



Import Position Data Checklist

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The purpose of this document is to guide you through the necessary steps to import position data to Position Management.

IMPORTANT: School calendars and all tables must be created in next year payroll files prior to importing position data into PMIS. The **Employee Must Be Assigned a Position Prior to Creating Payroll Record** field on the [District Administration > Options > Position Management](#) page should not be selected.

This document assumes you are familiar with the basic features of the ASCENDER Business system and have reviewed the [ASCENDER Business Overview guide](#).

[Position Records File Layout](#)



Some of the images and/or examples provided in this document are for informational purposes only and may not completely represent your LEA's process.

Step
<p><input type="checkbox"/> (Optional) You can either manually create positions on the Position Management > Maintenance > PMIS Position Admin page or continue to next steps to import multiple positions.</p> <p>TIP: As a reminder, you can create and use billet 00000 to serve as a position template. This can be helpful when manually creating multiple positions.</p>
<p><input type="checkbox"/> In the current year payroll, use the Payroll > Reports > User Created Reports page to generate a user-created report.</p> <p>Reference this image for a list of fields to select and click Create Report.</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 Import PMIS Position Records Template.</p>
<p><input type="checkbox"/> Copy and paste columns from the most current spreadsheet to the Import PMIS Position Records Template.</p> <p>TIP: Be sure to paste the values in order to correctly copy the formulas.</p> <p>Manually complete all applicable blank fields.</p> <p>For employees who started late in the school year, change the days employed to the number of days as if they worked the full school year. It is not necessary to update the salary as if they were with the LEA for the full school year. Be sure that each employee is only uploaded one time.</p>

Step
<input type="checkbox"/> Delete the first and last name columns. The file can only contain the information that is being imported.
<input type="checkbox"/> If using the above template, skip this step. Use this information as a reference if you need to restore column formatting. 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: Column I - The Occ Employee Number must be six characters Column C - The billet must be six characters Column M - The Occ Pay Step must be two characters. If your pay steps are less than two characters, the pay step column may have to be reformatted. Column O - The State Step must be two characters Column Y - The Job Code must be four characters. If your job codes are less than four characters, the Job Code column may have to be reformatted. Column AB - The Campus ID must be three characters. Column AG - The TRS Position Code must be two characters. Column BI - The Pay Step must be two characters. If your pay steps are less than two characters, the Pay Step column may have to be reformatted. Excel formatting instructions Format a Column in Excel Use the following steps to format a column with leading zeros. <input type="checkbox"/> In the Excel spreadsheet, click Home and click the drop-down arrow next to General. <input type="checkbox"/> Select <i>More Number Formats</i>. The Format Cells pop-up window opens. <input type="checkbox"/> Under Category, select <i>Custom</i> and then under Type, highlight the word General and type the number of zeros that represent the number of characters required for the field. For example, the Employee Number must be six characters with leading zeros, so you would type six zeros. <input type="checkbox"/> Click OK to save the changes.
<input type="checkbox"/> Delete the headers on the first row. Save the file again with a new name. For example, PMIS Regular Positions Load 1.
<input type="checkbox"/> In the current year PMIS, upload the file on the Position Management > Utilities > Import Position Records page. Select Position Records . Click Choose File and select the PMIS Regular Positions Load 1.csv file and click Execute . 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.
<input type="checkbox"/> Repeat the above steps for supplement positions; however, name the files accordingly. For example, save the file as PMIS Supplement Positions instead of Regular Positions. The supplements should be uploaded in a separate file from the regular positions.