

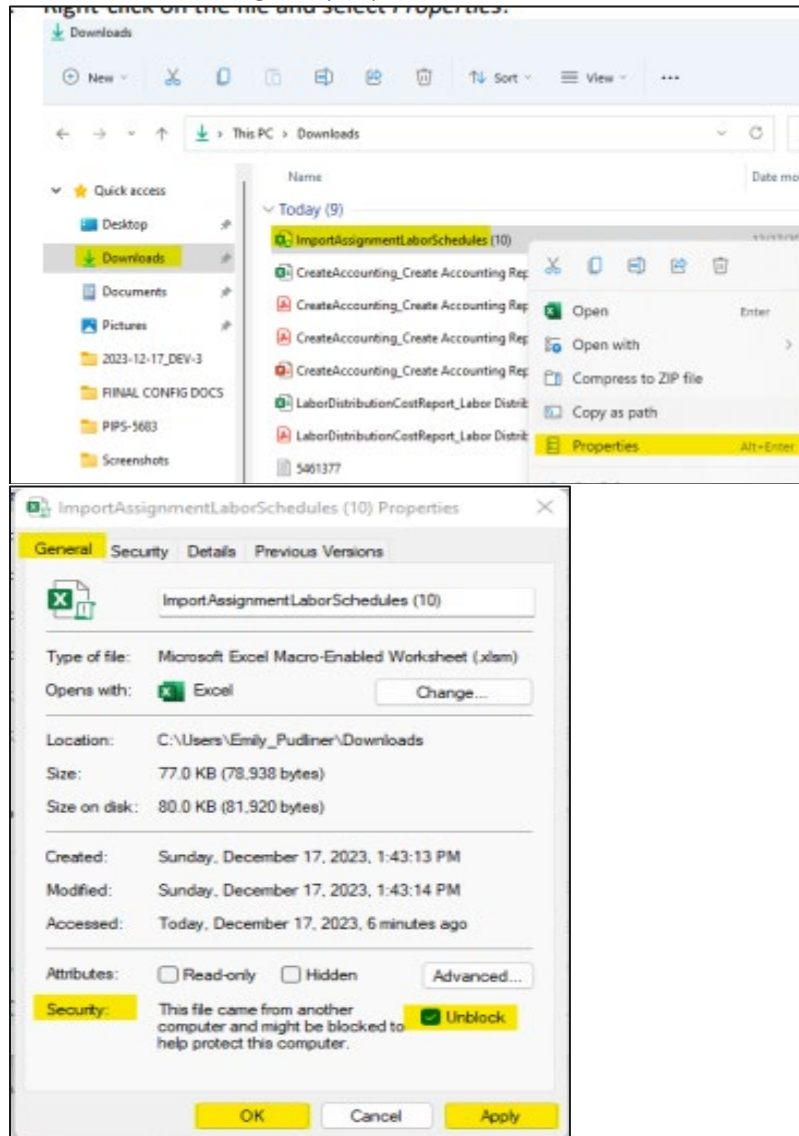
# Labor Distribution: Import Assignment Labor Schedule

## Overview

- This job aid is intended to explain how to import multiple assignment labor schedules using FBDI (File Base Data Import) for Departmental LD Analysts.
- This document outlines steps to prepare the import template, generate CSV file, and run Scheduled Process to import LD Costing information.

## I. Labor Schedule Import Template

1. Open the [ImportAssignmentLaborSchedules.xlsm](#) and click on “Download File”.
2. Go to the folder where the downloaded template is saved to enable editing. Right-click on the folder and go to properties. Check on the “Unblock” box and click ok.



**Note:** Save the enabled template for future use to avoid enabling the macro each time schedule import is needed. Use the link above every 2-3 months to make sure your template is up-to-date for any Oracle updates.

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- Open the saved template and enter data directly or copy/paste from another worksheet. The template also includes a separate sheet with detailed instructions to provide more guidance on how to prepare the file.
- There are multiple columns on the template. Below is a summary of a list of sections that **MUST** be filled out.

- Labor Schedule Name:** The format is “Name – Assignment #” for the assignment line. For ICP, it is “Name – Assignment # - Element name”.

*Labor Schedule Name
Lisa Plemons - E31239
Sarah Varga - E1000127507 - Overload Faculty

- Schedule Type Code:** For the assignment line, this cell is left blank. For ICP, enter “ASE”.

*Labor Schedule Name	Schedule Type Code
Lisa Plemons - E31239	
Sarah Varga - E1000127507 - Overload Faculty	ASE

- Person Number:** Enter the person number. Alternatively, the person name and email address column can be used, but the person number is the preferred information to use on the template.
- Assignment Number:** Enter the assignment number. Alternatively, an assignment name can be used.
- Pay Element Name:** This section is only filled when the schedule type code is ASE. Enter the element on the cell.

*Labor Schedule Name	Schedule Type Code	Person Number	Assignment Number	Pay Element Name
Lisa Plemons - E31239		31239	E31239	
Sarah Varga - E1000127507 - Overload Faculty	ASE	1000127507	E1000127507	Overload Faculty

- Pay Element Legislative Data Group Name:** This section is only filled when the schedule type code is ASE. Enter “US Legislative Data Group” on the cell.

*Labor Schedule Name	Schedule Type Code	Person Number	Assignment Number	Pay Element Name	Pay Element Legislative Data Group Name
Lisa Plemons - E31239		31239	E31239		
Sarah Varga - E1000127507 - Overload Faculty	ASE	1000127507	E1000127507	Overload Faculty	US Legislative Data Group

- Version Name:** The format is “Pre-fix\_Entry Date\_First letter of First name and full last name”. A list of version name pre-fixes is included in the training material for reference.

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- **Batch Name:** Enter a batch name. The name can be simply “LD Batch\_Import date”.
- **Version Start and End date:** This is the costing start and end date. It has to be in the format of yyyy/mm/dd.

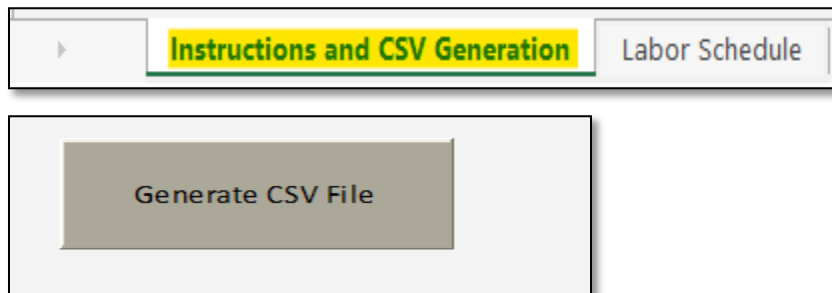
*Version Start Date	*Version End Date
2024/06/01	2024/12/31
2024/03/01	2024/05/31

- **Version Status:** There are three valid values for version status; New, Active, or Inactive.
  - **New:** This is a default status if left blank or marked “New”. Costing lines with “New” status will go through the approval workflow. After the import is completed, each labor version with “New” status will need to be updated to “Active” to initiate the approval workflow.
  - **Active:** If the costing line has “Active” status, the labor version import will bypass the approval workflow and is directly applied to the module.
  - **Inactive:** This status is rarely used. If a labor version is imported with “Inactive” status, it remains that way until the status is updated to “Active” manually.
- **Distribution:** Enter the project number, Task number, Award number, Funding source, expenditure organization name, and expenditure type if it is project costing, or enter the COA string under the Distribution GL Account column. Enter the percentage allocation under the Distribution line percentage.

Distribution Project Number	Distribution Task Number	Distribution Award Number	Distribution Funding Source Number	Distribution Expenditure Organization Name	Distribution Expenditure Type	Distribution GL Account
1001282	SP	102743	100003	Educational Leadership	Graduate Assistant Salaries	320-32220-100-1000000-91080-101-0000-00000-00000

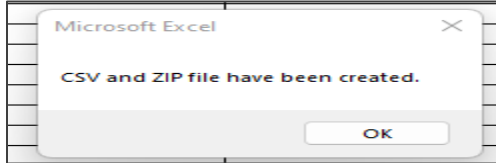
## II. Generate CSV File

1. After all labor schedules are entered in the import templet sheet, go to the instructions tab of the same worksheet and click on “Generate CSV File”



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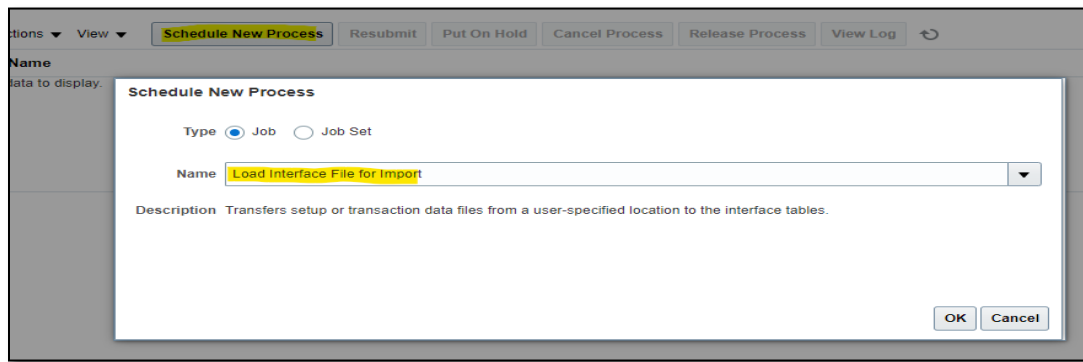
2. Save the Zip File. Add a date at the end of the file name to easily identify the file. A message box appears once the CSV and zip file are created.



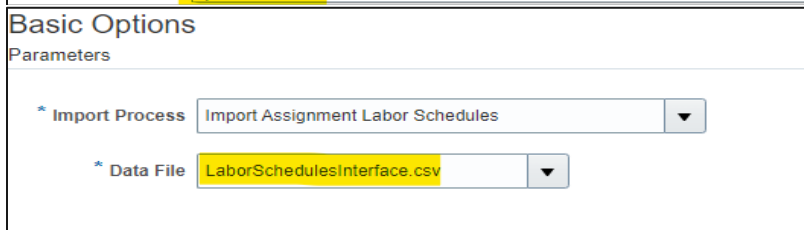
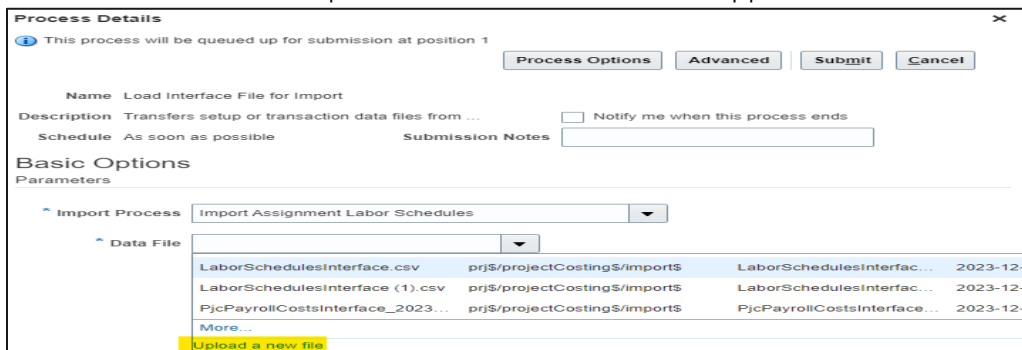
## III. Load Interface File for Import

This process is to load the data from the FBDI template that was prepared and converted to a CSV file in the previous steps of this instruction into the interface table for the Import Assignment Labor Schedule process.

1. Login to Ignite and navigate to Tools > Scheduled Process > Schedule New Process > Search "Load Interface File for Import" and click OK.



2. A second window opens. Select "Import Assignment Labor Schedules" from the Import Process menu. For the Data file, select the CSV file created in step II and click submit. A window with a process confirmation number appears. Click "OK".



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- Click on the refresh icon highlighted below a few times until the status on the load interface shows "Succeeded".

Name	Process ID	Status	Scheduled Time	Su
Load File to Interface	5466213	Succeeded	12/19/2023 4:44 AM ...	12
Transfer File	5466212	Succeeded	12/19/2023 4:44 AM ...	12
Load Interface File for Import	5466211	Succeeded	12/19/2023 4:44 AM ...	12

- Review the process log. Highlight the load to the interface line from step 3 and scroll down to view the Process Details tab. Click on the attachment under Log and Output to see the import log. Make sure all rows from the CSV file are successfully loaded into the interface table.

**Process Details** | Status Details

**Load File to Interface, 5466213**

Status: Succeeded | Schedule Start: 12/19/2023 4:44 AM

Log and Output

Attachment: **ESS\_L\_5466213**

Parameters

Table PJC\_LABOR\_SCHEDULE\_INT:  
**4 Rows successfully loaded.**  
 0 Rows not loaded due to data errors.  
 0 Rows not loaded because all WHEN clauses were failed.  
 0 Rows not loaded because all fields were null.

- Run the Import Assignment Labor Schedules Process. Click on "Schedule New Process" again and click "OK".

**Schedule New Process** | Resubmit | Put On Hold | Cancel Process | Release Process | View Log | Refresh

Type:  Job  Job Set

Name: **Import Assignment Labor Schedules** | Import

Description: Creates assignment level labor schedules.

OK | Cancel

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6. A new window opens. Select the batch name used on the import template (Column M) and click "Submit".

The screenshot shows the 'Process Details' window for 'Import Assignment Labor Schedules'. It includes a status message: 'This process will be queued up for submission at position 1'. There are buttons for 'Process Options', 'Advanced', and 'Submit'. The 'Name' is 'Import Assignment Labor Schedules', the 'Description' is 'Creates assignment level labor schedules.', and the 'Schedule' is 'As soon as possible'. A 'Submission Notes' field contains 'LD Import Test'. Below this is the 'Basic Options' section with a 'Parameters' area where the 'Batch Name' is set to 'LD Batch\_121423'.

7. Highlight Import Assignment Labor Schedule line and click on the refresh icon as shown on step 3 until the status changes to "Succeeded". Scroll down to view the process details. Click on the attachment under Log and Output to see the import log. Click on the txt file of the attachment to view a summary of schedules that are successfully imported as well as any exceptions.

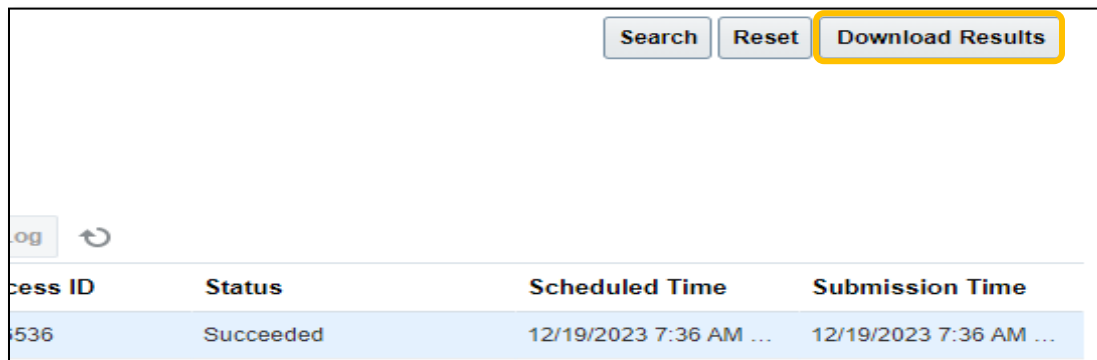
The screenshot shows the 'Attachments' section of the process details. It displays a table with two rows of attachments:

Type	Category	* File Name or URL	Title
File	Enterprise Sch	5466536.log	ESS_L_5466536
File	Enterprise Sch	5466536.txt	ESS_O_5466536

```
Headers Imported successfully = 4
Headers Import exception      = 0
Versions Imported             = 4
Versions Import exceptions    = 0
Distributions Imported        = 4
Distributions Import exceptions = 0
```

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8. Review the result of *Import Assignment Labor Schedule Report* to diagnose any errors during the import. Click on “Download Results” to view the results. Make any corrections to schedules in errored status and repeat steps 1-6.



The screenshot shows a web interface with a table and several buttons. At the top right, there are three buttons: "Search", "Reset", and "Download Results". The "Download Results" button is highlighted with a yellow border. Below the buttons is a "Log" button with a refresh icon. The table has four columns: "Process ID", "Status", "Scheduled Time", and "Submission Time". The first row of data shows "536" in the Process ID column, "Succeeded" in the Status column, and "12/19/2023 7:36 AM ..." in both the Scheduled Time and Submission Time columns.

Process ID	Status	Scheduled Time	Submission Time
536	Succeeded	12/19/2023 7:36 AM ...	12/19/2023 7:36 AM ...

**Note:** *During the import process, the system will validate existing labor schedules against award/project controls (e.g., period of performance, status, budget). Schedules that are invalid in terms of the award/project controls should not be imported and should be flagged in the resulting report.*