moveforecasttocyrpositionandpayroll

ii

Table of Contents

Move Forecast to CYR Position and Payroll - HRS6260

Human Resources > Utilities > PMIS > Move Forecast to CYR Position and Payroll

This utility is used to move select groups of payroll and current position forecast records to the current year based on the selection criteria entered.

You must be logged on to a next year pay frequency to access this utility.

Please create an export using Export Pay Tables, Export Human Resources by Payroll, and Export PMIS Tables prior to using this utility.

Move forecast records to current year:

In the **Select Pay Frequency** field, click ⌄ to select the pay frequency that you wish to move to current year. This is a required field.

By default, **Include Vacant Supplements** is not selected. Select **Include Vacant Supplements** to include the vacant supplement positions.

By default, **Validate Accounts against General Ledger** is selected. Clear **Validate Accounts against General Ledger** to not validate the accounts against the general ledger.

By default, **Update TRS Year Flag** is not selected. Select **Update TRS Year Flag** to update the **TRS Year** field as set on the Staff/Job Pay Data > Job Info tab. The **TRS Year** field is used to indicate those employees whose contract year begins in July or August (nonstandard) and who receive a contract payment before the beginning of the school year.

By default, **Update Workers' Comp Annual and Remaining Payments** is not selected. Select **Update Workers' Comp Annual and Remaining Payments** to update the WC Ann Pymts and the WC Remain fields as set on the Staff/Job Pay Data > Job Info tab. The **WC Ann Pymts** field indicates the number of annual workers' compensation payments for the contract period, and the **WC Remain** field indicates the number of remaining workers' compensation payments to be made during the contract period.

In the **Add Additional Workers' Comp Payments** field, type the number of additional workers' compensation payments. The field accepts any value between 0-9.

In the **Select State Minimum Salary Table (CYR/NYR)** field, click ⋮ to select current year or next year. This is a required field.

In the **Select First Pay Date Codes or blank for ALL** field, type the pay date codes, separating multiple pay date codes with a comma but no space (e.g., 1,17,88,A1). Or, click ⋮ to search for pay date codes. Otherwise, leave blank to use all pay date codes.

Select **Include Extra Duty** to include extra duty in the process. If not selected, no extra duty will be processed even if extra duty codes are selected.

In the **Select Extra Duty Codes** or blank for ALL field, type the extra duty codes, separating multiple extra duty codes with a comma but no space (e.g., 08,20,A2,TF). Or, click ⋮ to search for extra duty codes. Otherwise, leave blank to use all extra duty codes.

In the **Select Positions or blank for ALL (Includes ALL billets for selected positions Blank for ALL not processed when Positions/Billets selected)** field, type the position codes, separating multiple position codes with a comma but no space (e.g., PRIN,T187). Or, click ⋮ to search for position codes. Otherwise, leave blank to use all position codes.

In the **Select Positions/Billets or blank for ALL** field, type the position/billet codes, separating multiple position/billet codes with a comma but no space (e.g., PRIN/00001,PRIN/00006). Or, click ⋮ to search for position/billet codes. Otherwise, leave blank to use all position/billet codes.

In the **Select Supplement Positions or blank for ALL (Includes ALL billets for selected supplement positions Blank for ALL not processed when Supplements/Billets selected)** field, type the supplement position codes, separating multiple supplement position codes with a comma but no space (e.g., PRIN,T187). Or, click ⋮ to search for supplement position codes. Otherwise, leave blank to use all supplement position codes.

In the **Select Supplement Positions/Billets or blank for ALL** field, type the supplement position/billet codes, separating multiple supplement position/billet codes with a comma but no space (e.g., PRIN/00001,PRIN/00006). Or, click to search for supplement position/billet codes. Otherwise, leave blank to use all supplement position/billet codes.

Click **Execute** to process the selections.

The following reports are available:

- Move Forecast Process Error Listing
- Update Positions From Forecast
- Update Payroll From Forecast by Employee Name
- Update Payroll From Forecast by Campus

Click **Generate Reports**. The system displays the first report selected.

Review the report.

Review the report using the following buttons:

Click First to go to the first page of the report.
Click ◀ to go back one page.
Click ▶ to go forward one page.
Click Last to go to the last page of the report.

The report can be viewed and saved in various file formats.

Click 🅿 to save and print the report in PDF format.

Click to save and print the report in CSV format. (This option is not available for all reports.) When a report is exported to the CSV format, the report headers may not be included.

Click **X** to close the report window. Some reports may have a **Close Report**, **Exit**, or **Cancel** button instead.

|

Click **Continue** to view the next report, or click **Return** to return to the reports selection page.

Click **Process** to move the forecast records to current year.

Create a backup.

A backup is highly recommended. Click **Yes** to create an export. Otherwise, click **No** to not create the export and continue with the process.

Type a password for the archive, and then click **Continue**. An export spinning wheel is displayed indicating the progress of the export process.
When the export process is completed, the File Download page is displayed.
Select **Save File**, and then click **OK**. The Save As dialog box is displayed. Otherwise, click **Cancel** to close the dialog box.
In the **Save As** field, click ⌄ to navigate to the appropriate folder.
In the **File name** field, the file name is set to dbcccddd_freq_mmddyyyy.rsf, where cccddd is the county-district number and mmddyyyy is the current date.
Click **Save**. Otherwise, click **Cancel** to close the Save As dialog box without saving the file.

After the export process is completed, the actual update is performed. If the update is successful, a message indicating that the move forecast updates was processed successfully is displayed.

Click **Cancel** to return to the Move Forecast to CYR Position and Payroll page without moving the forecast records to current year.