

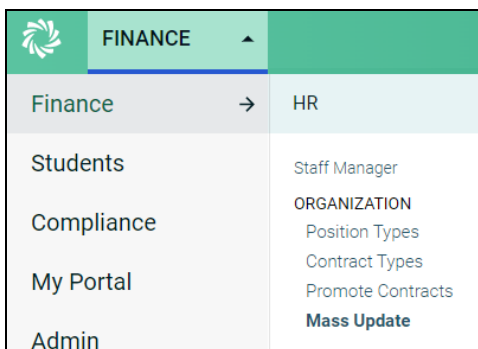
Mass Update Account Code for HR Position

Introduction

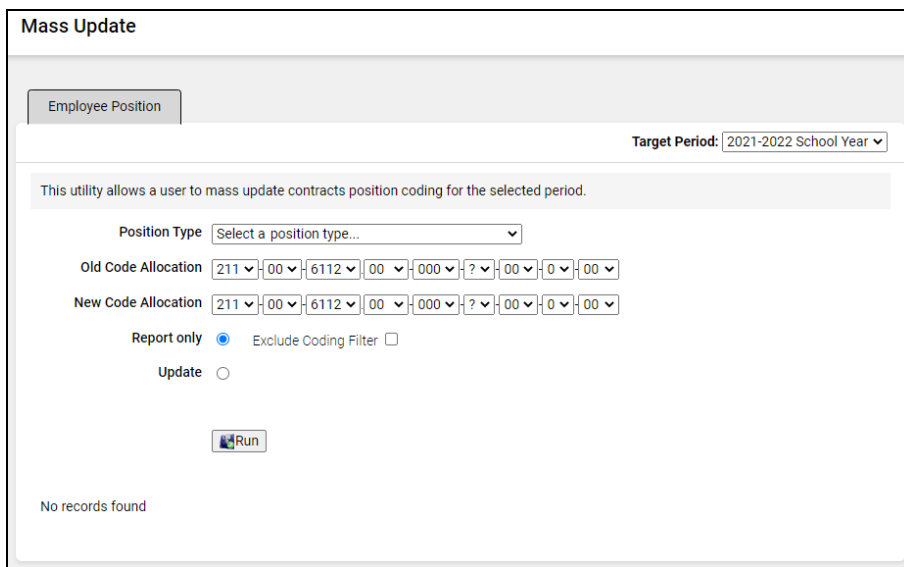
WebSmart has added the ability to mass change an account code for a specific HR position. Users can search for jobs that have a particular account code, and then change that code for all the selected jobs at once.

Explanation

The Mass Update screen is accessible in the *Finance > HR* section on the main menu.



On the Mass Update screen, users can search for a Position Type and/or an Account Code. Once found, the old code can be replaced with a new code. All positions that are to be changed will display on the screen.



Finance > HR > Mass Update Screen



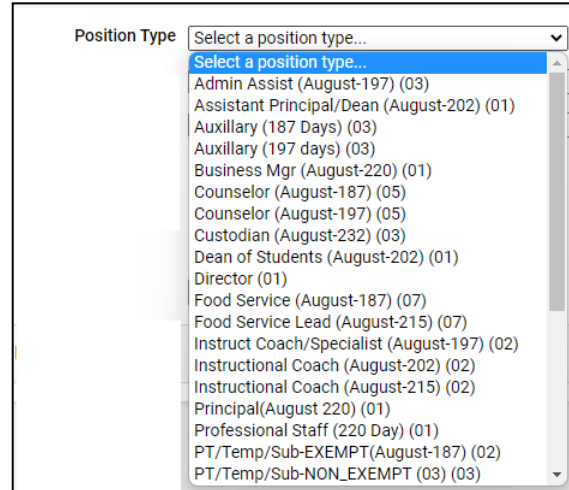
WebSmart Technical Document

Mass Update Account Code for HR Position

How to Mass Change Account Codes

To change the account code for multiple positions at once, follow these steps:

1. Select a Position Type from the drop-down (or leave it on its default setting to change all positions with the selected account code)



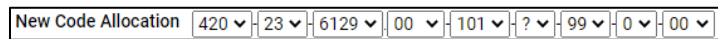
A screenshot of a web application interface showing a dropdown menu for 'Position Type'. The menu is open, displaying a list of position types with their corresponding codes in parentheses. The first option, 'Select a position type...', is highlighted in blue. Other options include 'Admin Assist (August-197) (03)', 'Assistant Principal/Dean (August-202) (01)', 'Auxillary (187 Days) (03)', 'Auxillary (197 days) (03)', 'Business Mgr (August-220) (01)', 'Counselor (August-187) (05)', 'Counselor (August-197) (05)', 'Custodian (August-232) (03)', 'Dean of Students (August-202) (01)', 'Director (01)', 'Food Service (August-187) (07)', 'Food Service Lead (August-215) (07)', 'Instruct Coach/Specialist (August-197) (02)', 'Instructional Coach (August-202) (02)', 'Instructional Coach (August-215) (02)', 'Principal(August 220) (01)', 'Professional Staff (220 Day) (01)', 'PT/Temp/Sub-EXEMPT(August-187) (02)', and 'PT/Temp/Sub-NON_EXEMPT (03) (03)'.

2. Enter the Old Code Allocation



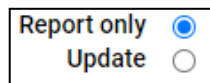
A screenshot of the 'Old Code Allocation' input field. It consists of a series of dropdown menus and text boxes containing the values: 420, 23, 6129, 00, 001, ?, 99, 0, 00.

3. Enter the New Code Allocation



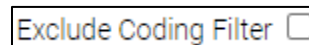
A screenshot of the 'New Code Allocation' input field. It consists of a series of dropdown menus and text boxes containing the values: 420, 23, 6129, 00, 101, ?, 99, 0, 00.

4. Select the "Report Only" radio button to display the jobs with the selected code without changing them. Select the "Update" radio button to change all the selected positions to the new code.




A screenshot of two radio buttons. The 'Report only' radio button is selected (indicated by a blue dot), and the 'Update' radio button is unselected (indicated by an empty circle).

5. Select the "Exclude Coding Filter" checkbox to display a listing of staff who have different allocation codes for the selected position type. This position type listing lets the user identify if there are other allocation codes for the selected position type that may need to be updated.



A screenshot of the 'Exclude Coding Filter' checkbox, which is currently unselected.

6. Click  to view the jobs with the selected code (if "Report Only" is selected) or to update the codes (if "Update" is selected).

NOTES:

- The "Report Only" option does not allow for printing to an actual report. For a hard copy, select the report listing, select copy, and paste into Notepad or Word.
- Exclude Coding Filter checkbox works only with the "Report Only" option.
- The "Update" option updates all *unposted* scheduled payments with the old allocation to the new allocation for the selected position type. All existing *posted* schedule payments are not changed. Those payments maintain the old allocation code.