

PROCESSES, INTERFACES, AND EXCEL-TO-CI

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Session Topics

- Welcome & Introductions (5 min)
- Overview of System and Terminology (5 min)
- Processes (25 min)
- Interfaces (10 min)
- Excel-to-Component Interface (CI) for HCM (10 min)
- Wrap up & Closing (5 min)

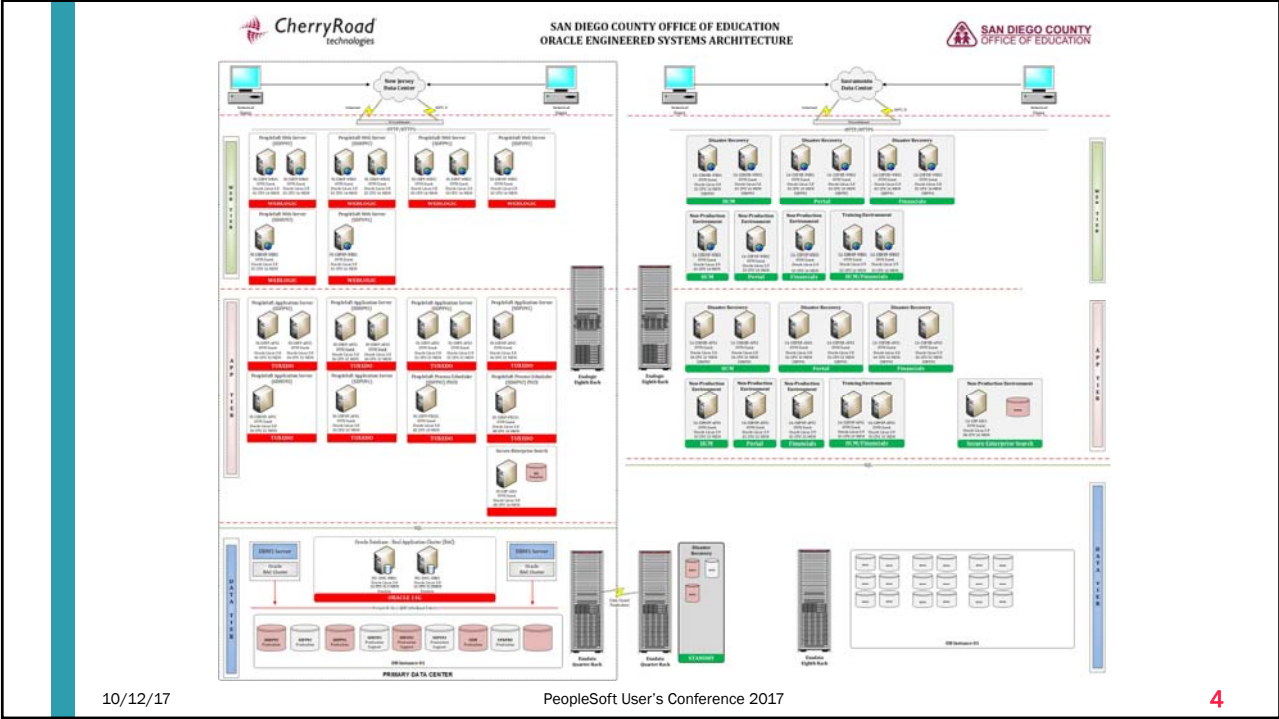
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Welcome & Introductions

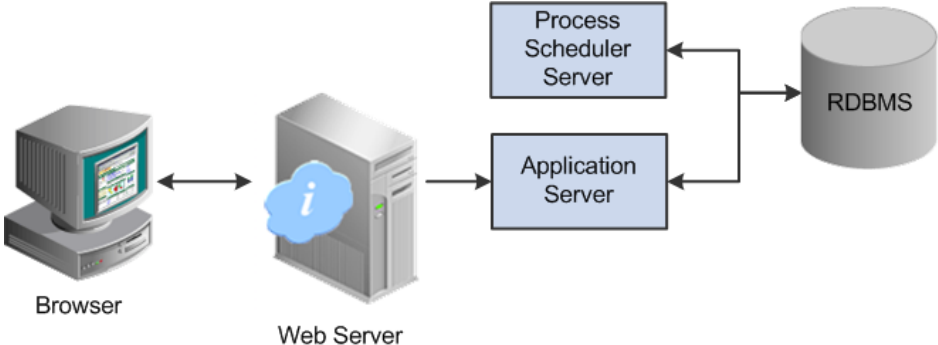
- The purpose of this session is to provide a general understanding of what is happening in PeopleSoft behind the scenes.

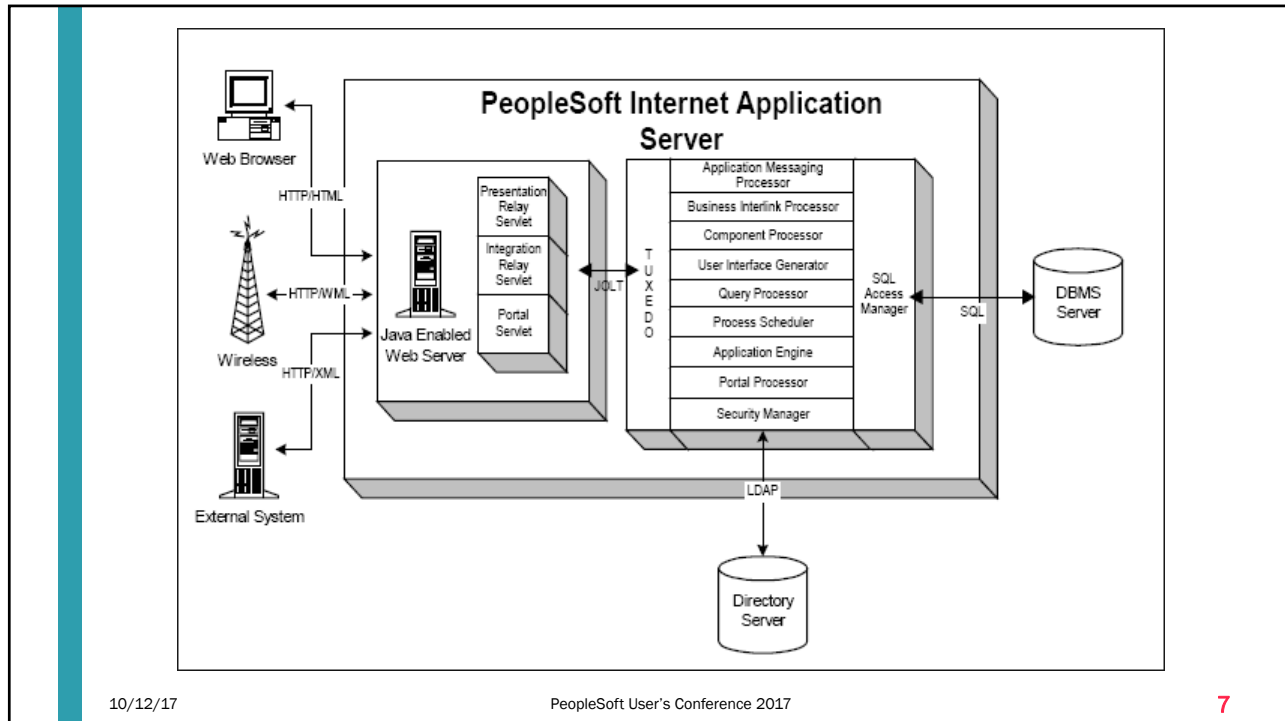


Overview of System and Terminology

- HCM
- Finance
- External systems
- Web Service
- Excel-to-CI (Component Interface)
- Integration broker (IB)
- Process scheduler
- Web Servers, Application Servers

A High Level View of PeopleSoft's Architecture





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What is the Process Scheduler?

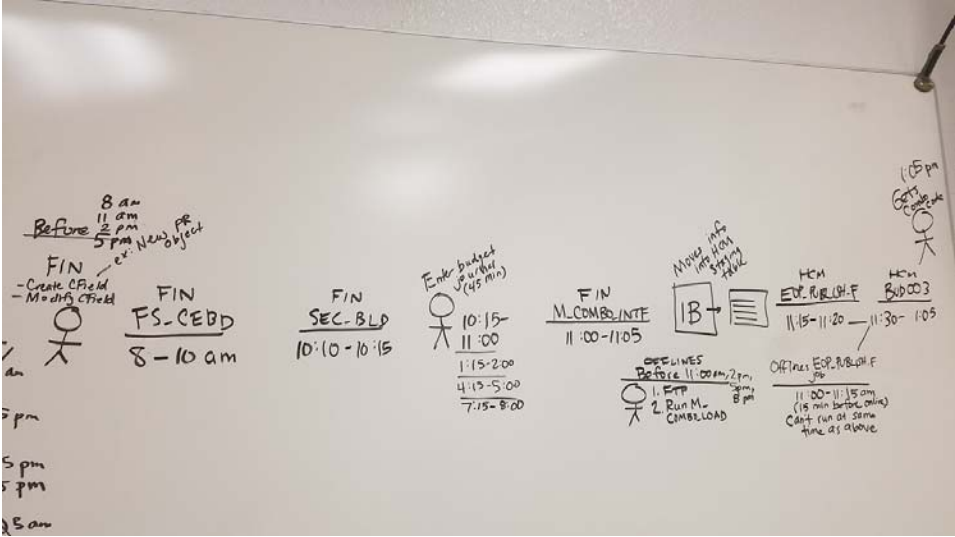
- A method to run processing requests
 - COBOLs
 - SQR Reports
 - Nvision
 - Application Engine processes
 - Queries
 - PS Jobs
- A way to schedule things to run at a different time
 - Jobs vs Job Sets
 - Reoccurrences

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Combo Code Build/Load Process (really)



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Entire combo code process (Finance to HCM)

This process describes how a combo code is created.

NOTE: The times listed here are not in Production yet - this reflects the new schedule that is currently in test.

	FIN	FIN	FIN	FIN	FIN		HCM	HCM	HCM		
Cycle	User creates or modifies ChartField	Combo Code Process Start Time	FS_CEBD (2 hrs)	SEC_BLD (5 min)	User has 45 min to enter budget journal	M_COMBO_INTF (5 min)	Integration Broker IB moves into HCM Staging Table	Offlines upload to FTP and run M_COMBO_LOAD	EOP_PUBLISH_F (5 min)	BUD003 (95 min)	End Time Combo Code ready for use
1	By 8:00 am	8:00 am	8:00 - 10:00 am	10:10 - 10:15 am	10:15 - 11:00 am	11:00 - 11:05 am	By 11:00 am	11:15 - 11:20 am	11:30 am - 1:05 pm	1:05 pm	
2	By 11:00 am	11:00 am	11:00 am - 1:00 pm	1:10 - 1:15 pm	1:15 - 2:00 pm	2:00 - 2:05 pm	By 2:00 pm	2:15 - 2:20 pm	2:30 - 4:05 pm	4:05 pm	
3	By 2:00 pm	2:00 pm	2:00 - 4:00 pm	4:10 - 4:15 pm	4:15 - 5:00 pm	5:00 - 5:05 pm	By 5:00 pm	5:15 - 5:20 pm	5:30 - 7:05 pm	7:05 pm	
4	By 5:00 pm	5:00 pm	5:00 - 7:00 pm	7:10 - 7:15 pm	7:15 - 8:00 pm	8:00 - 8:05 pm	By 8:00 pm	8:15 - 8:20 pm	8:30 - 10:05 pm	10:05 pm	

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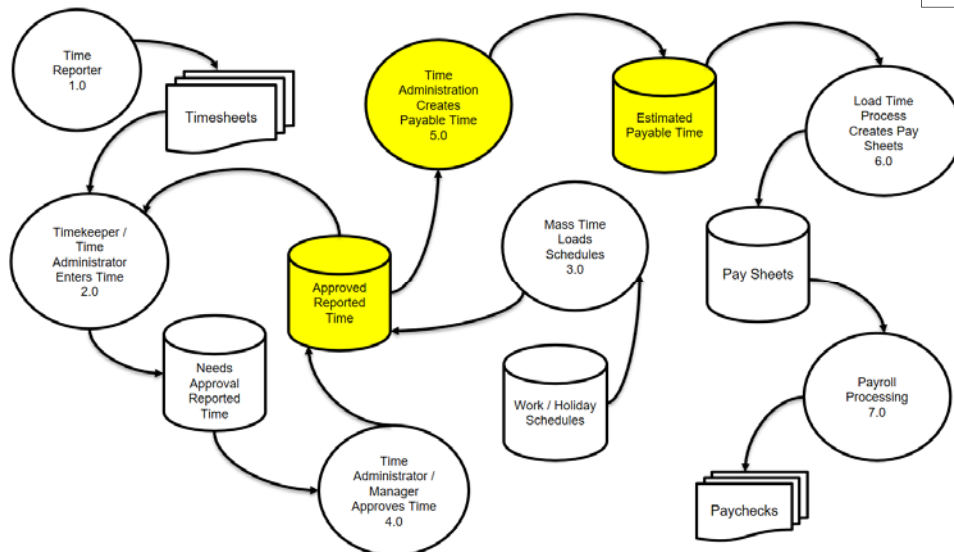
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What is the Time Administration Process?

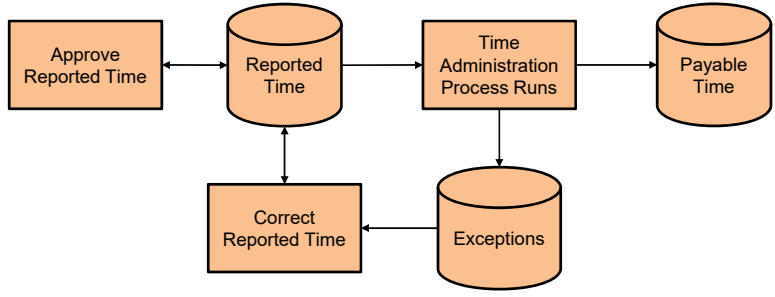
PeopleSoft's **Time Administration** is the core process in Time & Labor that converts Reported Time into Payable Time for processing by the Payroll system. It uses a complex set of computer programs to evaluate *Approved* Reported Time and produce Payable Time with a status of *Estimated*, provided there are no errors or exceptions. The *Estimated* Payable Time will get sent over to Payroll for processing. All time that is not approved, for example Reported Time in *Needs Approval* status or time containing exception errors, will not be processed by Payroll nor paid to the employee.

The **Time Administration** process runs automatically every 30 minutes, however it can also be run manually by the CRC or MITI if necessary.

Time & Labor Process Flow Overview



Time Administration Process Flow Overview



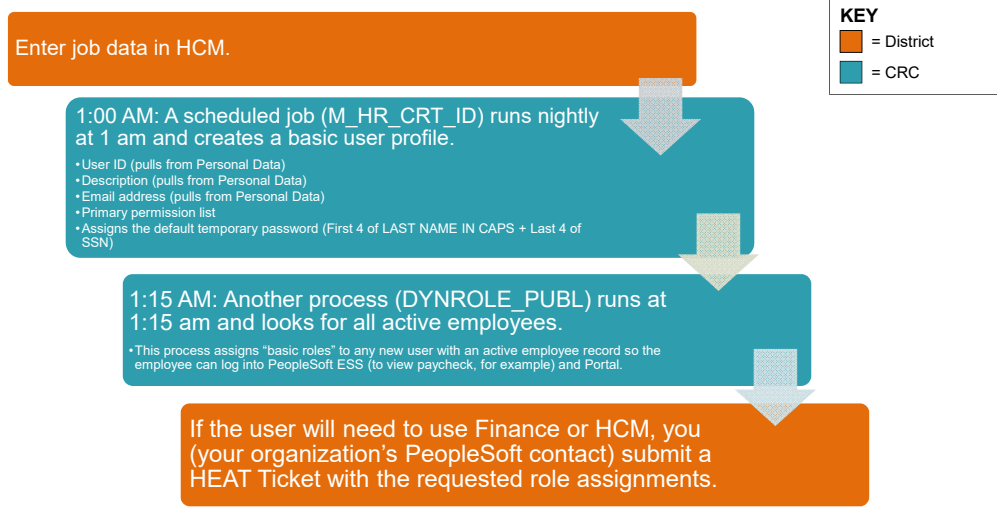
Time Administration uses the employee's Earliest Change Date (ECD) to determine how far back to go looking for *Approved Reported Time* to convert to *Payable Time* in *Estimated* status for processing by Payroll. The ECD is the date-under-report of the earliest addition or update to time-related data for an employee since the last **Time Administration** run.

The Time Administration Status (TA Status) indicates whether or not the employee's time will be processed by **Time Administration**. The *Up For Processing* status means the time is ready to be processed and *Not Up For Processing* means something needs to be done before the time can be processed.

Reported Time containing high severity exception errors will not be converted to Payable Time nor processed by Payroll.

User Creation Process Overview

Employees need to be set up as users with the appropriate roles in order to use PeopleSoft. After you enter job data in HCM, two scheduled jobs run at night to create user accounts and assign basic roles. The next day the employee can log into Employee Self-Service (ESS).



KEY

- Orange box = District
- Blue box = CRC

FTP File Transfer Interfaces

- Offline districts/organizations
- Rapid time Text file
- Combo coded loading

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Direct Server Connection Interfaces

- EdJoin for Recruiting

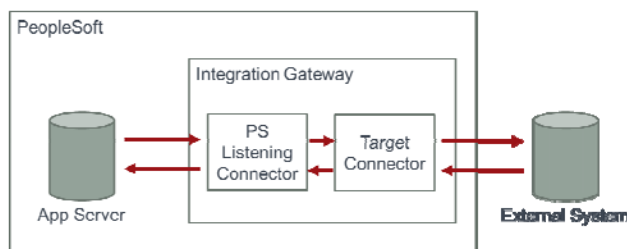
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Web Services

- The SDCOE web data interface (WDI) provides a way for authorized users to access data without having to directly log into PeopleSoft. WDI makes use of PeopleSoft's component interface technology. Component interfaces allow external programs to either update or extract data from PeopleSoft while maintaining business logic.
- Current tables available include Job data and Employee data.
- SDCOE is using the Web Service for directory data. Two other districts currently have access.
- An implementation guide is in progress and will be released soon.



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Web Services Pros & Cons

Pros	Cons
Web Services are standards-based	Web Services are immature
Web Services' loose coupling leads to increased modularity and flexibility in complex, distributed IT environments	PeopleSoft Web Services are restricted to Components. Changes to Components can be very complicated.
Web Services can reduce integration costs and simplify Business to Business Integration (B2Bi)	The name "Web Services" is vague and misleading.
	Web Services enable technical business people to "assemble" software solutions but coding is required.

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Excel-to-CI for HCM

- **What is Excel-to-CI?** PeopleSoft's Excel to Component Interface (CI) functionality provides a simplified method to upload large numbers of data from Microsoft Excel to PeopleSoft databases.

Status	Line No	Record Type	Empl ID	Empl Record	Benefit Record Number	Override Company Sels, DE	Company Seniority Date	Override Service Date
Template	1000							
Template	1100							
Template	1110							
Template	1200							
Template	1300							
Template	1400							
Template	1500							

Excel-to-CI for HCM: Rapid Time

- PeopleSoft's **Rapid Time Excel-to-CI** provides a simplified method for loading large numbers of time entries for many employees into the Time & Labor application specifically the Timesheet screen. Rapid Time bypasses many of the steps performed when time is manually entered directly on the Timesheet screen.

Session Number	Empl ID	Empl Record	Date Under Report	Sequence number	Time Reporting Code	Quantity	Override Rate	Combination Code
021077	600138	0	12/15/2014	01	HRLY	8		
021077	622222	0	12/15/2014	01	HRLY	8		

Excel-to-CI for HCM: Rapid Time Guidelines

- You must know how to manually enter time on the **Timesheet** screen.
- You must have more than a novice level knowledge of Microsoft Excel.
- Do NOT use Rapid Time for Exception Hourly employees or any type of absence event (for example, sick leave).
- The Data Input and EMPPOS worksheets or tabs are the only ones you can change on the *Rapid Time Excel/CI Spreadsheet*, all others must **NEVER** be changed.
- Each Rapid Time session should not exceed 500 time entries.
- The Date Under Report must be a valid date that is not before the employee's hire date nor after the employee's termination date.
- The Time Reporting Code (TRC) must be valid and all uppercase.
- The Quantity cannot be zero.
- The Override Rate is optional but if entered it cannot be zero, and must not be used with amount TRC codes.
- The Combination Code must be valid for the employee's position and contain leading zeros to make it the required 9 digits.

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Excel-to-CI for HCM: Absence Management Balance Adjustment

- PeopleSoft's **Absence Balance Adjustment Excel-to-CI** provides a simplified method for loading large numbers of absence balance adjustments for many employees into the Absence Management application, specifically the **Adjust Balances > Absences** screen. You can use the Absence Balance Adjustment Excel-to-CI to make adjustments to the employee's Sick and Vacation balances only. All other absence balance adjustments must be manually entered on the **Adjust Balances > Absences** screen.

	A	B	C	D	E	F	G
	Enter Connect Information > Build Template > Data Input > Stage & Submit Data						
1							
2							
3	Record Type 000	Record Type 000	Record Type 000	Record Type 000	Record Type 100	Record Type 100	
4	Empl ID	Empl Record	Pay Group	Calendar ID	PIN Number	Balance Adjustment	
5							
6							
7							

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Excel-to-CI for HCM: Absence Balance Adjustment Guidelines

- You must know how to manually enter an absence balance adjustment on the **Adjust Balances > Absences** screen.
- You must have more than a novice level knowledge of Microsoft Excel.
- You can only enter sick and vacation balance adjustments on the *Absence Balance Adjustment Excel/CI Spreadsheet*, all others must be manually entered on the **Adjust Balances > Absences** screen.
- The Data Input worksheet or tab is the only one you can change on the *Absence Balance Adjustment Excel/CI Spreadsheet*, all others must **NEVER** be changed.
- Each batch should not exceed 1,000 adjustments.
- You must use the current Calendar ID or period for all adjustments.
- The Begin/End Dates are not entered which means they default to the first and end of the Calendar ID, respectively. If the default Begin Date is prior to the employee's hire date or if the default End Date is after the employee's termination date, the adjustment will not get processed by the nightly Absence Calc Process and applied to the employee's balance.

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Other Excel-to-CI for HCM

- Job Data > Employment Data Screen
- Position Data
- Salary Administration Plan
- Assign Work Schedule Screen
- Time Reporter Data Screen

You can request these other Excel-to-CI to be loaded.

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Access Resources: Guides, Job Aids, Demos

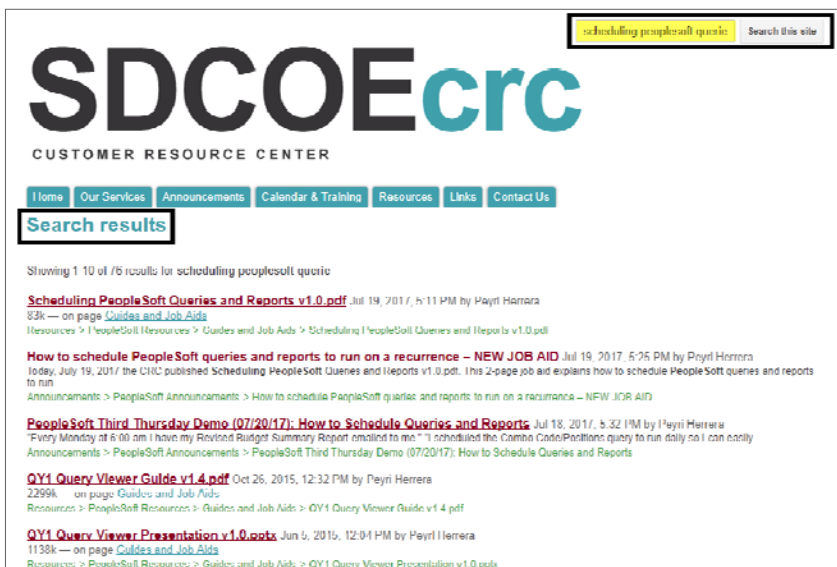


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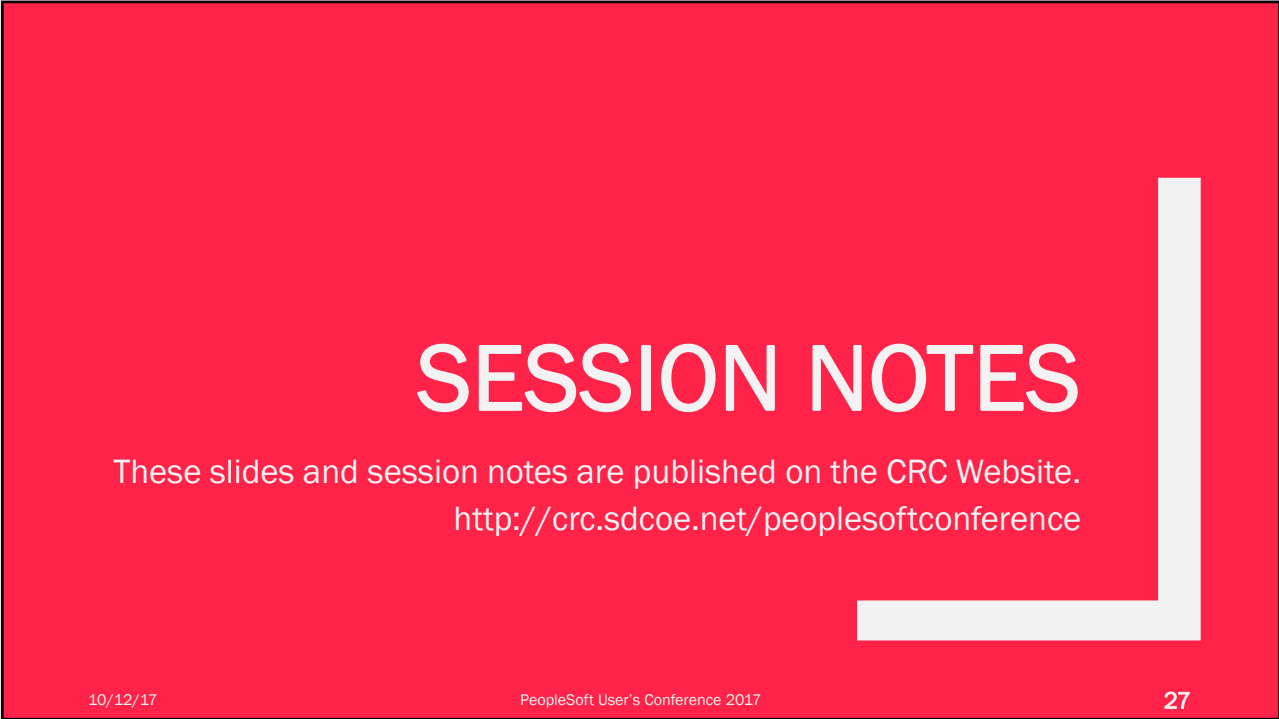
Scheduling PeopleSoft Queries and Reports



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SESSION NOTES

These slides and session notes are published on the CRC Website.
<http://crc.sdcoe.net/peoplesoftconference>

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