



Incrementing Years of Experience for Employees

***** Districts on Redesign will need to wait until the EMIS Staff Reporting Period is closed. For FY2020, that close date is August 7th. Please discuss with your EMIS Coordinator on your district timing of final reporting. *****

Districts can use Mass Load for this action and can create their upload CSV file as follows.

1. Go to **Core > Employee**
2. On your grid from **More** add these fields:

Under Dates: Last Paid Date, Termination Date

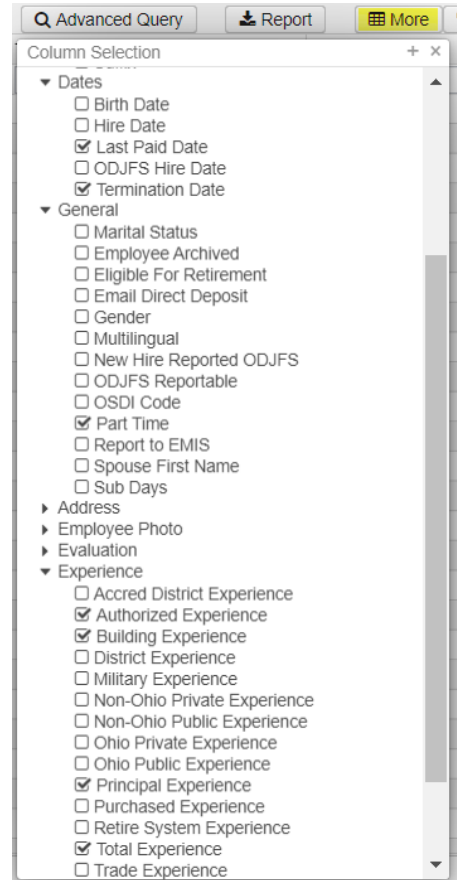
Under Experience: Authorized Experience, Building Experience (if tracked by the distr, Principal Experience, Total Experience

Under General: Part Time

The Employee Number, Last Name and First Name fields should already have been in the grid.

Note: Updating Building Experience is optional.

Note: Part Time Employees do get incremented with a year of service credit each year, though there may be special exceptions.



3. Click on **Advance Query**, select Termination Date by clicking on the field name and dragging it to the Display Name area. Set **Operation=IS_NULL**. Then click **Apply Query**.

Number	Last Name	First Name	Part Time	Principal Experience	Authorized Experience	Total Experience	Termination Date
ANON1001	Schroeder	Nick	false			8.00	2.00
ANON1002	Larson	Dustin	false			1.00	6.00
ANON1010	Kelley	Trent	false				11/09/1985

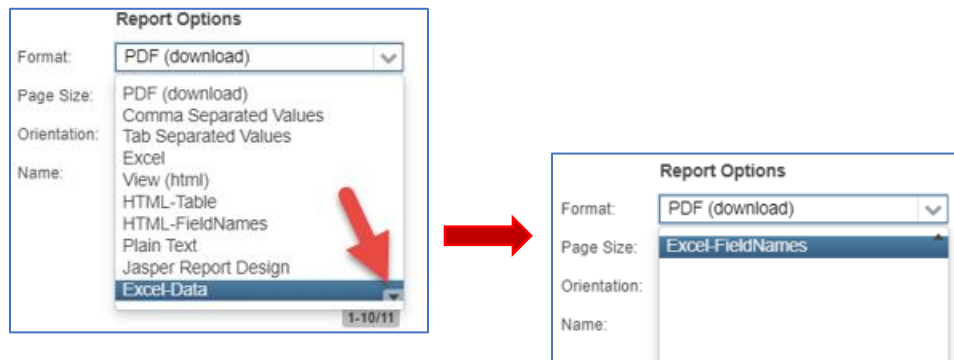
The employees displayed in your grid will then not include employees that already have termination dates.

4. Click on **Reports**.

- a) For **Format** choose *Excel-FieldNames* from the dropdown option. This version will allow easiest evaluation and editing of data, as well as the correct field names to use with Mass Load.

Where is that report format choice?

Open the format dropdown and look for the small down arrow in the bottom right corner. Click on the arrow to scroll further and find the Excel-FieldNames option.



- b) The default report name is Employee Report. Changed if desired.
c) Click **Generate Report**

5. **Save this report** to desktop or a folder of your choosing.

Note: Keep unchanged version for your records as a “before” snapshot.

Note: Review the file carefully.

6. Change the number of years for all experience columns to be updated. A formula may be used to accomplish this.
7. **REMOVE** fields from the file, which were only included to help with reviewing the data: Last Date Paid, Termination Date and Part Time Your finished upload file should contain only the following fields:

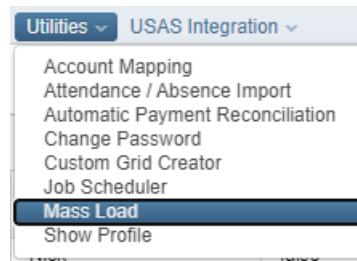
number
name.lastName
name.firstName
customFields.principalExperience.value
customFields.authorizedExperience.value
customFields.totalExperience.value
customFields.buildingExperience.value

Note: Remember to include the column header row. Do not delete the header row.

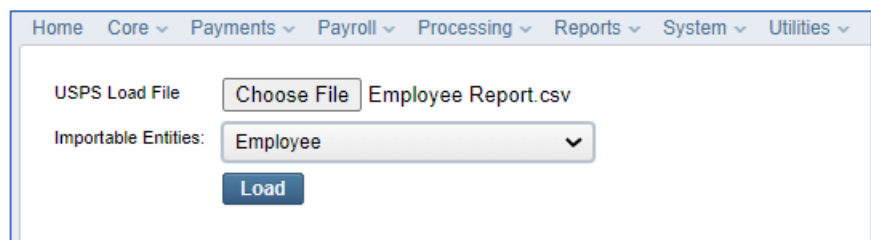
Note: All fields must be populated. Enter **0** instead of leaving an experience field blank.

8. Save the file as **CSV**.

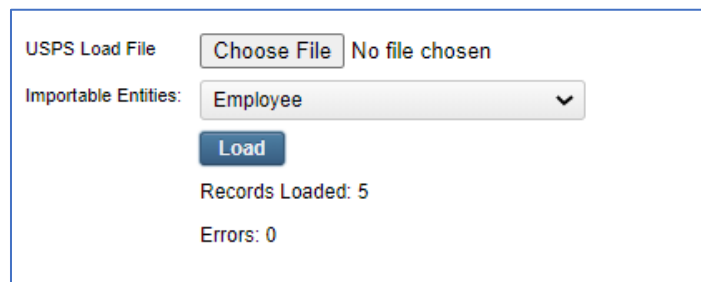
9. Go to **Utilities > Mass Load**.



10. Locate your file and then choose **Employee** as the Importable Entity. Click **Load**.



Upload results will display below the Load button and an upload/error report will be generated.



11. Go to **Core > Employee** to verify the data loaded as expected. Generate a new Report to document results.

Note: Keep this final report in your records as an “after” snapshot.