

copycyrstafftonyr

Table of Contents

Copy CYR Staff to NYR - HRS4300 1

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Human Resources > Next Year > Copy CYR Staff to NYR

This page is used to select current year employees who are to be copied to the corresponding next year. Any selected employee records that currently exist in the next year tables (e.g., pay distribution, job records, deductions, bank deposits, and pay records) are deleted and replaced with the current year tables during the copy process.

Example: If an employee is copied from the current year to the next year, a job code is changed in the current year, and the employee is recopied, the original job records that were previously copied are deleted before the new records are copied.

- Employee 100 has job TEA1 and job BUSD in the current year.
- Employee 100 is copied from the current year to the next year.
- Job TEA1 is changed to ADM1 in the current year for employee 100.
- Employee 100 is copied from the current year to the next year again.
- When logged on to the next year, employee 100 now has job ADM1 and job BUSD.

This scenario can also be applied to bank records, extra duties, distributions, and deduction codes.

With this feature, users can also delete single or multiple employees from the corresponding next year. Employee names are copied to next year records, but their records are deleted, and the employees are listed as inactive.

Copy current year staff to the next year:

Under **Parameters**, select which employees and records are to be copied to the current year.

Field	Description
Pay Status	Select whether active, inactive, or both groups are to be included in the process.
Pay Type	Click ⌄ to select the one-digit pay type to be included in the process. The system is set to All.
Job Code	Click ⌄ to select the four-digit job code to be included in the process. The system is set to All.
Accrual Code	Click ⌄ to select the one-character accrual code to be included in the process. The system is set to All.
Pay Grade	Type the three-digit pay grade to be included in the process.
Prior Yr Emp Date	Type a date in the MMDDYYYY format for the previous school year reemployment date. The system will select all employees who were hired on or before that date. If there is no reemployment date from the previous school year, the system will use the employee's original employment date.
Primary Campus	Click ⌄ to select the three-digit primary campus to be included in the process. The system is set to All.
Pay Campus	Click ⌄ to select the three-digit pay campus to be included in the process. The system is set to All.

Field	Description
Contract Begin Date	Click to select the exact contract begin date to be included in the process.
Contract End Date	Click to select the exact contract end date to be included in the process.
Contract Months	Type the contract months to be included in the process.
Payoff Date	Click to select the payoff date to be included in the process.
Payroll Freq	Click to select the one-digit payroll frequency to be included in the process. The system is set to the current logged-on payroll frequency. A specific payroll frequency must be selected; otherwise, no data displays.
Salary Concept	Click to select the salary concept to be used in the process. The system is set to All. However, when calculating salaries, a specific salary concept must be selected (e.g., A - Use annual salary table, D - Use hourly/daily rate table, or M - Use mid-point table). If All is selected, the system will not perform salary calculations.
Extract ID	Click to select a three-character, locally assigned code (e.g., En1 = English 1, AL2 = Algebra 2, HI4 = History 4) for grouping employees. The code is used to tag employee records for a batch process (e.g., copy or extract). Each employee must have the Extract ID set in the Employment Info tab before they can be selected using this function.
Employee Nbr	If you want to update data for only one employee, type the employee number, if known. If the employee number is not known or multiple employees are needed, click to select employees.

Under **Options**, perform the following:

Field	Description
Include Employees with Termination Date	Select to copy employees with a termination date in the Employment Info tab to next year records. Leave blank to exclude employees with a termination date from the next year records.
Inactivate Records when Creating NY Tables	Select to populate the **Pay Status** field on the Pay Info tab as Inactive in next year employee records. Leave blank if next year employees are to have Active placed in the **Pay Status** field.
Next Year's Funding Code	Type the fiscal year to be used when updating the distribution account code fiscal year in the next year employee master distribution records. Leave blank if the distribution account code fiscal year in the next year employee master distribution record is to remain the same as the current fiscal year.
Number of Remaining Deductions	Type the number to be used to update the remaining payments in the next year employee master deduction record. It is recommended that you type 99, and then edit the exceptions in the next year tables.
Preview changes	Select to view the staff data records being copied to the next year tables. Leave the field blank to not view the staff data records that are being copied.

❑ Click **Execute**. If the process is successful, a preview report is displayed. Review the employee list to verify that the correct data was copied to the next year records. Also, review the total employee count at the end of the report.

❑ Click **Process** to accept the changes and continue. A message is displayed indicating that the process was completed successfully. In addition, a list of the database record tables that were copied

is displayed. Click **OK**.

❑ Click **Cancel** to return to the Copy CYR Staff to NYR page without making the changes.

Delete current year staff in next year:

After copying the employees to the next year, select either single or multiple employees to be deleted from the next year staff using the same parameters as explained above.

Click **Delete** to delete selected employees from the next year staff records. A message displays indicating the number of records being deleted and asks if you want to continue.

> **Note**: If any data exists in the EOY Accrual Data table, a message box is displayed and asks if the user wishes to delete the data and continue the process.

- If the data in the EOY Accrual Data table is for next year payroll calculations, the data can be deleted. However, the user may need to extract the data for next year payroll again and interface to budget again.
- If the data in the EOY Accrual Data table is for EOY accrual payroll calculations, the user needs to determine the last step completed for the EOY accrual process.
    - If the EOY accrual process has been performed through the create general journal (not interfaced to finance yet), the data may be deleted.
    - If the EOY accrual process has progressed past the create general journal step, it is recommended that the data not be deleted because of the impact on finance and the payroll history.

Click **Yes** to continue deleting the next year staff records or **No** to stop the process and return to the Copy Current Year to Next Year page.

If you click **Yes**, the system displays a Data Preview window.

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 **Process** to accept the changes and continue. When all records have been deleted, a message displays that lists the database record tables that were deleted. Click **OK**.

Click **Cancel** to return to the Copy CYR Staff to NYR page without making the changes.

Other functions & features

Reset	Click to undo all the parameter selections and return to the default settings.
Cancel	Click to close the page without copying the current year employees to the next year tables.


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Back Cover