

KB – IPS Upload to CAT (Append)

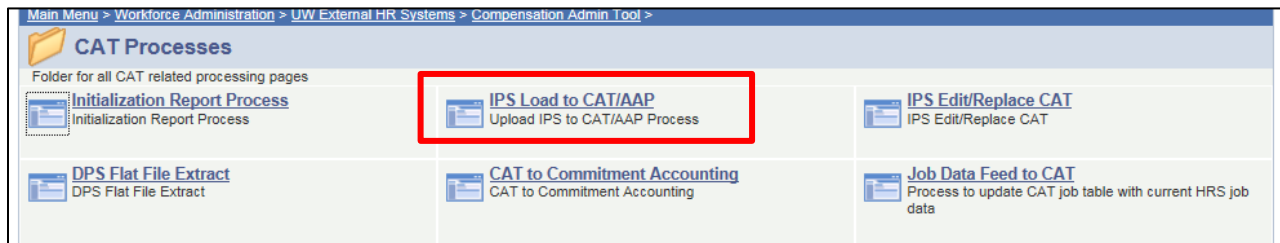
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Purpose and Overview

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/APP 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.

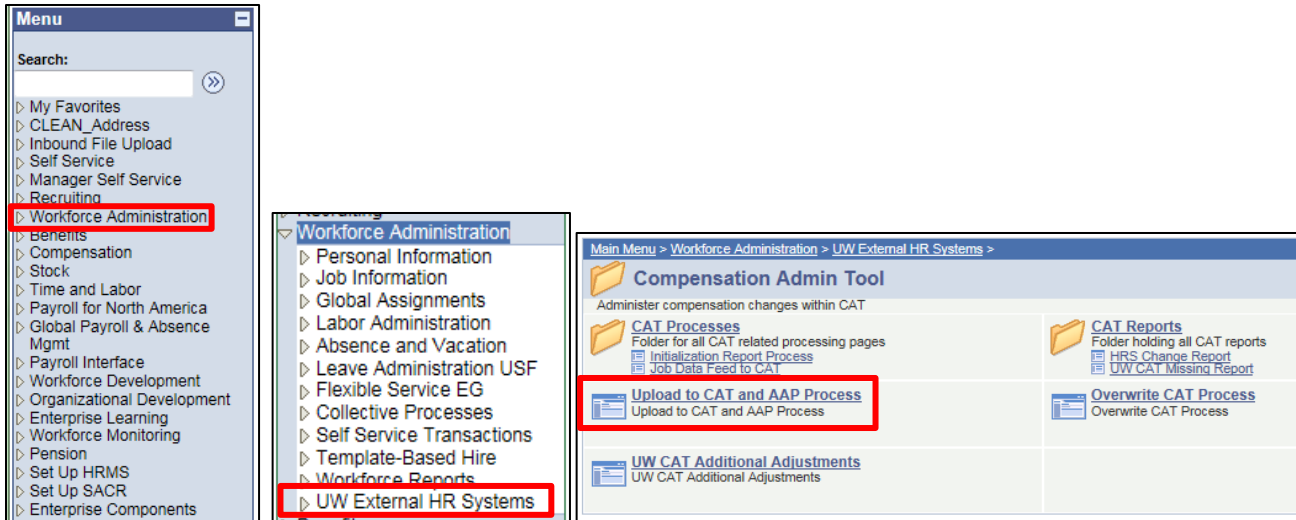
A row is considered ‘unique’ if any of the following fields are different when comparing one row to another row within the file and/or CAT: Effective Date, Employee ID, Employee Rcd, Action, Action Reason, and Change Amount.



Procedure Steps

The IPS should be loaded to the CAT after all mass changes have been made in the IPS. For information on how to use the IPS, please see KB 05.

1. Save the “IPS -> CAT” tab of the IPS as a .CSV.
 - a. Scroll down the Comp Admin Planning tab to identify the number of data rows populated.
 - b. Open the “IPS→CAT” tab
 - c. The text string formula that begins in cell A4 only copies down for 100 rows. If the number of rows counted in step (a) is greater than 100, drag the formula in A4 down for ten more rows than that number.
 - d. Any extra rows copied will appear in this format: IPS;;;;000000;00000000;00;;;;0.000000. Delete any null rows like this.



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").
 - i. Note: you cannot use spaces in your Run Control ID.
 - c. Click either the "Find and Existing Value" or "Add a New Value" tab depending on what you would like to do.
 - d. Enter the run control.
 - e. Click either "Search" or "Add."
 - f. If you are searching for a run control and it does not exist, you will have the option to create a new run control.

The screenshot shows the 'Upload to CAT and AAP Process' form. At the top, there are two tabs: 'Find an Existing Value' and 'Add a New Value'. Below the tabs is a text input field labeled 'Run Control ID:' containing the text 'ABC01'. Below the input field is a yellow 'Add' button, which is highlighted with a red box. At the bottom of the form, there are two links: 'Find an Existing Value' and '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 CAT. It generates an output .xls file that allows the data and any possible errors to be reviewed.

Process Options

Report Only
 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 CAT and generates an output .xls file.

6. The Fiscal Year should be automatically populated.

7. Select the appropriate “Inbound File Upload Criteria”

Inbound File Upload Criteria

*File Type

*Business Unit

*File Description

*Attached File [Upload File](#)

Uploaded On _____ by 00833917

a. For File Type, select “Compensation Adjustment”

Inbound File Upload Criteria

*File Type

- b. For Business Unit, click the magnifying glass to search for the appropriate business unit. Click the blue link for the business unit to select it.
 - c. For file description, there is no set format. A potential suggested format is “CAT_IPS_date” (e.g. “CAT_IPS_080615”).
 - 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 IPS to the CAT.
- a. Press **“Run”** at the top right of the window.

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

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

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

IPS Load to CAT/AAP

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

- d. The new window will indicate the status of your file upload. When the file is finished uploading, Run Status will be “Success.”
- If Run Status is “queued,” it indicates that the file is waiting to be uploaded.
 - 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.

Process List Server List

Actions

User ID: 00833917 Type: Last: 1 Days Refresh

Server: Name: Instance: to: Run Status: Distribution Status: Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1958510		Application Engine	UW_CAT_LOAD	00833917	08/27/2015 9:28:11AM CDT	Success	Posted	Details

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

Process List Server List

Actions

User ID: 00833917 Type: Last: 1 Days Refresh

Server: Name: Instance: to: Run Status: Distribution Status: Save On Refresh

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	1958510		Application Engine	UW_CAT_LOAD	00833917	08/27/2015 9:28:11AM CDT	Success	Posted	Details

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

Process Detail

Process

Instance: 1958510 Type: Application Engine
 Name: UW_CAT_LOAD Description: IPS to CAT/AAP Process
 Run Status: Success Distribution Status: Posted

Run	Update Process
Run Control ID: test Location: Server Server: PSUNX Recurrence:	<input type="radio"/> Hold Request <input type="radio"/> Queue Request <input type="radio"/> Cancel Request <input checked="" type="radio"/> Delete Request <input type="radio"/> Restart Request

Date/Time	Actions
Request Created On: 08/27/2015 9:28:13AM CDT	Parameters Transfer
Run Anytime After: 08/27/2015 9:28:11AM CDT	Message Log View Locks
Began Process At: 08/27/2015 9:28:27AM CDT	Batch Timings
Ended Process At: 08/27/2015 9:28:56AM CDT	View Log/Trace

- 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

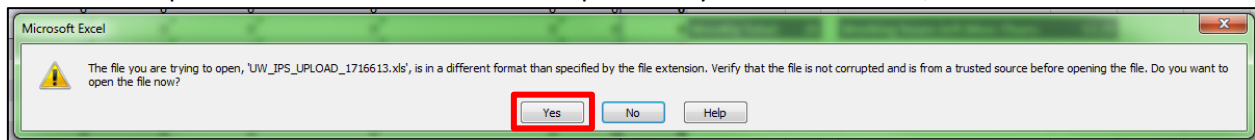
File List

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

Distribute to

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. An example output file is displayed below
 - ii. A description of the different header fields is displayed in the “Output Header Fields” table below
- b. The file will contain Error, Warning, and Successful sections.
 - i. Review the Error and Warning section of the output. Use the ERRORMSG column to diagnose the errors and correct if necessary.
 - ii. A description of the different types of error messages is displayed in the “Error, Warning, and Successful Messages” table below.

IPS to CAT						
Report Parameters:						
Run Control ID:	ABC01	Process Instance:	1716848			
Run Date:	07/16/2015	Ran By:				
Mode:	Report					
Report Statistics:						
Total CAT Job Records	10	Rejected:	2			
Processed:	8					
Total CAT Rate Records	5	Rejected:	0			
Processed:	5					
Total CAT Fund Records	20	Rejected:	0			
Processed:	20					
EMPLID	EMPL RCD	BUSINESS UNIT	EMPL CLASS	PAY BASIS	EJED	FISCAL YEAR
ERROR						
	0	UWMSN	FA	C		2016
WARNING						
	0	UWMSN	AS	C		2016
SUCCESSFUL						
		UWMSN	FA	C		2016
		UWMSN	FA	C		2016
		UWMSN	FA	C		2016
		UWMSN	LI	A		2016
		UWMSN	FA	C		2016
	1	UWMSN	LI	C	08/23/2015	2016



COMMENTS	
ERRORMSG	
Business Unit: UWMS did not match Run Control;	
Business Unit: UWMSN mismatch between loaded row and HRS; Deptid: A538500 mismatch between loaded row and HRS; Emplid/Empl_Rcd not in Active HR STATUS;	
FTE: 0.64 mismatch between loaded row and HRS;	

- c. Correct the IPS based on the errors in the output. Once all errors have been corrected, the upload can be run in Process and Report mode using the same steps.
 - i. If the output file contains errors after the upload is run in Process mode, failed rows can also be manually added or edited directly within the CAT.
- d. If saving the output file, ensure that it is saved as a file type Excel Workbook (.xlsx).

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 CAT Job Records	The total number of CAT job records evaluated.
Processed	The total number of CAT job records processed successfully.
Rejected	The total number of CAT job records rejected because of errors.

Error, Warning and Successful Messages				
#	Row Type	Description	Comments	IPS Upload Error Message
1	Error	Empl Id/Empl Rcd Not Active in HRS	Entire row errors out	Emplid/Empl_Rcd not in Active HR STATUS

2	Error	Position Number does not match emplid/empl rcd		Position_Nbr does not match emplid/empl_rcd
3	Error	Invalid Effective Date, Fiscal Year, Emplid, emplrcd, position number, business unit, deptid, action reason, comprate, funding string, planned FTE	Field errors. <i>Does this need to include all fields in the funding string?</i>	INVALID_Field Name
3.1	Error	Invalid Account Code		Account Code is invalid
3.2	Error	Negative Distribution %		Negative Distribution % is invalid
3.3	Error	Business Unit did not match Run Control		Business Unit: XXXXX did not match Run Control;
3.4	Error	Invalid CSB Flag	CSB Flag is not 'Y' or 'N'	CSB Flag value is invalid;
3.5	Error	Planned FTE < 0		Planned FTE cannot be negative
4.1	Warning	Business unit did not match between loaded row and HRS		Business Unit: XXXXX mismatch between loaded row and HRS;
4.2	Warning	Deptid did not match between loaded row and HRS		Deptid: XXXX mismatch between loaded row and HRS
4.3	Warning	FTE did not match between loaded row and HRS	For L basis employees HRS FTE .000250 = File FTE 0	FTE: XXX mismatch between loaded row and HRS
4.4	Warning	Pay Basis did not match between loaded row and HRS		Pay Basis: X mismatch between loaded row and HRS;
4.5	Warning	Comprate did not match between loaded row and HRS	Comprate pulled from PS_COMPENSATION	Comprate: XXXX mismatch between loaded row and HRS;
4.6	Warning	EJED did not match between loaded row and HRS		EJED mismatch between loaded row and HRS;
5	Warning	Identical emplid/empl rcd/action reason/change amount exists	Funding section still loads	Identical emplid/empl_rcd/action reason/change amount exists in the file
5.1	Warning	Invalid Action Reason for PAY	Rate row will error out but all other rate/fund	Action Reason is not valid for PAY;

			row still loads	
6	Warning	Identical funding string/distribution % exists	Compensation section still loads	Identical emplid/empl_rcd/acct_cd/uw_cat_dist_pct exists in the file
6.1	Warning	Invalid Fund Code	Errors out fund row but all other rate/fund row still loads	Account Code: Fund Code is not valid;
6.2	Warning	Invalid DeptId	Errors out fund row but all other rate/fund row still loads	Account Code: DeptId is not valid;
6.3	Warning	Invalid Program Code	Errors out fund row but all other rate/fund row still loads	Account Code: Program Code is not valid;
6.4	Warning	Invalid Project Id	Errors out fund row but all other rate/fund row still loads	Account Code: Project Id is not valid;
6.5	Warning	Invalid Business Unit	Errors out fund row but all other rate/fund row still loads	Account Code: Business Unit is not valid;
7	Successful	New Emplid/empl_rcd combos	Create New CAT record	N/A
8	Successful	Existing record, but unique emplid/empl_rcd/actionreason/change amount exists	Add to existing CAT record	N/A
9	Successful	Existing record, but unique funding string/distribution% exists	Add to existing CAT record	N/A