

# Importing and Exporting Positions from Excel

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# Purpose

This utility is used to prepare multiple positions for various types of Employee Pay

Examples:

- Classroom Site Fund Payments
  - Base Pay
  - Performance Pay – Individual Goals
  - Performance Pay – Site Goals
  - Other Pay
- Instructional Improvement Fund Payments
- Supplemental Assignments (anything outside of the contract range)
  - Coaching addenda
  - Tutoring addenda
  - Summer school work

# Advantages

This utility is beneficial in implementing a standard and formal process for creating, approving and assigning supplemental payments to employees.

It is important to have written procedures in place



To assist in this process, PARs can be created to:

- Request supplemental payments – an excel file is created with all pertinent information which is subsequently placed on board agenda for approval. Once approved by the board, the excel file is used to import supplemental payments into Visions and available for the DACS to assign via iVisions
- Modify supplemental payments

# Creating an Excel File to Export and Import Data to Visions

## Exporting Data from Visions

The Employee Positions & Pay Grid is used to export employee data

### TIPS

- If you are using SSN as an identifier for the import process you must first change the Payroll Configuration settings to display the entire SSN
- Display Funding Codes on the Grid for account code export
- Create your own grid layout that matches the import field requirements
- Filter data to prepare list for desired employees
- Export data to excel and modify as needed (verify DAC names, account codes)
- Make sure that you have the correct the excel file format
- Make sure that the worksheet is named Sheet 1
- Keep your files organized!

# Creating an Excel File to Export and Import Data to Visions

## Importing Data to Visions

The Employee Positions & Pay Grid is used to import supplemental pays

### TIPS

- Create a Blank Template that you can use consistently
- Make sure that the Template has the proper Deduction/Leave Controls prior to import
- If you are importing with one pay calendar you can set it up on the template and excel file fields can be blank
- Review imported data prior to payment - IMPORTANT
- If data is incorrect you can easily delete and do the import process again
- Keep your files organized! Make sure you know where your import file is located prior to import

# Creating an Excel File to Import Data to Visions

## Build your own file!

### TIPS

- Create a Blank Excel file that you can consistently use to build your own data
- You can have a basic or an advanced template
- Make sure that the fields are in the right order and format

PAY TYPE	EMPLOYEE SSN	LASTNAME	FIRSTNAME	MI	DAC	POSITION TYPE	Description	CLASSIFICATION
Supplemental								Certified Non-admin

- Keep your files organized! Make sure you know where your import file is located prior to import