



HCM Excel-to-CIs

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Session Topics

- Welcome & Introductions (5 min)
- What are Excel-to-CIs? (30 min)
 - Heat Ticket Excel-to-CIs
 - District Managed Excel-to-CIs
- Guest speaker: Olga West, Escondido High (10 min)
 - “What we have used – where to find, how, when, what to submit, how to make sure it is done correctly”
- Group Discussion (10 min)
- Wrap up & Closing (5 min)

What are Excel-to-CIs?

PeopleSoft's Excel to Component Interface (CI) functionality provides a simplified method to upload data into the target PeopleSoft database from a Microsoft Excel spreadsheet. The CI is basically a computer program developed by the Technical Team for processing the data uploaded from the Excel spreadsheet.

Excel-to-CI Type	Heat Ticket	District Managed
1. Job Data - Employment Data	•	
2. Position Data	•	
3. Salary Schedule/Administration Plan	•	
4. Payline Adjustments	•	
5. Payline Vacation Payments Only	•	
6. Retroactive Pay Forms	•	
7. Time Reporter Data	•	
8. Assign Work Schedule	•	
9. Rapid Time		•
10. Absence Balance Adjustment		•

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What are Excel-to-CIs?

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Methods for Processing Excel-to-CI Spreadsheets

- **Heat Self-Service:** The district requests an Excel-to-CI spreadsheet by submitting a Heat Self-Service Ticket. Education Business Systems (EBS) sends the spreadsheet, with instructions, to the district who fills out the spreadsheet and sends it back to EBS for processing. EBS notifies the district when processing has completed so they can review the results.
- **District Managed:** The district downloads the Excel-to-CI files from the CRC website, enters the required information, submits the data for upload and processing, and verifies the results. Detailed instructional guides are on the CRC website's *Resources > PeopleSoft Resources > Guides and Job Aids* page.

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HCM Excel-to-CIs

Excel-to-CI Type	Heat Ticket	District Managed
1. Job Data > Employment Data	•	
2. Position Data	•	
3. Salary Schedule/Administration Plan	•	
4. Payline Adjustments	•	
5. Payline Vacation Payouts Only	•	
6. Retroactive Pay Form	•	
7. Time Reporter Data	•	
8. Assign Work Schedule	•	
9. Rapid Time		•
10. Absence Balance Adjustment		•

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Heat Ticket Excel-to-CIs

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Job Data > Employment Data Excel-to-CI

- Provides a simplified method for performing a mass update of selected fields found on the **Job Data** and **Employment Data** screens in the Human Resources application. The following fields can be updated:

- | | | |
|--|---|--|
| <ul style="list-style-type: none">▪ Empl ID▪ Empl Record▪ Effective Date▪ Effective Sequence▪ Action▪ Action Reason▪ Position Number▪ Job Indicator | <ul style="list-style-type: none">▪ Business Unit▪ Default Pay Components▪ Calculate Compensation▪ Empl Class▪ Officer Code▪ Salary Admin Plan▪ Grade | <ul style="list-style-type: none">▪ Step▪ Grade Entry Date▪ Step Entry Date▪ Company Option 1▪ Company Option 2▪ Company Option 3▪ Company Option 4▪ Absence Accrual Date |
|--|---|--|

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Job Data > Employment Data Excel-to-CI

- There is a separate template spreadsheet for uploading data found on the **Employment Data** window (from the **Job Data** screen) using the Job Data > Employment Data Excel-to-CI.
- The following **Employment Data** fields can be updated:
 - Empl ID
 - Empl Record
 - Company Option 1
 - Company Option 2
 - Company Option 3
 - Absence Accrual Date
 - Company Option 4

Job Data > Employment Data Excel-to-CI

- The processing steps for uploading data found on the **Employment Data** window (from the **Job Data** screen) using the Job Data > Employment Data Excel-to-CI are as follows:
 - Download the Employment Data Excel-to-CI (Employment Data Template v1.0.xls) from the CRC website's *Resources > PeopleSoft Resources > Guides and Job Aids* page in the *Human Resources – HR3 New Hires & Job Data* section.
 - Submit a Heat Self-Service Ticket with the attached, and completed, Employment Data Template spreadsheet requesting it to be processed.
 - Education Business Systems (EBS) will process the district's Employment Data Template spreadsheet using the Job Data > Employment Data Excel-to-CI spreadsheet and notify the district when it is finished.
 - Verify the Excel-to-CI results by reviewing the **Employment Data** window (from the **Job Data** screen) and running the **M_HR_EMPLOYMENT_DATA** query.

Job Data > Employment Data Excel-to-CI

- How to update fields that are not defined on the Employment Data Excel-to-CI (Employment Data Template v1.0.xls):
 - Submit a Heat Self-Service Ticket listing the fields to be updated.
 - Education Business Systems (EBS) will e-mail a spreadsheet *template* with the requested fields to the district who will fill it out and send it back to EBS.
 - EBS will process the district's spreadsheet *template* and notify the district when it is finished.
 - Verify the Excel-to-CI results by reviewing the **Job Data** screen and running the **M_HR_EMPLOYMENT_DATA** query.

Position Data Excel-to-CI

- Provides a simplified method for performing a mass update of position data in the Human Resources application. The following fields can be updated:

▪ Position Number	▪ Full/Part Time	▪ Grade
▪ Effective Date	▪ Union Code	▪ Standard Hours
▪ Reason	▪ Title/Short Title	▪ Max Head Count
▪ Status	▪ Department	▪ CBEDS
▪ Position Status	▪ Location	▪ FTE
▪ Job Code	▪ Reports To	▪ CDAYS Track
▪ Reg/Temp	▪ Salary Admin Plan	

Position Data Excel-to-CI

- The Position Data Excel-to-CI processing steps are as follows:
 - Submit a Heat Self-Service Ticket requesting the Positon Data Excel-to-CI spreadsheet, including the fields you want to upload.
 - Education Business Systems (EBS) will e-mail the spreadsheet to the district who will fill it out and send it back to EBS.
 - EBS will process the district's Position Data Excel-to-CI spreadsheet and notify the district when it is finished.
 - Verify the Excel-to-CI results by reviewing the **Add/Update Position Info** screen (*Main Menu > Organizational Development > Position Management > Maintain Positions/Budgets > Add/Update Position Info*) and running the **M_HR_POSITIION_DTA** query.
- **Note:** *The Position Data Excel-to-CI also updates **Job Data** screen fields.*

Salary Schedule/Administration Plan Excel-to-CI

- Provides a simplified method for loading salary grade and salary step information into PeopleSoft tables.
- The processing steps are as follows:
 - Run the **M_HR_SALARY_GRADE_STEP** query and download the results to an Excel spreadsheet.
 - Update the fields from the **M_HR_SALARY_GRADE_STEP** query to match the published salary schedule.
 - Submit a Heat Self-Service Ticket requesting a Salary Schedule change and attach the updated **M_HR_SALARY_GRADE_STEP** spreadsheet.
 - Education Business Systems (EBS) will process the Salary Schedule changes using the Salary Schedule/Administration Plan Excel-to-CI spreadsheet and notify the district when it is finished.
 - Verify the Excel-to-CI results by viewing the **Define Salary Grades** screen (*Main Menu > Compensation > Base Compensation > Maintain Plans > Define Salary Grades*) and re-running the **M_HR_SALARY_GRADE_STEP** query.

Payline Adjustments Excel-to-CI

- Provides a simplified method for performing a mass update of paylines for active employees having a system generated payline in the Payroll application. It can be used for any mass update, such as:
 - Off Schedule Bonus
 - Benefit Incentive
- The processing steps are as follows:
 - Submit a Heat Self-Service Ticket requesting the Payline Adjustments Excel-to-CI spreadsheet.
 - Education Business Systems (EBS) will e-mail the spreadsheet to the district who will fill it out and send it back to EBS.
 - EBS will process the district's Payline Adjustments Excel-to-CI spreadsheet and notify the district when it is finished.
 - Verify the Excel-to-CI results by running the **M_PY_PAYSHEET_ADJ_AUDIT_BY_LN** query.

Payline Vacation Payouts Excel-to-CI

- Provides a simplified method for performing a mass update of paylines for active employees having a system generated payline in the Payroll application. It is only used for Vacation Payouts (VPO earnings code).
- The processing steps are as follows:
 - Submit a Heat Self-Service Ticket requesting the Payline Vacation Payouts Excel-to-CI spreadsheet for Vacation Payouts.
 - Education Business Systems (EBS) will e-mail the spreadsheet to the district who will fill it out and send it back to EBS.
 - EBS will process the district's Payline Vacation Payouts Excel-to-CI spreadsheet for Vacation Payouts and notify the district when it is finished.
 - Verify the Excel-to-CI results by running the **M_PY_PAYSHEET_ADJ_AUDIT_BY_LN** query.

Retroactive Pay Form Excel-to-CI

- Provides a simplified method for performing a mass upload of *retros* to the paylines. The process creates paysheets for employees who are on Short Work Break or terminated. It needs to have an hourly rate on each line that is carried out to 6 decimal places so it can be used to calculate correct retirement reporting rates.
- The processing steps are as follows:
 - Submit a Heat Self-Service Ticket requesting the Retro Pay Form Excel-to-CI spreadsheet.
 - Education Business Systems (EBS) will e-mail the spreadsheet to the district who will fill it out and send it back to EBS.
 - EBS will process the district's Retroactive Pay Form Excel-to-CI spreadsheet for Vacation Payouts and notify the district when it is finished.
 - Verify the Excel-to-CI results by running the **M_PY_PAYSHEET_ADJ_AUDIT_BY_LN** query.

Time Reporter Data Excel-to-CI

- Provides a simplified method for loading large numbers of Time Reporter Data records for many employees into the Time & Labor application (through Human Resources), specifically the **Time Reporter Data** screen.
- For example:
 - Changing the Workgroup and/or Taskgroup for many employees.
- The processing steps are as follows:
 - Submit a Heat Self-Service Ticket requesting the Time Reporter Data Excel-to-CI spreadsheet.
 - Education Business Systems (EBS) will e-mail the spreadsheet to the district who will fill it out and send it back to EBS.
 - EBS will process the district's Time Reporter Data Excel-to-CI spreadsheet and notify the district when it is finished.
 - Verify the Excel-to-CI results by reviewing the **Time Reporter Data** screen using the **Time Reporter Data** link found on the **Employment Data** window of the **Job Data** screen (*Main Menu > Workforce Administration > Job Information > Job Data*).

Assign Work Schedule Excel-to-CI

- Provides a simplified method for loading large numbers of work schedules for many employees into the Time & Labor application, specifically the **Assign Work Schedule** screen.
- For example:
 - Changing work schedules for a large group of employees, such as Bus Drivers.
- The processing steps are as follows:
 - Submit a Heat Self-Service Ticket requesting the Time Reporter Data Excel-to-CI spreadsheet.
 - Education Business Systems (EBS) will e-mail the spreadsheet to the district who will fill it out and send it back to EBS.
 - EBS will process the district's Assign Work Schedule Excel-to-CI spreadsheet and notify the district when it is finished.
 - Verify the Excel-to-CI results by reviewing the **Assign Work Schedule** screen (*Main Menu > Manager Self Service > Time Management > Manage Schedules > Assign Work Schedules*).

District Managed Excel-to-CIs

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 (*Main Menu > Manager Self Service > Time Management > Report Time > Timesheet*).
- For example:
 - Time worked for teachers attending a Saturday workshop.
 - Extracted time worked that has been captured by a system outside of PeopleSoft.
 - Large volume of monthly time worked entries.
- Download the Rapid Time Excel-to-CI files from the CRC website's *Resources > PeopleSoft Resources > Guides and Job Aids* page in the *HCM - Excel/CI* and *HCM - Excel/CI Rapid Time* sections.

Absence Balance Adjustment Excel-to-CI

- Provides a simplified method for loading large numbers of absence balance adjustments (Sick, Vacation, Personal Necessity, Personal Business and Sick Half Pay only) for many employees into the Absence Management application, specifically the **Adjust Balances > Absences** screen (*Main Menu > Global Payroll & Absence Mgmt > Payee Data > Adjust Balances > Absences*).
- Balance adjustments are available for review on the Results by Calendar screen (*Main Menu > Global Payroll & Absence Mgmt > Review Absence/Payroll Info > Results by Calendar*) the next day after the nightly Absence Calc Process runs.
- For example:
 - Establish balances for a large group of new hires.
 - Make balance corrections for a large group of employees.
- Download the Absence Balance Adjustment Excel-to-CI files from the CRC website's *Resources > PeopleSoft Resources > Guides and Job Aids* page in the *HCM - Excel/CI* and *HCM - Excel/CI AM Balance Adjustment* sections

Guest Speaker: “What we have used – where to find, how, when, what to submit, how to make sure it is done correctly”

Olga West, Escondido High, owest@euhsd.org

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Group Discussion

How do you use Excel-to-CI?
What questions do you have about Excel-to-CI?

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Session Notes

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