Assignment Migration Export screen

## Selecting an Export Set

An export set is a unique combination of Export Set Number, selected fields, field order, plan year, selected plans, selection parameters, export file location, and export file name. Export sets are used to manage exported files and to identify imported files.

You must create or select An Export Set before choosing other options. Export Set Descriptions can be changed at any time, but Export Set Numbers cannot be modified after creation. Export Set options, selection parameters, file name, and export location are automatically saved when the .CSV file is created after you click Export.

**NOTE** If you select a pre-existing Export Set and make changes, you will be prompted to overwrite the existing Export Set or to create a new set before the file is created.

1. Go to HR\SN.
2. Click WSIPC.
3. Double-click Position-Assignment Migration Export.
4. Click Reset. This clears any current parameters.
5. Click Add.
6. Type an identifier in the Set Number box.
7. Type a description in the Description box.
8. Click OK.

Your new export set appears in the Export Sets list.

## Selecting Fields to Export

Now that you've selected an Export Set, you must select the fields you want to export. The application uses the selected fields and field sort order to create the exported .CSV file of Position Control Record Candidates. You can use Field sort order to group similar assignments in the exported .CSV file. A Position Control Record Candidate is a suggested Position Control Record that is generated by the migration export utility.

1. Remain on the Position Migration Export screen (HR\SN).
2. Select the check boxes you want in the Select Fields to Export area.

Choose the fields that will best suit your new position structure.

3. Use the Move buttons to change the Field Sort Order.

The example in Figure 4 uses five fields to export and uses the default sort order. This default sort order is based on the order in which the fields are selected to export.

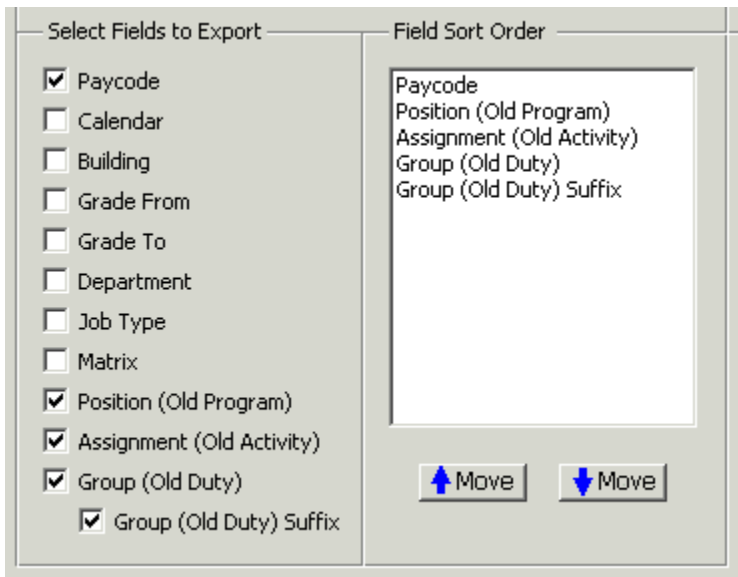


Figure 4 – Fields to Export and Sort Order example

## Selecting Plans to Export From

Once you've selected your fields to export, you must select a plan to export from. You may select one or more Salary Negotiations plans for the selected plan year and selected Ded/Ben Group. All selected plans must use the same Ded/Ben Group. Single Salary Negotiations plans or smaller selection groups may be easier to modify in the exported spreadsheet. Imported plans may be combined after migration is complete.

1. Remain on the Position Migration Export screen (HR\SN).
2. Select the correct year in the Plan Year box.
3. Select the correct Ded/Ben Group in the Ded/Ben box.

All plans for the selected Plan Year and for the selected Ded/Ben Group display in the Selected Plans list.

4. Select one or multiple plans. You can:
  - Select and add Plans one-by-one.
  - Select multiple plans at once by holding down the Ctrl key on the keyboard while you click the various plans in the Selected Plans list.
  - Click Edit and Add the plans you want to the Selected Plans list on the Plans Selection dialog box.

5. Click OK to exit the Plans Selection dialog box.

The example in Figure 5 has one plan selected to export from.

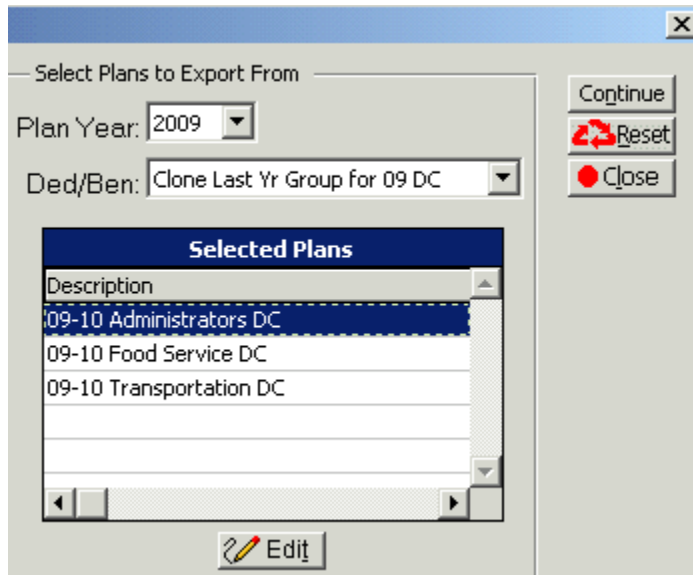


Figure 5 – Plans to Export From

## Selection Parameters

You can use additional parameters to further define the data to export.

1. Remain on the Position Migration Export screen (HR\SN).
2. Click Selection Parameters.
3. Click Reset. This clears any current parameters.
4. Click Yes.
5. Make choices based on Code Type that will create the export with a more defined set of criteria if desired.

You may want to leave the options wide open until you see what the export looks like, and then decide which selection parameters to use.

6. Click OK and click Continue.

Figure 6 shows a Position-Assignment Migration Export screen with options selected.

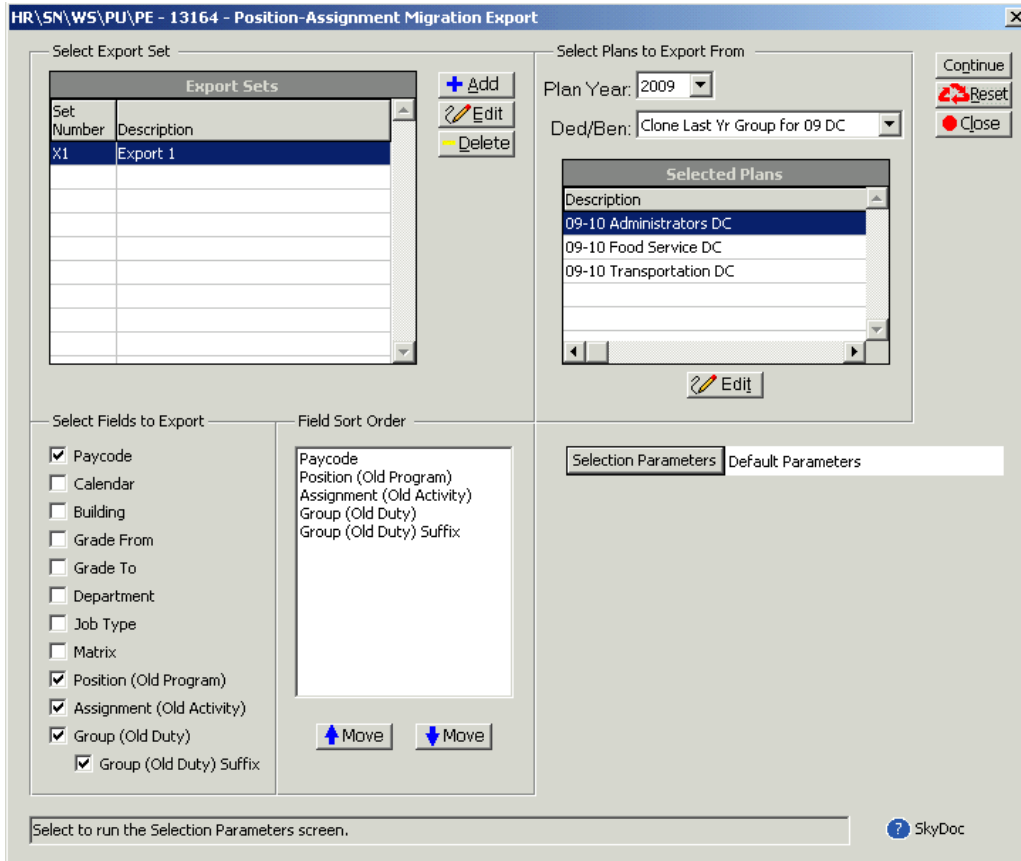


Figure 6 – Position-Assignment Migration Export example

## Position-Assignment Migration Export Browse Dialog Box Overview

The Position-Assignment Migration Export Browse dialog box, shown in Figure 7, is discussed below.

A column is displayed for each field that was selected on the Position-Assignment Migration Export dialog box. Columns and records are sorted in the order selected on the Position-Assignment Migration Export dialog box.

The Excel option is for informational use only and is not used in the migration process. This option will add only the displayed columns (not the additional New Position, New Assignment, New Group, and Link columns required for upload) to the Excel .XLS document.

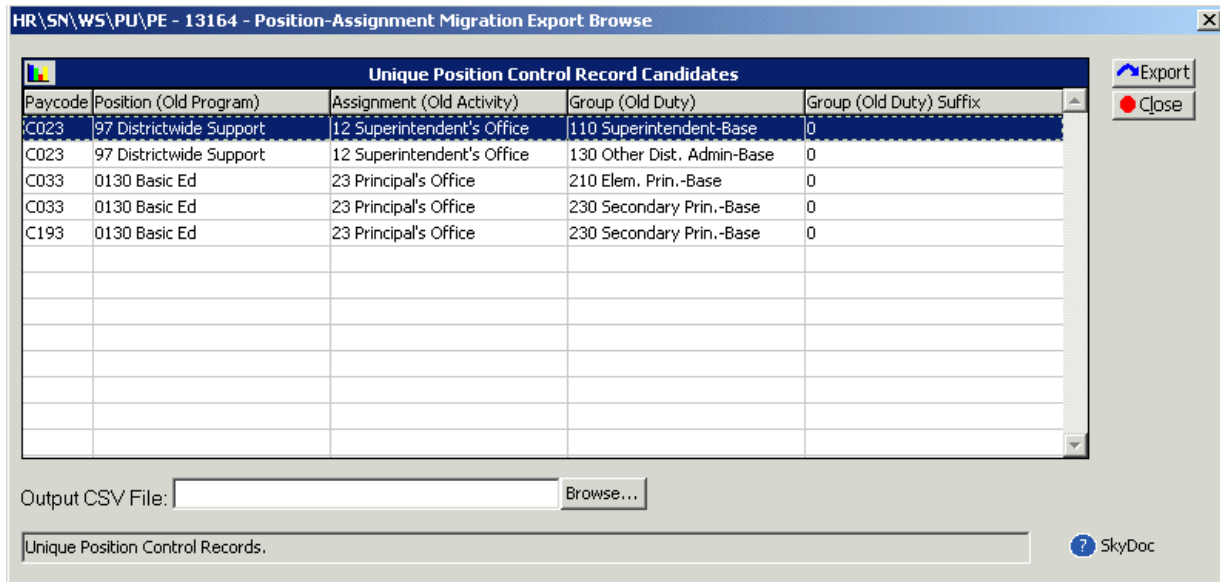


Figure 7 – Position-Assignment Migration Export Browse

## Selecting the Output .CSV File Location

The Browse option allows you to select any available file location. You may find it easier to export to your computer's desktop or your My Documents folder. You can also export to your Client C folder, your Citrix Home location, or the Export folder location.

You must name the file with .CSV extension (example: Export1.CSV). The spreadsheet must be imported from the same location that it was exported to.

1. Remain on the Position Migration Export screen (HR\SN).
2. Click Browse.
3. Select the location for the export file.
4. Type a file name in the File name box.
5. Click Open. Your file and location appear in the Output CSV File box.

Figure 8 shows a list of Unique Position Control Record Candidates created based on the selected migration export options. The data has not yet been exported to the .CSV file.

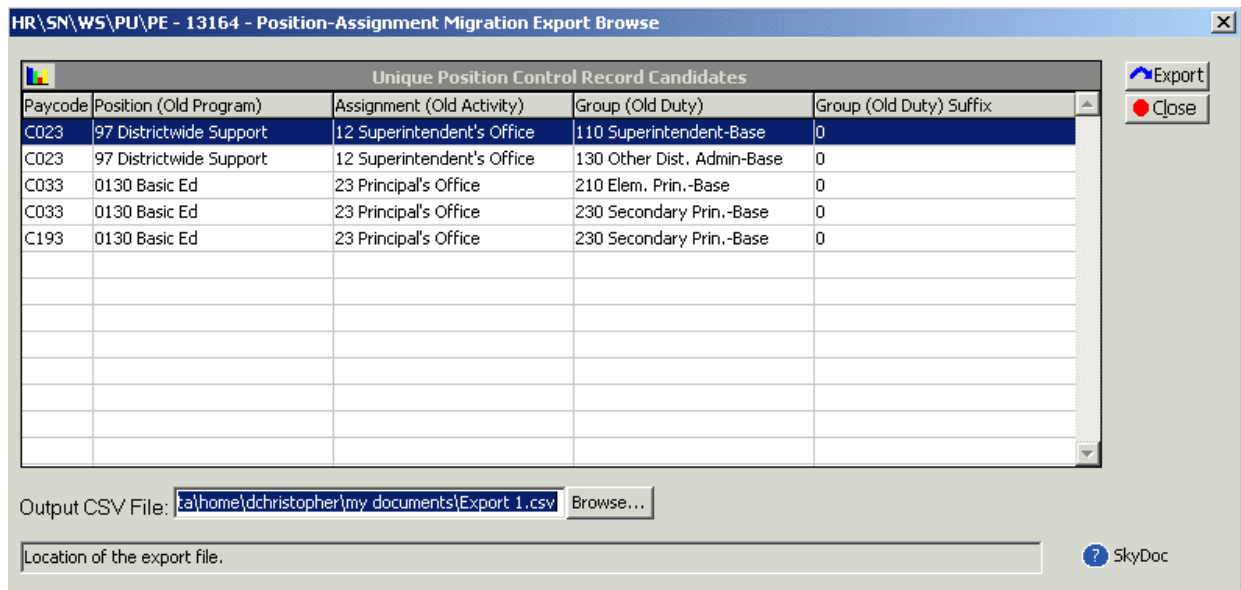


Figure 8 – Position-Assignment Migration Export Browse example

## Exporting the Output .CSV File

The Export option exports the data displayed in the Unique Position Control Record Candidates list as a .CSV file. The file displays the columns in the browse and has additional blank columns for New Position, New Assignment, New Group, and Link.

The export file name, location, and Export Set selections are saved with the Export Set name. The application will warn you if you are about to overwrite an existing .CSV file.

The message “Progress Errno=13. (98)” may appear when you try to export if the selected Output CSV File is already open. If you see this message, close the file and choose Export again.

1. Remain on the Position Migration Export screen (HR\SN).
2. Click Export.
3. Click OK.
4. Click Close to exit the Position-Assignment Migration Export Browse dialog box.
5. Click Close to exit the Position-Assignment Migration Export dialog box.
6. Click Close to exit the Reporting menu.
7. Click Close to exit the Salary Negotiations Main Screen dialog box.



# Using the Exported Spreadsheet

The spreadsheet file has the Unique Position Control Records extracted from your selected assignment data. You will enter new position and assignment information in this spreadsheet.

Do not move, rename, or delete columns on the spreadsheet. If you find that a field (column) is unnecessary, re-extract the spreadsheet without the selected field. You can also try using the Link option to get around the unnecessary column (see “Using the Link Column”).

Figure 9 shows a spreadsheet export with the Unique Position Control Record Candidates and the additional blank columns.

	A	B	C	D	E	F	G	H	I
1	Paycode	Position (Old Program)	Assignment (Old Activity)	Group (Old Duty)	Group (Old Duty) Suffix	New Position	New Assignment	New Group	Link
2	C023	97 Districtwide Support	12 Superintendent's Office	110 Superintendent-Base	0				
3	C023	97 Districtwide Support	12 Superintendent's Office	130 Other Dist. Admin-Base	0				
4	C033	0130 Basic Ed	23 Principal's Office	210 Elem. Prin.-Base	0				
5	C033	0130 Basic Ed	23 Principal's Office	230 Secondary Prin.-Base	0				
6	C193	0130 Basic Ed	23 Principal's Office	230 Secondary Prin.-Base	0				
7									
8									
9									
10									
11									
12									
13									
14									
15									

Figure 9 – Export 1 spreadsheet example

## Column Headings

The A-E column headings in line 1 in the example above are the fields selected to export. *Do not modify these headings.* When the spreadsheet is imported, the text on line 1 of the spreadsheet must appear exactly as it was when it was extracted.

**TIP** If you underline the headings, you can sort by specific headings.

## Unique Position Control Record Candidates

The Unique Position Control Record candidates start in line 2 in the example above. Data is from existing assignments in the selected plans exported from.

## Columns Added by Export Process

The export process creates four additional columns (F-I in the example above). These are needed for file import.

### **New Position** (Required)

Enter the Position you want for this Position Control Record.

### **New Assignment** (Required)

Enter the Assignment you want for this Position Control Record.

### **New Group** (Optional)

Enter the Group you want for this Position Control Record.

### **Link** (Optional)

Use if two or more unique lines on the spreadsheet should be combined to create a Position Control Record.

## Using the Link Column

Use the Link column to associate two or more unique lines into a single Position Control Record. This field is useful if some unique records in your spreadsheet require a particular field and others do not.

**NOTE** Linked Position Control Record candidates must have the same New Position, New Assignment, and New Group definitions.

Linked records populate a single Position Control Record with matching data from the import spreadsheet using the most frequently found combination of calendar, start date, end date, and number of days. Any spreadsheet values that do not match exactly on the linked Position Control Records will be left blank (that is, will not be populated to the generated Position Control Record). This can cause calendars in the New Positions to be different from the calendars retained in the associated assignments.

The Link feature combines assignments that are currently for the Position Control Record candidates and that are correctly linked into one assignment (unless the assignments have different pay codes, calendars, start dates, end dates, number of days, or salary matrix and placement data). You may find that some split assignments using salary amounts may not combine. You can modify Position Control Record values after the Import is complete.

Link column values can be any combination of letters, numbers and spaces. However, link values must be identical among records being linked and the link value for each set of linked records must be unique.

Figure 10 shows several positions being linked.

	A	B	C	D	E	F	G	H	I
1	Paycode	Position (C	Assignme	Group (Olr	Group (Olr	New Position	New Assignment	New Group	Link
2	C013	01 Basic	£27 Teachir	002 Subst		2 Teacher	Sub Pay		
3	C013	01 Basic	£27 Teachir	310 Elem.		0 Teacher	Elementary	Basic	TEB
4	C013	0130 Basi	Teaching	310 Elem.		0 Teacher	Elementary	Basic	TEB
5	C013	0130 Basi	Teaching	320 Secor		0 Teacher	Secondary	Basic	TSB
6	C013	21 Specia	Teaching	310 Elem.		0 Teacher	Special Ed	Basic	TSEB
7	C013	21 Specia	Teaching	320 Secor		0 Teacher	Special Ed	Basic	TSEB
8	C013	21 Specia	Teaching	330 Oth. T		0 Teacher	Other	Basic	TOB
9	C013	24 Specia	Teaching	330 Oth. T		0 Teacher	Other	Basic	TOB
10	C013	31 Vocatic	Teaching	320 Secor		0 Teacher	Secondary	Basic	TSB
11	C013	58 Specia	Teaching	320 Secor		0 Teacher	Secondary	Basic	TSB
12	C013	66 Studen	Teaching	320 Secor		0 Teacher	Secondary	Basic	TSB
13	C013A	01 Basic	£27 Teachir	312 Elem.		2 Teacher	Elementary	Extended	
14	C013A	66 Studen	Teaching	320 Secor		0 Teacher	Secondary	Basic	TSB
15	C153	0130 Basi	Teaching	310 Elem.		0 Teacher	Elementary	Basic	TEB
16	C213	0130 Basi	Teaching	311 Elem.		1 Teacher	Elementary	No Time	
17	C213	0130 Basi	Teaching	331 Oth. T		1 Teacher	Other	No Time	
18	C303	0130 Basi	28 Extract	512 Extrac		2 Teacher	Extracurricular	Extended	
19	C513	31 Vocatic	27 Teachir	322 Secor		2 Teacher	Secondary	Extended	TSET
20	C605	0120 Basi	27 Teachir	331 Oth. T		1 Teacher	Other	No Time	TON
21	C615	01 Basic	£27 Teachir	311 Elem.		1 Teacher	Elementary	No Time	
22	C703	24 Specia	Teaching	332 Oth. T		2 Teacher	Other	Extended	TOE
23	PD	01 Basic	£27 Teachir	322 Secor		2 Teacher	Secondary	Extended	STE
24	T103X	31 Vocatic	Teaching	321 Secor		1 Teacher	Secondary	No Time	TSN
25	T113	31 Vocatic	27 Teachir	322 Secor		2 Teacher	Secondary	Extended	TSET
26	T113	66 Studen	Teaching	322 Secor		2 Teacher	Secondary	Extended	TSET
27	T123	01 Basic	£27 Teachir	322 Secor		2 Teacher	Secondary	Extended	TSET
28									

Figure 10 – Export spreadsheet with linked positions

Figure 11 shows the resulting Position Control records.

Plan In Use: 09-10 Teachers Migrated DC

Position		Assignmt		FTE Totals		
Description	Code	Description	Code	Position	Assignmt	Posit. Ctr
Teacher		Elementary		44.0000	13.0000	8.0000
		Extracurricular				
		Other				
		Secondary				
		Special Ed				
		Sub Pay				
FTE Totals				Positions:	Offers:	Filled:
				44.0000	1.9198	37.3290
				13.0000	0.0000	12.8623
				8.0000	0.0000	8.7956
				Open:		
				4.7512	0.1377	-0.7956

FTE To Use for Calculation: Entered FTE

Building	Job Type	Group	Departm
		Basic	
		No Time	
ELEMENTARY		Extended	
East Elementary	INCENTIVE	No Time	

Figure 11 – Positions that were created based on import

# Creating New Positions and Assignments in the Exported Spreadsheet

You will use Excel and enter data to define new positions and assignments.

These steps assume you know how to navigate to where you saved the exported file and know how to use Excel.

1. Open the saved exported .CSV file in Excel.
2. Enter a New Position and New Assignment for each Position Control Record candidate (each line) in the spreadsheet.
3. Determine which Position Control Record candidates should be linked and enter appropriate link values for these records.
4. Save the .CSV file (the file must be saved in .CSV format).
5. Click Yes to the Excel informational message asking you whether you want to keep the workbook in this format.

# Using the Position-Assignment Migration Import Utility

This utility imports your modified .CSV file to create new Positions, Assignments, and Position Control Records in a new Salary Negotiations plan. No existing plans or data are modified by this utility.

The import creates Positions, Assignments, and Position Control Records as you defined them in the export migration spreadsheet. Each individual assignment is migrated to the appropriate Position, Assignment, and Position Control Record. An Exception Report is created if any assignments cannot be processed by the import utility. You must manually migrate these assignments.

Use the Audit Assignment Salaries (HR\SN\CA\AA) process on each newly migrated Salary Negotiations plan to verify there are no exceptions after using the import utility. If there are exceptions, **do not use the Fix** option. WSIPC highly recommends that you **manually** fix all exceptions in your newly migrated Salary Negotiations plans.

## Position-Assignment Migration Import Screen Overview

On the Position-Assignment Migration Import screen (Figure 12) you'll select an Export Set to import and configure import settings.

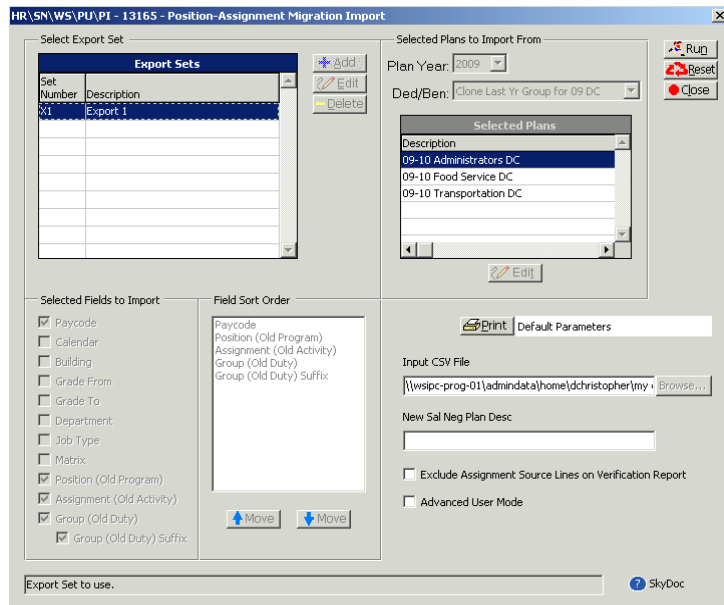


Figure 12 – Position-Assignment Migration Import screen

## Selecting an Export Set to Import

You must select an Export Set. Only previously defined Export Sets may be used for Import; Export Sets cannot be added, edited or deleted. These options aren't available.

1. Go to HR\SN.
2. Click WSIPC.
3. Double-click Position-Assignment Migration Import.
4. Click the correct Export Set in the Export Sets list.

## Selecting Fields to Import

Data in the Selected Fields to Import and the Field Sort Order appears based on the selected Export Set. Verify the data you expect is displayed. You cannot make any changes to these options.

## Selecting Plans to Import From

Data for the Plan Year, Ded/Ben Group, and Selected Plans appears based on the selected Export Set. Verify the data you expect is displayed. You cannot make any changes to these options.

## Configuring Import Settings

Data in the Input CSV File box appears based on the selected Export Set. Verify that the data you expect is displayed. You cannot make any changes to this option.

The Print option provides a report of all parameters in the selected Export Set and includes the new plan name. You probably won't use this option very often. You can select Print title page when you are ready to Run the import and get a list of all the parameters.

The Exclude Assignment Source Lines on Verification Report allows you to display or not display the assignment data from the selected Salary Negotiations plan used for export and import.

The Advanced User Mode is not discussed in this Guide.

1. Type a description for the new plan in the New Sal Neg Plan Desc box.

The name must be unique (not previously in use).

Do not initially click the check box Exclude Assignment Source Lines on Verification Report. You must see a report first and then decide if you want to select this option.

2. Click Run.

3. Select Screen in the Output box.
4. Select the Print title page check box.

This produces a page showing you what options you used.

5. Click OK.

See the Position-Assignment Migration Import Exception Report Overview section for some example exception messages.

6. Click Save and Exit.
7. Update information in the Report Title box or any other fields your agency may use.
8. Click Save.

The Output Destination dialog box appears if the exception report did not have errors.

9. Click OK.
10. Click Save and Exit.
11. Update the information in the Report Title box or any other fields that your agency may
12. Click Save.
13. Click Yes.
14. Click OK.
15. Click Close to exit the Position-Assignment Migration Import dialog box.
16. Click Close to exit the Reporting menu.
17. Click Close to exit the Salary Negotiations Main Screen dialog box.

The import process has now created your new migrated plan for you to begin reviewing.

If your selected Export Set is incomplete or corrupt, the following message will appear:

“The saved parameters for the selected Export Set are incomplete or corrupt. No parameters will be loaded.”

If you receive this message, you must recreate the Export Set and spreadsheet.

## Most Frequently Found

When Position Control Records are created by the import utility, the most frequently found combination of calendar, start date, end date, and number of days on Position Control Records of the Assignments matching the new Position Control definition will be used if the values do not already match. This can cause calendars in the New Positions to be different from the calendars retained in the associated assignments.

For all other fields, if values do not match on all assignments for a particular Position Control Record, those fields will be left blank on the Position Control Record. Position Control Records may be modified after import.

## Rules to Remember

Pay Codes, Calendar Codes, Work Start Date, Work End Date, and Salary Matrix Codes must all match to be combined into an Assignment during the migration.

Building, Group, Job Type, Department, Grade From, and Grade To will be set to blank or zero when combined Assignments have different field values.

## Position-Assignment Migration Import Exception Report Overview

This report appears if there are fatal errors on the import spreadsheet.

### Spreadsheet Import Fatal Errors

Below is a list of fatal errors.

**Blank 'New Position' value found in input file at line x.**

Make sure your exported .CSV file has data in the new position column for each line.

**Blank 'New Assignment' value found in input file at line x.**

Make sure your exported .CSV file has data in the new assignment column for each line.

For the following three errors, look at rows with Link: x, and make changes to the link in your exported .CSV file as needed.

**Linked position control records with non-matching Position values.**

**Linked position control records with non-matching Assignment values.**

**Linked group control records with non-matching Group values.**

### Spreadsheet Import Warnings

Below is a list of non-fatal spreadsheet warnings that print if no Errors are found.

**One or more assignments have missing or blank breakdown records.**



These blank or missing breakdown records will be blank in the imported plan.

**No new Position found matching assignment. Assignment will not be included.**

POS: x, ASN: x, DUT: x, PAY \$x.xx

Figure 13 shows errors, which need corrected before the import process can continue.

6pmbrk18.p		Emerald School District		Time: 1:59 PM	Date: 09/09/08
03.07.10.00.00-010003		Position-Assignment Migration Import Exception Report			PAGE: 1
<b>PLAN:</b>	n/a				
EMPLOYEE	ERROR TYPE	ERROR DESCRIPTION			
n/a	Error	Blank 'New Position' value found in input file at line 17.			
n/a	Error	Blank 'New Assignment' value found in input file at line 54.			
n/a	Error	Linked position control records with non-matching Position values. Look at rows with Link: HR.			
n/a	Error	Linked position control records with non-matching Assignment values. Look at rows with Link: Teacher3.			
***** End of report *****					

**Figure 13 – Position-Assignment Migration Import Exception Report error example**

Figure 14 shows warnings. Examine this in the new migrated plan and make updates as needed.

6pmbrk18.p		Emerald School District		Time: 9:41 PM	Date: 11/24/08
04.08.10.00.00-010003		Position-Assignment Migration Import Exception Report			PAGE: 1
<b>PLAN:</b>	09-10 Teachers DC				
EMPLOYEE	ERROR TYPE	ERROR DESCRIPTION			
BAKE CINO0	Warning	No new Position found matching assignment. Assignment will not be included. POS: 0130 Basic Ed, ASN: 28 Extracurricular, DUT: 321 Secondary Teacher-No Time, PAY: \$801.55			
CASH JOH00	Warning	No new Position found matching assignment. Assignment will not be included. POS: 0130 Basic Ed, ASN: 28 Extracurricular, DUT: 321 Secondary Teacher-No Time, PAY: \$500			
DONOVEN00	Warning	No new Position found matching assignment. Assignment will not be included. POS: 0130 Basic Ed, ASN: 28 Extracurricular, DUT: 321 Secondary Teacher-No Time, PAY: \$2667.81			
GRAINMYE00	Warning	No new Position found matching assignment. Assignment will not be included. POS: 0130 Basic Ed, ASN: 28 Extracurricular, DUT: 321 Secondary Teacher-No Time, PAY: \$1789			
N/A	Warning	One or more assignments has missing or blank breakdown records. These blank or missing breakdown records will be blank in the imported plan.			
***** End of report *****					

**Figure 14 – Position-Assignment Migration Import Exception Report warning example**

# Position-Assignment Migration Import Verification Report Overview

The import verification report contains four heading rows. Rows two through four are indented to the right to make the report easier to read.

NEW POSITION		NEW ASSIGNMENT				BUILDING	GRADE	JOB TYPE	DEPARTMENT
PCR: CALENDAR	STRT	STOP	# DRYS	GROUP	BUILDING	GRADE	JOB TYPE	DEPARTMENT	
Asn: NMEKEY	PRYCODE	STRT	STOP	# DRYS	BUILDING	GRADE	MAIN ASN PRY	ADD-ON PRY	
Source Asn:	SOURCE POSITION	SOURCE ASSIGNMENT			SOURCE GROUP		MAIN ASN PRY	ADD-ON PRY	
Teacher		Extracurricular							
PCR: SPORT		08/17/09	06/23/09	222	Extended	Emerald High	Secondary Gr	COACH	
Asn: BALANTON000	C303	08/18/08	06/23/09	222		Emerald High	Secondary Gr	1,000.00	0.00
Source Asn:	0130 Basic Ed	28 Extracurricular			512 Extracur.-Extend			1,000.00	0.00
Teacher		Other							
PCR: TEACH-AT 7:30		08/27/09	06/17/10	182	No Time	North Element			
Asn: ALLYNETH000	C213	08/27/09	06/17/10	1		North Element		1,035.94	0.00
Source Asn:	0130 Basic Ed	Teaching			331 Oth. Teacher-No Time			1,035.94	0.00
PCR: TEACH-AT 7:30		08/27/09	06/17/10	182	Basic		Secondary Gr		
Asn: DECATFEL000	C013	08/28/09	06/15/10	182		Green High Sc	Secondary Gr	19,421.29	0.00
Source Asn:	21 Special Ed-Supplemental	Teaching			330 Oth. Teacher-Base			19,421.29	0.00
Asn: MAGPIHIN000	C013	08/27/09	06/15/10	182		Emerald High	Secondary Gr	39,218.00	0.00
Source Asn:	24 Special Ed-Supplemental	Teaching			330 Oth. Teacher-Base			39,218.00	0.00
PCR: 5 Additional Days for Te		08/27/08	05/23/09	193	Extended	East Elementa		ADDITIONAL DA	
Asn: BALANTON000	C703	08/27/08	05/22/09	193		East Elementa		930.00	0.00
Source Asn:	24 Special Ed-Supplemental	Teaching			332 Oth. Teacher-Extend			930.00	0.00
PCR: 12 Responsibility Days		09/01/08	06/30/09	217	No Time	ELEMENTARY		RESPONSIBLLT	
Asn: BALANTON000	C605	09/01/08	06/30/09	217		ELEMENTARY		2,148.00	0.00
Source Asn:	0120 Basic Education	27 Teaching			331 Oth. Teacher-No Time			2,148.00	0.00

Figure 15 – Position-Assignment Migration Import Verification Report

The detail line furthest to the left is the new position and new assignment pair.

## First Indent

The first indent is the new Position Control Record that has Calendar, Start, Stop, # Days, Group, Building, Grade, Job Type, and Department data.

Calendar, Start Date, Stop Date, and Number of Days for the new Position Control Records are based on the most frequently found combination from the Position Control Records of the source assignments that migrate to the new Position Control Records. This means the new assignments could have different calendar information than the new Position Control Record.

Example:

- Source assignment 1 has calendar A.
- Source assignment 2 has calendar A.
- Source assignment 3 has calendar B.
- The new Position Control Record will have calendar A.

## Second Indent

The second indent is the new assignment record. New assignments are totals of combined source assignments, based specifications in the import spreadsheet. Asn lines preceded with three asterisks (\*\*\*) have had one or more add-ons dropped in the creation of the new assignment. All source Assignment Main Asn and Add-On Pay values are listed below the new Asn lines. Any add-on dollars that were not migrated will need to be manually added back.

### Third Indent

The third indent is the source assignment record. Displaying this information is an option on the Position-Assignment Migration Import dialog box (Exclude Assignment Source Lines on Verification Report). The source assignment data is from the selected Salary Negotiations plan used for export and import.

## Reviewing Newly Migrated Salary Negotiations Plans

Examine your newly migrated Salary Negotiations plans to make sure the results are acceptable.

You should:

- Look at the overall position and assignment structure.
- Review the Position Control Records.
- Review the individual assignments for the Position Control Records.
- Add any records the import utility could not process.
- Select the Track changes made in this plan check box.
- Use the Audit Assignment Salaries (HR\SN\CA\AA) process on each newly migrated Salary Negotiations plan to verify there are no exceptions after using the import utility. If there are exceptions, **do not use the Fix** option. WSIPC highly recommends that you **manually** fix all exceptions in your newly migrated Salary Negotiations plans.

Create reports and compare them to the previous reports. See the section “Creating Reports for Later Comparison” earlier in this Guide. If you don’t like the results, delete the unwanted newly migrated Salary Negotiations plans and start the migration processing again.

# Appendix A

## Examples of Old and New Structure

### Old SPI Code Defined Structure

<b>Position</b>	<b>Assignment</b>	<b>Group</b>
01 Basic Education	27 Teaching	310 Elem. Teacher-Base
21 Special Ed-Supplemental-St	23 Principal's Office	230 Secondary Prin.-Base
97 Districtwide Support	12 Superintendent's Office	110 Superintendent-Base
99 Pupil Transportation	52 Operations (Pupil Transpor	950 Operator-Base

### Possible New Defined Structure for the Above Old Structure

<b>Position</b>	<b>Assignment</b>	<b>Group (Optional)</b>
Teacher	Elementary	Base
Teacher	Special Ed	Base
Superintendent	Base	
Transportation	Operator Base	

# Appendix B

## Examples of Position Codes, Assignment Codes, and Group Codes

A small agency may have a very simple positions, assignments, and groups structure similar to the examples below.

### Small Agency Examples

<b>Position Codes (no State Code used)</b>
Administrator
Certificated
Classified

<b>Assignment Codes (no State Code used)</b>		
Accts Payable/Human Resources	Librarian	Principal – 213 Day
Admin Secretary	Maintenance	Psychologist
Advisor	Nurse	Secretary
Business Manager	OT/PT	Speech/Language
Coach	Oth Admin – 200 Day	Superintendent
Coordinator	Oth Director – 210 Day	Teacher
Counselor	Para-Educator	Transportation
Custodian	Payroll/Human Resources	Vice Principal – 200 Day
Director of Special Programs	Principal – 200 Day	Vice Principal – 208 Day
Food Service	Principal – 212 Day	

The asterisk (\*) at the front of the description sorts to the top of the Group Codes list.

<b>Group Codes (no State Code used)</b>	
*5.5 Day Ext Contract	*Fall Sports
*Base Contract	*Incentive Contract
*Class Stipend	*Longevity
*Club – Dept Stipend	*Spring Sports
*Conditional Certificate	*Stipend Contract
*Extended Day Cont	*Winter Sports

A large agency may need more-detailed positions, assignments, and groups.

### **Large Agency Examples**

<b>Position Codes</b>	<b>State Code Used (8 digits)</b>
Administrator	Admin
Food Service	Food
Human Resources	Human Resources
Instructional Assistants	IA
Librarian	Library
Payroll	Payroll
Principal	Princ
Secretary	Sec
Superintendent	Super
Teacher	Teacher
Transportation	Transp
Vice Principal	VP
(and more)	

<b>Assignment Codes</b>	<b>State Code Used (8 digits)</b>
Assistant Head Cook	AHC
Assistant Cook	AC
Base Contract	BASE
Bus Driver	BD
Bus Extra Hours	BEH
Certificated Stipend	CTSTP
Classified Stipend	CLSTIP
Elementary Teacher	ELTCH
Extended Contract Days	ECD
Fall Coach – HS	FCHS
Incentive Contract	IC
Maintenance Supervisor	MNTSUP
Middle Teacher	MIDTCH
Miscellaneous Stipend	MISCSTP
Secondary Teacher	SECTCH
Teacher 1 <sup>ST</sup>	TCH1ST
Teacher 2 <sup>nd</sup>	TCH2ND
Teacher English	TCHENG
Teacher Music	TCHMUS
(and more)	

The Group Code could be used for the bargaining unit.

<b>Group Codes</b>	<b>State Code Used (8 digits)</b>
Bus Driver's Union	BUS
Teacher's Union	TEA
Maintenance Bargaining Unit	MAINT
*Base Contract	*BASE
*No Time	*NOTIME
*Extended	*EXTEND
(and more)	