Infor Human Capital Management Conversion Guide

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Contents

Introduction

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This conversion process guide provides general information for each step in the conversion process. An appendix at the end of the guide provides an example conversion that takes you through the entire process for converting your business data to the Lawson system.

Use this conversion process guide to familiarize yourself with the general conversion process. There is a Conversion Guide detailing the specific conversion steps for each Lawson suite:

Infor Human Capital Management Conversion Guide

This guide includes specific information on converting your human resources information into the following Infor Human Capital Management applications: Human Resources, Payroll, Time Accrual, Time and Attendance, Personnel Administration, and Benefits Administration.

Lawson Enterprise Financial Management Conversion Guide

This guide includes specific information on converting your financial information into the following Lawson Enterprise Financial Management applications: Currency, General Ledger, Strategic Ledger, Multi-Book Ledger, Accounts Receivable, Accounts Payable/Cash and Treasury Management, Pay To Bill, Terms, Enterprise Budgeting, Attribute Matrix, Project Accounting, Billing and Revenue Management, Asset Management, and Lease Management.

Lawson Supply Chain Management Conversion Guide

This guide includes specific information on converting your procurement and distribution information into the following Lawson Procurement applications: Accounts Payable, Cash and Treasury Management, Inventory Control, Requisitions, Invoice Matching, and Pharmacy. This guide also includes specific information on converting your financial information into the following Lawson Distribution Management applications: Accounts Receivable, Order Entry, Billing, Production Orders, Tax, and Warehouse. For information on converting non-Lawson data into the Purchase Order application, refer to the Procurement File Layouts available on Infor Support Portal.

Related Lawson Documentation

The following documentation is also relevant to the conversion process. You can order through Lawson Software any of the following documentation that was not included with your application(s) delivery:

Application User Guides

There is a User Guide for each Lawson application. These manuals are how-to guides for learning all functions in an application. They explain what to consider before setting up your Lawson application setup procedures; daily, quarterly, and yearly procedures; and system logic. Use these manuals with online help text for a comprehensive explanation of a process.

Online Help

Online help provides quick access to detailed information about a form, a file, program file usage, or data files in an application. Press Help (F1) to view help text for the active application. You can print an entire online manual or only the portions you need:

- User Text provides a printout of all online form and field help text.

Conversion File Layouts

File layouts for each Lawson conversion file are located on the Documentation page on Infor Support Portal.

Getting Ready for Your Conversion

The decisions you make as you prepare for conversion will directly affect how smoothly your conversion goes. You must plan the conversion and complete conversion prerequisites with the assistance of a Lawson Consultant and a conversion team. Careful analysis during these important conversion steps helps to ensure that you accomplish your conversion with maximum effectiveness and also helps to fulfill your expectations of the Lawson applications you have purchased.

Your conversion team should have the following expertise:

- Knowledge about Lawson suites and applications,
- Technical knowledge about management information systems (MIS),
- Knowledge about your organization's existing data, and
- Understanding of your organization's reporting needs.

A member of the conversion team should attend the training classes for each Lawson application that you have purchased.

Overview of the Human Capital Management Conversion Process

The conversion process consists of the following steps and substeps:

1 Plan Conversion

Planning your conversion involves deciding which non-Lawson data to convert, scheduling the conversion, defining the conversion environment, and determining a backup schedule.

2 Complete Conversion

Prerequisites Before you begin the actual conversion process, you must define the required Lawson information, or verify it was already defined if you are in the middle of your conversion process and have converted data for another Lawson application or suite.

3 Map Data

In this step, you must identify the Lawson conversion database files and conversion work files that you will load your data into, compare your non-Lawson data to Lawson equivalents by using available Lawson materials such as conversion file layouts, and then map your data to a source file.

4 Load Conversion Data

Note: For Lawson Human Capital Management conversions, you only need to transfer the file to the Lawson server. No other load utility is necessary.

In this conversion step, you first must to transfer the source files to the Lawson server. Then, you can use a Lawson load utility to load the source files into the conversion database files or conversion work files.

5 Run Conversion Programs

Before you run a conversion program, you must to prepare for running it. This involves tasks such as backing up application data and choosing the run options. After conversion preparations are completed, you then run the conversion program and resolve any errors that occurred.

6 Test Conversion Results

After you have mapped, loaded, and converted data to the Lawson system, you must to run data listings and reports from your non-Lawson system and the Lawson system, and compare them to determine the accuracy and completeness of the conversion.

The Conversion Process diagram on the following page illustrates the entire conversion process. The first two steps of the process prepare for the conversion. In the last three steps, you perform the conversion. At each step during the performance of the conversion, verify the data, correct any errors, and repeat the step if necessary. You continue to repeat steps 3, 4, and 5 until all records are error free.

1 - Plan Conversion
Determine the data to convert
Determine a conversion schedule
Define the conversion environment
Determine a backup schedule

2 - Complete Conversion Prerequisites
Define or verify required Lawson information

3 - Map Data
Identify conversion database files
and conversion work files

Compare non-Lawson data to
Lawson equivalents

Map data to source file

4 - Load Conversion Data
Transfer source files to Lawson
server

Verify transferred source files and
correct errors

Run the load utility

Verify loaded data and correct
errors

5 - Run Conversion Program

Prepare to run
conversion program

Run the conversion
program

Review the error report
and correct errors

6 - Test Conversion Results
Run data listings and
application-specific
reports

Verify the converted
data

Correct problems

Non-Lawson data

Write program to
unload data and
convert into
Lawson format

Source file

Transfer source
files to Lawson
server

UNIX
or
NT platform?

Source file

Verify transferred
source files and
correct errors

Run the load
utility

importdb
(CSV file)
or impexp
(flat file)?

Data loaded
into
conversion
database file

Data loaded
into
conversion
work file

Verify loaded
data and correct
errors

Run conversion
program

Errors

Correct
Errors

No errors

Live Lawson data

Verify converted
data

Conversion Programs in Lawson Human Capital Management

Lawson Human Capital Management consists of seven applications.

System Code	Application
HR	Human Resources
PR	Payroll
LP	Absence Management
TA	Time Accrual
TM	Time and Attendance
TP	Tips
BN	Benefits Administration
PA	Personnel Administration

All conversion programs within Lawson Human Resources use comma-separated value (CSV) data files as input.

Sequences of Conversions

All the Lawson Human Capital Management applications are closely interrelated. Because of this, the sequence in which you convert your data is critical to the success of your conversion. Some of the decisions you make concerning sequences depend on which features of the Lawson Human Capital Management applications you plan to use. For example, if you do not use formal positions, you can skip the position conversion. The following list provides a recommended sequence.

1   Supervisor Conversion (HR507)

Supervisor codes are required for Position Conversion if you are linking supervisor codes to position codes.

2   Job Code Conversion (HR506)

3   Position Conversion (PA502)

4   Budget Conversion (PA570)

5   Employee Conversion (HR511)

6   Position and Job Conversion (PA513)

For more information, see "Conversion Strategy" on page 16.

7   User Field Conversion (HR515)

8   Alternate Rates Conversion (HR514)

9   Employee ACH Distribution Interface (PR512)

10 Dependent Conversion (HR513)

11 Emergency Contact Conversion (PA512)

12 Employee and Applicant Test Conversion (PA549)

13 Health and Safety Incident Conversion (PA590)

14 Batch Benefit Enrollment (BN531)

15 Batch Dependent Benefit Enrollment (BN532)

16 Employee Deduction Master Load (PR514)

17 Payroll History Load CSV (PR560)

18 CSV Load Balances (TA570)

19 Employee History Conversion (HR521)

20 Training Conversion (TR500)

21 Applicant Conversion (PA531)

22 Employee and Applicant Code Conversion (PA520)

23 Attendance History Conversion (TM570)

24 Defined Benefits or Defined Contribution (BN555)

25 Compensation History Upload (BN556)

26 Job History Conversion (PA533)

27 Pension Payroll Conversion (PR529)

28 Time Record Interface CSV (PR530)

Conversion Strategy

Position Rules and Employee Records

If you plan to use job codes or position codes to budget and track headcount and FTE count, you must define position rules in Position Rules (PA06.1) before you convert employee records.

If you do not intend to convert headcount budgets before you convert employee records, set the Automatic Counting flag to N on PA06.1 to turn off budgets. After employee records are converted, change the Automatic Counting flag on Position Rules (PA06.1) to Y, indicate what parameters will be counted, and define position or job headcount budgets using Position Budget (PA70.1) or Job Budget (PA71.1). Then run Recalculate Assigned Recources (PA111) to update the assigned resources count.

If you convert employee records, the effective date on PA02.1 must be equal to or earlier than the earliest date on an employee record.

Converting Employee History Records

Employee history records reside in two database files:

- PAEMPPOS (Unix/Windows) or DBHRPEP (System i), which holds employee position or job history

- HRHISTORY (Unix/Windows) or DBHRHRH (System i), which holds employee personnel action history and history of changes to the employee record

You use three different programs to convert employee history.

- Employee Conversion (HR511)

  HR511 provides an option to update history which will create records in both HRHISTORY (Unix/Windows) or or DBHRHRH (System i) and PAEMPPOS (Unix/Windows) or DBHRPEP (System i).

- Position and Job Conversion (PA513)

  PA513 converts employee position history into PAEMPPOS (Unix/Windows) or DBHRPEP (System i).

- HR History Conversion (HR521)

  HR521 converts changes to the employee record including personnel actions into HRHISTORY (Unix/Windows) or DBHRHRH (System i).

Your purposes for converting history and the dates you want to preserve in history will dictate which of these programs you will use.

On Employee Conversion (HR511), if you select Yes in the Update History field, the effective date for the historical records will be the date of the conversion. As a result, the termination date for terminated employees or the hire date of new hires will be inaccurate. Effective position dates will also be the same as the conversion date. If this is acceptable, you can run HR511 to convert records in history of all position levels.

Note: To prevent conversion errors, create position rules for old employee records. For example, if you have employee records dating back to 1988, create position rules with an effective date of 1988. An option for rules include Company and Effective Date fields on Position Rules (PA06.1).

To maintain employee position history records with accurate dates, select No in the Update History flag when you run HR511. Run HR513 to convert position history records and convert all position levels. You should convert the primary position and then convert the others in order. The conversion program checks the dates of a Level 2 position to verify that a record of a Level 1 position exists for the same dates.

PA513 also has an option to update history. If you set this flag to Yes, the program will update HRHISTORY (Unix/Windows) or DBHRHRH (System i) with the PA513 conversion date as the effective date.

To convert employee history (personnel action history, changed fields on the employee) with accurate dates, you must run HR History Conversion (HR521).

Factors Affecting Run Time

The breadth and complexity of the data you are converting affects how long it will take to run the conversion. If you are converting thousands of employee records, the conversion will take a long time. The more complicated your set up, the longer the conversion program will need to complete the conversion.

For example, if you have a large number of employee groups, for each record, Employee Conversion (HR511) checks to see if the employee meets the employee group criteria. If you have many data items to be logged, for each item set to be logged, an entry in the LOGFILE/HRHISTORY (Unix/Windows) or LOGFILE/DBHRHRH (System i) file will be created. These factors increase exponentially the run time of the conversion.

Human Resources

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This chapter provides guidelines for converting Human Resources data from a non-Lawson system to the Lawson Human Resources system. Use this information in conjunction with the appendices to convert your Human Resources data.

- "Plan Human Resources Conversion" on page 19
- "Complete Human Resources Conversion Prerequisites" on page 22
- "Map Human Resources Data" on page 27
- "Load Human Resources Conversion Data" on page 28
- "Run Human Resources Conversion Programs" on page 29
- "Test Human Resources Conversion Results" on page 44

Plan Human Resources Conversion

When planning your Human Resources conversion, refer to the following sections in this chapter for information that is in addition to, or is different from, the conversion information presented in "Plan Conversion" on page 128.

- "Determine the Human Resources Data to Convert" on page 19
- "Determine a Human Resources Conversion Schedule" on page 21
- "Determine the Human Resources Conversion Environment" on page 21
- "Determine a Human Resources Backup Schedule" on page 21

Determine the Human Resources Data to Convert

Note: Use this information in addition to the general conversion information on this topic presented in "Determine the Data to Convert" on page 129.

Before you convert data to the Lawson Human Resources application, you must identify the methods you want to use to convert your data. For more information on each method, see "Run Human Resources Conversion Programs" on page 29.

Determine data to include in conversion

Decide if you want to include data on terminated employees. To make this decision, consider what information you will need for reports in the Lawson system and whether you have terminated employees who may be coming back at a future date.

Before the conversion of employee data, you must have determined if you plan to convert required deductions. If you convert them, define deduction codes and required deduction codes before conversion. If you define them after the conversion, use the update program to create required deductions for the employees.

Before you convert, consider how you will use employee groups. You can use employee groups to add versatility to all parts of Lawson Human Resources. See the *Human Resources User Guide* for more information on the uses of employee groups. Employee groups can be grouped into higher level employee groups. Before conversion, decide how you will use employee groups and if they will be part of the conversion or if you will create employee groups after conversion.

Determine conversion settings

When you run the conversion program, indicate the data items for which you want the program to record changes, what fields are required, and if you will use automatic employee numbering. How you plan to use converted employee data will drive these decisions.

Determine the data items for which you want additions or changes recorded in the history file.

The Human Resources system gives you the option to keep a record of additions or changes to a specific data item as one of the data item attributes set in Data Item Attributes (HR10.1) or in HR Codes Setup (HR04.1). This feature is one of the data item attributes you define when setting up your company's Human Resources structure.

You may choose to set this option before or after conversion. If you set it before conversion, the conversion program stores the value of that data item at the time of conversion. The history file holding this value can help you verify conversion data. It also provides an audit trail of your converted data. For example, if you have pay rate history recorded during conversion, you will have a record of the pay rate at the time of conversion in the Pay Rate History File. (The Pay Rate History File is **PRRATEHIST** (Unix/Windows) or **DBHRPRH** (System i)).

If you wait to set this option until after conversion, the Pay Rate History file will contain only the changes in pay rate after conversion. You may decide to set data item attributes after conversion, if you have limited space or you do not need to keep a record of changes to specific data items.

Determine what fields will be required on Employee (HR11.1)

In the Human Resources system, you need to determine what fields, including user fields, you wish to be required on Employee (HR11.1). If you set a field as required using Data Item Attributes (HR10.1) or HR Code Setup (HR04.1), data must be in the field for every record in your conversion

data. You also must make sure that the HR codes and user fields that you require were defined in HR Code Setup (HR04.1).

Decide if you will use automatic employee numbering

Before converting employee data, verify that you have determined how employee numbers will be set up in the system. The conversion program provides the option to use automatic numbering for employee numbers. Verify that you discussed this issue with your Lawson consultant.

Determine a Human Resources Conversion Schedule

Note: Use this information in addition to the general conversion information on this topic presented in "Determine a Conversion Schedule" on page 129.

The timing of the employee conversion requires careful planning. Consider how often employee data such as rate of pay or W-4 information changes and schedule the Human Resources conversion at a time when the conversion will include all changes.

Determine if you will stagger the conversion within company units or convert the whole company on the same date. Your decision to stagger the conversion or convert all at once depends on the parallel and/or live schedule you determined for the Payroll and Benefit conversions.

Define a test sample

Because employee data is usually extensive, you should run a test sample through the whole process to find errors and discrepancies before you are encumbered by the volume of data.

You must determine the size of the sample. It is recommended that you limit your test sample to a few employees. Select employees with several kinds of data.

Determine the Human Resources Conversion Environment

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Define the Conversion Environment" on page 131 for the full details.

Determine a Human Resources Backup Schedule

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Determine a Backup Schedule" on page 132 for the full details.

Complete Human Resources Conversion Prerequisites

When completing your Human Resources Conversion Prerequisites, refer to the following section in this chapter for information that is in addition to, or is different from, conversion prerequisites presented in "Complete Conversion Prerequisites" on page 133.

Define or Verify Required Lawson Human Capital Management Information

Note: Use this information in addition to the general conversion information on this topic presented in "Define or Verify Required Lawson Information" on page 133.

Before you map and convert your data, you must verify that you defined the General Ledger company structure, the activities, and the company's Human Resources structure and data. If you purchased any of the following, verify that their structure and data or both is defined:

• BSI package

• Payroll application

• Personnel Administration application

• Benefits Administration application

• Time Accrual application

• Tips application

Before you can convert employee data, you must complete several other procedures. You must verify that you defined structures and codes in the Human Resources system and other Lawson systems. The conversion program validates the values of the input data against values set up in the Human Resources system and other Lawson systems. The Human Resources employee conversion program will not convert records with invalid data. The definitions the Human Resources conversion program requires are:

• General Ledger structure

• Activities (optional)

• Human Resources structure

You must also define the following systems if you purchased the package and if you are going live with that system at the time of conversion:

• BSI data

• Payroll structure

• Personnel Administration structure

• Time Accrual plans

Verify general ledger structure is defined

Verify that you defined your company accounting structure including Chart of Accounts (GL00.1), GL Company (GL10.1), and Accounting Units (GL20.1) in the Lawson® General Ledger application before using any other Lawson application. For complete information on defining your company structure, see the *General Ledger User Guide*.

The conversion program validates specific General Ledger fields. For example, during conversion the program compares the account number in your conversion input file to the account numbers set up in the General Ledger application to verify that it is a valid account number. The following table lists the specific fields validated and the programs used to define the valid values or to produce listings of defined values.

Validated Field	Form	Listing Name
Home Accounting Unit	Accounting Units-Accounts (GL20.1)	Accounting Unit Listing (GL220)
Home Account Number	Accounting Units-Accounts (GL20.1)	Accounting Unit Listing (GL220)
Home Subaccount Number	Accounting Units-Accounts (GL20.1)	Accounting Unit Listing (GL220)

Verify activities are defined

If you intend to reference or use activities on Employee (HR11.1), verify that you defined them in the Lawson® Project Accounting application because the conversion program will validate the values during conversion. Use Activity (AC10.1) to define activities. You can produce a listing of existing activities with Activity Listing (AC210).

Verify Human Resources structure is defined

Verify that you defined your company's Human Resources structure in the Human Resources application. For complete information on defining your company's Human Resources structure, see your *Human Resources User Guide*.

You can define data item attributes before or after conversion. If you wish, the program can keep a record of changes to some or all data items. You can also determine which data items are required data items. For more information on recording data item changes and determining required data items before or after conversion, see "Plan Human Resources Conversion" on page 19.

The conversion program compares data values in the conversion input file with values you have set up for specific fields in the Human Resources system. The following table lists some of the specific fields validated during the Human Resources conversion and the programs used to define the valid values or produce listings of defined values.

Validated Field	Form	Listing Form
Company	Company (HR00.1)	Company Listing (HR200)
Process Levels	Process Level (HR01.1)	Process Level Listing (HR201)
Departments	Department (HR02.1)	Department Listing (HR202)
Employee Status	Employee Status (HR03.1)	Employee Status Code Listing (HR203)
Supervisor *	Supervisor (HR07.1)	Supervisor Listing (HR207)
Job Code *!	Job Code (HR06.1)	Job Code Listing (HR206)
Union (UN) **	HR Codes Setup (HR04.1)	HR Code Listing (HR204)
User Level (UL)	HR Codes Setup (HR04.1)	HR Code Listing (HR204)
Location Code (LO)	HR Codes Setup (HR04.1)	HR Code Listing (HR204)
Hire Source (HS)	HR Codes Setup (HR04.1)	HR Code Listing (HR204)
Security (SC)	HR Codes Setup (HR04.1)	HR Code Listing (HR204)
Bargaining Unit (BU)	HR Codes Setup (HR04.1)	HR Code Listing (HR204)
Mail Group (MG)	HR Codes Setup (HR04.1)	HR Code Listing (HR204)
Primary Care Physician (PC)	HR Codes Setup (HR04.1)	HR Code Listing (HR204)
Any User Fields you have defined *	HR Codes Setup (HR04.1)	HR Code Listing (HR204)

* Values for fields followed by an asterisk (*) can be converted in batch from non-Lawson data.

** The HR code type is in parenthesis ().

! The job code is optional if you have defined formal positions.

You can define employee groups before or after conversion. If you decide to define employee group criteria before conversion, the conversion program records Employee Group History and adds employees to the groups. If you decide to define employee group criteria after conversion, use Employee Group Update (HR155) to add the converted employee records into the appropriate employee groups.

To define employee groups, use Employee Group Definition (HR55.1). For more information, see the *Human Resources User Guide*.

Verify Personnel Administration structure is defined

Verify that you defined the Personnel Administration structure of your company in the Lawson® Personnel Administration application. For more information on defining the personnel administration structure, see the *Personnel Administration User Guide*.

The following table lists the fields validated during the Human Resources conversion and the programs used to define valid values or to produce listings of defined values.

Validated Field	Form	Listing Form
Position !	Position (PA02.1)	Position Structure Listing (PA202)
Grade Range Schedule *!!	Grade Range Schedule (PA95.1)	Grade Range Schedule Listing (PA295)
Grade	Grade Range Schedule (PA95.1)	Grade Range Schedule Listing (PA295)

! You must define positions before conversion, only if you use formal positions on the employee.

Before you define positions, you must define Position Rules (PA06.1). You can use Position Rules Listing (PA206) to verify position rules definitions.

The effective date on Position Rules must be prior to or equal to the earliest date on employee converted records.

* If you use a Grade Range Schedule for a specific record, do not use a Step and Grade Schedule in the Payroll system for the same record.

!! Schedules must be in effect on conversion date.

Verify BSI data is defined

The Lawson® Payroll application uses the BSI's TaxFactory software provided by Business Software, Inc., to provide the tax formulas and interface calculations. If you convert tax information, verify that the BSI programs are loaded. Verify that you established the BSI company codes, BSI tax codes for federal, state, and locality taxes, and BSI custom data for unemployment experience rates. Use the BSI Load Report to verify that your file is valid.

Verify Payroll structure is defined

Verify that your company's payroll structure is defined in the Payroll application before converting employee information. For complete information on defining the pay structure and deduction structure in the Payroll application, see the *Payroll User Guide*.

The conversion program also validates certain Payroll application fields. The following table lists the fields validated during the Human Resources conversion and the programs used to define valid values or to produce listings of defined values.

Validated Field	Form	Listing Form
Pay Code *	Pay Codes (PR20.4)	Pay Code Listing (PR220)
Pay Plan	Pay Plan (PR21.1)	Pay Plan Listing (PR221)

Validated Field	Form	Listing Form
Tax Authority	Tax Authority (PR06.1)	Tax Authority Listing (PR206)
Step and Grade Schedule **!!	Step and Grade Schedule (PR16.1)	Step and Grade Schedule Listing (PR216)
Pay Step	Step and Grade Schedule (PR16.1)	Step and Grade Schedule Listing (PR16.1)
Pay Grade	Step and Grade Schedule (PR16.1)	Step and Grade Schedule Listing (PR16.1)

* If you convert alternate pay rates by pay code, you must define pay codes.

** If you use Step and Grade schedules in the Payroll System for a specific record, do not use Grade Range Schedules in the Personnel Administration system for the same record.

!! Schedules must be in effect on conversion date.

If you define the deduction codes and required deduction codes before conversion, use the defining program. If you decide to define them after conversion, use the update program to create required deductions for employees.

Codes	Defining Program	Updating Program	Listing Program
Deductions	Deduction Code (PR05.1)	Deduction Listing (PR205), Report Selection: 5, Update: U	Deduction Listing (PR205)
Required Deduction	Deduction Required Code (PR03.1)	Deduction Listing (PR205), Report Selection: 5, Update: U	Deduction Listing (PR205)

Verify Time Accrual plans are defined

You can define an event management plan before or after conversion. For information on setting up your time accrual system, see the *Time Accrual User Guide*. If you define plans before conversion, employees are added automatically to the plans as part of conversion. If you decide to define the plan after conversion, use the update program to enroll converted employees in the appropriate Time Accrual plans.

Codes	Defining Program	Updating Program	Listing Program
Time Accrual Plan	Plan (TA20)	Employee Plan Inquiry (TA60.1) to enroll employees individually	Plan Listing (TA220)
		Employee Enrollment Update (TA125) to enroll multiple employees	

> ⚠️ **Caution:** Complete the processes above before running the Human Resources conversion.

Map Human Resources Data

When mapping your Human Resources data, refer to the following section in this chapter for information that is in addition to, or is different from, the Map Data information presented in Appendix C "Map Data" on page 134.

- "Identify Human Resources Conversion Database Files" on page 27
- "Compare Non-Lawson Human Resources Data to Lawson Equivalents" on page 28
- "Map Human Resources Data to Source File" on page 28

The suggested format to use for your Human Resources source files is the CSV file format.

Related topics

- "Determine the Human Resources Data to Convert" on page 19

Identify Human Resources Conversion Database Files

Note: Use this information in addition to the general conversion information on this topic presented in "Identify Conversion Database Files and Conversion Work Files" on page 135.

The Lawson® Human Resources application uses work files to convert non-Lawson data. To define your existing data in Lawson, you must identify the conversion work files into which the data will be loaded. See the Human Resources section in the Lawson Human Resources File Layouts on the Documentation page on Infor Support Portal.

Compare Non-Lawson Human Resources Data to Lawson Equivalents

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Compare Non-Lawson Data to Lawson Equivalents" on page 136 for full details.

Map Human Resources Data to Source File

Note: Use this information in addition to the general conversion information on this topic presented in "Map Data to Source File" on page 137.

Determine if the format of the non-Lawson employee data exactly matches the format of the Lawson data. If so, the data can be mapped directly. If not, the data must be changed to conform to the Lawson format before it can be mapped.

Important: If you have more data for a specific field than the conversion file layout allows, enter the data after conversion. For example, the conversion program converts only one ACH distribution per record and two alternate pay rates. You must load additional ACH distributions manually using ACH Distributions (PR12.1) or automatically using Employee ACH Dist Interface (PR512). You can manually enter alternate pay rates using Employee (HR11.1) or automatically using Alternate Rates Conversion (HR514). You also can load only one tax authority. Therefore, establish any additional tax deductions in Employee Deduction (PR14.1), and any necessary W-4 information in Employee Taxes (PR13.1) following conversion.

Create a CSV file containing your non-Lawson data

Create a CSV file from your data table and assign the CSV file a unique name.

If you use headers to identify columns in your table, you can place the column headers at the beginning of the CSV file preceding the data. The file then contains only the applicable fields.

If you do not use headers at the beginning of the file, you must include all fields in the file layout in the order given in the layout. For those fields for which you have no data, include the blank field so that each field is accounted for.

Load Human Resources Conversion Data

Note: For this specific application, there are changes from the general conversion information on this topic presented in "Load Conversion Data" on page 143.

Lawson Human Capital Management does not require this step. Instead you need to transfer your CSV work file to your Lawson server. The conversion program then loads the data from the file you transferred to the Lawson server.

> ⚠️ **Caution:** This section contains changes from the general conversion process as presented in the appendices.

Run Human Resources Conversion Programs

Note: Use this information in addition to the general conversion information on this topic presented in "Run Conversion Programs" on page 150.

When running your Human Resources conversion programs, refer to the following sections in this chapter for information that is in addition to, or is different from, the information presented in "Run Conversion Programs" on page 150.

- "Converting Supervisor Data" on page 30
- "Converting Employee Data" on page 32
- "Converting User Field Data" on page 34
- "Converting Alternate Rates" on page 37
- "Converting Dependent Data" on page 39
- "Converting Employee History" on page 40
- "Converting Job Code Data" on page 43
- "Reviewing the Human Resources Error Reports and Correcting Errors" on page 44

The following table shows the conversion programs you can run and the types of data they convert.

Conversion Procedure	Program Used
Supervisor Conversion (Supervisor Codes)	HR507
Employee Conversion (Current employee data including current positions)	HR511
User Field Conversion (Employee, Position, or Applicant User Field Values)	HR515
Alternate Rates File Conversion (Employees alternate pay rates)	HR514

Conversion Procedure	Program Used
Dependent Conversion (Employee dependent data)	HR513
Employee History Conversion (Employee history)	HR521
Job Code Conversion	HR506

When creating batch jobs, you can convert employees from only one company at a time.

If you set the parameters to update employee groups, required deductions, or event management plans, you must have defined these features before conversion.

Converting Supervisor Data

Run Supervisor Conversion (HR507) to load supervisor data from a non-Lawson system into Supervisor (HR07.1) in the Lawson Human Resources system. This program takes fields from a comma-separated value (CSV) file and updates the associated supervisor files as if the supervisor was added on HR07.1. HR507 uses workfile SUPLOADCSV. If you are converting employees, the employees must exist in Employee (HR11.1).

Use the Add function in the CSV file only for initial supervisor creation. Use the Change function in the CSV file to update existing supervisor data with data from a non-Lawson system.

The program loads all supervisor fields found in HR07.1 and performs all the edits of HR07.1. If the record has errors, an error message prints on the report.

Run Supervisor Listing (HR207) to verify data converted through HR507.

Before beginning the conversion process, you must decide what supervisor data you will convert.

- Decide if you will convert reports to data

  Data in this field can be used for hierarchical structure reporting relationships. Supervisor records are processed and printed in the order they are found in the CSF file. If converting reports to data, the records should be sorted in hierarchical order. For example, the CEO supervisor code should be converted before the SRVP supervisor code if SRVP reports to CEO.

- Decide if you will attach employees to converted supervisor data

  If supervisor codes are converted before converting employees, the process may be a two step process. You can run HR507 to add supervisor codes without employee numbers. After converting employee records, run HR507 again sending change records which include employee numbers.

- Decide if you want supervisor data changes to be logged to history

  This history can be used in ad hoc reports.

Verify that you have set up the following information before you convert supervisor records. For set up procedures, see the *Human Resources User Guide*.

Validated Field	Form	Listing Form
Company	Company (HR00.1)	Company Listing (HR200)
Employee *	Employee (HR11.1)	Employee Listing (HR211)
Data Item Attributes (SU) **	Data Item Attributes (HR10.1)	Data Item Attribute Listing (HR210)
Supervisor User 1 (S1)	HR Codes Setup (HR04.1)	HR Code Listing (HR204)
Supervisor User 2 (S2)	HR Codes Setup (HR04.1)	HR Code Listing (HR204)
Supervisor User 3 (S3)	HR Codes Setup (HR04.1)	HR Code Listing (HR204)
Supervisor User 4 (S4)	HR Codes Setup (HR04.1)	HR Code Listing (HR204)
Supervisor User 5 (S5)	HR Codes Setup (HR04.1)	HR Code Listing (HR204)

* If converting employees, employee must exist in Employee (HR11.1)

** Supervisor fields which should be logged to history need to be flagged in Data Item Attributes (HR10.1).

Before you start Before you run HR507, verify that company information is defined in Company (HR00.1), employees are defined in Employee (HR11.1), data item attributes are defined in Data Item Attributes (HR10.1), and supervisor use codes (S1-S5) are defined in HR Codes Setup (HR04.1).

In addition, supervisor fields that should be logged to history need to be flagged in HR10.1.

To convert human resources data

1 Access Supervisor Conversion (HR507).

2 Select the run parameters. Use the following guidelines to enter field values:

Company	Select a company.
Update History	Select whether to update supervisor history.
Update	Select whether to perform the update. If you select Yes, the update is performed. If you select No, the system creates a report that lists pending changes.

3 Add the job.

4 Transfer to the Job Definition form (jobdef).

5 Select the job you just added.

6 Press Define (F6) and select CSV file attributes.

7 Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

8 Press Enter twice to save the attributes.

9 Return to the program form and select the Submit form action to submit the job.

Updated Database Files

The Supervisor Conversion (HR507) uses the data in the conversion files to update the following database files.

Data Type	Database File Name
Supervisors	HRSUPER (Unix/Windows or DBHRHSU (System i)
History *	HRHISTORY (Unix/Windows) or DBHRHRH (System i)

* Updated if supervisor fields are logged to history

Converting Employee Data

Run Employee Conversion (HR511) to convert employee data from a non-Lawson system into Employee (HR11.1) in the Lawson Human Resources application. HR511 converts employee records through a batch workfile, EMPLOAD. Before you submit the batch job, you use job definition attributes to assign the name EMPLOAD to the input file and a different name to the output file of the job.

You also use HR511 to convert up to 98 levels of position and job records into Multiple Positions and Jobs (PA13.1).

This program takes fields from a comma-separated value (CSV) file and updates the associated employee files as if the employee was added on HR11.1 and PA13.1.

Use the Add function in the CSV file only for initial employee creation. If an employee record already exists with the same employee number, the system overrides the original employee record. Use the Change function in the CSV file to update existing employee data, such as deductions, benefits, personnel actions, and so on, with data from a non-Lawson system.

The program loads all employee fields found in HR11.1 and PA13.1 and performs all the edits of HR11.1 and PA13.1. If the record has errors, an error message prints on the report. You correct the errors in the output file, rename the file to EMPLOAD, and rerun HR511.

The program allows creation of one automatic deposit account to be used as the default ACH record.

To convert employee data

1 Access Employee Conversion (HR511).

2 Create the batch. Use the following guidelines to enter field values:

Company	Select a company.
Update History	Select whether to update employee history.
Update Employee Groups	Select whether to update employee groups.
Create Required Deductions	Select whether to create required deductions.
Update Time Accrual Plans	Select whether you want time accrual plans.
Report Sequence	Select whether to print the report in alphabetic, numeric, or file order.
Update	Select whether or not to perform the update.
	If you select Yes, the update is performed. If you select No, the system creates a report that lists pending changes.

3 Select the Add form action to add the job.

4 Transfer to the Job Definition form (jobdef).

5 Select the job you just added.

6 Press Define (F6) and select CSV file attributes.

7 Use the following guidelines to enter field values:

Extrnal Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

8 Press Enter twice to save the attributes.

9 Return to the program form and select the Submit form action to submit the job.

Updated Database Files

The Employee Conversion (HR511) uses the data in the conversion files to update the following database files.

Data Type	Database File Name
Employee (EMP)	EMPLOYEE (Unix/Windows) or DBHREMP (System i)
Employee Multiple Pos, Job (PEP)	PAEMPPOS (Unix/Windows) or DBHRPEP (System i)
Employee Personnel Information (PEM)	PAEMPLOYEE (Unix/Windows) or DBHRPEM (System i)
Employee ACH Account (EAD)	EMACHDEPST (Unix/Windows) or DBPREAD (System i)
Alternate Pay Rate (PRR)	PRRATES (Unix/Windows) or DBPRPRR (System i)
Employee Deduction (EDM)	EMDEDMASTR (Unix/Windows) or DBPREDM (System i)
HR History (HRH)	**HRHISTORY** (Unix/Windows) or DBHRHRH (System i)

Converting User Field Data

Run User Field Conversion (HR515) to convert applicant, employee, or position user field information from a non-Lawson system. The conversion can create data for three different reports:

- Applicants (PA31.1)
- Positions (PA02.1)
- Employee Records (HR11.1)

This program takes fields from a comma-separated value (CSV) file and updates the associated employee, applicant, or position files. Edits are performed as if the changes were made online. Use the USFCSV workfile when converting applicant data.

Run the following reports to verify converted user field data:

- Employee Listing (HR211)

- Applicant Profile (PA231)

- Position Listing (PA202)

Use the Add function in the CSV file for initial user field creation. Use the Change function in the CSV file to update existing employee, applicant, or position user field data.

Before beginning the conversion process, determine the information you will convert.

- Determine the types of records you will convert. Options are:

  Note: Only one of these types can be converted per conversion.

  - Applicant User fields

  - Employee User fields

  - Position User fields

- Valid user fields must be set up in HR04.1, if you are load applicant or employee data. If loading position data, valid user fields must be set up in User Field Setup (PA04.1).

- Effective and End dates are utilized when converting position user fields. If left blank, the user field data will be associated with the most recent position effective/end date.

- You must determine if you want to update history.

Verify that you have set up the following information before you convert alternate rate records. For set up procedures, see the *Human Resources User Guide*.

Validated Field	Form	Listing Form
Company	Company (HR00.1)	Company Listing (HR200)
Employee *	Employee (HR11.1)	Employee Listing (HR211)
Applicant **	Applicant (PA31.1)	Applicant Profile (PA231)
Position ***	Position (PA02.1)	Position Listing (PA202)
Alpha User Fields #	HR Code Setup (HR04.1)	HR Code Listing (HR204)
Numeric User Fields #	HR Code Setup (HR04.1)	HR Code Listing (HR204)
Date User Fields #	HR Code Setup (HR04.1)	HR Code Listing (HR204)
Alpha Fields ***	User Field Setup (PA04.1)	User Field Listing (PA204)
Numeric Fields ***	User Field Setup (PA04.1)	User Field Listing (PA204)
Date Fields ***	User Field Setup (PA04.1)	User Field Listing (PA204)

* and # Updated if converting employee user fields

** and # Updated if converting applicant user fields

*** updated if converting position user fields

Before you start Before you run HR515, verify companies are defined in Company (HR00.1), employees are defined in Employee (HR11.1), applicants are defined in Applicant (PA31.1) if you are converting applicant user fields, positions are defined in Position (PA02.1) if you are converting position user fields, user fields are defined in HR Code Setup (HR04.1), position user fields are defined in User Field Setup (PA04.1) if you are converting positions.

To convert user field data

1   Access User Field Conversion (HR515).

2   Select the run parameters. Use the following guidelines to enter field values:

Company	Select a company.
Type	Select the type of user field you want to convert.
Create History	Select whether to update historical records.
Update	Select whether or not to perform the update.
	If you select Yes, the update is performed. If you select No, the system creates a report that lists pending changes.

3   Select the Add form action to Add the job.

4   Transfer to the Job Definition form (jobdef).

5   Select the job you just added.

6   Press Define (F6) and select CSV file attributes.

7   Use the following guidelines to enter field values:

Extrnal Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

8   The Lawson server path/file name of the CSV file to be converted.

9   Press Enter twice to save the attributes.

Updated Database Files

The User Field Conversion (HR515) uses the data in the conversion files to update the following database files.

Data Type	Database File Name
Employee/Applicant User Fields	HREMPUSF / DBHRHEU

Data Type	Database File Name
Position User Fields	HRPOSUSD / DBHRHPD
History *	**HRHISTORY** / DBHRHRH

* Updated if user fields are logged to history.

Converting Alternate Rates

Run Alternate Rates Conversion (HR514) to import alternate pay rate information from a comma-separated value (CSV) file into Alternate Rates (HR14.1). HR514 uses workfile HR514CSV when updating.

The program processes and prints records in the order in which they are found on the CSV file. The program edits records as if they were directly typed into HR14.1. Any errors are written out to a new CSV file.

Run Employee Listing (HR211) to verify converted data.

Before beginning the conversion process, you must determine the records you will convert.

- Current and/or historical alternate rates can be converted

- Alternate rates can be tied to process levels, departments, job codes, positions, pay codes, or any combination of them

- If converting a historical rate that is tied to a position, the position must exist for the effective through end date range

Verify that you have set up the following information before you convert alternate rate records. For set up procedures, see the *Human Resources User Guide*.

Validated Field	Form	Listing Form
Company	Company (HR00.1)	Company Listing (HR200)
Process Level	Process Level (HR01.1)	Process Level Listing (HR201)
Departments	Department (HR02.1)	Department Listing (HR202)
Job Code	Job Code (HR06.1)	Job Code Listing (HR206)
Pay Code	Pay Code (PR20.4)	Pay Code Listing (PR220)
Position	Position (PA02.1)	Position Listing (PA202)
Employee *	Employee (HR11.1)	Employee Listing (HR211)

Before you start Verify that employee records exist on Employee (HR11.1) and that if used that Pay Code (PR20.4), Process Level (HR01.1), Department (HR02.1), Job Code (HR06.1), and Position (PA02.1) are defined.

If you use positions, the positions need to be defined for the date range being converted.

To convert alternate rates

1 Access Alternate Rates Conversion (HR514).

2 Select the run parameters. Use the following guidelines to enter field values:

Company	Select a company.
Update	Select whether to perform the update.
	If you select Yes, the update is performed. If you select No, the system creates a report that lists pending changes.
	Lawson recommends that you select Report Only to view the report before selecting Update.

3 Select the Add form action to add the job.

4 Transfer to the Job Definition form (jobdef).

5 Select the job you just added.

6 Press Define (F6) and select CSV file attributes.

7 Use the following guidelines to enter field values:

Extrnal Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

8 Press Enter twice to save the attributes.

9 Return to the program form and select the Submit form action to submit the job.

Updated Database Files

The Alternate Rate Conversion (HR514) uses the data in the conversion files to update the following database files.

Data Type	Database File Name
Employee *	EMPLOYEE / DBHREMP

Data Type	Database File Name
Alternate Pay Rates	PRRATES / DBPRPRR

Converting Dependent Data

Run Dependent Conversion (HR513) to load dependent data from a non-Lawson system into Dependent (HR13.1) in the Lawson Human Resources application. This program takes fields from a comma-separated value (CSV) file and updates the associated dependent files as if the employee was added on HR13.1. Data is updated through a batch workfile, DEPLOADCSV.

Use the Add function only for initial dependent creation. Use the Change function to update existing dependent data. Use the Delete function to delete dependent records added in error.

Run Dependent Listing (HR213) to verify converted data.

Important: The Delete function is not intended as a purge program.

The program loads all dependent fields found in HR13.1 and performs all the edits of HR13.1. If the record has errors, an error message prints on the report.

Before you start Before you convert dependent data, verify that the employees for who you are converting dependents exist in the system, that the values for the Relationship Code (DP) are defined in HR Codes (HR04.1), and that the values for the primary care physician code (PC) are defined in HR Codes (HR04.1).

To convert dependent data

1   Access Dependent Conversion (HR513).

2   Select the Add form action to add the job.

Company	Select a company.
Report Sequence	Select how you want the report to sort.
Update Option	Select whether or not you want to perform the update.
	If you select Yes, the update is performed. If you select No, the system creates a report that lists pending changes.

3   Transfer to the Job Definition form (jobdef).

4   Select the job you just added.

5   Press Define (F6) and select CSV file attributes.

6 Use the following guidelines to enter field values:

Extrnal Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

7 Press Enter twice to save the attributes.

8 Return to the program form and select the Submit form action to submit the job.

Updated Database Files

The Dependent File Load (HR513) uses the data in the conversion files to update the following database files.

Data Type	Database File Name
Employee Dependent Information	EMDEPEND / DBHREMD
Employee Personnel Comments	PACOMMENTS / DBPAPAC
Employee Personnel Information	PAEMPLOYEE / DBHRPEM
Employee Flex Dollars Remaining	EMPFLEXREM / DBBNEFR
Employee Investments	**EMPINVEST / DBBNEMI**
Employee	EMPLOYEE / DBHREMP
Dependent Benefits	HRDEPBEN / DBHRHDB
Standard Time Record	STANDTIME / DBPRSTM

Converting Employee History

Use Employee History Conversion (HR521) to take information from a comma-separated value (CSV) file and update personnel action history or employee history. The program creates a history of changes to the employee without updating the employee's record. HR521 can be used to create history for any field of the employee master. The workfile used for HR521 is HR521CSV.

If you use the Lawson Personnel Administration system, you can convert history for job or position levels 1 through 5.

This program can be used to create history for any fields of employee master, deduction master, or user fields.

For each record in the CSV file, you must include the field number and type of the data item in Employee History that was changed.

Mapping Considerations

For each record in the CSV file, you must include the field number and type of data item in Employee History that was changed. History may be loaded for any fields on the topics E1-E8 and EP with the exception of the company number and employee number.

Before you use HR521 to convert employee history, you must determine the records you will convert.

• Determine if you will convert personnel action history or only employee history

   If you choose to create personnel action history, you have a personnel action code on each record.

• When personnel action history is created, the file holding employee history, **HRHISTORY** / DBHRHRH , is automatically created

   Personnel action history is just like the history created when you perform a personnel action using Individual Action (PA52.1). Employee history records those changes made directly to Employee (HR11).

• Determine if you want to use default values for annual hours and FTE if they do not exist in **HRHISTORY** / DBHRHRH

   You can define the default values on this form.

• Define test samples

   If you are loading personnel action data, it is recommended that you use a sample including several types of actions.

For each record in the CSV file, you must include the field number and type of the data item in Employee History that was changed.

Run a report of the Employee Audit Report (HR105) for the date of the changes to verify converted data. When running the report, use the date the conversion programs were run.

Before you start Before you run HR521, verify employees are defined in Employee (HR11.1).

To convert employee history

1 Access Employee History Conversion (HR521).

2 Complete the form. Use the following guidelines to enter field values:

Company	Select a company.
Employee	Select an employee.

Annual Hours	Type the annual hours you want to use as a default value to calculate annual salary in pay rate history.
	If the system does not find an annual hours value in **HRHISTORY** / DBHRHRH , this value will be used for the pay history record.
	If the system does not find a value in this field or in **HRHISTORY** / DBHRHRH , it uses the value in the annual hours field on Company (HR00. 1).
FTE	Type the FTE you want to use as a default.
	If the system does not find an FTE value in **HRHISTORY** / DBHRHRH , this value will be used for the pay history record.
	Note: If the system does not find a value in this field or in **HRHISTORY** / DBHRHRH , it uses an FTE rate of 0. THIS CAN RESULT IN AN ANNUAL SALARY OF 0 FOR HOURLY EMPLOYEES! The system uses the following calculation to calculate annual salary for hourly employees: pay rate * annual hours * FTE=annual salary Therefore if the FTE is zero, the annual salary is zero as well.
Update	Select whether or not to perform the update.
	If you select Yes, the update is performed. If you select No, the system creates a report that lists pending changes.

3   Select the Add form action to submit the job.

4   Transfer to the Job Definition form (jobdef).

5   Select the job you just added.

6   Press Define (F6) and select CSV file attributes.

7   Use the following guidelines to enter field values:

Extrnal Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

8   Press Enter twice to save the attributes.

9   Return to the program form and select the Submit form action to submit the job.

Updated Database Files

The Employee History Conversion (HR521) uses the data in the conversion files to update the following database files.

Data Type	Database File Name
Employee History	**HRHISTORY** \ DBHRHRH

Converting Job Code Data

To convert job code data

1 Access Job Code Conversion (HR506).

2 Complete the form. Use the following guidelines to enter field values:

Company	Select the HR company you want to convert job codes for. This field is required. The company you select in this field must be the same as the company on the CSV file or the program will not run.
Update History	Select whether or not to update job code history. Selecting Yes creates **HRHISTORY** / DBHRHRH records for the converted job codes.
	If you define Data Item Attributes (HR10.1) to store job code history, but you DO NOT select Yes in this field, no history will be stored for the job codes you convert using this program.
Update	Select whether or not to update the JOBCODE / DBHRJBC file.
	If you select Yes, the updates the JOBCODE /DBHRJBC file and converts the job codes or job code changes into the Lawson Human Resources system.
	If you select No, the system creates a report that lists pending changes.

3 Select the Add form action to add the job.

4 Transfer to the Job Definition form (jobdef).

5 Select the job you just added.

6 Press Define (F6) and select CSV file attributes.

7 Use the following guidelines to enter field values:

Extrnal Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

8 Press Enter twice to save the attributes.

9 Return to the program form and select the Submit form action to submit the job.

Updated Database Files

The Job Code Conversion (HR506) program uses the data in the conversion files to update the following database files.

Data Type	Database File Name
Job Codes	JOBCODE / DBHRJBC
Job Code History	**HRHISTORY** / DBHRHRH

Reviewing the Human Resources Error Reports and Correcting Errors

Note: Use this information in addition to the general conversion information on this topic presented in "Review the Error Report and Correct Errors" on page 152.

When you run conversion programs with the Update option set to N, the system does not update the Lawson databases, but it does generate a listing of any existing errors.

Review the error report to analyze the errors and determine a possible solution.

- If the error affects only one or a few records, you can correct it directly in the conversion database files. Use programs to view and update contents of the conversion input databases.

- If the errors are massive or affect most of the records, return to "Map Human Resources Data to Source File" on page 28 and remap your data. If you have incorrect data in the conversion databases files, remove all records loaded into the databases and reload them.

Test Human Resources Conversion Results

When testing your Human Resources conversion results, refer to the following section in this chapter for information that is in addition to, or is different from, the Test Conversion Results information presented in Appendix F "Test Conversion Results" on page 154.

- "Run Human Resources Data Listings and Application-Specific Reports" on page 45

- "Verify the Converted Human Resources Data" on page 46

- "Correct Problems with Human Resources Data" on page 46

Run Human Resources Data Listings and Application-Specific Reports

Note: Use this information in addition to the general conversion information on this topic presented in "Run Data Listings and Application-Specific Reports" on page 154.

Print available listings and reports of the non-Lawson data. Choose reports that provide information similar to that provided in the Accounts Receivable reports. Print the listings immediately before the conversion to include all of the data you converted and no more.

Run the following Lawson reports:

To	Use
Produce a list of employee detail for each employee	Employee Listing (HR211)
Produce a listing of all data item changes made to fields designated to be recorded in Data Item Attributes (HR10.1)	Employee Audit Report (HR105) You can use this report to verify converted data from HR History Conversion (HR521)
Produce a list of employees by position class	Position Class Listing (PA201)
Produce a list of employees and their positions	Employee Listing (HR211)/Position Listing (PA202)
Produce a list of automatic deposit distributions defined for individual employees ACH	Account Listing (PR212)
Make custom reports to meet your needs	HR Writer Report Request (HR170)
List employee groups	Employee Group Update (HR155)
Produce a listing of deductions created for each employee	Employee Deduction Listing (PR214)
Produce a list of changes to employee deduction records	Deduction Audit Report (PR280)
Produce a list of employee enrolled in time accrual plans	Employee Plan Listing (TA260)
Verify converted data from Supervisor Conversion (HR507)	Supervisor Listing (HR207)
Verify converted data from Dependent Conversion (HR513) and create a listing of employee dependents	Dependent Listing (HR213)

To	Use
Verify converted data from Alternate Rate Conversion (HR514) and User Field Conversion (HR515)	Employee Listing (HR211)
Verify converted data from User Field Conversion (HR515)	Applicant Profile (PA231)
Verify converted data from User Field Conversion (HR515)	Position Listing (PA202)

Verify the Converted Human Resources Data

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Verify the Converted Data" on page 155 for full details.

Correct Problems with Human Resources Data

Note: Use this information in addition to the general conversion information on this topic presented in "Correct Problems" on page 155.

Error	Possible Solutions
Missing data for an employee	Type information directly into Lawson using Employee (HR11.1) or ACH Distribution (PR12.1)
Missing employees	Remap and convert data for the missing employees

Benefits Administration

<div style="text-align: right;">**3**</div>

This chapter provides guidelines for converting Benefits data from a non-Lawson system to the Lawson Benefits Administration system. Use this information in conjunction with the appendices to convert your Benefits data.

- "Plan Benefits Administration Conversion" on page 47
- "Complete Benefits Administration Conversion Prerequisites" on page 49
- "Map Benefits Administration Data" on page 51
- "Load Benefits Administration Conversion Data" on page 52
- "Run Benefits Administration Conversion Programs" on page 53
- "Test Benefits Administration Conversion Results" on page 62

Plan Benefits Administration Conversion

When planning your Benefits Administration conversion, refer to the following sections in this chapter for information that is in addition to, or is different from, the conversion information presented in "Plan Conversion" on page 128.

- "Determine the Benefits Administration Data to Convert" on page 47
- "Determine a Benefits Administration Conversion Schedule" on page 49
- "Define the Benefits Administration Conversion Environment" on page 49
- "Determine a Benefits Administration Backup Schedule" on page 49

Determine the Benefits Administration Data to Convert

Note: Use this information in addition to the general conversion information on this topic presented in "Determine the Data to Convert" on page 129.

Before beginning the conversion process, you must decide what benefit data you will convert.

Plan the benefit records you will convert

Decide if you will convert all benefits records or only selected records. For example, you might want to convert only current health benefits, but both historical and current 401 (k) benefits.

You must have plans, coverage, contributions and waiting periods in effect for the start date of the benefits. For example, if a 401 (k) benefit is for 01/01/01, the plan waiting period and contribution must be in effect for that date. If the benefit is a flex benefit, the employee must have flex dollars in effect on benefit start date. Examine carefully the dates of the historical records you will be converting, and be sure that dates were defined appropriately.

If you plan to convert payroll and benefits at the same time, the code names you assign to benefits deductions in the Payroll conversion must differ from the same benefits deductions in the Benefits Administration system. For example, if you name the health deduction HL for the Lawson Benefits program, use another name, such as HLCV for the health deduction history.

When you run the payroll history conversion program (PR560), it creates payroll benefit deductions without sequence numbers or stop dates. When you define plans in the Lawson® Benefits Administration application, deductions are automatically created in the same file with a sequence number.

Verify that the benefit deduction codes you defined for payroll history data are different from other benefit deduction codes and that the codes for payroll history data have stop dates. In this way, you avoid creating duplicate deductions and you create an audit trail of both the converted deduction amounts and those created in the Benefits Administration application.

If you already converted the Payroll application and are running live when you convert the Benefits Administration application, in addition to assigning unique names to the benefit deductions from each system, put stop dates on benefits deductions in the Payroll application for the day before the benefits deductions in the Benefits Administration application become effective.

If you have a large volume of data, convert each plan type as a different CSV file. If a problem occurs, you then have only one smaller file to correct.

Define test samples

If you have extensive benefits history, running a test sample through the whole process helps to flush out errors and discrepancies before you are encumbered by the volume of data.

Decide the samples you will use. You should have a sample for each plan that requires different input values. It is recommended that, at a minimum, you try a sample for each unique plan type. For example, for life benefits, use a different sample for flat amount, multiple of salary and supplemental life plans.

Perform all steps of the conversion process for each sample to verify that you defined plans properly and that your data converted without errors.

Determine a Benefits Administration Conversion Schedule

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Determine a Conversion Schedule" on page 129 for the full details.

Define the Benefits Administration Conversion Environment

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Define the Conversion Environment" on page 131 for the full details.

Determine a Benefits Administration Backup Schedule

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Determine a Backup Schedule" on page 132 for the full details.

Complete Benefits Administration Conversion Prerequisites

When completing your Benefits Administration conversion prerequisites, refer to the following section in this chapter for information that is in addition to, or is different from, conversion prerequisites presented in "Complete Conversion Prerequisites" on page 133.

- "Define or Verify Required Lawson Benefits Administration Information" on page 49

Define or Verify Required Lawson Benefits Administration Information

Note: Use this information in addition to the general conversion information on this topic presented in "Define or Verify Required Lawson Information" on page 133.

Make sure that you set up the following parameters before you convert benefit records. For set up procedures, see the Lawson Human Resources User Guides.

- Verify employee records are valid

  You must also verify that the values the Benefits application uses are included in the employee record on Employee (HR11.1). The required values depend upon how you set up benefit plans, such as how you defined criteria for eligibility or the values you use to create benefit contributions. The following is a list of fields on the employee record the Benefit application might use.

  - Rate of pay or calculated annual salary

  - Job Code

  - Job Code Full Time Equivalent

  - Birthdate

  - Benefit Dates

  - Benefit Salaries

  - Hire Date

  - Adjusted Hire Date

  - Seniority Date

  - Anniversary Date

  - Smoker

  - Pay Plan

  - Address Postal Code

  - Benefits Postal Code

  Important: The Postal Code on the Benefits folder in Employee (HR11.1) is used to override Postal codes on the Address folder.

- Verify Employee Groups are updated

  The Benefits Administration application uses employee groups for eligibility, coverage, contributions, and general ledger overrides. Verify that you updated employee groups before you convert benefit records.

  Use Employee Group Update (HR155) to update groups and Employee Group Listing (HR255) to inquire on employees within an Employee Group.

- Verify that the Payroll features are defined (optional)

  If you used prior or next pay periods, or prior or next work periods for benefits eligibility on Plan Waiting Periods (BN16.1), verify that this feature is defined in the Payroll application. You must also verify that each employee is associated with a pay plan. Use Pay Plan Listing (PR221) to verify pay plans.

- Verify that the Benefits Plans are defined.

  Before converting benefit records, make sure that you defined all benefit plans for which you are converting records. You must verify the following information:

Verify that you set the initial start dates and premium dates for all plans and the start dates for coverage and contributions so that they are effective on the date of the benefit.

Verify that the benefit entry rules for each plan establish initial waiting rules. Waiting plans are defined using Plan Waiting Periods (BN16.1).

If the benefit record is for a flex benefit, verify that the flex benefits plan was defined and that employee flex dollars exist. Employee flex dollars are created using Employee Flex Dollars (BN45.1) or Benefit Election Form (BN145).

If you used postal codes for eligibility, verify that you defined postal code tables using Eligibility Postal Codes (BN11.1).

Map Benefits Administration Data

When mapping your Benefits Administration data, refer to the following section in this chapter for information that is in addition to, or is different from, the Map Data information presented in Appendix C "Map Data" on page 134.

- "Identify Benefits Administration Conversion Work Files " on page 51

The suggested format to use for your Benefits Administration source files is the CSV file format.

Related topics

- "Determine the Benefits Administration Data to Convert" on page 47

  - "Identify Benefits Administration Conversion Work Files " on page 51

  - "Compare Non-Lawson Benefits Administration Data to Lawson Equivalents" on page 52

  - "Map Benefits Administration Data to Source File" on page 52

Identify Benefits Administration Conversion Work Files

Note: Use this information in addition to the general conversion information on this topic presented in "Identify Conversion Database Files and Conversion Work Files" on page 135.

The Lawson Benefits Administration application uses work files to convert non-Lawson data. To define your existing data in Lawson, you must identify the conversion work files into which the data will be loaded. For more information on the conversion work files, see the Benefits Administration File Layouts on the Documentation page on Infor Support Portal.

It is recommended that you create a unique CSV file for each plan type or plan code and complete the entire conversion process for each CSV file before beginning another.

Certain fields are required by all benefit plans, but each plan may require one or more fields as well.

For example, for a health plan, you may need to load only the fields required for all plans and the COV-OPTION field. For an employee life plan which is a multiple of salary, you may need to load only the MULT-SALARY field in addition to the required fields. For a flat amount life plan paid for by the company, you may not need any additional fields.
For example, for a health plan, you may need to load only the fields required for all plans and the COV-OPTION field. For an employee life plan which is a multiple of salary, you may need to load only the MULT-SALARY field in addition to the required fields. For a flat amount life plan paid for by the company, you may not need any additional fields.

Compare Non-Lawson Benefits Administration Data to Lawson Equivalents

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Compare Non-Lawson Data to Lawson Equivalents" on page 136 for full details.

Map Benefits Administration Data to Source File

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Map Data to Source File" on page 137 for full details.

Load Benefits Administration Conversion Data

Note: For this specific application, there are changes from the general conversion information on this topic presented in "Load Conversion Data" on page 143.

Lawson Human Capital Management does not require this step. Instead you need to transfer your CSV work file to your Lawson server. The conversion program then loads the data from the file you transferred to the Lawson server.

⚠ **Caution:** This section contains changes from the general conversion process as presented in the appendices.

Run Benefits Administration Conversion Programs

Use this information in addition to the general conversion information on this topic presented in "Run Conversion Programs" on page 150.

When running your Benefits Administration conversion programs, refer to the following sections in this chapter for information that is in addition to, or is different from, the information presented in "Run Conversion Programs" on page 150.

- "Converting Batch Benefit Enrollment Data" on page 53
- "Converting Batch Dependent Benefit Enrollment Data" on page 55
- "Converting DB/DC Account Balance Data" on page 57
- "Converting Compensation History" on page 58
- "Converting ACA Offers Upload Data" on page 59
- "Converting ACA Hours Upload Data" on page 60
- "Converting ACA Measurement Upload Data" on page 61
- "Reviewing the Benefits Administration Error Reports and Correcting Errors" on page 62

This table shows the conversion programs you need to run and the types of data they convert.

Conversion Procedure	Program Used
Batch Benefits Enrollment	BN531
Dependent Benefit Conversion	BN532
DC/DB Balance Conversion	BN555
Compensation History Upload	BN556
ACA Offers Upload	BN529
ACA Hours Upload	BN554
ACA Measurement Upload	BN549

Converting Batch Benefit Enrollment Data

Batch Benefit Enrollment (BN531) converts employee benefit enrollment records. It enrolls employees in benefit plans in batch through a benefits workfile and functions exactly as Speed Benefit Entry (BN31.1).

Run BN531 to load benefits from CSV (Comma Separated Value) files.

BN531 creates a report showing which benefits were loaded, the cost of each benefit, and an error report of benefits not loaded.

To verify converted data, run Plan Participant Report (BN230), Employee Benefit Report (BN231), and Employee Deduction Listing (PR214).

Before you start Before you run BN531, make sure all plans have been defined for the benefits you are loading.

To convert batch benefit enrollment data

1 Access Batch Benefit Enrollment (BN531).

2 Select the run parameters. Use the following guidelines to enter field values.

Job Name	With the Add form action, type the name of the job.
	With the Inquire form action, you can select a previously defined job. The jobs displayed are for the active user.
Job Description	Type a description of the job.
	The job description helps you identify a batch job by providing additional information about the job name.
Company	Select a company.
Through Date	Select a date through which benefits will be loaded. Only records with a start date on or before that date will be processed. If you type a date, leave the Use Current Date field blank or select No. Leave this field blank to process all records in the input CSV file.
Use Current Date	Select Yes if only records on or before the current system date should be processed. If you select Yes, the Through Date field must be blank.
Update	Select whether or not to perform the update. If you select Yes, the update is performed. If you select No, the application creates a report that lists pending changes.

3 Select the Add form action to add the job.

4 Transfer to the Job Definition form (jobdef).

5 Select the job you just added.

6 Press Define (F6) and select CSV file attributes.

7 Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

Updated Database Files

The Batch Benefit Enrollment (BN531) uses the data in the conversion database files to update the following Lawson database files.

Data Type	Lawson Database File Name
Employee Benefit	BENEFIT / DBBNBEN
Benefit Comments (updated if comments are deleted)	BNCOMMENTS / DBBNBCM
Employee Deduction Master	EMDEDMASTR / DBPREDM
Employee Flex Dollars Remaining	EMPFLEXREM / DBBNEFR
Employee Investments	EMPINVEST / DBBNEMI
Employee	EMPLOYEE / DBHREMP
Dependent Benefits	HRDEPBEN / DBHRHDB
Standard Time Record	STANDTIME / DBPRSTM

Converting Batch Dependent Benefit Enrollment Data

Run Batch Dependent Benefit Enrollment (BN532) to load dependent benefits from Comma-Separated Value (CSV) files into Dependent Benefits (HR13.1).

BN532 adds dependent benefits the same way benefits are added in Speed Benefit Entry (BN31.1).

BN532 creates a report showing which benefits were loaded, the cost of each benefit, and an error report of benefits not loaded.

Use Employee Benefit Report (BN231) to verify the converted data.

Before beginning the conversion process, you must decide what dependent benefit data you will convert.

• Determine the records you will convert

  Decide if you will convert all benefits records or only selected records. For example, you might want to convert only current dental benefits, but both historical and current health benefits.

• Run BN531 to make sure employee benefits exist for the dependent who records are going to be converted

Verify that you have set up the following information before you convert dependent benefit records. For set up procedures, see the *Human Resources User Guide* and *Benefits Administration User Guide*.

Validated Field	Form	Listing Form
Company	Company (HR00.1)	Company Listing (HR200)
Employee	Employee (HR11.1)	Employee Listing (HR211)
Dependent	Dependent (HR13.1)	Dependent Listing (HR213)
Plan Code	Benefit Plan (BN15.1)	Plan Parameter Listing (BN215)

Before you start Before you run BN532 make sure all plans have been defined for the benefits you are loading.

To convert batch dependent benefit enrollment data

1 Access Batch Dependent Benefit Enrollment (BN532).

2 Select the run parameters. Use the following guidelines to enter field values.

Job Name	With the Add form action, type the name of the job.
	With the Inquire form action, you can select a previously defined job. The jobs displayed are for the active user.
Job Description	Type a description of the job.
	The job description helps you identify a batch job by providing additional information about the job name.
Company	Select a company
Through Date	Select a date through which benefits will be loaded. Only records with a start date on or before that date will be processed. If you type a date, leave the Use Current Date field blank or select No. Leave this field blank to process all records in the input CSV file
Use Current Date	Select Yes if only records on or before the current system date should be processed. If you select Yes, the Through Date field must be blank.
Update	Select whether or not to perform the update. If you select Yes, the update is performed. If you select No, the application creates a report that lists pending changes.

3 Click the Add button to add the job.

4 Transfer to the Job Definition form (jobdef).

5 Select the job you just added.

6 Press Define (F6) and select CSV file attributes.

7 Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

8 Press Enter twice to save the attributes.

9 Return to the program form and select the Submit form action to submit the job.

Updated Database Files

The Batch Dependent Benefit Enrollment (BN532) uses the data in the conversion database files to update the following Lawson database files.

Data Type	Lawson Database File Name
Dependent Benefit	HRDEPBEN (Unix/Windows)
	DBHRHDB (System i)

Converting DB/DC Account Balance Data

Use DB/DC Account Balance Conversion (BN555) to import DB/DC plan balance adjustments. Payroll Close (PR199) updates the pre-tax, after-tax, and company contributions for employees for each defined contribution benefit. You can load account balances of previous years and adjust forfeitures, investment interest, and company contribution amounts.

The DB/DC account balances are updated for the plan year(s) identified in the data file you are loading.

To convert DB/DC account balance data

1 Access DB/DC Account Balance Conversion (BN555).

2 Define a job name in the Job Name field.

3 Select the run parameters. Use the following guidelines to enter field values:

Company   Select a company.

Update	Select whether or not to perform the update.
	If you select Yes, the update is performed. If you select No, the system creates a report that lists pending changes.
	It is recommended that you select Report Only to view the changes before selecting Update.

4 Click the Add button to add the job.

5 Transfer to the Job Definition form (jobdef).

6 Select the job you just added.

7 Press Define (F6) and select CSV file attributes.

8 Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

9 Press Enter twice to save the attributes.

10 Return to the program form and select the Submit form action to submit the job.

Converting Compensation History

Use Compensation History Upload (BN556) to import compensation history. Payroll Close (PR197) updates compensation history. You can load compensation history for previous years. The DB/DC account balances are updated for the plan year(s) identified in the data file you are loading.

To convert compensation history

1 Access Compensation History Upload (BN556).

2 Define a job name in the Job Name field.

3 Select the run parameters. Use the following guidelines to enter field values:

Company	Select a company.

Update	Select whether or not to perform the update.
	If you select Yes, the update is performed. If you select No, the system creates a report that lists pending changes.
	It is recommended that you select Report Only to view the changes before selecting Update.

4 Click the Add button to add the job.

5 Transfer to the Job Definition form (jobdef).

6 Select the job you just added.

7 Press Define (F6) and select CSV file attributes.

8 Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

9 Press Enter twice to save the attributes.

10 Return to the program form and select the Submit form action to submit the job.

Converting ACA Offers Upload Data

Use ACA Offers Upload (BN529) to convert employee benefit offer records. It is used to create employee offers through a workfile. Run BN529 to load offers from CSV (Comma Separated Value) files.

To verify converted data, use ACA Offers (BN29) or ACA Offers Report (BN229).

Before you start Before you run BN529, verify that all benefit plans have been defined for the ACA benefits that you are loading.

To convert ACA Offers Upload data

1 Access ACA Offers Upload (BN529).

2 Select the run parameters.

3 Select the Add form action to add the job.

4 Transfer to the Job Definition form (jobdef).

5 Select the job you just added.

6 Press Define (F6) and select CSV file attributes.

7 Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

Updated Database Files

The ACA Offers Upload (BN529) uses the data in the conversion database files to update these Lawson database files.

Data Type	Lawson Database File Name
ACA Offers	BNACAOFFER

Converting ACA Hours Upload Data

Use ACA Hours Upload (BN554) to convert employee hours records. It is used to create employee hours through a workfile. Run BN554 to load hours from CSV (Comma Separated Value) files.

To verify converted data, use ACA Hours (BN54) or ACA Hours Report (BN254).

To convert ACA Hours Upload data

1 Access ACA Hours Upload (BN554).

2 Select the run parameters.

3 Select the Add form action to add the job.

4 Transfer to the Job Definition form (jobdef).

5 Select the job you just added.

6 Press Define (F6) and select CSV file attributes.

7 Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).

Date Format	Format of dates to be converted in CSV file.

Updated Database Files

The ACA Hours Upload (BN554) uses the data in the conversion database files to update these Lawson database files.

Data Type	Lawson Database File Name
ACA Hours	BNACAHOURS

Converting ACA Measurement Upload Data

Use ACA Measurement Upload (BN549) to convert employee benefit offer records. It is used to create employee measurement assessment dates through a workfile. Run BN549 to load measurement assessment data from CSV (Comma Separated Value) files.

To verify converted data, use ACA Measurement Assessment (BN49) or ACA Measurement Assessment Report (BN249).

To convert ACA Measurement Upload data

1 Access ACA Measurement Upload (BN549).

2 Select the run parameters.

3 Select the Add form action to add the job.

4 Transfer to the Job Definition form (jobdef).

5 Select the job you just added.

6 Press Define (F6) and select CSV file attributes.

7 Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

Updated Database Files

The ACA Measurement Upload (BN549) uses the data in the conversion database files to update these Lawson database files.

Data Type	Lawson Database File Name
ACA Measure Assessment	BNACADATES

Reviewing the Benefits Administration Error Reports and Correcting Errors

Note: Use this information in addition to the general conversion information on this topic presented in "Review the Error Report and Correct Errors" on page 152.

When you run the conversion with the Update option set to N, the system does not update the Lawson databases, but it does generate a listing of any existing errors.

Review the error report to analyze the errors and determine a possible solution.

*   If the error affects only one or a few records, you can correct it directly in the conversion database files. Use programs to view and/or update contents of the conversion input databases.

    After loading the conversion input databases, use the following online programs to view and update contents of the conversion input databases.

Conversion Database File Name	Conversion Maintenance Form
ACIFACTV DBACAIV (Activity Interface)	Activity Interface Adjustment (AC50)

*   If the errors are massive or affect most of the records, return to "Map Benefits Administration Data to Source File" on page 52 and remap your data. If you have incorrect data in the conversion databases files, remove all records loaded into the databases and reload them.

Test Benefits Administration Conversion Results

When testing your Benefits Administration conversion results, refer to the following section in this chapter for information that is in addition to, or is different from, the Test Conversion Results information presented in Appendix F "Test Conversion Results" on page 154.

Run Benefits Administration Data Listings and Application-Specific Reports

Note: Use this information in addition to the general conversion information on this topic presented in "Run Data Listings and Application-Specific Reports" on page 154.

Print available listings and reports of the non-Lawson data. Choose reports that provide information similar to that provided in the Benefits Administration reports. Print the listings immediately before the conversion to include all of the data you converted and no more.

Run the following Lawson reports:

To	Use
List participants enrolled in a benefit plan	Plan Participant Report (BN230)
List all benefits in which an employee is enrolled	Employee Benefit Report (BN231)
List employee deductions	Employee Deduction Listing (PR214)

Verify the Converted Benefits Administration Data

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Verify the Converted Data" on page 155 for full details.

Correct Problems with Benefits Administration Data

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Correct Problems" on page 155 for full details.

Payroll

4

This chapter provides guidelines for converting Payroll data from a non-Lawson system to the Lawson Payroll system. Use this information in conjunction with the appendices to convert your Payroll data.

- "Plan Payroll Conversion" on page 64
- "Complete Payroll Conversion Prerequisites" on page 65
- "Map Payroll Data" on page 65
- "Load Payroll Conversion Data" on page 66
- "Run Payroll Conversion Programs" on page 67
- "Test Payroll Conversion Results" on page 76

Plan Payroll Conversion

For this specific application, there are no changes from the general conversion information on this topic presented in "Plan Conversion" on page 128.

- "Determine the Payroll Data to Convert" on page 64
- "Determine a Payroll Conversion Schedule" on page 65
- "Define the Payroll Conversion Environment" on page 65
- "Determine a Payroll Backup Schedule" on page 65

Determine the Payroll Data to Convert

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Determine the Data to Convert" on page 129 for the full details.

Determine a Payroll Conversion Schedule

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Determine a Conversion Schedule" on page 129 for the full details.

Define the Payroll Conversion Environment

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Define the Conversion Environment" on page 131 for the full details.

Determine a Payroll Backup Schedule

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Determine a Backup Schedule" on page 132 for the full details.

Complete Payroll Conversion Prerequisites

For this specific application, there are no changes from the general conversion information on this topic presented in "Complete Conversion Prerequisites" on page 133.

Define or Verify Required Lawson Payroll Information

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Define or Verify Required Lawson Information" on page 133 for full details.

Map Payroll Data

When mapping your Payroll data, refer to the following section in this chapter for information that is in addition to, or is different from, the Map Data information presented in Appendix C "Map Data" on page 134.

- "Identify Payroll Conversion Work Files " on page 66
- "Compare Non-Lawson Payroll Data to Lawson Equivalents" on page 66
- "Map Payroll Data to Source File" on page 66

The suggested format to use for your Payroll source files is the CSV file format.

Related topics

- "Determine the Data to Convert" on page 129

Identify Payroll Conversion Work Files

Note: Use this information in addition to the general conversion information on this topic presented in "Identify Conversion Database Files and Conversion Work Files" on page 135.

The Lawson® Payroll application uses work files to convert non-Lawson data. To define your existing data in Lawson, you must identify the conversion work files into which the data will be loaded. See the Payroll File Layouts on the Documentation page on Infor Support Portal.

Compare Non-Lawson Payroll Data to Lawson Equivalents

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Compare Non-Lawson Data to Lawson Equivalents" on page 136 for full details.

Map Payroll Data to Source File

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Map Data to Source File" on page 137 for full details.

Load Payroll Conversion Data

Note: For this specific application, there are changes from the general conversion information on this topic presented in "Load Conversion Data" on page 143.

Lawson Human Capital Management does not require this step. Instead you need to transfer your CSV work file to your Lawson server. The conversion program then loads the data from the file you transferred to the Lawson server.

⚠️ **Caution:** This section contains changes from the general conversion process as presented in the appendices.

Run Payroll Conversion Programs

When running your Payroll conversion programs, refer to the following sections in this chapter for information that is in addition to, or is different from, the information presented in "Run Conversion Programs" on page 150.

- "Converting Employee ACH Distribution Data" on page 68
- "Converting Employee Deduction Master Data" on page 69
- "Converting Payroll History Data" on page 71
- "Converting Pension Payroll Data" on page 73
- "Converting Time Record Data" on page 74
- "Reviewing the Payroll Error Reports and Correcting Errors" on page 76

The following table shows the conversion programs you need to run and the types of data they convert.

Conversion Procedure	Program Used
Employee ACH Distribution Interface	PR512
Employee Deduction Master Conversion	PR514
Payroll History Conversion	PR560
Pension Payroll Conversion	PR529
Time Record Interface	PR530

Converting Employee ACH Distribution Data

Run Employee ACH Dist Interface (PR512) load employee direct deposit information into the Lawson system. PR512 processes the CSV work file named ACHDSTCSV that you populated with employee direct deposit information.

If there are any errors, the Payroll system creates an error report and a CSV file of the errors named ACHDSTECSV.

To convert employee ACH distribution data

1 Access Employee ACH Dist Interface (PR512).

2 Define a job name in the Job Name field.

3 Select the run parameters. Use the following guidelines to enter field values:

Company	Select a company.
Update	Select whether or not to update the system.
	Select Yes if you want to load employee direct deposit distributions and create a report of the changes made by the load.
	Select No if you want to create a report of changes without updating the system. If you select this option, the system does not update employee direct deposit distributions.

4 Select the Add form action to add the job.

5 Transfer to the Job Definition form (jobdef).

6 Select the job you just added.

7 Press Define (F6) and select CSV file attributes.

8 Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

9 Press Enter twice to save the attributes.

10 Return to the program form and select the Submit form action to submit the job.

Converting Employee Deduction Master Data

Run Employee Deduction Master Load (PR514) to load non-benefit, non-tax employee deduction data from a non-Lawson system into Employee Deduction (PR14.1) and Employee Garnishment (PR26.1) in the Lawson Payroll system. This program takes fields from a comma-separated value (CSV) work file and updates the associated deduction files as if the deductions were added using PR14.1 or PR26.1. The program performs all the edits of PR14.1 and PR26.1.

The conversion creates records in the EMDEDMASTR / DBPREDM file.

The program also updates declining balances, limit balances, ascending balances, and additional tax amounts. If the record has errors, an error message prints on the report.

Use the Add function only for initial deduction creation. Use the Change function to update existing deduction data.

Use the Employee Deduction Listing (PR214) to verify converted data.

Mapping Considerations

The data in the CSV file should be sorted to improve the efficiency of the conversion. The sort order should be:

- Company

- Employee

Before beginning the conversion process, you must decide what miscellaneous deduction data you will convert.

- Determine records you want to convert

  Examine the miscellaneous deduction records (records that are not created automatically when the employee is added and enrolled in benefits) and determine how many records exist. If there are only a few, it may be more efficient to enter the records manually.

- Define test samples

  Select one deduction for one employee as a sample. It is recommended that you choose a deduction that is taken for a large number of employees.

  Make the sample large enough to test most fields but small enough to be manageable. Perform all steps of the conversion process to verify that you defined structure and codes properly and that your data converted without errors.

Verify that you have set up the following parameters before you convert pay records. For set up procedures, see the *Human Resources User Guide* and *Payroll User Guide*.

Validated Field	Form	Listing Form
Company	Company (HR00.1)	Company Listing (HR200)
*Employee	Employee (HR11.1)	Employee Listing (HR211)

Validated Field	Form	Listing Form
Deduction Code	Deduction Code (PR20.4)	Deduction Code Listing (PR220)
Expense Distrib Company	Company (GL10.1)	Company Listing (GL210)
Expense Accounting Unit	Accounting Units-Accounts (GL20.1)	Accounting Unit Listing (GL220)
Expense Account Number	Accounting Units-Accounts (GL20.1)	Accounting Unit Listing (GL220)
Expense Sub-Acct Number	Accounting Units-Accounts (GL20.1)	Accounting Unit Listing (GL220)
Accrual Distrib Company	Company (GL10.1)	Company Listing (GL210)
Accrual Accounting Unit	Accounting Units-Accounts (GL20.1)	Accounting Unit Listing (GL220)
Accrual Account Number	Accounting Units-Accounts (GL20.1)	Accounting Unit Listing (GL220)
Accrual Sub-Acct Number	Accounting Units-Accounts (GL20.1)	Accounting Unit Listing (GL220)

To convert employee deduction master data

1 Access Employee Deduction Master Load (PR514).

2 Define a job name in the Job Name field.

> **Note:** In the Update parameter, use N to test and correct your data before permanently updating it.

3 Select the run parameters. Use the following guidelines to enter field values.

Update	Select whether or not to perform the update.
	If you select Yes, the update is performed. If you select No, the system creates a report that lists pending changes.
	Lawson recommends that you select Report Only to view the report before selecting Update.
Bypass	If you enter No, the report will be produced.
	If you enter Yes, the report (except for errors) will not be created. This is done to speed up the processing of the program.

4 Click the Add button to add the job.

5 Transfer to the Job Definition form (jobdef).

6 Select the job you just added.

7 Press Define (F6) and select CSV file attributes.

8 Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

9 Press Enter twice to save the attributes.

10 Return to the program form and select the Submit form action to submit the job.

Updated Database Files

The Employee Deduction Master Load (PR514) uses the data in the conversion database files to update the following Lawson database files.

Data Type	Lawson Database File Name
Employee Deduction Master	EMDEDMASTR / DBPREDM
Employee	EMPLOYEE / DBHREMP
HR History *	**HRHISTORY** / DBHRHRH
Employee Garnishment	PREMPGARN / DBPRPEG
Garnishment Rule	PRGARNRULE / DBPRPGR

* Updated if changes are logged to history

Converting Payroll History Data

Run Payroll History Load (PR560) to create payroll history records in the Lawson Payroll system. PR560 reads the contents of a previously created comma separated value (CSV) work file (HSTLOADCSV).

Any history record that does not pass cleanly through edits is written to a CSV file called HSTOUTCSV and does not create a record in the database. Errors are printed on an edit report so you can make corrections. History records that are created are also listed on the report unless "Bypass report" is entered as "Yes".

Important: The input file, HSTLOADCSV, must be SORTED prior to running PR560. If it is not sorted, unpredictable results and data corruption are possible.

HSTLOADCSV must be sorted by:

- Company

- Employee

- Payment ID

- Process Level

- Department

A re-run option is also available. When you re-run the program against the original input, history for each employee included in the input file is deleted and reconstructed. Select No in the Rerun field so that existing data is not purged and the contents of the HSTLOADCSV file is added to the existing data.

Each record in this file represents a deduction or pay record for an employee for a specified year, quarter, payment ID, tax state, process level, and department, if applicable.

PR560 jobs may be run concurrently, each having it's own input and output files. For best results, all records for a specific employee must be run in the same job.

The Payment ID field is required and the Payment Number field is optional but will default from the payment ID.

To convert payroll history data

1 Access Payroll History Load CSV (PR560) or UK Payroll History Load CSV UK560).

2 Define a job name in the Job Name field.

3 Select the run parameters. Use the following guidelines to enter field values:

Update	Select the type of report to run.
	If you select No, the system creates an edit report but does not update the database with the payroll history records.
	If you select Yes, the system updates the database with payroll history records.
Rerun	Select whether or not to rerun the program.
	If you select Yes, the system re-runs the program against the original input. All history for each employee in the input file is deleted and reconstructed.
	If you select No, the system does not purge the existing data but simply adds the contents of the History Load file to the existing data.
Error Limit	Type the number of errors you want to allow before the program terminates.

Create Payment Records	If you select No, no PRCHECK / DBPRPCH records will be created.
	If you select Yes, PRCHECK / DBPRPCH records will be created based on the payment information provided and the bank account assigned to the process level. If the check number is blank, the payment ID will be used as the payment number instead. By creating PRCHECK / DBPRPCH records, the payment information will be available on-line through PR85 (Payment Reconciliation). Payments are created with a "Reconciled" status and as "System" payments.
Bypass Lookup Edits	If you select No, the normal edits will be performed on the input data.
	If you select Yes, some "lookup" edits will NOT be performed in order to speed up processing.
	⚠️ **Warning:** USE CAUTION WHEN SELECTING YES - THIS CAN CAUSE DATA CORRUPTION IF THE INPUT DATA HAS NOT BEEN CAREFULLY SCREENED PRIOR TO RUNNING THE PROGRAM IN UPDATE MODE.
Bypass Report	If you select No, the report will be produced.
	If you select Yes, the report (except for errors) will not be created. This is done to speed up the processing of the program.

4 Select the Add form action to add the job.

5 Transfer to the Job Definition form (jobdef).

6 Select the job you just added.

7 Press Define (F6) and select CSV file attributes.

8 Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.

9 Press Enter twice to save the attributes.

10 Return to the program form and select the Submit form action to submit the job.

Converting Pension Payroll Data

To convert pension payroll data

1 Access Pension Payroll Conversion (PR529).

2 Define a job name in the Job Name field.

3 Select the run parameters. Use the following guidelines to enter field values:

Company	The company number represents an established company and is entered on all function codes.
Rerun	
Error Limit	Type the number of errors you want to allow before the program terminates.
Bypass Report	If you select No, the report will be produced.
	If you select Yes, the report (except for errors) will not be created. This is done to speed up the processing of the program.
Error Option	Select Yes if you want to create an error file.
	Select No if you do not want to create an error file.
Update Option	Select whether or not you want to perform an update.
	If you select Yes, the update is performed. If you select No, the system creates a report that lists pending changes.

4 Select the Add form action to add the job.

5 Transfer to the Job Definition form (jobdef).

6 Select the job you just added.

7 Press Define (F6) and select CSV file attributes.

8 Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

9 Press Enter twice to save the attributes.

10 Return to the program form and select the Submit form action to submit the job.

Converting Time Record Data

Time Record Interface CSV (PR530) creates time records in the Payroll system. The system creates Batch status time records by reading a comma separated value (CSV) file created from a non-Lawson time record system. This is also the program used to load time records for payroll processing which have been entered in Lawson's web time entry feature in Lawson Employee and Manager Self-Service.

PR530 can create multiple batches of time records from the same time record interface file and then process them into the Payroll system by a specific batch or for all batches.

PR530 provides an option to either create the records with errors in an error file and not update the actual time record file or to update the actual time record file. The error messages will print on an error report.

Important: The CSV file for this program MUST be pre-sorted by company, batch number, and employee.

To convert time record data

1 Access Time Record Interface CSV (PR530).

2 Define a job name in the Job Name field.

3 Select the run parameters. Use the following guidelines to enter field values:

Company	Select the company for which you want to create time records through the interface program.
Batch Selection	If the Auto Batch Numbering field in the Company Payroll Information form tab of HR00.1 (Company) for the selected company is Yes, leave the Batch field blank to create a new batch.
	If auto batch numbering is not indicated for the selected company, type a batch number. This number is used in selecting records from the interface file.
Batch Assignment	If the Auto Batch Numbering field in the Company Payroll Information form tab of HR00 (Company) for the selected company is No, select a batch number to assign to records that do not have a batch number.
Error Records	Select whether to update the actual time record file or to create a comma-separated value (CSV) error file.
	If you select Update Time Records, records with errors will update the time record file. Time records must be fixed in PR35.1 (Time Entry) before batches can be released.
	If you select Update Exception File, records with errors update the CSV error file. These records can be fixed in the error file and used for subsequent input.

4 Select the Add form action to add the job.

5 Transfer to the Job Definition form (jobdef).

6 Select the job you just added.

7 Press Define (F6) and select CSV file attributes.

8 Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).

Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

9 Press Enter twice to save the attributes.

10 Return to the program form and select the Submit form action to submit the job.

Reviewing the Payroll Error Reports and Correcting Errors

Note: Use this information in addition to the general conversion information on this topic presented in "Review the Error Report and Correct Errors" on page 152.

When you run the conversion with the Update option set to N, the system does not update the Lawson databases, but it does generate a listing of any existing errors.

Review the error report to analyze the errors and determine a possible solution.

- If the error affects only one or a few records, you can correct it directly in the conversion database files. Use programs to view and/or update contents of the conversion input databases.

- If the errors are massive or affect most of the records, return to "Map Payroll Data to Source File" on page 66 and remap your data. If you have incorrect data in the conversion databases files, remove all records loaded into the databases and reload them.

Test Payroll Conversion Results

When testing your Payroll conversion results, refer to the following section in this chapter for information that is in addition to, or is different from, the Test Conversion Results information presented in Appendix F "Test Conversion Results" on page 154.

- "Run Payroll Data Listings and Application-Specific Reports" on page 76

- "Verify the Converted Payroll Data" on page 77

- "Correct Problems with Payroll Data" on page 77

Run Payroll Data Listings and Application-Specific Reports

Note: Use this information in addition to the general conversion information on this topic presented in "Run Data Listings and Application-Specific Reports" on page 154.

Print available listings and reports of the non-Lawson data. Choose reports that provide information similar to that provided in the Payroll reports. Print the listings immediately before the conversion to include all of the data you converted and no more.

Run the following Lawson reports:

To	Use
List employee decuctions	Employee Deduction Listing (PR214)

Verify the Converted Payroll Data

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Verify the Converted Data" on page 155 for full details.

Correct Problems with Payroll Data

There are no changes to the general conversion information on this topic presented in "Correct Problems" on page 155.

Absence Management

<div style="text-align: right">**5**</div>

This chapter provides guidelines for converting Absence Management data from a non-Lawson system to the Lawson Absence Management application. Use this information in conjunction with the appendices to convert your Absence Management data.

Plan Absence Management Conversion

For this specific application, there are no changes from the general conversion information on this topic presented in "Plan Conversion" on page 128.

Determine the Absence Management Data to Convert

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Determine the Data to Convert" on page 129 for the full details.

Determine an Absence Management Conversion Schedule

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Determine a Conversion Schedule" on page 129 for the full details.

Define the Absence Management Conversion Environment

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Define the Conversion Environment" on page 131 for the full details.

Determine an Absence Management Backup Schedule

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Determine a Backup Schedule" on page 132 for the full details.

Complete Absence Management Prerequisites

For this specific application, there are no changes from the general conversion information on this topic presented in "Complete Conversion Prerequisites" on page 133.

- "Define or Verify Required Lawson Absence Management Information" on page 79

Define or Verify Required Lawson Absence Management Information

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Define or Verify Required Lawson Information" on page 133 for the full details.

Map Absence Management Data

When mapping your Absence Management data, refer to the following section in this chapter for information that is in addition to, or is different from, the Map Data information presented in "Map Data" on page 134.

- "Identify Absence Management Conversion Work Files " on page 80
- "Compare Non-Lawson Absence Management Data to Lawson Equivalents" on page 80
- "Map Absence Management Data to Source File" on page 80

The suggested format to use for your Absence Management source files is the CSV file format.

Related topics

- "Determine the Data to Convert" on page 129

Identify Absence Management Conversion Work Files

Note: Use this information in addition to the general conversion information on this topic presented in "Identify Conversion Database Files and Conversion Work Files" on page 135.

The Lawson® Absence Management application uses work files to convert non-Lawson data. To define your existing data in Lawson, you must identify the conversion work files into which the data will be loaded. See the Absence Management section in the Lawson Absence Management File Layouts on the Documentation page on Infor Support Portal.

Compare Non-Lawson Absence Management Data to Lawson Equivalents

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Compare Non-Lawson Data to Lawson Equivalents" on page 136 for full details.

Map Absence Management Data to Source File

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Map Data to Source File" on page 137 for full details.

Load Absence Management Conversion Data

Note: For this specific application, there are changes from the general conversion information on this topic presented in "Load Conversion Data" on page 143.

Lawson Human Capital Management does not require this step. Instead you need to transfer your CSV work file to your Lawson server. The conversion program then loads the data from the file you transferred to the Lawson server.

> ⚠️ **Caution:** This section contains changes from the general conversion process as presented in the appendices.

Run Absence Management Conversion Programs

When running your Absence Management conversion programs, refer to the following sections in this chapter for information that is in addition to, or is different from, the information presented in "Run Conversion Programs" on page 150.

- "Converting Employee Service and Event Data" on page 81
- "Converting Employee Service and Event History" on page 83
- "Converting Manual Transactions" on page 84
- "Reviewing the Absence Management Error Reports and Correcting Errors" on page 85

The following table shows the conversion programs you need to run and the types of data they convert.

Conversion Procedure	Program Used
Employee Service and Event Conversion	LP553
Employee Service and Event History Conversion	LP554
Manual Transaction Conversion	LP570

Converting Employee Service and Event Data

Run Employee Service and Event Conversion (LP553) to convert current service and event information from a comma-separated value (CSV) file into Employee Service Entry (LP53.1).

The workfile used for employee service and event conversion is LPTSECSV. The conversion creates employee service and event records in LP53.1.

The program processes and prints records in the order in which they are found on the CSV file. The program edits records as if they were directly typed into LP53.1. Any errors are written out to a new CSV file.

To verify converted data, run:

• Employee Service and Event Report (LP260)

Before you convert data, you must determine what service and event information you will convert.

• Determine if employees and/or requisition records will be updated.

    If you select Update emps; Reqs Immediately, updates will be made to employee, requisition, and new hire actions immediately. If you select Update Emps; Reqs Later, or if the update is incomplete, you will need to run Position Update (PA102) when you are ready to update records with these changes.

Important: When you change historical position information, no updates are performed for employees or requisitions.

To convert employee service and event data

1 Access Employee Service and Event Conversion (LP553).

2 Define a job name in the Job Name field.

3 Select the run parameters. Use the following guidelines to enter field values.

Company	Select the company for which you will be loading employee event and service data.
Error Records	Identify whether records that have errors should be loaded into the service and even file anyway, or written to an exception CSV file.

4 Select the Add form action to add the job.

5 Transfer to the Job Definition form (jobdef).

6 Select the job you just added.

7 Press Define (F6) and select CSV file attributes.

8 Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.

File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

9 Press Enter twice to save the attributes.

10 Return to the program form and select the Submit form action to submit the job.

Converting Employee Service and Event History

Run Employee Service and Event History Conversion (LP554) to load historical service and event records into Lawson.

Records are loaded with a closed status so they are not included in any future absence cycle processing. This program will be used by non-Lawson Payroll clients to load historical service data, which will be necessary if any absence plans are defined to use hours as a basis for determining length of service. This program may also be used to load in historical absence-related data which is not tied to a time record in payroll.

To convert employee service and event history

1 Access Employee Service and Event History Conversion (LP554).

2 Define a job name in the Job Name field.

3 Select the run parameters. Use the following guidelines to enter field values.

Company	Select the company for which you will be loading employee event and service data.
Error Records	Identify whether records that have errors should be loaded into the service and even file anyway, or written to an exception CSV file.

4 Select the Add form action to add the job.

5 Transfer to the Job Definition form (jobdef).

6 Select the job you just added.

7 Return to the program form and select the Submit form action to submit the job.

Converting Manual Transactions

Note: Records can only be added with this program; no change function will be provided. You will need to delete existing record and add new record to effect a change.

Run Manual Transaction Conversion (LP570) to mass load initial plan balances or manual adjustments.

Any record that errors will be written to an error CSV file that can be manually corrected then used as an input file to facilitate the process.

To convert manual transactions

1 Access Manual Transaction Conversion (LP570).

2 Define a job name in the Job Name field.

3 Select the run parameters. Use the following guidelines to enter field values.

Company	Select the company for in which to load historical employee event and service data.
Override Transaction Date	If you want to override the transaction date of the CSV file, type a new date.
	If you leave this field blank, the date on the CSV file is used.
Create Error File	Select the value that indicates whether you want to create an error file.
	If you leave this field blank, No defaults and the error records will only be listed on an error report.
Update Option	Select the value that indicates whether you want to perform the update.
	If you select Yes, the update is performed.
	If you select No, the system creates a report that lists pending changes. Lawson recommends that you select Report Only to view the report before selecting Update.

4 Select the Add form action to add the job.

5 Transfer to the Job Definition form (jobdef).

6 Select the job you just added.

7 Return to the program form and select the Submit form action to submit the job.

Reviewing the Absence Management Error Reports and Correcting Errors

Note: Use this information in addition to the general conversion information on this topic presented in "Review the Error Report and Correct Errors" on page 152.

When you run the conversion with the Update option set to N, the system does not update the Lawson databases, but it does generate a listing of any existing errors.

Review the error report to analyze the errors and determine a possible solution.

- If the error affects only one or a few records, you can correct it directly in the conversion database files. Use programs to view and/or update contents of the conversion input databases.

- If the errors are massive or affect most of the records, return to "Map Absence Management Data to Source File" on page 80 and remap your data. If you have incorrect data in the conversion databases files, remove all records loaded into the databases and reload them.

Test Absence Management Conversion Results

When testing your Absence Management conversion results, refer to the following section in this chapter for information that is in addition to, or is different from, the Test Conversion Results information presented in "Run Conversion Programs" on page 150.

- "Run Absence Management Data Listings and Application-Specific Reports" on page 85
- "Verify the Converted Absence Management Data" on page 86
- "Correct Problems with Absence Management Data" on page 86

Run Absence Management Data Listings and Application-Specific Reports

Note: Use this information in addition to the general conversion information on this topic presented in "Run Data Listings and Application-Specific Reports" on page 154.

You can print available listings and reports of the non-Lawson data. Choose reports that provide information similar to that provided in the Absense Management reports. Print the listings immediately before the conversion to include all of the data you converted and no more.

Run the following Lawson reports:

To	Use
List applicant competency information	Applicant Competency Listing (PA235)
List applicant certification information	Applicant Certification Listing (PA236)
List applicant relocation information	Applicant Relocation Listing (PA238)

Verify the Converted Absence Management Data

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Verify the Converted Data" on page 155 for full details.

Correct Problems with Absence Management Data

There are no changes to the general conversion information on this topic presented in "Correct Problems" on page 155.

Personnel Administration

6

This chapter provides guidelines for converting Personnel data from a non-Lawson system to the Lawson Personnel Administration system. Use this information in conjunction with the appendices to convert your Personnel data.

- "Plan Personnel Administration Conversion" on page 87
- "Complete Personnel Administration Conversion Prerequisites" on page 88
- "Map Personnel Administration Data" on page 90
- "Load Personnel Administration Conversion Data" on page 91
- "Run Personnel Administration Conversion Programs" on page 91
- "Test Personnel Administration Conversion Results" on page 116

Plan Personnel Administration Conversion

For this specific application, there are no changes from the general conversion information on this topic presented in "Plan Conversion" on page 128.

- "Determine the Personnel Administration Data to Convert" on page 87
- "Determine a Personnel Administration Conversion Schedule" on page 88
- "Define the Personnel Administration Conversion Environment" on page 88
- "Determine a Personnel Administration Backup Schedule" on page 88

Determine the Personnel Administration Data to Convert

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Determine the Data to Convert" on page 129 for the full details.

Determine a Personnel Administration Conversion Schedule

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Determine a Conversion Schedule" on page 129 for the full details.

Define the Personnel Administration Conversion Environment

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Define the Conversion Environment" on page 131 for the full details.

Determine a Personnel Administration Backup Schedule

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Determine a Backup Schedule" on page 132 for the full details.

Complete Personnel Administration Conversion Prerequisites

For this specific application, there are no changes from the general conversion information on this topic presented in "Complete Conversion Prerequisites" on page 133.

- "Define or Verify Required Lawson Personnel Administration Information" on page 89

When completing your Training Administration Conversion Prerequisites, refer to the following section in this chapter for information that is in addition to, or is different from, conversion prerequisites presented in "Complete Conversion Prerequisites" on page 133.

- "Define or Verify Required Lawson Training Administration Information" on page 89

  - "Define or Verify Required Lawson Personnel Administration Information" on page 89

  - "Define or Verify Required Lawson Training Administration Information" on page 89

Define or Verify Required Lawson Personnel Administration Information

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Define or Verify Required Lawson Information" on page 133 for the full details.

Define or Verify Required Lawson Training Administration Information

Note: Use this information in addition to the general conversion information on this topic presented in "Define or Verify Required Lawson Information" on page 133.

Before you begin the conversion process, you must decide the data to convert.

- Determine how you map the structure of your current training data

  Examine your current training system and decide how you want it be structured in the Lawson® Training Administration application. Decide the tracks you have in the Lawson application, the skills and certification they provide and the courses that comprise each track. Then, examine the changes you must make to tracks and/or courses in your existing training data to fit the structure you define in the Lawson application.

- Determine what historical records you want to convert

  Decide if you will convert all training records or only selected records. You can convert training for terminated employees if you anticipate that some employees will return or if you plan on using the data for statistical studies.

Before you convert the Training Administration data, you must set up structures in the Training Administration application and other Lawson applications.

- Verify that the Training Administration structure has been defined.

  Set up all the courses in the Lawson application for which you want to convert non-Lawson training records.

- Verify that employee records have been converted in the Human Resources application.

  The employee for who you are converting a training record must be a valid employee in the Human Resources application. Therefore, you must verify that the employee records have been converted into the HR application.

- Assign employees to tracks (optional)

  If you want the conversion program to automatically record tracks complete, you must assign the employees to tracks in the Training Administration application before the conversion. If you decide to assign employees to tracks after conversion, you have to manually flag tracks completed for each employee.

Map Personnel Administration Data

When mapping your Personnel Administration data, refer to the following section in this chapter for information that is in addition to, or is different from, the Map Data information presented in "Map Data" on page 134.

- "Identify Training Administration Conversion Work Files " on page 90

- "Compare Non-Lawson Personnel Administration Data to Lawson Equivalents" on page 90

- "Map Personnel Administration Data to Source File" on page 90

The suggested format to use for your Personnel Administration source files is the CSV file format.

Related topics

- "Determine the Data to Convert" on page 129

Identify Training Administration Conversion Work Files

Note: Use this information in addition to the general conversion information on this topic presented in "Identify Conversion Database Files and Conversion Work Files" on page 135.

The Lawson Personnel Administration application and Lawson Training Administration application use work files to convert non-Lawson data. To define your existing data in Lawson, you must identify the conversion work files into which the data will be loaded. See the Personnel Administration File Layouts on the Documentation page on Infor Support Portal.

Compare Non-Lawson Personnel Administration Data to Lawson Equivalents

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Compare Non-Lawson Data to Lawson Equivalents" on page 136 for full details.

Map Personnel Administration Data to Source File

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Map Data to Source File" on page 137 for full details.

Load Personnel Administration Conversion Data

Note: For this specific application, there are changes from the general conversion information on this topic presented in "Load Conversion Data" on page 143.

Lawson Human Capital Management does not require this step. Instead you need to transfer your CSV work file to your Lawson server. The conversion program then loads the data from the file you transferred to the Lawson server.

> ⚠️ **Caution:** This section contains changes from the general conversion process as presented in the appendices.

Run Personnel Administration Conversion Programs

When running your Personnel Administration conversion programs, refer to the following sections in this chapter for information that is in addition to, or is different from, the information presented in "Run Conversion Programs" on page 150.

- "Converting Position Data" on page 92
- "Converting Budget Data" on page 97
- "Converting Position and Job Data" on page 99
- "Converting Emergency Contact Data" on page 102
- "Converting Applicant Data" on page 104
- "Converting Employee and Applicant Test Data" on page 107
- "Converting Health and Safety Incident Data" on page 108
- "Converting Employee and Applicant Code Data" on page 110
- "Converting Job History Data" on page 112
- "Reviewing the Personnel Administration Error Reports and Correcting Errors" on page 114

The following table shows the conversion programs you need to run and the types of data they convert.

Conversion Procedure	Program Used
Position Conversion	PA502
Budget Conversion	PA570
Position and Job Conversion	PA513
Emergency Contact Conversion	PA512

Conversion Procedure	Program Used
Employee and Applicant Test Conversion	PA549
Health and Safety Incident Conversion	PA590
Applicant Conversion	PA531
Employee and Applicant Code Conversion	PA520
Job History Conversion	PA533

When running your Training Administration conversion programs, refer to the following sections in this chapter for information that is in addition to, or is different from, the information presented in "Run Conversion Programs" on page 150.

- "Converting Training Data" on page 114

- "Reviewing the Training Administration Error Reports and Correcting Errors" on page 116

The following table shows the conversion programs you need to run and the types of data they convert.

Conversion Procedure	Program Used
Training Conversion	TR500

Converting Position Data

Run Position Conversion (PA502) to convert current and historical position information from a comma-separated value (CSV) file into Positions (PA02.1). The workfile used for position conversion is POSLOADCSV. The conversion creates positions in PA02.1 and, depending on the value in the Update Emps, Reqs field, updates Employees (HR11.1) or Requisition (PA42.1) or both.

The program processes and prints records in the order in which they are found on the CSV file. The program edits records as if they were directly typed into PA02.1. Any errors are written out to a new CSV file.

To verify converted data, run:

- Position Listing (PA202)

- Employee Listing (HR211)

- Requisition Listing (PA242)

Before you convert data, you must determine what position information you will convert.

- Determine if employees and/or requisition records will be updated.

If you select Update emps; Reqs Immediately, updates will be made to employee, requisition, and new hire actions immediately. If you select Update Emps; Reqs Later, or if the update is incomplete, you will need to run Position Update (PA102) when you are ready to update records with these changes.

Important: When you change historical position information, no updates are performed for employees or requisitions.

• Determine if position changes will be logged to history.

Verify that you have set up the following information before you convert positions records. For set up procedures, see the *Human Resources User Guide* and the *Personnel Administration User Guides*.

Validated Field	Form	Listing Form
Company	Company (HR00.1)	Company Listing (HR200)
Position Reason Code	Human Resource Code Setup (HR04.1)	Human Resource Code Listing (HR204)
Process Level	Process Level (HR01.1)	Process Level Listing (HR201)
Department	Department (HR02.1)	Department Listing (HR202)
User Level (UL)	Human Resource Code Setup (HR04.1)	Human Resource Code Listing (HR204)
Job Code	Job Code (HR06.1)	Job Code Listing (HR206)
Location Code (LO)	Human Resource Code Setup (HR04.1)	Human Resource Code Listing (HR204)
Supervisor Code	Supervisor (HR07.1)	Supervisor Listing (HR207)
Work Schedule (WS)	Human Resource Code Setup (HR04.1)	Human Resource Code Listing (HR204)
Overtime Pay Plan	Pay Plan (PR21.1)	Pay Plan Listing (PR221)
Schedule *	Step & Grade Schedule or Grade Range Schedule (PR16.1 or PA95)	Step & Grade Schedule Listing or Grade Range Schedule Listing (PR216 or PA295)
Grade **	Step & Grade Schedule or Grade Range Schedule (PR16.1 or PA95)	Step & Grade Schedule Listing or Grade Range Schedule Listing (PR216 or PA295)
Step	Step & Grade Schedule (PR16.1)	Step & Grade Schedule Listing (PR216)
Expense Company	Company (GL10.1)	Company Listing (GL210)

Validated Field	Form	Listing Form
Expense Accounting Unit	Accounting Units-Accounts (GL20.1)	Accounting Unit Listing (GL220)
Expense Account Number	Accounting Units-Accounts (GL20.1)	Accounting Unit Listing (GL220)
Expense Subaccount Number	Accounting Units-Accounts (GL20.1)	Accounting Unit Listing (GL220)
Activity	Activity (AC10.1)	Activity Listing (AC210)
Account Category	Account Categories (AC05.1)	Account Category Listing (AC205)

Before you start Before you convert positions:

- verify companies are defined in Company (HR00.1)

- process levels are defined Process Level (HR01.1)

- departments are defined in Department (HR02.1)

- position reason codes are defined HR Code Setup (HR04.1)

- user level codes (UL) are defined HR Code Setup (HR04.1)

- location codes (LO) are defined in HR Code Setup (HR04.1)

- work schedule codes (WS) are defined in HR Code Setup (HR04.1)

- job codes are defined in Job Code (HR06.1)

- supervisor codes are defined in Supervisor (HR07.1)

- overtime pay plans are defined in Pay Plan (PR21.1)

- schedules or grade ranges are defined in Step & Grade Schedule (PR16.1) or Grade Range Schedule (PA95.1)

- steps are defined in PR16.1

- expense companies are defined in Company (GL10)

- expense accounting units, expense account numbers, and expense sub account numbers are defined in Accounting Units-Accounts (GL20.1)

- activities are defined in Activity (AC10.1)

- account categories are defined in Account Categories (AC05.1).

- position rules exist in Position Rules (PA06.1) for the earliest position date being converted

- default and override rules are set up in Position Item Attributes (HR10.2)

To convert position data

1 Access Position Conversion (PA502).

2 Define a job name in the Job Name field.

3 Select the run parameters. Use the following guidelines to enter field values:

Company	Select a company.
Update Employee and Requisitions	Select when you would like to update employee and requisition records to reflect changes you are making to the position.
	If you select Update Emps; Reqs Later, you will need to run Position Update (PA102) when you are ready to update records with these changes.
	If you select Update Emps; Reqs Immediately, updates will be made to employee and requisition records when the change is complete. The report comments indicate whether the update is fully completed. If the update was not fully completed, run Position Update (PA102) afterwards.
Update History	Select whether you want to update position history with changes.
	If you leave this field blank, No defaults and changes are not logged to history.
Update	Select whether you want to perform the update.
	If you select Yes, the update is performed. If you select No, the system creates a report that lists pending changes.
	Lawson recommends that you select Report Only to view the report before selecting Update.

4 Select the Add form action to add the job.

5 Transfer to the Job Definition form (jobdef).

6 Select the job you just added.

7 Press Define (F6) and select CSV file attributes.

8 Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

9 Press Enter twice to save the attributes.

10 Return to the program form and select the Submit form action to submit the job.

Updated Database Files

The Position Conversion (PA502) uses the data in the conversion database files to update the following Lawson database files.

Data Type	Lawson Database File Name	Updated if:
Benefit Changes	BNCHANGE / DBBNBNH	C
Employee	EMPLOYEE / DBHREMP	C
HR History *	HRHISTORY / DBHRHRH	A, B, C
Rate History *	PRRATEHIST / DBHRPRH	C
Position User Field Type **	HRPOSUSD / DBHRHPD	A, B, C
Supervisors	HRSUPER / DBHRHSU	C, if supervisor link is changed
Employee Personnel Information	PAEMPLOYEE / DBHRPEM	C
Employee Multiple Pos, Jobs	PAEMPPOS / DBHRPEP	C
Job Requisition	PAJOBREQ / DBPAPJR	C
Retroactive Pos, Job Changes	PAPEPAUDIT / DBPAPEA	C, if emps updated retroactively
Position Changes	PAPOSCHG / DBPAPPC	B, C, if emps not fully updated
Position Errors	PAPOSERR / DBPAPPE	C, if emps not fully updated
Position	PAPOSITION / DBPAPOS	A, B, C
Employee Report Writer Paths	PATHFIND / DBHRPTF	C
Personnel Action Detail	PERSACTION / DBPAPCT	C
Personnel Action History	PERSACTHST / DBPAPAH	C
Employee Group Employees	PGEMPLOYEE / DBHRPGE	C

* Updated if changes are logged to history

** If a new effective dated record is added, positions user fields are brought forward

A Files updated if no employees or requisitions are assigned to any of the positions

B Files updated if "update emps, reqs" is not immediate

C Files updated if "update emps, reqs" is immediate

Converting Budget Data

Use Budget Conversion (PA570) to convert budget records from a comma-separated value (CSV) file into Position Budget (PA70.1), Job Budget (PA71.1), Preliminary Position Budget (PA72.1), or Preliminary Job Budget (73.1) depending on the effective date you use in the CSV work file and the approved through date you define in Position Rules (PA06.1). When converting, use the work file BUDCSV.

The program converts one count category at a time. If the CSV file has more than one category, the program writes it to another CSV file which can be converted separately.

PA570 creates a CSV file for errors.

After you convert the records, run Budget and Assigned Resource Listing (PA272) to determine where assigned resources exceed the budget.

To verify converted data, run the following:

- Budget Listing (PA271)

- Budget and Assigned Resource Listing (PA272)

- Assigned Resource Listing (PA211) to determine any areas where assigned resources exceed budget

Before beginning the conversion process, determine what data you will convert:

- Count Category

- Current or Historical Budgets (how much history)

- Records are processed in the order in which they are found in the CSV file. If you want the system to automatically assign end dates when a new effective dated record is added, the CSV work file should be sorted in ascending effective date order. If the system automatically assigns end dates (when a new effective dated record is added), then the load file should be sorted in ascending date order (if the file is not sorted in this order, the user will have many date overlap errors).

- Load one count category at a time. If the CSV work file contains records from the other 2 count categories, these records will be written out to the other CSV files (which can then be reloaded).

- Ensure that position rules (PA06) exist for the earliest budget date being loaded.

Verify that you have set up the following information before you convert position budget records. For set up procedures, see the Human Resources and Personnel Administration User Guides.

Validated Field	Form	Listing Form
Company	Company (HR00.1)	Company Listing (HR200)
Position	Position (PA02.1)	Position Listing (PA202)
Process Level	Process Level (HR01.1)	Process Level Listing (HR201)
Department	Department (HR02.1)	Department Listing (HR202)
Job Code	Job Code (HR06.1)	Job Code Listing (HR206)

Validated Field	Form	Listing Form
Budget Reason (BD)	HR Code Setup (HR04.1)	HR Code Listing (HR204)

Before you start Before you convert PA570, verify:
- the company is defined in Company (HR00.1)

- the process level is defined in Process Level (HR01.1)

- job codes are defined in Job Code (HR02.1)

- positions are defined in Position (PA02.1)

- budget reason codes (BD) are defined in HR Code Setup (HR04.1)

In addition, verify position rules exist for the earliest budget date being converted. If you are using position codes, verify positions exist for the budget date being converted.

To convert budget data

1 Access Budget Conversion (PA570).

2 Define a job name in the Job Name field.

3 Select the run parameters. Use the following guidelines to enter field values:

Company	Select a company.
Count Category	Select the count category you want to convert.
	You can convert one count category at a time. If the comma-separated value (csv) file contains records from other count categories, these records are written to other csv files, which can be converted separately.
Update	Select whether or not you want to perform the update.
	If you select Yes, the update is performed. If you select No, the system creates a report that lists pending changes.

4 Click the Add button to add the job.

5 Transfer to the Job Definition form (jobdef).

6 Select the job you just added.

7 Press Define (F6) and select CSV file attributes.

8 Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).

Date Format	Format of dates to be converted in CSV file.

9 Press Enter twice to save the attributes.

10 Return to the program form and select the Submit form action to submit the job.

Updated Database Files

The Budget Conversion (PA570) uses the data in the conversion work file to update the following Lawson database files.

Data Type	Lawson Database File Name
Budget	PABUDGET (Unix/Windows)
	DBPAPAB (System i)

Converting Position and Job Data

Run PA513 to import historical information from a comma-separated value (CSV) file into Position, Job History (PA13.2).

Use the input file PA513CSV when converting position and job data.

Determine what information will be converted.

• Verify valid value tables exist.

• Determine how much historical data you will convert for each employee

• Determine if information should be logged to history

• A Level 1 (primary) historical record must exist for the time frame for which any Level 2-5 records are converted

• It is recommend the file be sorted in the following order: employee:position level:descending effective date

• If using formal positions, default/override edits will not be performed.

The program processes and prints records in the order in which they are found on the CSV file. The program edits records as if they were directly typed into PA13.2. Any errors are written out to a new CSV file.

To verify converted data, run the following:

• Position, Job Listing (PA213)

Verify that you have set up the following information before you convert employee position, job history records. For set up procedures, see the *Human Resources User Guide* and the *Personnel Administration User Guide*.

Validated Field	Form	Listing Form
Company	Company (HR00.1)	Company Listing (HR200)
Employee	Employee (HR11.1)	Employee Listing (HR11.1)
Position	Position (PA02.1)	Position Listing (PA202)
Job Code	Job Code (HR06.1)	Job Code Listing (HR206)
Process Level	Process Level (HR01.1)	Process Level Listing (HR201)
Department	Department (HR02.1)	Department Listing (HR202)
User Level (UL)	HR Code Setup (HR04.1)	HR Code Listing (HR204)
Location Code (LO)	HR Code Setup (HR04.1)	HR Code Listing (HR204)
Supervisor Code	Supervisor (HR07.1)	Supervisor Code Listing (HR207)
Union Code (UN)	HR Code Setup (HR04.1)	HR Code Listing (HR204)
Work Schedule (WS)	HR Code Setup (HR04.1)	HR Code Listing (HR204)
Schedule *	Step & Grade Schedule or Grade Range Schedule (PR16.1 or PA95)	Step & Grade Schedule Listing or Grade Range Schedule Listing (PR216 or PA295)
Grade **	Step & Grade Schedule or Grade Range Schedule (PR16.1 or PA95)	Step & Grade Schedule Listing or Grade Range Schedule Listing (PR216 or PA295)
Step	Step & Grade Schedule (PR16.1)	Step & Grade Schedule Listing (PR216)

* This is either a step and grade schedule or a grade range schedule.

** This is either a step & grade schedule grade or a grade range schedule grade.

Before you start Before you run PA513, verify:

- companies are defined in Company (HR00.1)

- process levels are defined Process Level (HR01.1)

- positions are defined in Position (PA02.1)

- departments are defined in Department (HR02.1)

- user level codes (UL) are defined HR Code Setup (HR04.1)

- location codes (LO) are defined in HR Code Setup (HR04.1)

- supervisor codes are defined in Supervisor (HR07.1)

- work schedule codes (WS) are defined in HR Code Setup (HR04.1)

- union codes (UN) are defined in HR Code Setup (HR04.1)

- schedules or grade ranges are defined in Step & Grade Schedule (PR16.1) or Grade Range Schedule (PA95.1)

- steps are defined in PR16.1

In addition, verify employee records exist in Employee (HR11.1), and position rules exist in Position Rules (PA06.1) and Position Item Attributes (HR10.2) for the earliest date being converted. If you use formal positions, be sure positions exist in Positions (PA02.1) for the dates being converted. Be sure all codes such as job and location are set up.

To convert position and job data

1 Access Position and Job Conversion (PA513).

2 Define a Job Name.

Note: In the Update parameter, use N to test and correct your data before permanently updating it.

3 Select the run parameters. Use the following guidelines to enter field values:

Company	Select a company.
Update History	Select whether to log changed fields to history.
	If you select Yes, historical information is available through the Drill Around feature and through listings.
	If you leave this field blank, No defaults and changes are not logged.
Update	Select whether you want to perform the update.
	If you select Yes, the update is performed. If you select Report Only, the system creates a report that lists pending changes.
	Lawson recommends that you select Report Only to view the report before selecting Update.

4 Click the Add button to add the job.

5 Transfer to the Job Definition form (jobdef).

6 Select the job you just added.

7 Press Define (F6) and select CSV file attributes.

8 Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

9 Press Enter twice to save the attributes.

10 Return to the program form and select the Submit form action to submit the job.

Updated Database Files

The Position and Job Conversion (PA513) uses the data in the conversion work file to update the following Lawson database files.

Data Type	Lawson Database File Name
Employee Positions	PAEMPPOS / DBHRPEP
History *	HRHISTORY / DBHRHRH
Rate History *	PRRATEHIST / DBHRPRH

* Updated if changes are logged to history

Converting Emergency Contact Data

Run Emergency Contact Conversion (PA512) to convert emergency contact information from a comma-separated value (csv) file into Emergency Contact (PA12.1).

Use the work file PAELOADCSV when converting emergency contact data.

Before you start Before you run PA512, verify the company is defined in Company (HR00.1), employees are defined in Employee (HR11.1), countries are defined in Country Maintenance (IN01.1).

To verify data, run the following:

- Emergency Contact Listing (PA212)

To convert emergency contact data

1 Access Emergency Contact Conversion (PA512).

2 Define a job name in the Job Name field.

   Note: In the Update parameter, use N to test and correct your data before permanently updating it.

3 Complete the form. Use the following guidelines to enter field values:

Company	Select a company.
Update	Select whether to perform the update.
	If you select Yes, the update is performed. If you select Report Only, the system creates a report that lists pending changes.
	Lawson recommends that you select Report Only to view the report before selecting Update.

4 Select the Add form action to add the job.

5 Transfer to the Job Definition form (jobdef).

6 Select the job you just added.

7 Press Define (F6) and select CSV file attributes.

8 Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

9 Press Enter twice to save the attributes.

10 Return to the program form and select the Submit form action to submit the job.

Updated Database Files

The Emergency Contact Conversion (PA512) uses the data in the conversion work files to update the following Lawson database files.

Data Type	Lawson Database File Name
Personnel Comments	PACOMMENTS / DBPAPAC
Employee Emergency Contact	PAEMERGCNT / DBPAPAE
Employee Personnel Information	PAEMPLOYEE / DBHRPEM

Converting Applicant Data

Run Applicant Conversion (PA531) to convert applicant data from a non-Lawson system into Applicant (HR31.1) in the Lawson Personnel Administration System. Also, the conversion creates some information in Applicant Military (PA39.1) and Applicant Medical (PA40.1).

This program takes fields from a comma-separated value (CSV) file and updates the associated applicant files as if the applicant was added on PA31.1.

Use work file APLLOADSCV when converting applicant data.

Use the Add function in the CSV file only for initial applicant creation. If an applicant record already exists with the same applicant number, an error message will print on the CSV error file. To resolve this error, use the Change function. Use the Change function in the CSV file to update existing applicant data with data from a non-Lawson system.

The program loads all applicant fields found in PA31.1 and performs all the edits of PA31.1. If the record has errors, an error message prints on the report. All errors are written to a new CSV file.

To verify converted data, run the following,

- Applicant Profile (PA231)

Before beginning the conversion process, you must decide the applicant data you will convert.

- Determine the applicant information you will convert.
- Determine if changes will be logged to history.
- Confirm required fields in Data Item Attributes (HR10).

Verify that you have set up the following information before you convert applicant records. For set up procedures, see the *Human Resources User Guide* and the *Personnel Administration User Guide*.

Validated Field	Form	Listing Form
Company	Company (HR00.1)	Company Listing (HR200)

Validated Field	Form	Listing Form
Applicant Status	Applicant Status (PA30.1)	Applicant Status Listing (PA230)
Hire Source (HS)	HR Code Setup (HR04.1)	HR Code Listing (HR204)
Rating (AR)	HR Code Setup (HR04.1)	HR Code Listing (HR204)
Job Code	Job Code (HR06.1)	Job Code Listing (HR206)
Work Restriction (WR)	Human Resource Code Setup (HR04.1)	Human Resource Code Listing (HR204)
Position	Position (PA02.1)	Position Listing (PA202)
Process Level	Process Level (HR01.1)	Process Level Listing (HR201)
Employee Status	Employee Status (HR03.1)	Employee Status Listing (HR203)
Work Schedule (WS)	Human Resource Code Setup (HR04.1)	Human Resource Code Listing (HR204)

Before you start Before running PA531, verify the company is defined in Company (HR00.1), applicant statuses are defined in Applicant Status (PA30.1), hire source codes (HS) are defined in HR Code Setup (HR04.1), rating codes (AR) are defined in HR04.1, job codes are defined in Job Code (HR06.1), work restriction codes are defined in HR04.1, positions are defined in Position (PA02.1), employee statuses are defined in Employee Status Codes (HR03.1), work schedule codes (WS) are defined in HR04.1.

Before you convert applicant information, be sure any required codes are set up.

To convert applicant data

1 Access Applicant Conversion (PA531).

2 Define a job name in the Job Name field.

   Note: In the Update option parameter, use N to test and correct your data before permanently updating it.

3 Complete the form. Use the following guidelines to enter field values:

   Company   Select a company.

Update History	Select whether to log changed fields to history.
	If you select Yes, historical information is available through the Drill Around feature and through listings.
	If you leave this field blank, No defaults and changes are not logged.
Update	Select whether to perform the update.
	If you select Yes, the update is performed. If you select Report Only, the system creates a report that lists pending changes.
	Lawson recommends that you select Report Only to view the report before selecting Update.

4 Select the Add form action to add the job.

5 Transfer to the Job Definition form (jobdef).

6 Select the job you just added.

7 Press Define (F6) and select CSV file attributes.

8 Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

9 Press Enter twice to save the attributes.

10 Return to the program form and select the Submit form action to submit the job.

Updated Database Files

The Applicant Conversion (PA531) uses the data in the conversion work files to update the following Lawson database files

Data Type	Lawson Database File Name
Applicant	APPLICANT /
	DBPAAPL
HR Company and Process Levels **	PRSYSTEM /
	DBHRPRS
History *	HRHISTORY /
	DBHRHRH /

* Updated if fields are logged to history

** Updated if auto applicant numbering = "Y"es

Converting Employee and Applicant Test Data

Run Employee and Applicant Test Conversion (PA549) to convert employee or applicant test information from a comma-separated value (CSV) file to Employee Tests (PA49.1) or Applicant Tests (PA49.3).

This program processes records in the order provided by the CSV file. If you are converting sequenced tests (that is, test with an originating test), convert the tests in sequential order. For example, Test 1, then Test 2.

Use the workfile PTSCSVLOAD when converting employee and applicant test data.

If an employee does not meet the eligibility criteria defined in Test Set Up (PA48.1), the information will be converted. However, a message prints on the error report.

You run the program separately to convert employee or applicant test information. You can convert past, present, or future test information.

To verify converted data, run the following:

• Employee and Applicant Test Listing (PA249)

Before you start Before you convert employee or applicant test information to PA49.1 or PA49.3, verify the test sequence on the CSV file is the way you want it in the Personnel Administration system. Tests are converted in the same sequence they appear on the CSV file. You must verify the test is defined in PA48.1, employees or applicants exist in the Personnel Administration system, test results are defined in Test Results (PA48.2), test reason (TA) codes are defined in HR Code Setup (HR04.1), establishment information is defined in HR04.1.

To convert employee and applicant test data

1 Access Employee and Applicant Test Conversion (PA549).

2 Define a job name in the Job Name field.

Note: In the Update option parameter, use N to test and correct your data before permanently updating it.

3 Complete the form. Use the following guidelines to enter field values:

Company	Select a company.
Record Type	Select whether to convert applicant or employee test information.

Update	Select whether to perform the update.
	If you select Yes, the update is performed. If you select No, the system creates a report that lists pending changes.
	Lawson recommends that you select Report Only to view the report before selecting Update.

4 Select the Add form action to add the job.

5 Transfer to the Job Definition form (jobdef).

6 Select the job you just added.

7 Press Define (F6) and select CSV File attributes.

8 Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

9 Press Enter twice to save the attributes.

10 Return to the program form and select the Submit form action to submit the job.

Updated Database Files

The Employee and Applicant Test Conversion (PA549) uses the data in the conversion database files to update the following Lawson database files.

Data Type	Lawson Database File Name
Employee, Applicant Tests	PAEMPAPTST /
	DBPAPTS /

Converting Health and Safety Incident Data

Run Health, Safety Incident Conversion (PA590) to convert health and safety incident information from a comma-separated value (CSV) file to:

• Health and Safety Incident (PA90.1)

• Incident Follow Up (PA90.2)

• Incident Costs (PA90.3)

You run the program separately for each conversion; to convert information for all three forms, you run PA590 three times.

To verify converted data, use the following:

•   Health and Safety Incident Listing (PA290)

Before you start Before you convert health and safety information for PA90.1, PA90.2, or PA90.3, define all incident codes associated with the incidents, follow up, and costs.

Before you convert follow up or cost information in PA90.2 or PA90.3, convert or create the incidents in PA90.1.

To convert health and safety incident data

1   Access Health and Safety Incident Conversion (PA590).

2   Define a job name in the Job Name field.

3   Complete the form. Use the following guidelines to enter field values:

Company	Select a company.
Record Type	Select whether to convert applicant or employee test information.
Update	Select whether to perform the update.
	If you select Yes, the update is performed. If you select No, the system creates a report that lists pending changes.
	Lawson recommends that you select Report Only to view the report before selecting Update.

Note: In the Update option parameter, use N to test and correct your data before permanently updating it.

4   Select the Add form action to add the job.

5   Transfer to the Job Definition form (jobdef).

6   Select the job you just added.

7   Press Define (F6) and select CSV File attributes.

8   Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

9   Press Enter twice to save the attributes.

10 Return to the program form and select the Submit form action to submit the job.

Updated Database Files

The Health and Safety Incident Conversion (PA590) uses the data in the conversion database files to update the following Lawson database files.

Data Type	Lawson Database File Name
OSHA Incident History	OSHA / DBPAOSH
Personnel Comments	PACOMMENTS / DBPAPAC
Incident Follow Up	PAFOLLOWUP / DBPAPAF
Incident Costs	PAINCICOST / DBPAPAI

Converting Employee and Applicant Code Data

Run Employee and Applicant Code Conversion (PA520) to convert employee and applicant certification, education, relocation, contracts, and competencies from a non-Lawson system into the Lawson Personnel Administration system.

The conversion updates the following forms: Education (PA20.1), Competencies (PA21.1), Certifications (PA22.1), Relocation (PA24.1), Contracts (PA27.1), Applicant Education (PA34.1), Applicant Competencies (PA35.1), Applicant Certification (PA36.1), and Applicant Relocation (PA38.1).

Use workfile EPCLOADCSV to convert employee and applicant code data.

To verify data, run the following:

- Education Listing (PA220)
- Employee Competency Listing (PA221)
- Certification Listing (PA222)
- Relocation Listing (PA224)
- Applicant Education Listing (PA234)
- Applicant Competency Listing (PA235)
- Applicant Certification Listing (PA236)
- Applicant Relocation Listing (PA238)

Before you start Before you run the conversion, verify all codes exist in the Personnel Administration system, all codes are active in the Personnel Administration system.

To convert employee and applicant code data

1 Access Employee and Applicant Code Conversion (PA520).

2 Define a job name in the Job Name field.

   Note: In the Update option parameter, use N to test and correct your data before permanently updating it.

3 Complete the form. Use the following guidelines to enter field values:

Company	Select the HR company you want to convert employee contracts for.
Update	Select whether to perform the update.
	If you select Update, the update is performed.
	If you select Report Only, the system creates a report that lists pending changes.
	It is recommended that you select Report Only to view the report before selecting Update because you can look over the report to ensure that the data is correct before you convert it into the Lawson system.

4 Select the Add form action to add the job.

5 Transfer to the Job Definition form (jobdef).

6 Select the job you just added.

7 Press Define (F6) and select CSV file attributes.

8 Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

9 Press Enter twice to save the attributes.

10 Return to the program form and select the Submit form action to submit the job.

Updated Database Files

The Employee and Applicant Code Conversion (PA520) uses the data in the conversion work files to update the following Lawson database files

Data Type	Lawson Database File Name
Applicant	APPLICANT
	DBPAAPL
Benefit Changes	BNCHANGE
	DBBNBNH
Benefit Group Change	BNGRPCHG
	DBBNBNG
Emp/App Personnel Codes	EMPCODES
	DBPAEPC
Employee Personnel Information	PAEMPLOYEE
	DBHRPEM
Personnel Action	PERSACTION
	DBPAPCT
Employee Group Header	PERSGROUP
	DBHRPRG
Employee Group Employees	PGEMPLOYEE
	DBHRPGE

Converting Job History Data

Run Job History Conversion (PA533) to convert employee and applicant job history information from a comma-separated value (csv) file to Prior Work History (PA19.1) or Applicant Job History (PA33.1).

Use the workfile PA533CSV when converting job history data.

Any errors are written to a new csv file. You can correct the errors in the new csv file and reload them, if necessary.

To verify data, run the following:

- Applicant Job History Listing (PA233)
- Prior Work History Listing (PA219)

Before you start Before you run PA533, verify employees are defined in Employee (HR11.1), applicants are defined in Applicant (PA31.1), countries are defined in Country Maintenance (IN01.1), related job codes are defined in Job Code (HR06.1).

To convert job history data

1 Access Job History Conversion (PA533).

2 Define a job name in the Job Name field.

Note: In the Update option parameter, use N to test and correct your data before permanently updating it.

3 Complete the form. Use the following guidelines to enter field values:

Company	Select a company.
Update	Select whether to perform the update.
	If you select yes, the update is performed. If you select No, the system creates a report that lists pending changes.
	Lawson recommends that you select Report Only to view the report before selecting update.

4 Select the Add form action to add the job.

5 Transfer to the Job Definition form (jobdef).

6 Select the job you just added.

7 Press Define (F6) and select CSV file attributes.

8 Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

9 Press Enter twice to save the attributes.

10 Return to the program form and select the Submit form action to submit the job.

Updated Database Files

The Job History Conversion (PA533) uses the data in the conversion work files to update the following Lawson database files.

Data Type	Lawson Database File Name
Applicant Job History	APPJOBHIST
	DBPAAJH

Data Type	Lawson Database File Name
Personnel Comments	PACOMMENTS
	DBPAPAC

Reviewing the Personnel Administration Error Reports and Correcting Errors

Note: Use this information in addition to the general conversion information on this topic presented in "Review the Error Report and Correct Errors" on page 152.

When you run the conversion with the Update option set to N, the system does not update the Lawson databases, but it does generate a listing of any existing errors.

Review the error report to analyze the errors and determine a possible solution.

- If the error affects only one or a few records, you can correct it directly in the conversion database files. Use programs to view and/or update contents of the conversion input databases.

- If the errors are massive or affect most of the records, return to "Map Personnel Administration Data to Source File" on page 90 and remap your data. If you have incorrect data in the conversion databases files, remove all records loaded into the databases and reload them.

Converting Training Data

Training conversion (TR500) converts employee training history from a non-Lawson system to the Lawson Training Administration application. The conversion creates employee training records and updates employees skills and certification. It also update Employee Groups.

The program uses the error-free data in the TRNLOAD work file to update the database files.

To convert training data

1 Access Training conversion (TR500).

2 Define a job name in the Job Name field.

3 Select the run parameters. Use the following guidelines to enter field values:

Company   Select the company.

Certifications, Competencies	Select whether to update Certifications (PA22.1) and Competencies (PA21.1).
	If you update PA22.1 and PA21.1 and the competencies or certificate affect group membership, the group also updates.
Update	Select whether to run this report in report only or update mode.
	If you select report only, the database is not updated.

4 Select the Add form action to add the job.

5 Transfer to the Job Definition form (jobdef).

6 Select the job you just added.

7 Press Define (F6) and select CSV file attributes.

8 Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

9 Press Enter twice to save the attributes.

10 Return to the program form and select the Submit form action to submit the job.

Updated Database Files

The Training conversion (TR500) uses the data in the conversion work file to update the following Lawson database files.

If an employee group is defined by the acquisition of a specific skill and the converted data indicates that the employee has acquired the skill, the conversion program makes the employee a member of the employee group.

Data Type	Lawson Database File Name
Employee Training History	PATRNHIST
	DBPATRH
Required Training	PAEMPTRACK
	DBPAETR
Emp/App Personnel Codes	EMPCODES
	DBPAEPC

Data Type	Lawson Database File Name
Employee Group History	PGEMPLOYEE
	DBHRPGE

Reviewing the Training Administration Error Reports and Correcting Errors

Note: Use this information in addition to the general conversion information on this topic presented in "Review the Error Report and Correct Errors" on page 152.

When you run the conversion with the **Update** option set to **N**, the system does not update the Lawson databases, but it does generate a listing of any existing errors.

Review the error report to analyze the errors and determine a possible solution.

- If the error affects only one or a few records, you can correct it directly in the conversion database files. Use programs to view and/or update contents of the conversion input databases.

- If the errors are massive or affect most of the records, return to "Map Personnel Administration Data to Source File" on page 90 and remap your data. If you have incorrect data in the conversion databases files, remove all records loaded into the databases and reload them.

Test Personnel Administration Conversion Results

When testing your Personnel Administration conversion results, refer to the following section in this chapter for information that is in addition to, or is different from, the Test Conversion Results information presented in "Run Conversion Programs" on page 150.

- "Run Personnel Administration Data Listings and Application-Specific Reports" on page 117

- "Verify the Converted Personnel Administration Data" on page 118

- "Correct Problems with Personnel Administration Data" on page 118

When testing your Training Administration conversion results, refer to the following section in this chapter for information that is in addition to, or is different from, the Test Conversion Results information presented in "Test Conversion Results" on page 154.

- "Run Training Administration Data Listings and Application-Specific Reports" on page 118

- "Verify the Converted Training Administration Data" on page 118

- "Correct Problems with Training Administration Data" on page 119

Run Personnel Administration Data Listings and Application-Specific Reports

Note: Use this information in addition to the general conversion information on this topic presented in "Run Data Listings and Application-Specific Reports" on page 154.

Print available listings and reports of the non-Lawson data. Choose reports that provide information similar to that provided in the Personnel Administration reports. Print the listings immediately before the conversion to include all of the data you converted and no more.

Run the following Lawson reports:

To	Use
Verify converted information from Budget Conversion (PA570)	Budget Listing (PA271) – or – Budget and Assigned Resource Listing (PA272)
Determine any areas where assigned resources exceed budget	Assigned Resource Listing (PA211)
List position information	Position Listing (PA202)
List employee information	Employee Listing (HR211)
List requisitions	Requisition Listing (PA242)
List applicant job history	Applicant Job History Listing (PA233)
List prior work history	Prior Work History Listing (PA219)
List position and job information	Program and Job Listing (PA213)
List emergency contacts	Emergency Contact Listing (PA212)
List applicant profiles	Applicant Profile (PA231)
List test information for employees and applicants	Employee and Applicant Test Listing (PA249)
List health and safety information	Health and Safety Incident Listing (PA290)
List education	Education Listing (PA220)
List competencies	Employee Competency Listing (PA221)
List certifications	Certification Listing (PA222)
List relocation information	Relocation Listing (PA224)
List applicant education information	Applicant Education Listing (PA234)
List applicant competency information	Applicant Competency Listing (PA235)

To	Use
List applicant certification information	Applicant Certification Listing (PA236)
List applicant relocation information	Applicant Relocation Listing (PA238)

Verify the Converted Personnel Administration Data

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Verify the Converted Data" on page 155 for full details.

Correct Problems with Personnel Administration Data

There are no changes to the general conversion information on this topic presented in "Correct Problems" on page 155.

Run Training Administration Data Listings and Application-Specific Reports

Note: Use this information in addition to the general conversion information on this topic presented in "Run Data Listings and Application-Specific Reports" on page 154.

Print available listings and reports of the non-Lawson data. Choose reports that provide information similar to that provided in the Training Administration reports. Print the listings immediately before the conversion to include all of the data you converted and no more.

Verify the Converted Training Administration Data

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Verify the Converted Data" on page 155 for full details.

Correct Problems with Training Administration Data

Note: Use this information in addition to the general conversion information on this topic presented in "Correct Problems" on page 155.

Errors	Solution
Company does not exist.	The company number is not a valid company in the HR application. On Company (HR00.1), use the select key on the Company field for a list of valid numbers.
Course does not exist	Define the course in the Training Administration application using the Course (TR01.1) form.
Course is not in effect	The dates for the course on the converted data do not coincide with the dates in the Training application. Correct the incorrect date.
Course already exists	This employee already has taken this course. Verify that the coarse code is correct. Review the courses the employee has already complete on Session Completion (TR22).

Time Accrual

7

This chapter provides guidelines for converting Time Accrual data from a non-Lawson system to the Lawson Time Accrual system. Use this information in conjunction with the appendices to convert your Event data.

Plan Time Accrual Conversion

For this specific application, there are no changes from the general conversion information on this topic presented in "Plan Conversion" on page 128.

Determine the Time Accrual Data to Convert

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Determine the Data to Convert" on page 129 for the full details.

Determine a Time Accrual Conversion Schedule

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Determine a Conversion Schedule" on page 129 for the full details.

Define the Time Accrual Conversion Environment

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Define the Conversion Environment" on page 131 for the full details.

Determine a Time Accrual Backup Schedule

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Determine a Backup Schedule" on page 132 for the full details.

Complete Time Accrual Conversion Prerequisites

When completing your Time Accrual Conversion Prerequisites, refer to the following section in this chapter for information that is in addition to, or is different from, conversion prerequisites presented in "Complete Conversion Prerequisites" on page 133.

- "Define or Verify Required Lawson Time Accrual Information" on page 121

Define or Verify Required Lawson Time Accrual Information

Note: Use this information in addition to the general conversion information on this topic presented in "Define or Verify Required Lawson Information" on page 133.

Before beginning the conversion process, plan which balances you will convert. Decide if you will convert accrued balances, eligible balances, or both.

Verify that you have set up the following parameters before you convert Time Accrual balances.

- Verify that the employees for whom you are converting balances exist in the Human Resources application

  The employee for whom you are loading balances must be a valid employee in the Lawson® Human Resources application. Therefore, verify that the employee records entered manually using Employee (HR11.1).

- VerifyTime Accrual plans have been defined.

  Before converting balances, make sure that you have defined all the time accrual plans for which you are converting balances on Plan Adjustments (TA70.1).

- Verify each employee for whom you are converting balances has been enrolled in the Time Accrual Plan for which you are converting the balances.

  When employees are enrolled into Time Accrual Plans, an Employee Plan is created for them. To verify employee plans, use Employee Plan Inquiry (TA60.1).

- Verify that the Plan Entry date precedes the date the balances are loaded (Transaction Date)

  Check the Entry Date on the Employee Plan Inquiry (TA60.1) comes before the date you enter in the Transaction Date field in the conversion input file.

The following table lists the specific fields validated and the programs you use to define the valid values or produce listings of defined values.

Validated Field	Program	Listing Program
Company	GL10.1	GL210

Map Time Accrual Data

When mapping your Time Accrual data, refer to the following section in this chapter for information that is in addition to, or is different from, the Map Data information presented in "Map Data" on page 134.

- "Identify Time Accrual Conversion Work Files " on page 123
- "Compare Non-Lawson Time Accrual Data to Lawson Equivalents" on page 123
- "Map Time Accrual Data to Source File" on page 123

The suggested format to use for your Time Accrual source files is the CSV file format.

Related topics

- "Determine the Data to Convert" on page 129

Identify Time Accrual Conversion Work Files

Note: Use this information in addition to the general conversion information on this topic presented in "Identify Conversion Database Files and Conversion Work Files" on page 135.

The Lawson Time Accrual application uses work files to convert non-Lawson data. To define your existing data in Lawson, you must identify the conversion work files into which the data will be loaded. See the Time Accrual File Layouts on the Documentation page on Infor Support Portal.

Compare Non-Lawson Time Accrual Data to Lawson Equivalents

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Compare Non-Lawson Data to Lawson Equivalents" on page 136 for full details.

Map Time Accrual Data to Source File

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Map Data to Source File" on page 137 for full details.

Load Time Accrual Conversion Data

Note: For this specific application, there are changes from the general conversion information on this topic presented in "Load Conversion Data" on page 143.

Lawson Human Capital Management does not require this step. Instead you need to transfer your CSV work file to your Lawson server. The conversion program then loads the data from the file you transferred to the Lawson server.

> ⚠️ **Caution:** This section contains changes from the general conversion process as presented in the appendices.

Run Time Accrual Conversion Programs

When running your Time Accrual conversion programs, refer to the following sections in this chapter for information that is in addition to, or is different from, the information presented in "Run Conversion Programs" on page 150.

- "Converting Time Accrual Balance Data" on page 124

- "Reviewing the Time Accrual Error Reports and Correcting Errors" on page 125

The following table shows the conversion programs you need to run and the types of data they convert.

Conversion Procedure	Program Used
CSV Load Balances	TA570

Converting Time Accrual Balance Data

The CSV Load Balances (TA570) loads Time Accrual balances records through a batch work file, TABALCSV and places the records in error in a work file names TAERRCSV. The conversion creates balances in Plan Adjustments (TA70.1).

Use Open Manual Transactions (TA270) to verify converted data.

To convert time accrual balance data

1 Access CSV Load Balances (TA570).

2 Define a job name in the Job Name field.

3 Select the run parameters. Use the following guidelines to enter field values:

Company	Select the company.
Plan	If you leave this field blank, all plans are processed.
Override Transaction Date	If you leave this field blank, the program uses the date on the CSV file. If you enter a date, it overrides the date on the CSV file.
Create CSV Error File	Select whether to create an error file.
Update	Select whether to perform the update.
	If you select Yes, the update is performed. If you select No, the system creates a report that lists pending changes.
	Lawson recommends that you select Report Only to view the report before selecting Update.

4   Select the Add form action to add the job.

5   Transfer to the Job Definition form (jobdef).

6   Select the job you just added.

7   Press Define (F6) and select CSV file attributes.

8   Use the following guidelines to enter field values:

External Name	The Lawson server path/file name of the CSV file to be converted.
File Header	Set to On (if you have left the header row in the CSV file).
Xlt Header Names	Set to On (if you have left the header row in the CSV file).
Date Format	Format of dates to be converted in CSV file.

9   Press Enter twice to save the attributes.

10 Return to the program form and select the Submit form action to submit the job.

Updated Database Files

The CSV Load Balances (TA570) uses the data in the conversion work files to update the following Lawson database files.

Data Type	Lawson Database File Name
Employee Time Accrual Master	EMTAMASTR
	DBTAETM
Employee Time Accrual Transactions	EMTATRANS
	DBTAETT

Reviewing the Time Accrual Error Reports and Correcting Errors

Note: Use this information in addition to the general conversion information on this topic presented in "Review the Error Report and Correct Errors" on page 152.

When you run the conversion with the **Update** option set to **N**, the system does not update the Lawson databases, but it does generate a listing of any existing errors.

Review the error report to analyze the errors and determine a possible solution.

•   If the error affects only one or a few records, you can correct it directly in the conversion database files. Use programs to view and/or update contents of the conversion input databases.

- If the errors are massive or affect most of the records, return to "Map Time Accrual Data to Source File" on page 123 and remap your data. If you have incorrect data in the conversion databases files, remove all records loaded into the databases and reload them.

Test Time Accrual Conversion Results

When testing your Time Accrual conversion results, refer to the following section in this chapter for information that is in addition to, or is different from, the Test Conversion Results information presented in "Test Conversion Results" on page 154.

- "Run Time Accrual Data Listings and Application-Specific Reports" on page 126
- "Verify the Converted Time Accrual Data" on page 126
- "Correct Problems with Time Accrual Data" on page 127

Run Time Accrual Data Listings and Application-Specific Reports

Note: Use this information in addition to the general conversion information on this topic presented in "Run Data Listings and Application-Specific Reports" on page 154.

Print available listings and reports of the non-Lawson data. Select reports that provide information similar to that provided in the Time Accrual reports. Print the listings immediately before the conversion to include all of the data you converted and no more.

Run the following Lawson reports:

To	Use
To verify converted Training Administration data	TA270

Verify the Converted Time Accrual Data

For this specific application, there are no changes from the general conversion information on this topic presented in the appendices. Refer to "Verify the Converted Data" on page 155 for full details.

Correct Problems with Time Accrual Data

There are no changes to the general conversion information on this topic presented in "Correct Problems" on page 155.

Plan Conversion

The following process diagram summarizes the entire conversion process.

1 PLAN CONVERSION	2 COMPLETE CONVERSION PREREQUISITES	3 MAP DATA	4 LOAD CONVERSION DATA	5 RUN CONVERSION PROGRAMS	6 TEST CONVERSION RESULTS
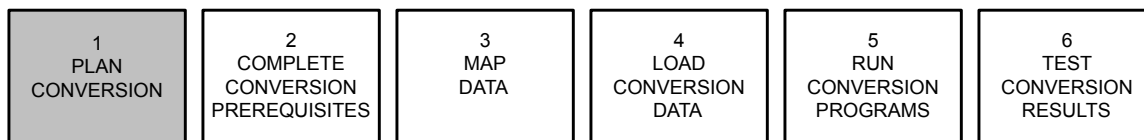
Planning the conversion process involves these tasks:

- Determine the data to convert.

- Determine a conversion schedule.

- Define the conversion environment.

- Determine a backup schedule.

```
                    ┌─────────────┐
                    │      1      │
                    │    PLAN     │
                    │ CONVERSION  │
                    └──────┬──────┘
          ┌────────────┬───┴────────┬────────────┐
┌─────────────┐ ┌─────────────┐ ┌───────────┐ ┌─────────────┐
│Determine the│ │ Determine a │ │Define the │ │Determine a  │
│data to      │ │ conversion  │ │conversion │ │backup       │
│convert      │ │ schedule    │ │environment│ │schedule     │
└─────────────┘ └─────────────┘ └───────────┘ └─────────────┘
```
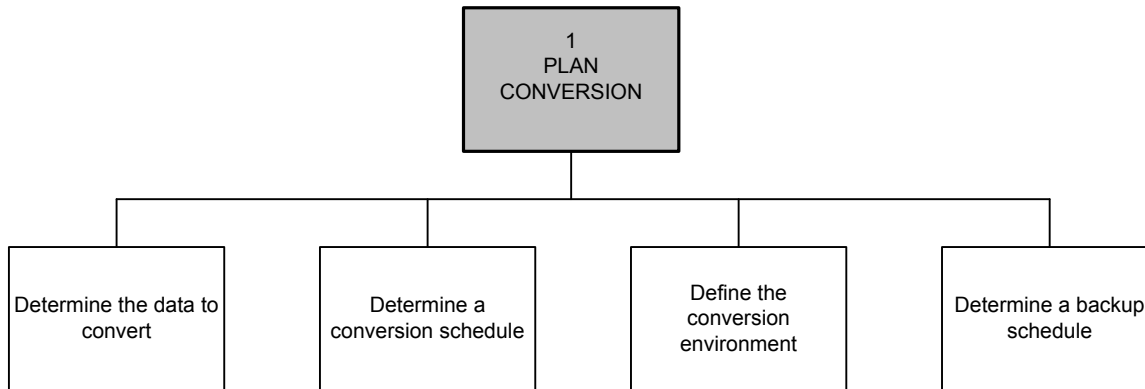
Determine the Data to Convert

When planning your conversion, make the following decisions about the data to be converted:

- Determine the scope of the data to be converted.

  The amount of data you will convert directly affects how long it takes to complete the conversion. You must decide which active records and which historical records to convert. For example, if you are converting employee records, decide whether to convert the records of former employees. You may want to consider limiting these records to those employees who quit or were terminated within the last year.

- Decide what data from your current system you want to convert.

  A majority of your data will convert into the Lawson application with minimal to moderate effort. Some of your data, however, may require more effort than it is efficient to convert into the Lawson application. In this case, you may want to consider entering it into the Lawson application manually.

- Determine how you will convert your data.

  At this point, determine whether there are any source file format requirements for the Lawson conversion database files and conversion work files that you will load data into. The source files you create in will be in either CSV file or flat file format.

  Note: All conversion programs in Lawson Human Capital Management use Comma Separated Value (CSV) data files as input.

  A CSV file, or *comma delimited file*, is a file that contains data records of fields, where the end of each field is indicated by a comma. The length of each field does not need to be a fixed length. In other words, its length does not need to match the length of the corresponding field in the Lawson conversion file layout. However, each field in a CSV file must be in the same order as the fields in the conversion file layout. If there are any additional fields after the last field you have data, for you can leave the rest of the fields blank.

  A flat file contains data records of fields as well. However, the length of each field in the file is fixed. In other words, each field position must contain a value because its length must match its related field length in the conversion file layout. And, as with CSV files, each field in a flat file must be in the same order as the fields in the conversion file layout, and no fields can be omitted.

  Most source files should be in CSV format. However, some conversion database files and conversion work files require source files to be in flat file format. For example, many of the Lawson Supply Chain Management conversion files require source files in flat file format. For specific source file format requirements, refer to the applicable conversion guide. For general data mapping and formatting guidelines, see ".

Determine a Conversion Schedule

When planning your conversion schedule, make the following decisions about the conversion schedule:

- Decide when you want to convert your data.

  Consider how the conversion will affect your business process, and schedule it when it will cause the least disturbance. For example, you may want to schedule the conversion during a time of year when there is the least traffic in your business cycle, such as at the beginning of your fiscal year. You should also consider how often your company data changes, and schedule the conversion at a time when it will include the most up-to-date data.

- Determine a testing schedule.

  Before converting your records to the Lawson application, you must test your conversion data. Set up a testing schedule that allows enough time so you can run several tests before the scheduled conversion dates.

- Consider the scope of the data you will convert.

  The more data you want to convert, the longer the conversion process will take.

- Consider the complexity of the data you will convert.

  The more complicated your current business setup is, the more time the conversion program will need to complete the conversion. For example, if you have a large number of employee groups, the Employee Conversion program (HR511) checks to see whether each employee meets the employee group criteria, *for each employee record*. This is a time-consuming process if you are converting thousands of employees. Factors such as this will increase the conversion run time exponentially.

- Determine whether to stagger the conversion, or convert everything at once.

  You may want to stagger the conversion within company units, or convert the entire company at the same date.

- Determine the parallel/live schedule.

  You must to determine whether you will run a parallel/live environment, and for how long.

- Determine your application conversion sequence.

  You can stagger your application conversions, or convert all applications at once. The order in which you convert your data to the Lawson application depends on Lawson requirements and the Lawson applications that you purchase. In general, Lawson Enterprise Financial Management conversions are performed first, followed by Lawson Supply Chain Management, and Lawson Human Capital Management. Refer to the conversion guides for recommended conversion program sequences.

The following table provides the sequence of an example conversion.

Application	Conversion Program Sequence
General Ledger	Chart of Accounts Interface (GL160)
	Accounting Unit Interface (GL161)
	Accounting Unit Attribute Interface (GL162)
	Balance Interface (GL167)
	Period Closing (GL199)
	Transaction Interface (GL165)
	Run Journal Posting (GL190)
	Run Period Closing (GL199)
Inventory Control	Item Master Load (IC811)
	Item Location Load (IC812)
	Beginning Balance Load (IC820)
	Transaction Load (IC850)
	History Load (IC851)

⚠️ **Caution:** This is a sample listing only. For your conversion, see the application chapters within the conversion technical guide(s) for the exact conversion sequence(s).

Define the Conversion Environment

You will need both a test and a live conversion environment. Define the following elements for each environment:

• Product lines/libraries

• Company within a live product line/library

• Data against a live company

• Machines

When defining your test environment, remember that the purpose of running a test sample through the entire conversion process is to help identify and clear out errors and discrepancies before you are encumbered by the volume of data in your actual conversion. There may also be application-specific structures and codes that require testing before you begin converting to a live environment. With this in mind, define the following for the test sample:

- Test sample size

  Limit the test sample to a manageable but representative set of records. The selected data should represent all fields and all types of data that you will convert.

- Test sample level of detail

  The test sample should be large enough to test most fields, yet small enough to be manageable. When converting the test sample, be sure to perform all steps of the conversion process to verify that structure and codes were defined properly and that your data converts without errors.

Determine a Backup Schedule

You must back up your data throughout the conversion process. You may need the backed-up data if you encounter errors or need to repeat a conversion step. In some cases, if you reprocess data without restoring a copy of the backed-up data, you may double or duplicating data.

In addition, you may want to back up your data for any of these reasons:

- Establish a logical point in time to restore your data
- Facilitate a test process
- Establish an audit trail of data before, during, and after the conversion

Because each conversion is unique, you must determine when and how often you should back up your changes. At a minimum, Lawson recommends that you schedule data backups at these points in the conversion process:

- After completing the conversion prerequisites (described in Appendix B), and
- After completing the conversion for each data type (described in Appendices C through F).

Complete Conversion Prerequisites

B

The following process diagram overviews the entire conversion process.

1 PLAN CONVERSION	2 COMPLETE CONVERSION PREREQUISITES	3 MAP DATA	4 LOAD CONVERSION DATA	5 RUN CONVERSION PROGRAMS	6 TEST CONVERSION RESULTS
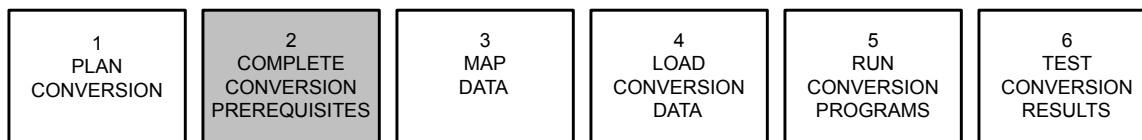
Completing conversion prerequisites involves this task:

- Define or verify required Lawson information.

-

  - "Define or Verify Required Lawson Information" on page 133

Define or Verify Required Lawson Information

Before you convert data to the Lawson application, you must define your Lawson applications and specific information in each application, or verify they have already been defined. The applications and information that you define are determined by the Lawson applications purchased and the business requirements determined in the Lawson implementation planning phase.

For each application to which you convert data, there are specific structures and codes that must be in place before conversion. The following required information is what you must define (or verify it is already defined) in this phase:

- Fields used for the specific information you are converting

- Programs used to produce listings of defined values

- Programs used to define missing valid values

The conversion guides provide this information for each type of data being converted. Refer to the user guide for a specific application for additional setup information.

Map Data

C

The following process diagram summarizes the entire conversion process.

1 PLAN CONVERSION	2 COMPLETE CONVERSION PREREQUISITES	3 MAP DATA	4 LOAD CONVERSION DATA	5 RUN CONVERSION PROGRAMS	6 TEST CONVERSION RESULTS
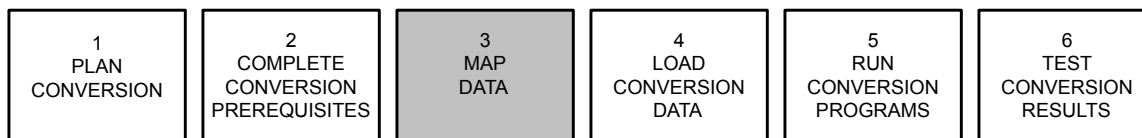
Mapping data involves these tasks.

- Identify conversion database files and conversion work files.

- Compare non-Lawson data to Lawson equivalents.

- Map data to source file.

```
                    ┌──────────────┐
                    │      3       │
                    │   MAP DATA   │
                    └──────┬───────┘
           ┌───────────────┼────────────────┐
┌──────────────────┐ ┌──────────────────┐ ┌──────────────────┐
│ Identify         │ │ Compare non-     │ │ Map data to source│
│ conversion       │ │ Lawson data to   │ │ file             │
│ database files and│ │ Lawson equivalents│ │                  │
│ conversion work  │ │                  │ │                  │
│ files            │ │                  │ │                  │
└──────────────────┘ └──────────────────┘ └──────────────────┘
```
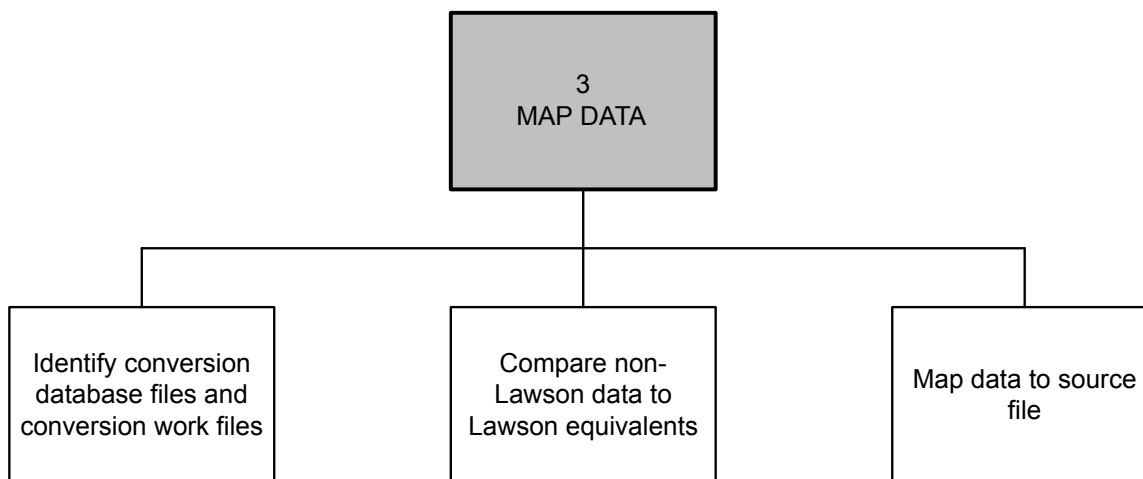
Note: In this section, all information relating to flat files does not apply to Lawson Human Capital Management . All conversion programs in Lawson Human Capital Management use Comma Separated Value (CSV) data files as input.

Identify Conversion Database Files and Conversion Work Files

Identify the Lawson conversion database files and conversion work files that you will transfer your non-Lawson data into. When you load a source file into a conversion database file, its format is the same as that in the Lawson database. When you load a source file into a conversion work file, its format is not the same as that in the Lawson database until the conversion program is run.

The following table lists some examples of non-Lawson data and the related conversion database file or conversion work file.

Non-Lawson Data	Lawson Conversion Database File or Conversion Work File
Customer information	ARCCUST* DBARARU*
Activity transaction records	ACTRANSREL* DBACTRR*
Payment transactions	ARCPAYMENT* DBARARC*
Orders	OE810-WORK ** OE810WK@ **
Return authorizations	OE830-WORK ** OE830WK@ **
Employee information	EMPLOAD**
Item master records	FFITEMWK ** IC811FIT **
Invoices	BL820-WORK ** BL820WRK **
Customer Ship-To address information	BL802-WORK ** BL802WRK **
Tax transactions	TX804-WORK ** TX804WRK **

* Indicates conversion database file.

** Indicates conversion work file.

After you determine the Lawson conversion database files and conversion work files that you will transfer your non-Lawson data into, use the following Lawson materials to determine how to map your data:

- Conversion file layouts

  Each conversion file has a related file layout. Conversion file layouts list the fields in the Lawson application and provide information about each field, such as its length and format. The conversion file layouts are your primary source of data mapping information. They are located on the Documentation page on Infor Support Portal. Be sure to compare the conversion file layouts with the export file descriptions, described below, which are generated for your application.

- Export file descriptions

  Use the Lawson build export file description utility called **bldexpfd** to generate a file description for formatting a source (export) file. This utility is useful for building user programs to dump user

database files and to import them into Lawson database files. For more information on this utility, see the *System Utilities Reference Guide*.

- Data file text (use the utility called **dbdoc**)

- Database definitions (use the utility called **dbdef**)

- Work file definitions (use the utility called **workdef**)

    For information about how to generate data file text, database definitions, and work file definitions, see the *System Utilities Reference Guide*.

Also determine whether there are any source file format requirements for the Lawson conversion database files and conversion work files. Most source files should be in CSV format. However, some conversion database files and conversion work files require source files to be in flat format. For example, many of the Lawson Supply Chain Management conversion database files and conversion work files require source files in flat file format. For specific source file format requirements, see the applicable conversion guide.

The materials you use to map your data will depend on the source file format you use. The following table lists the materials applicable for each source file format.

Source File Format	Conversion File Layouts	Export File Descriptions	Data File Text	Database Definitions	Work File Definitions
Flat files	X	X	N/A	N/A	X
CSV files	X	X	X	X	N/A

X - Material is applicable for this file format.

N/A - Material is not applicable for this file format.

Compare Non-Lawson Data to Lawson Equivalents

Determine whether the format of your data matches the format of its Lawson equivalent in the conversion database file or conversion work file, and identify which fields are required and which are optional. You can use the conversion file layout and export file description to make this determination.

- *If the data format is an exact match*, you can map it directly into a CSV or flat file, which can then be loaded into a conversion database file or conversion work file.

    For example, if your company identifier is four numeric positions, it will convert directly to the Lawson application's company identifier in a conversion file, which is also four numeric positions.

- *If the data format is not an exact match*, you must map it to conform to its Lawson equivalent.

    For example, if your purchase order identifier is four numeric positions, you must add three more numeric positions because the Lawson application's purchase order identifier is seven numeric positions. Or, some of your data may be in alphanumeric format and the Lawson application may require the data to be in numeric format.

There are some utilities that you can use to assist you in formatting your data. For example, the **cnvexp** utility adds Return characters to flat files that do not have them, and the **importdb** load utility reformats date fields into Lawson date format (CCYYMMDD) unless you select the **-d** option. For more information on these utilities, see the *System Utilities Reference Guide*.

Map Data to Source File

You can map your data to a source file in a number of ways. For example, you may want to put data into a spreadsheet file and create a source file from that, or you could create a source file by using data pulled from a Microsoft Access database. You could also write a data mapping program to map your data and save it as a source file.

When creating a source file from a spreadsheet program such as Excel, each column of the spreadsheet is considered a new field. When you save the spreadsheet as a CSV file, for example, Excel places a comma after each column. If a particular field is blank, you still need a comma, or column, to indicate the presence of the field, even though you do not specify a value for it. For example, if you are loading balances and do not have a balance for a specific period, there must be a blank column in your spreadsheet for that period's balance.

Follow these guidelines to map data. Not all guidelines are identified. For additional programming guidelines, see a COBOL reference manual.

- See Lawson conversion file layouts, export file descriptions, data file text, database definitions, and work file definitions for detailed information on each field in a conversion file (such as field order, type, and size). You can find the conversion file layouts on the Documentation page on Infor Support Portal. For information on how to build export files and generate data file text and database definitions, see the *System Utilities Reference Guide*.

- Determine the order of data in the source file:

  Flat files - Format the data in the order it is listed in the conversion file layout.

  Note: If there are any additional fields after the last field you have data for, you can leave the rest of the fields blank.

  CSV files - If you do not use headers at the beginning of a CSV file, you must include all fields in the conversion file layout in the order given in the layout. For those fields that have no data, include the blank field so that each field is accounted for. If you use headers to identify columns in your data table, you can place the column headers at the beginning of the CSV file preceding the data, on line 1. The file then can contain only the applicable fields. When you run the **importdb** load utility, use the **-f** option to indicate that the file includes headers. For information on **importdb**, see "Run the Load Utility" on page 146. For additional information on this utility, see the *System Utilities Reference Guide*.

  Note: For HR conversions, you only need to transfer the file to the Lawson server. No other load utility necessary.

If your data is in a flat file: The first 10 characters of a flat file must be the name of the work file that you want to load data into. For example, if you are loading data into the OE810-WORKOE810WK@ work file, the first 10 characters of that source file will be OE810-WORKOE810WK@. If the work file name is less than 10 characters, it should be followed by enough spaces to fill 10 positions.

- If your data for a field has fewer positions than those required by the conversion file layout:

Flat files - Fill the extra positions in the field with zeros if it is a numeric field, or with spaces if it is an alpha field. Numeric fields must be right justified. For example, in a 6-position numeric field, the number 20 would be represented as 000020. Alphanumeric fields must be left justified. Add trailing space characters to an alphanumeric field if a value does not fill the entire field.

- If a field is optional, blank, or zero:

CSV files - Use a comma to indicate the presence of the field, even though you do not specify a value for it.

Flat files - If the field is a numeric field, fill all the positions in the field with zeros. If the field is an alpha field, fill all the positions in the field with spaces.

Flat files only - Each record in a flat file must end with a Return character. To add Return characters to flat files that do not have them, use the Lawson convert sequential export file utility called **cnvexp** before you run the load utility. For more information about this utility, see the *System Utilities Reference Guide*.

- If a field is signed:

CSV files - The sign must be the farthest left character in the value string. For example, a signed amount field containing the value $5.82- would be represented as -5.82. A blank or plus sign (+) indicates a positive number, and a minus sign (-) indicates a negative number.

Flat files - The sign must trail the number in flat files. For example, if a numeric field is 10 characters with the sign trailing, the field is 11 characters in length: 10 characters for the number, and one character for the sign. To indicate a positive number, leave a space for the eleventh character.

- If a field requires decimal places:
    - For fields that have decimal places defined (such as amount and quantity fields), include decimal positions within the value string, but not the decimal point. Type zeros if a number has no decimal value.

        For example, if a weight field has a length of 9 characters, with 3 decimal positions, then the decimal point is located after the sixth position (defined in the database as Signed 9.3). One pound would be represented as: 000001000

    - For fields (such as general numeric fields) that do not have decimal places defined, and you want to load a decimal value, you must include the decimal point within the value string.

- If a field requires percentage rates:

Enter percentage rates as decimals (for example, enter 10% as .10).

- If a field requires alphanumeric values

CSV files only - Enclose alphanumeric field values in double quotes.

- Mapping the date field will vary depending on the platform where the conversion database file or conversion work file will reside (for example, UNIX, Windows, or System i). In the Lawson databases, dates are stored in this format: CCYYMMDD (Century, Year, Month, Day).

  CSV files only - If the dates in a CSV file are in that format, select the **-d** option when you run the **importdb** load utility so that the date formats are not changed. If the dates in a CSV file are in the MMDDCCYY format, leave this option off when you run the **importdb** load utility so that the dates will be modified to the correct format (CCYYMMDD). For more information about the **importdb** utility, see "Run the Load Utility" on page 146. For more information about this utility, see the *System Utilities Reference Guide*.

- Occur clauses indicate that a field exists more than once. For example, the trailer comment code field shown below exists twice, and each field is four alphanumeric characters in length.

  TRL-COMM-CODE-G OCCURS 2 TIMES

  TRL-COMM-CODE X(4)

  The conversion file layouts will also indicate which fields occur multiple times.

- Consider the following when you map data:

- The Lawson database indexes may prevent you from loading and converting duplicate information. For example, when importing APCINVOICE / DBAPCVI the database index will not let you import more than one invoice with the same COMPANY-VENDOR-INVOICE-SUFFIX combination.

Creating a Source File

Now that your data is mapped, create a source file (or run the data mapping program that you wrote). The source file is then ready to be loaded.

When working in UNIX, save your source file on your hard drive. When working in Windows, you can either save your source file to the Lawson $LAWDIR directory or transfer it according to "Transferring Files to a Lawson Windows Server" on page 144.

From a PC, map a drive to System i and copy the file. Or, from another server, ftp the file to the System i root level IFS directory in ASCII.

The following example shows a typical conversion file layout, followed by an example of how a CSV source file and a flat source file created in Excel would appear based on this conversion file layout.

Invoice Line Items File Layout

This section describes the properties associated with the ARIITEM / DBARARI files.

Field Name	Field Type and Length	User Name	Valid Value	Description
ARI-COMPANY / DARICMPNY **Required**	Numeric 4	Company		Required. The company number.

Field Name	Field Type and Length	User Name	Valid Value	Description
ARI-TRANS-TYPE / DARITRNSTY **Required**	Alpha 1	Transaction Type	I=Invoice C=Credit Memo D=Debit Memo	Required. The transaction type of the item.
ARI-TRANS-NBR / DARITRNNBR **Required**	Alpha 10 (Right Justified)	Transaction Number		Required. A unique user-defined value used to identify the transaction.
ARI-SEQUENCE / DARISQNC **Required**	Numeric 6	Sequence		Required. The sequence number of the line item record.
ARI-DESCRIPTION / DARIDSCRPT	Alpha 30 (Lowercase)	Description		The description of the line item.
ARI-AMOUNT / DARIAMOUNT **Required**	Currency 15.2	Amount		Required. The amount of the line item.
ARI-ITEM-USER1 / DARIITMUSR	Alpha 20	Item User 1		The User 1 field associated with the line item.
ARI-ACTIVITY / DARIACTVTY	Alpha 15	Activity		The activity assigned to the line item.
ARI-ACCT-CATEGORY / DARIACCCTG	Alpha 5	Account Category		The account category assigned to the activity.
ARI-LINE-NBR / DARILNNBR	Numeric 6	Line Number		This field contains the line number.

Field Name	Field Type and Length	User Name	Valid Value	Description
ARI-LINE-TYPE / DARILNTYP	Alpha 1	Line Type	Blank=Non-Lawson BL generated A=Add-on charge item I=Inventoried item N=Non-stock item X=Special order item	Indicates the type of the line item.
ARI-LINE-SEQ / DARILNSQ	Numeric 3	Line Item Sequence Number		The sequence number of the line item.

Based on this conversion file layout, this is how a file created in Excel would appear:

5661	I	IN00004783	1	invoice description	664.75	1
5661	I	IN00007568	1		34.77	1
5661	I	IN00008973	1	description field	978,.25	1

Editing Source Files

You may want to edit a source file before transferring it to the Lawson server. The editing tool you use depends on the platform that you use, and the type of source file that you have created. For example:

Note: For UNIX/Windows platforms: If you use the Lawson LX editor to edit a large source file directly on the Lawson server, you may get a message that indicates that the file is read-only. If this happens, the file is too large to be read for edit. You must move the file to your hard drive, edit it in Notepad, and transfer it back to the server.

• If you use a PC and create a CSV source file from an Excel spreadsheet, you would first save the spreadsheet in Excel format (with an .xls extension). Then, you would save the spreadsheet again in CSV format (with a .csv extension) to create your source file. If you need to make changes to the source file, make them to the original Excel file, and then resave it as a CSV file. These steps are necessary because if you use Excel to open a CSV file, it can sometimes change formats on columns that you did not want to change. For example, it will take leading zeros off of numbers.

• You can also use Notepad to edit a CSV or flat source file on a PC.

• If you are working in UNIX and create a CSV or flat source file, you can use a UNIX text editor, such as the vi editor, to make changes to the file.

If you are working in System i and create a CSV or flat source file, you can use the System i **wrklnk** command (option 2 to edit).

⚠ **Caution:** Use care when editing a source file directly on a server. Some system editors leave characters that are invisible to the eye or null character spaces, which will result in error. These types of characters can only be seen when a hexadecimal dump is made of the file.

Note: For UNIX/Windows platforms: If you use Lawson's LX editor to edit a source file on the Lawson server, note that this editor sometimes truncates long records.

Load Conversion Data

<div style="text-align: right">

D

</div>

The following process diagram summarizes the entire conversion process.

1 PLAN CONVERSION	2 COMPLETE CONVERSION PREREQUISITES	3 MAP DATA	4 LOAD CONVERSION DATA	5 RUN CONVERSION PROGRAMS	6 TEST CONVERSION RESULTS

Loading conversion data involves these tasks.

- Transfer source files to the Lawson server.

- Verify transferred source files and correct errors.

- Run the load utility.

- Verify loaded data and correct errors.

```
                    4
                  LOAD
               CONVERSION
                  DATA
```

Transfer source files to Lawson server	Verify transferred source files and correct errors	Run the load utility	Verify loaded data and correct errors
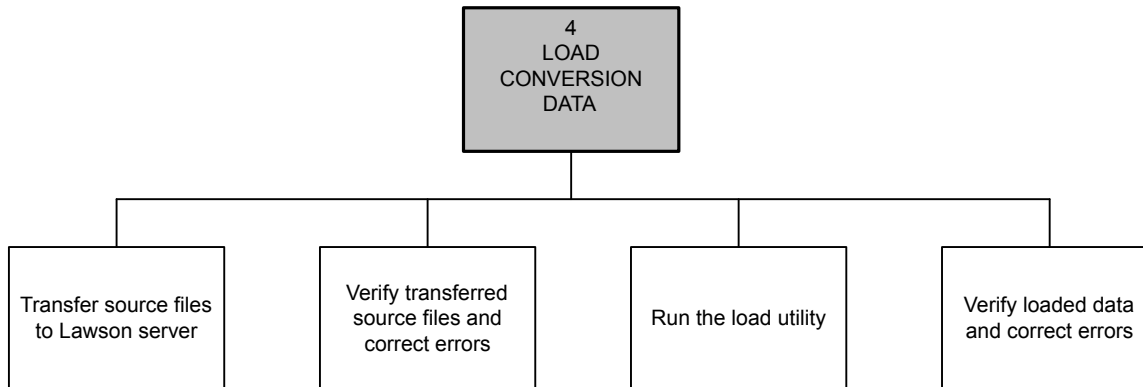
Transfer Source Files to Lawson Server

In this step, you are transfer the source files that you created in "Map Data" on page 134to a location on the Lawson server. The method you used to transfer files depends on the Lawson server platform: UNIX, Windows, or System i.

Transferring Files to a Lawson UNIX Server

Use an available utility to transfer or copy source files to your Lawson UNIX server. For example, to transfer or copy a file by using **winptxfr**, follow this syntax:

winptxfr

```
winptxfr -[d | u][b] ServerFileName [ClientFileName] winptxfr -r RequestName
d - (Download) transfer the files from Server to Client u - (Upload) transfer
the files from Client to Server b - Binary file, default is Text (ASCII)
file r - (Request) transfer the files by transfer request xn - Set Debug
Level to n
```

Note: You must enter two backslashes between PC directory names.

For example:

In another example, you can use the MS Windows TCP/IP group and select FTP. Follow this syntax:

ftp

```
ftp>open (UNIX system name) ftp>cd (Target directory) ftp>bin ftp>put (CSV/
flat file client file) (CSV/flat file server file) ftp>bye
```

For example:

ftp>open pint ftp>cd /70/DB ftp>bin ftp>put a:\data\org.xls org.csv ftp>bye

Transferring Files to a Lawson Windows Server

Use an available utility to transfer or copy source files to your Lawson Windows server. For example, to transfer or copy a file by using File Manager:

File Manager

1 Click the file you want to move. (To transfer multiple files, press **Control** and click each file you want to move.)

2 Drag the file(s) to the Lawson server.

In another example, you can use the MS Windows TCP/IP group and select FTP. Follow this syntax:

ftp

```
ftp>open (Windows system name) ftp>cd (Target directory) ftp>bin ftp>put
(CSV/flat file client file) (CSV/flat file server file) ftp>bye
```

For example:

```
ftp>open dacty1nt ftp>cd/linte/db ftp>bin ftp>put a:\data\org.xls org.csv
ftp>bye
```


Transferring Files to a Lawson System i Server

From a PC, map a drive to the System i server and use an available utility to transfer or copy source files. For example, to transfer or copy a file by using File Manager:

File Manager

1 Click the file you want to move. (To transfer multiple files, press **Control** and click each file you want to move.)

2 Drag the file(s) to the Lawson server.

In another example, you can use the MS Windows TCP/IP group and select FTP. Follow this syntax:

ftp

```
ftp>open (System i system name) ftp>cd (Target directory) ftp>bin ftp>put
(CSV/flat file client file) (CSV/flat file server file) ftp>bye
```

For example:

```
ftp>open dacty1nt ftp>cd/linte/db ftp>bin ftp>put a:\data\org.xls org.csv
ftp>bye
```

Verify Transferred Source Files and Correct Errors

Verify the contents of the file that you transferred to the Lawson server. If you find any errors, correct them.

Note: For UNIX/Windows platforms: If you use the Lawson LX editor to edit a large source file directly on the Lawson server, you may get a message indicating that the file is read-only. If this happens, the file is too large to be read for edit. You must move the file to your hard drive, edit it in Notepad, and transfer it back to the server.

It is up to you to determine whether you correct the errors in the original source file and retransfer it to the Lawson server, or correct them in the transferred file. However, if you correct errors in the original source file and retransfer it to the Lawson server, then all the places where the data is saved are in sync and you do not run the risk of forgetting which changes you made and where you made them.

> ⚠️ **Caution:** Use care when editing a source file directly on a server. Some system editors leave characters that are invisible to the eye or null character spaces, which will result in error. These types of characters can only be seen when a hexadecimal dump is made to the file.

Note: For UNIX/Windows platforms: If you use the Lawson LX editor to edit a source file on the Lawson server, note that this editor sometimes truncates long records.

There are some utilities available that you can use to assist you in formatting your data. For example, the **cnvexp** utility adds Return characters to flat files that do not have them, and the **importdb** load utility reformats date fields into Lawson date format (CCYYMMDD) unless you select the **-d** option. For more information about these utilities, see the *System Utilities Reference Guide*.

Viewing Source Files in UNIX

Use a standard UNIX command to view a source file. For example:

```
od -ch conv.csv | more
```

or

```
hd conv.csv | more
```

You can also use the **lashow** command:

```
lashow filename
```

Viewing Source Files in Windows

Use a standard command to view a CSV file. For example:

```
od -ch conv.csv | lashow
```

Viewing Source Files in System i

From a PC, map a drive to an System i server and use Notepad or Wordpad to view data. From an System i server, use the **wrklnk** command (option 2 to edit or option 5 to view).

Run the Load Utility

Note: For HR conversions, you only need to transfer the file to the Lawson server. No other load utility necessary.

Run a Lawson load utility to load your source files into conversion database files or conversion work files. The load utility you use depends on the format of your source file: CSV or flat.

Loading CSV Files

Note: For more information on the **importdb** utility, see the *System Utilities Reference Guide*.

Use the import comma-delimited file utility called **importdb** to load CSV files.

Note: When you load a CSV file into a conversion database file, its format is the same as that in the Lawson database. However, when you load a CSV file into a conversion work file, its format is not the same as that in the Lawson database until the conversion program is run.

For UNIX/Windows platforms

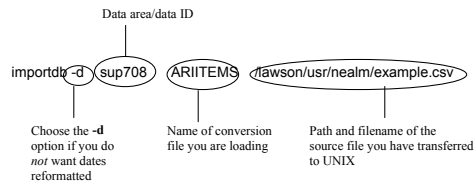To use **importdb**, follow this syntax:

```
importdb

importdb [ -anrftudcV] DataArea/DataID FileName FlatFile

a - All: overwrite duplicates n - None: do not overwrite duplicates r -
Report on duplicate records f - File has Field headers t - Tabs treated
as Separator Value [default = space] u - Update records - valid with -f
only d - Do not reformat dates [Files in db format]
```

Tip: Use the **importdb** utility to reformat date fields into Lawson date format (CCYYMMDD). Select the **-d** option if they are already in Lawson format.

```
c - Correct records - enforce strict data type casting (ex: type ALPHA
converted to uppercase; leading zero added to floating point fields [.12
-> 0.12]) [default = generate data-cast warnings only] (-c is only valid
with -u and -f) V - Prints the importdb version number and exits
```

For example:

You can run **importdb** from the Environment menu. Or you can type **laenv** at the UNIX command line and after you are in Lawson, execute a form transfer function (**F8**) to transfer to **importdb**.

For System i platform

Note: When you load a CSV file into a conversion database file, its format is the same as that in the Lawson database. However, when you load a CSV file into a conversion work file, its format is not the same as that in the Lawson database until the conversion program is run.

To use **importdb**, follow this syntax:

```
call importdb
```

```
call importdb [ -anrftudcV] DataArea/DataID FileName FlatFile
```

```
a - All: overwrite duplicates n - None: do not overwrite duplicates r -
Report on duplicate records f - File has Field headers t - Tabs treated
as Separator Value [default = space] u - Update records - valid with -f
only d - Do not reformat dates [Files in db format]
```

Tip: Use the **importdb** utility to reformat date fields into Lawson date format (CCYYMMDD). Select the **-d** option if they are already in Lawson format.

```
c - Correct records - enforce strict data type casting (ex: type ALPHA
converted to uppercase; leading zero added to floating point fields [.12
-> 0.12]) [default = generate data-cast warnings only] (-c is only valid
with -u and -f) V - Prints the importdb version number and exits
```

For example:

```
call importdb parm(-a LAWAPP9 ARIITEM /home/lawson/usr/nealm/example.csv)
```

You can run **importdb** from the Environment menu. Or you can type **laenv** from Lawson Desktop (LID) and after you are in Lawson, execute a form transfer function (**F8**) to transfer to **importdb**.

Loading Flat Files

Note: For more information on the **impexp** utility, see the *System Utilities Reference Guide*.

Use the import and export file utility called **impexp** to load flat files.

For UNIX/Windows platforms:

When using **impexp**, follow this syntax:

```
impexp
```

Note: Because the first 10 characters for each record in a flat file are the name of the conversion database file or conversion work file that you want to load the data into, the syntax for **impexp** does not need to specify the conversion database file or conversion work file name.

```
impexp [-afnrst] DataArea/DataID [ ExportFile ]
```

a - Overwrite duplicate records if records are different b - Blocksize if reading tape f - Fast: do not check for matching records Implies -n will be ignored n - No overwrite of duplicate records r - Report mode only Will be ignored if used with -a; -n; -f s - Set return code if DB or Dup errorst - Tape blocksize - same as -b 10k V - Only print version

Note: When you load a flat file into a conversion database file, its format is the same as that in the Lawson database. However, when you load a flat file into a conversion work file, its format is not the same as that in the Lawson database until the conversion program is run.

For example:

```
impexp -a sup708 /lawson/usr/nealm/example.flt
```

You can run **impexp** from the Environment menu. Or you can type **laenv** at the UNIX command line, and after you are in Lawson, execute a form transfer function (**F8**) to transfer to **impexp**.

For System i platform

When using **impexp**, follow this syntax:

```
call impexp
```

Note: Because the first 10 characters for each record in a flat file are the name of the conversion database file or conversion work file that you want to load the data into, the syntax for **impexp** does not need to specify the conversion database file or conversion work file name.

```
call impexp [-afnrst] DataArea/DataID [ ExportFile ]
```

a - Overwrite duplicate records if records are different b - Blocksize if reading tape f - Fast: do not check for matching records Implies -n will be ignored n - No overwrite of duplicate records r - Report mode only Will be ignored if used with -a; -n; -f s - Set return code if DB or Dup errors

Note: When you load a flat file into a conversion database file, its format is the same as that in the Lawson database. However, when you load a flat file into a conversion work file, its format is not the same as that in the Lawson database until the conversion program is run.

t - Tape blocksize - same as -b 10k V - Only print version

For example:

```
call impexp parm(-a LAWAPP9 ARIITEM /home/lawson/usr/nealm/example.flt)
```

You can run **impexp** from the Environment menu. Or you can type **laenv** from Lawson Desktop (LID) and after you are in Lawson, execute a form transfer function (**F8**) to transfer to **impexp**.

Verify Loaded Data and Correct Errors

Before you convert all your data, verify the contents of the conversion database file or conversion work file. In some Lawson applications, you can run interface data listings on conversion database files and conversion work files. In other Lawson applications, you can run the conversion programs in edit mode to test the loading process, which lets you check for errors without updating the database files. You should correct all errors by using available interface maintenance programs before you run conversion programs to update them, or you may have a partial run.

For specific information, refer to "Verify Loaded Data and Correct Errors" in each application chapter.
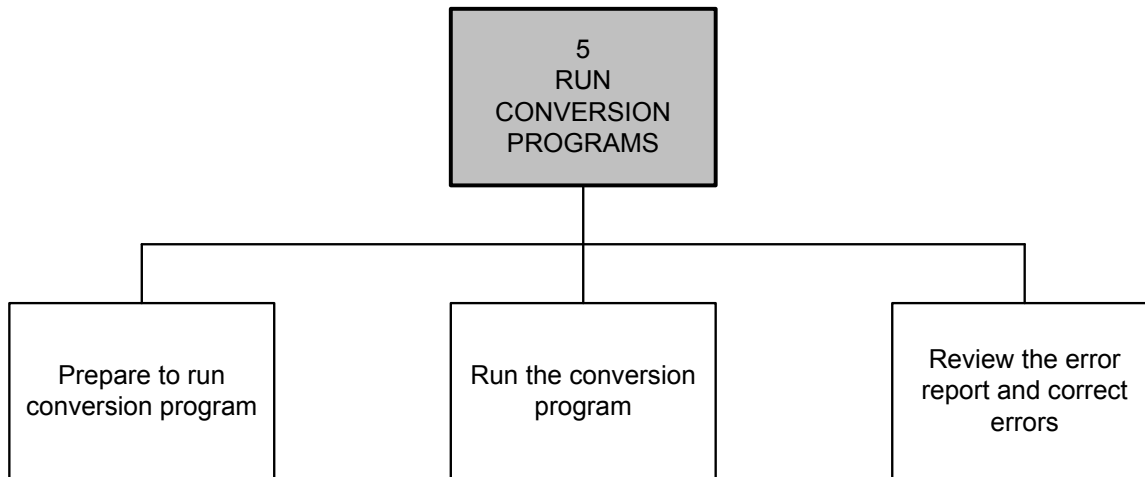
Run Conversion Programs

E

The following process diagram summarizes the entire conversion process.

1 PLAN CONVERSION	2 COMPLETE CONVERSION PREREQUISITES	3 MAP DATA	4 LOAD CONVERSION DATA	5 RUN CONVERSION PROGRAMS	6 TEST CONVERSION RESULTS

Running conversion programs involves these tasks.

- Prepare to run conversion program.

- Run the conversion program.

- Review the error report and correct errors.

```
                        5
                       RUN
                   CONVERSION
                    PROGRAMS

   Prepare to run      Run the conversion      Review the error
 conversion program       program           report and correct
                                                  errors
```

- "Prepare to Run Conversion Program" on page 150

- "Run the Conversion Program" on page 151

- "Review the Error Report and Correct Errors" on page 152

Prepare to Run Conversion Program

To prepare to run the conversion program, perform the following:

- Determine whether to run the conversion program in your test environment or live environment.

  Before you run the conversion program in a live environment, be sure to run it in a test environment until you have no conversion errors in your test sample. If you have errors in your test sample, be sure to check similar data in your current database for this type of error before you convert that data.

  Note: Not all conversion programs offer these run options.

- Select the run options within the conversion program.

  Select update or non-update mode: Select update mode to convert your data to the Lawson database. Select non-update mode to generate a conversion error report and not update the Lawson database. For more information on this option, see "Running a Conversion Program in Non-Update/Update Mode" on page 152.

  Select to include or not include records with errors: If you select to include records with errors, the conversion program places records with errors in a CSV output file with a name different from the input file. After you correct the errors, rename the CSV file as the input file, and rerun the conversion program. If you choose not to include records with errors, they will be saved to an output (error) file.

  Specify maximum error count (if including records with errors): You can specify a maximum error count acceptable for the run. When the maximum error count is reached, the conversion program stops. If you do not specify a maximum error count, the system defaults the count to 999,999. You can use this option to limit the amount of processing time if an error begins to repeat in every record.

- Back up application data.

  You must back up your application data before you run the conversion program. You may need backup data if you encounter errors or need to repeat a conversion step. Backup data is also important because it provides an audit trail before, during, or after the conversion.

- Remove unwanted test data.

  You may want to remove unwanted test data when you run multiple conversion tests. You may also want to remove unwanted test data if most of your database contains errors and you need to start your conversion over again. After you remove unwanted test data, replace it with the data on the backup tape you made before you ran the conversion program.

Run the Conversion Program

When you run the conversion program, the data in a conversion database file or conversion work file is converted into Lawson format and moved into the appropriate database in the Lawson application, such as ARCCUST DBARARU . See Run Conversion Programs in each application chapter for information about running a particular conversion program.

⚠️ **Caution:** If you need to rerun a conversion program to convert the same data, you should restore the files with the data on your backup tape before you rerun the program. If you rerun a conversion program without restoring the files, amounts could be added to the existing balances, resulting in doubled amounts.

Running a Conversion Program in Non-Update/Update Mode

Some conversion programs offer the option of running the conversion in a non-update mode or an update mode. (Some conversion programs use the term "report mode" instead of "non-update mode.") See Run Conversion Programs in each application chapter for information on available run options for a particular conversion program.

Non-Update Mode

When you run a conversion program in non-update mode (with the **Update** option set to **N**), all records with errors are listed in an output file (error report), and the Lawson database is not updated.

Update Mode

Note: Some conversion programs will not update the Lawson database until all errors are fixed. See Run Conversion Programs in each application chapter for details on specific conversion programs.

When you run a conversion program in update mode (with the **Update** option set to **Y**), records without errors will be updated to the Lawson application. Any records with errors will be listed in an output file (error report).

Review the Error Report and Correct Errors

Review the error report generated when you ran the conversion program, and correct the errors. To help analyze errors and determine a possible solution, compare the errors on the error report to those listed in the Troubleshooting Chart. Not every application chapter provides a Troubleshooting Chart. Refer to "Review the Error Report and Correct Errors" in each application chapter for available Troubleshooting Charts.

Note: Records with fatal errors are not updated to the Lawson application when you run a conversion program.

The error report may indicate that you have made errors setting up codes in other Lawson applications. To correct these errors, make changes to the appropriate Lawson application. For example, you may be converting invoices to the Accounts Receivable application and a terms code is required. This code is set up in the Terms application. You would have to set up your terms code, and then run the Accounts Receivable invoice conversion program again.

Your strategy to resolve errors depends on the number and type of errors:

- *If an error affects a few to a moderate number of converted records*, you can usually correct the error by using a conversion maintenance form. For example, AR99.1 is available to correct accounts receivable transaction data. See the applicable conversion guide for information about available conversion maintenance forms.

- *If no conversion maintenance form is available*, or there are numerous errors or errors that affect most of the converted records, you must correct the original source data, resave the source file, re-transfer it to the Lawson server, reload it, and reconvert it. Before you reconvert the data, restore the Lawson database by using the backup tape you made before you converted the data.

  For information about editing source files, see "Creating a Source File" on page 139.

- *If some records were not updated in the Lawson database*, correct the records in error, reload the corrected records into the applicable conversion file, and rerun the conversion program. If you have to rerun the conversion program with all of your data, restore the Lawson databases by using the backup tape you made before you ran the conversion program, and run the conversion program again.

Test Conversion Results

The following process diagram summarizes the entire conversion process.

1 PLAN CONVERSION	2 COMPLETE CONVERSION PREREQUISITES	3 MAP DATA	4 LOAD CONVERSION DATA	5 RUN CONVERSION PROGRAMS	6 TEST CONVERSION RESULTS

Testing conversion results involves these tasks.

- Run data listings and application-specific reports.
- Verify the converted data.
- Correct problems.

-
-
-
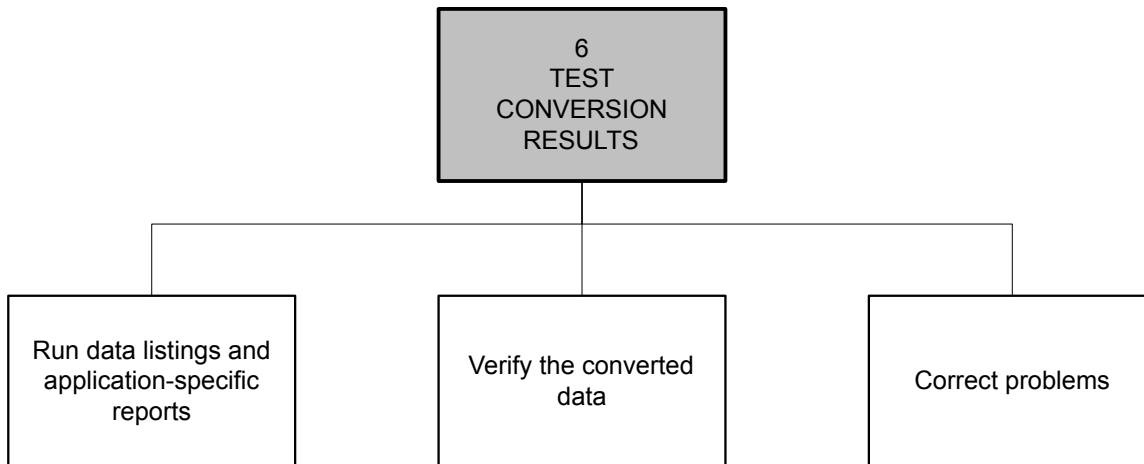
Run Data Listings and Application-Specific Reports

Run listings of data and reports from both your non-Lawson system and the Lawson application to review for accuracy and completeness. The Lawson applications provide inquiry, maintenance, and

report programs that you can use to view and print listings of Lawson application data. See the applicable conversion guide to identify which reports to use for the conversion program you want to run.

Verify the Converted Data

Compare the non-Lawson data listings and reports with the data listings and reports on the Lawson application. Verify that the data converted correctly, and that it is complete and accurate.

Correct Problems

Make corrections as necessary to the converted data by using the available programs in the Lawson application. See to the applicable conversion guide to identify the programs to help you correct the converted data.