



# Import Distribution Data to PMIS Checklist



# Table of Contents

<b>Import Distribution Data to PMIS Checklist .....</b>	<b>i</b>
<b>Import Distribution Data to PMIS Checklist .....</b>	<b>1</b>



# Import Distribution Data to PMIS Checklist

**Note:** Positions must be loaded prior to uploading distributions.

Step
<p><input type="checkbox"/> In the current year payroll, use the <a href="#">Payroll &gt; Reports &gt; User Created Reports</a> page to generate a user-created report.</p> <p>Reference the below image for a list of fields to select and click <b>Create Report</b>.</p> <p>Use the filter to exclude pay type 4 (substitutes) employees.</p> <p>Save the report as an Excel file.</p>
<p><input type="checkbox"/> Download and save a copy of the <a href="#">Import PMIS Distributions Template</a>.</p>
<p><input type="checkbox"/> Copy and paste columns from the most current spreadsheet to the <a href="#">Import PMIS Distributions Template</a>.</p> <p>Manually complete all applicable blank fields.</p> <p>Distribution Sequencing is required if the distribution record has more than one account code. Indicate matching position number and billet with multiple sequence numbers. (Sample screenshot - Gina)</p>
<p><input type="checkbox"/> Delete the first and last name columns. The file can only contain the information that is being imported.</p>
<p><input type="checkbox"/> Prior to uploading the file, some column formatting changes must be done to reflect leading zeros. After deleting the first and last name columns, format the following columns:</p> <ul style="list-style-type: none"> <li>• <b>Column C</b> Billet must be five characters</li> <li>• <b>Column E</b> Distribution Sequence - If an employee has more than one line of distribution data, this field should be numbered consecutively beginning with 1 and must be three characters.</li> <li>• <b>Column G</b> Job Code must be four characters. If your job codes are less than four characters, the job code column may have to be reformatted.</li> <li>• <b>Column M</b> Sub Object must be two characters</li> <li>• <b>Column N</b> Organization must be three characters</li> <li>• <b>Column R</b> Project Detail must be two characters</li> <li>• <b>Column T</b> Account Percent must be eight characters (five digits to the right of the decimal)</li> </ul> <p><a href="#">Excel formatting instructions</a>.</p>
<p><input type="checkbox"/> Delete the headers on the first row. Save the file again with a new name. For example, PMIS Distributions Load 1.</p>
<p><input type="checkbox"/> In the current year PMIS, upload the file on the <a href="#">Position Management &gt; Utilities &gt; Import Position Records</a> page.</p> <p>Select <b>Distribution Records</b>.</p> <p>Click <b>Choose File</b> and select the PMIS Distributions Load 1.csv file and click <b>Execute</b>. Review the error report and make changes as necessary and import the file again until there are no errors and the file is successfully uploaded.</p>

	<b>Step</b>
<input type="checkbox"/>	Repeat the above steps for supplement positions; however, name the files accordingly. For example, save the file as PMIS Supplement Distributions instead of Distributions. The supplements should be uploaded in a separate file from the regular distributions.