

KB – IPS Upload to AAP

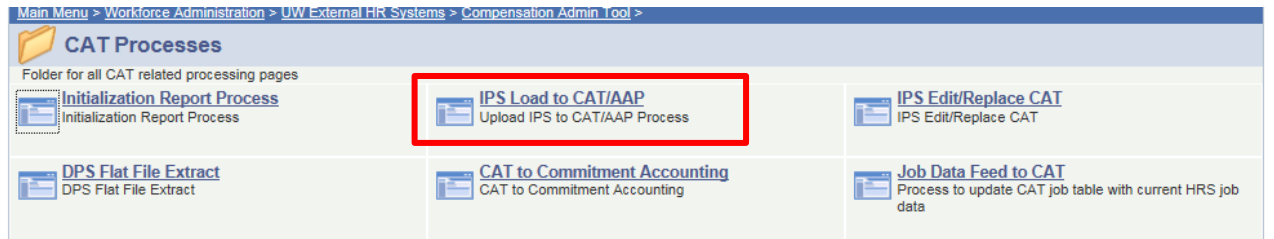
Contents

Purpose and Overview	1
Procedure Steps	1
Output Header Fields	9

Purpose and Overview

The IPS Load to CAT and AAP (Append) process uploads data from the IPS to the CAT and AAP for analysis, reporting, editing. The IPS Load to CAT/AAP process appends existing data in the CAT/AAP by only adding new, unique employee records or rows to existing employees. Therefore, all data in the IPS file will be added to the CAT and AAP, with the exception of data this is identical on all fields that make a unique record.

A row is considered 'unique' if any of the following fields are different when comparing one row to another row within the file and/or CAT: Effective Date, Employee ID, Employee Rcd, Action, Action Reason, and Change Amount.



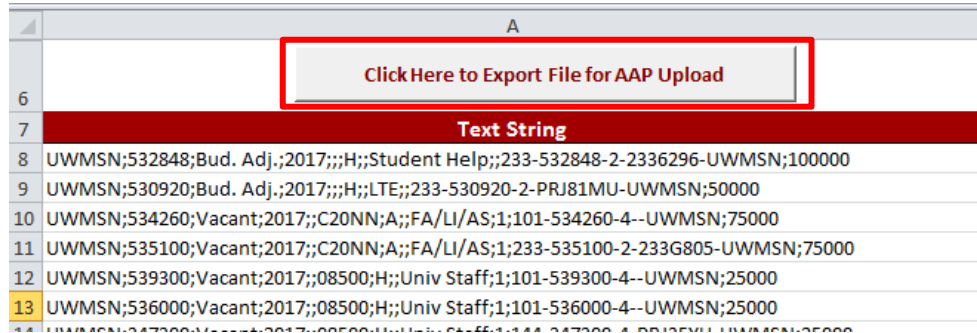
Procedure Steps

The Additional Adjustments tab can be loaded to the AAP after all mass changes have been made in the IPS.

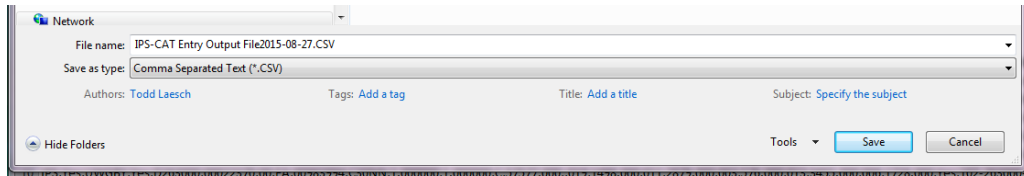
1. Save the "IPS -> AAP" tab of the IPS as a .CSV.
 - a. Open the "IPS→CAT" tab.
 - b. Scroll to the bottom of this tab and delete any rows that appear as so:

21	---;	_____
22	---;	_____
23	---;	_____
24	---;	_____
25		_____

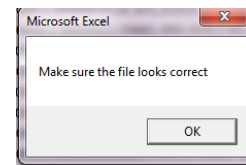
- i. Note that similar to the IPS→CAT tab, the formula in cell A8 is only copied down 22 rows. If you have more data rows than this on your Additional Adjustments page, copy the formula down to cover the appropriate number of data rows. Delete any extra null rows in the above format.
- c. Press the “**Click Here to Export File for AAP Upload**” button.
- i. Note that if this button does not appear, you can do it manually by clicking the View tab, selecting the Macros option on the right, and running the “ThisWorkbook.ExportRangetoFileAAP” option listed.



- d. Save the output file “Name.CSV” under the file menu.



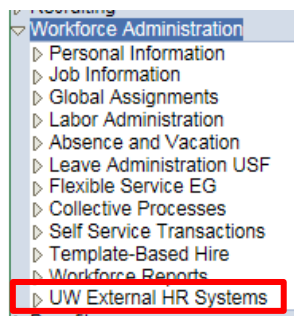
- e. The following box will appear in Excel. Select **Okay**.



- f. The “Name.CSV” file will appear on your screen. You may close it out.

2. Navigate to the CAT.

- a. Log in to HRS and navigate to Workforce Administration > UW External HR Systems > Compensation Admin Tool > Upload to CAT and AAP Process (shown in the images below).



Main Menu > Workforce Administration > UW External HR Systems >

Compensation Admin Tool

Administer compensation changes within CAT

CAT Processes
Folder for all CAT related processing pages

- Initialization Report
- IPS Load to CAT/AAP**
- IPS Edit/Replace CAT
- Job Data Feed to CAT

CAT Page
CAT Entry Page

3. Create a new run control or use existing saved run control.
 - a. The Run Control ID is a unique identifier that saves different values for the run control criteria.
 - b. While there is no set format for the Run Control ID, a potential suggested format is Initials_next available number (e.g. "ABC01").

[Upload to CAT and AAP Process](#)

[Find an Existing Value](#) [Add a New Value](#)

Run Control ID:

[Add](#)

[Find an Existing Value](#) | [Add a New Value](#)

4. The following screen will appear:

IPS Load to CAT/AAP

Run Control ID: Test [Report Manager](#) [Process Monitor](#) [Run](#)

Process Options

Report Only
 Process and Report

*Fiscal Year [🔍](#)

Inbound File Upload Criteria

*File Type

*Business Unit [🔍](#)

*File Description

*Attached File [Upload File](#)


Uploaded On _____ by 00833917

[Save](#) [Notify](#) [Add](#) [Update/Display](#)

5. Under “Process Options,” choose between “Report” and “Process and Report.”

a. The report mode should be run first.

i. This mode allows the data to be processed without committing data to the AAP. It generates an output .xls file that allows the data and any possible errors to be reviewed.



The image shows a dialog box titled "Process Options" with two radio button options: "Report Only" (which is selected) and "Process and Report".

b. The process mode should be run after.

i. Once the data has been reviewed and any errors in the data have been corrected, the process mode can be run. This commits the data to the AAP and generates an output .xls file.

6. The Fiscal Year should be automatically populated.

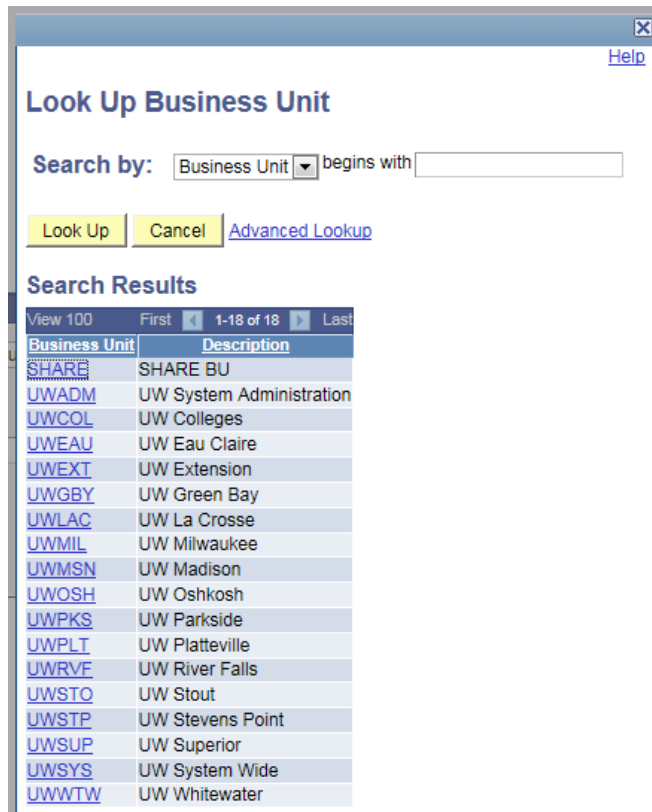
7. Select the appropriate “Inbound File Upload Criteria”

a. For File Type, select “Additional Adjustment”



The image shows a dialog box titled "Inbound File Upload Criteria" with a dropdown menu for "File Type" set to "Additional Adjustment".

b. For Business Unit, click the magnifying glass to search for the appropriate business unit. Click the green link for the business unit to select it.



The image shows a "Look Up Business Unit" dialog box. It has a search field with a dropdown menu set to "Business Unit" and a "begins with" input field. Below the search field are buttons for "Look Up", "Cancel", and "Advanced Lookup". Below the buttons is a "Search Results" section with a table listing business units and their descriptions. The table has columns for "Business Unit" and "Description".

Business Unit	Description
SHARE	SHARE BU
UWADM	UW System Administration
UWCOL	UW Colleges
UWEAU	UW Eau Claire
UWEXT	UW Extension
UWGBY	UW Green Bay
UWLAC	UW La Crosse
UWMIL	UW Milwaukee
UWMSN	UW Madison
UWOSH	UW Oshkosh
UWPKS	UW Parkside
UWPLT	UW Platteville
UWRVF	UW River Falls
UWSTO	UW Stout
UWSTP	UW Stevens Point
UWSUP	UW Superior
UWSYS	UW System Wide
UWWTW	UW Whitewater

c. For file description, there is no set format. A potential suggested format is “AAPCAT_IPS_date” (e.g. “CAT_IPS_20160101”)

d. Click the “Upload File” link next to Attached File to browse for, select, and upload the CSV file from Step 1.

*Attached File [Upload File](#)

e. Once the CSV file has uploaded, press the “Save” button at the bottom of the window.

- i. The screen will appear the same, and your Run Control will be saved
- 8. Upload the AAP to the CAT.
 - a. Press **“Run”** at the top right of the window.

- b. Press **“OK”** at the bottom of the new window.

Process Scheduler Request

User ID: 00830576 Run Control ID: ABC01

Server Name: [dropdown] Run Date: 07/08/2015 [B1]

Recurrence: [dropdown] Run Time: 10:06:57AM [Reset to Current Date/Time](#)

Time Zone: [dropdown]

Select	Description	Process Name	Process Type	*Type	*Format	Distribution
<input checked="" type="checkbox"/>	UW_CAT_LOAD	UW_CAT_LOAD	Application Engine	Web	TXT	Distribution

[OK](#) [Cancel](#)

- c. You will have returned to your previous window. Note your Process Instance Number. Press **“Process Monitor”** at the top right of the window.

- d. The new window will indicate the status of your file upload. When the file is finished uploading, Run Status will be **“Success.”**
 - i. If Run Status is **“queued,”** it indicates that the file is waiting to be uploaded.
 - ii. Click Refresh at the top right of the window to refresh the status of the document.

- Note that this process may take several minutes, depending upon the data load in the Process Monitor.

The screenshot shows the 'Process Monitor' interface. At the top, there are tabs for 'Process List' and 'Server List'. Below the tabs is an 'Actions' section with search filters for User ID (00833917), Type, Last, Days (1), and a Refresh button. There are also dropdowns for Server, Name, Instance, Run Status, and Distribution Status, along with a 'Save On Refresh' checkbox. The main area is a table titled 'Process List' with columns: Select, Instance, Seq., Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details. The first row shows Instance 1958510, Process Type Application Engine, Process Name UW_CAT_LOAD, User 00833917, Run Date/Time 08/27/2015 9:28:11AM CDT, Run Status Success, and Distribution Status Posted. The 'Run Status' cell is highlighted with a red box.

9. Once the Run Status is “Success,” download the output.

- Click “**Details.**”

This screenshot is identical to the previous one, showing the 'Process Monitor' interface. The 'Details' link in the 'Details' column of the 'Process List' table is highlighted with a red box.

- Click “**View Log/Trace**” at the bottom right of the window.

The screenshot shows the 'Process Detail' window. It is divided into several sections:

- Process:** Instance 1958510, Type Application Engine, Name UW_CAT_LOAD, Description IPS to CAT/AAP Process, Run Status Success, Distribution Status Posted.
- Run:** Run Control ID test, Location Server, Server PSUNX, Recurrence.
- Update Process:** Radio buttons for Hold Request, Queue Request, Cancel Request, Delete Request (selected), and Restart Request.
- Date/Time:** Request Created On 08/27/2015 9:28:13AM CDT, Run Anytime After 08/27/2015 9:28:11AM CDT, Began Process At 08/27/2015 9:28:27AM CDT, Ended Process At 08/27/2015 9:28:56AM CDT.
- Actions:** Parameters (Transfer), Message Log (View Locks), Batch Timings, and View Log/Trace (highlighted with a red box).

- c. Under File List, click the file with the .xls extension to download the output.

View Log/Trace

Report

Report ID: 1103875 Process Instance: 1958510 [Message Log](#)
Name: UW_CAT_LOAD Process Type: Application Engine
Run Status: Success
IPS to CAT/AAP Process

Distribution Details

Distribution Node: HRDEV_RPTNOD Expiration Date: 08/26/2016

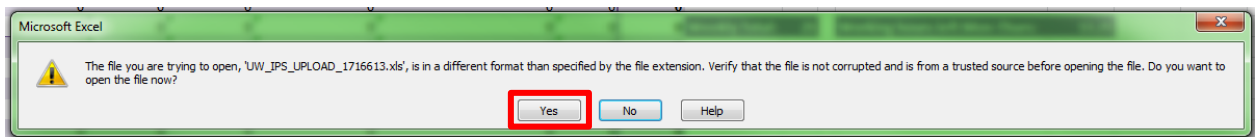
File List

Name	File Size (bytes)	Datetime Created
AE_UW_CAT_LOAD_1958510.AET	7,082	08/27/2015 9:28:56.527675AM CDT
AE_UW_CAT_LOAD_1958510.log	51,466	08/27/2015 9:28:56.527675AM CDT
AE_UW_CAT_LOAD_1958510.trc	205	08/27/2015 9:28:56.527675AM CDT
UW_IPS_UPLOAD_1958510.xls	146,717	08/27/2015 9:28:56.527675AM CDT

Distribution ID

Distribution ID Type	*Distribution ID
User	00833917

- d. When opening the file, if an error message appears indicating that “The file you are trying to open...is in a different format than specified by the file extension,” click “Yes.”



10. Review the output file.

- a. Open the downloaded Excel file.
 - i. A depiction of the Excel output is below.
 - ii. A description of the different header fields of the output is below in the 'Output Header Fields' table.
- b. The file will contain Error, Warning, and Successful sections.
 - i. Review the Error and Warning section of the output. Use the Error Message column to diagnose the errors and correct if necessary.
 - ii. A description of the different error messages is below.

IPS to AAP Upload Process Summary Report														
Report Parameters:														
Run Control ID:		mv0713		Process Instance:		1716752								
Run Date:		07/14/2015		Ran By:		00793622								
Mode:		Report												
Report Statistics:														
Total AAP Records:														
Processed:		0												
Processed with Warnings:		0												
Rejected:		6												
FUNDING DEPARTMENT	FISCAL YEAR	BUSINESS UNIT	POSITION TYPE	JOB CODE	PAY BASIS	FTE	ADJUSTMENT TYPE	FUND	DEPTID	PROGRAM	PROJECT	BUDGETED AMOUNT	DESCRIPTION	ERROR MESSAGE
ERROR														
101505	2016	UWWTW	Bud. Adj.			0	SH	102	101505	0		100000	John Smith	Adjustment Type SH, FTE Entered; Invalid Project Id;
101505	2016	UWWTW	Bud. Adj.			0	LTE	102	101505	0		50000		Adjustment Type LTE, FTE Entered; Invalid Project Id;
101505	2016	UWWTW	Vacant	N54DN		15		102	101505	0	PRJ51MI	84000		Invalid Adjustment Type;
101505	2016	UWWTW	Vacant	L88DM		0.5		102	101505	0		30000		Invalid Adjustment Type;
101505	2016	UWWTW	Vacant	P14NL		0.5		102	101505	0		30000		Invalid Adjustment Type;
101505	2016	UWWTW	Bud. Adj.			0		102	101505	0		-2000		Invalid Adjustment Type;
WARNING														
SUCCESSFUL														

- c. Correct the AAP based on the errors in the output. Once all errors have been corrected, the upload can be run in Process mode.

Output Header Fields

Report Parameters	
Field Name	Description
Run Control ID	The run control used to create the report.
Run Date	The date the report was created.
Mode	The mode used for the upload. Either report or process.
Process Instance	The number assigned by PeopleSoft for each process.
Ran By	The user ID of the user who ran the report.
Report Statistics	
Field Name	Description
Total AAP Records	The total number of AAP records evaluated.
Processed	The total number of AAP records processed successfully.
Processed with Warnings	The total number of AAP records processed but have warnings.
Rejected	The total number of AAP records rejected because of errors.

Error, Warning and Successful Messages				
#	Row Type	Description	Comments	Message
1	Error	Funding Department not active in HRS	Entire row errors out	Invalid Funding Department
2	Error	Funding Department does not match Business Unit		Invalid Funding Department
3	Error	Fiscal Year not Active in CAT		Fiscal Year not Active in CAT
3.1	Error	Fiscal Year did not match Run Control		Fiscal Year did not match Run Control

4	Error	Invalid Fiscal Year, Funding Department, Job Code, pay basis, position number, business unit, FTE, Adj Type, Fund, Deptid, Program, budgeted amount.	Field errors.	Did not load
4.1	Error	Invalid Jobcode		Invalid Jobcode
4.2	Error	Invalid Pay Basis	Pay Basis not 'H' 'A' or 'C'	Invalid Pay Basis
4.3	Error	Invalid Position Type	Position Type not 'Vacant' or 'Bud. Adj.'	Invalid Position Type, needs to be either Vacant or Bud. Adj.
4.4	Error	Invalid Position Number		Invalid Position Number
4.5	Error	Invalid Adjustment Type	Adjustment Type not 'SH' 'Grad' 'LTE' 'Univ Staff' or 'LI/AS/FA'	Invalid Adjustment Type
4.6	Error	Invalid Business Unit GL in Account Code		Invalid Business Unit GL
4.7	Error	Invalid Fund Code in Account Code		Invalid Fund Code
4.8	Error	Invalid Dept ID in Account Code		Invalid Department Id
4.9	Error	Invalid Program Code in Account Code		Invalid Program Code
4.1	Error	Invalid Project ID in Account Code		Invalid Project Id
5	Error	Identical AAP Row Exists (entire row is key)	AAP Row Exists entire row is key not 'H' 'A' or 'C'	Identical AAP Row Exists in File/Table
6	Error	Incomplete funding string (missing fund, deptid or program)	funding string missing fund deptid or program not 'H' 'A' or 'C'	Account Code is invalid
7	Error	Row Errors out, no budgeted amount entered for positive FTE or no FTE	Errors out no budgeted amount entered for positive FTE or no FTE not 'Vacant' or 'Bud. Err.'	
7.1	Error	No FTE entered	No FTE for Empl Type 'LTE' or 'SH'	No FTE entered
7.2	Error	No budget amount for position FTE		No budget amount entered for position FTE
8	Error	Does not pass budget edits	not pass budget edits error 'Vacant' or 'Bud. not.'	No special messages. The error messages from Section 4 is used for Budget Error Edits

9	Warning	Adj Type SH, FTE Entered	Everything will load except the FTE, SH cannot have FTE entered	Adjustment Type SH, FTE Entered
10	Warning	Adj Type LTE, FTE Entered	Everything will load except the FTE, LTE cannot have FTE entered	Adjustment Type LTE, FTE Entered
11	Successful	New Funding Department Record	Create New AAP record	Loaded Successfully
12	Successful	Existing record, but unique row (entire row is Key)	Add to existing AAP record	Loaded Successfully
13	Successful	Row loads, Negative FTE, \$0 budgeted amount	loads Negative FTE budgeted amount Loaded 'Vacant' successful 'Bud. loa.'	Loaded Successfully