

Administrator Guide

Casual Academic Timesheets

Bulk Upload and Troubleshooting

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1 Background

This document details the steps needed to create and upload a comma-separated file. Once, uploaded successfully, the data creates Contract data pages for the relevant casual academics.

The contract data drives the contents of the casual academic timesheets and sets the limits on the timesheet periods available.

2 Creating the CSV file

The following steps describe how to set up your CSV file for bulk upload.

2.1 Create the column headings

1. Open Excel.
2. Copy the following headings and paste them in to Excel:

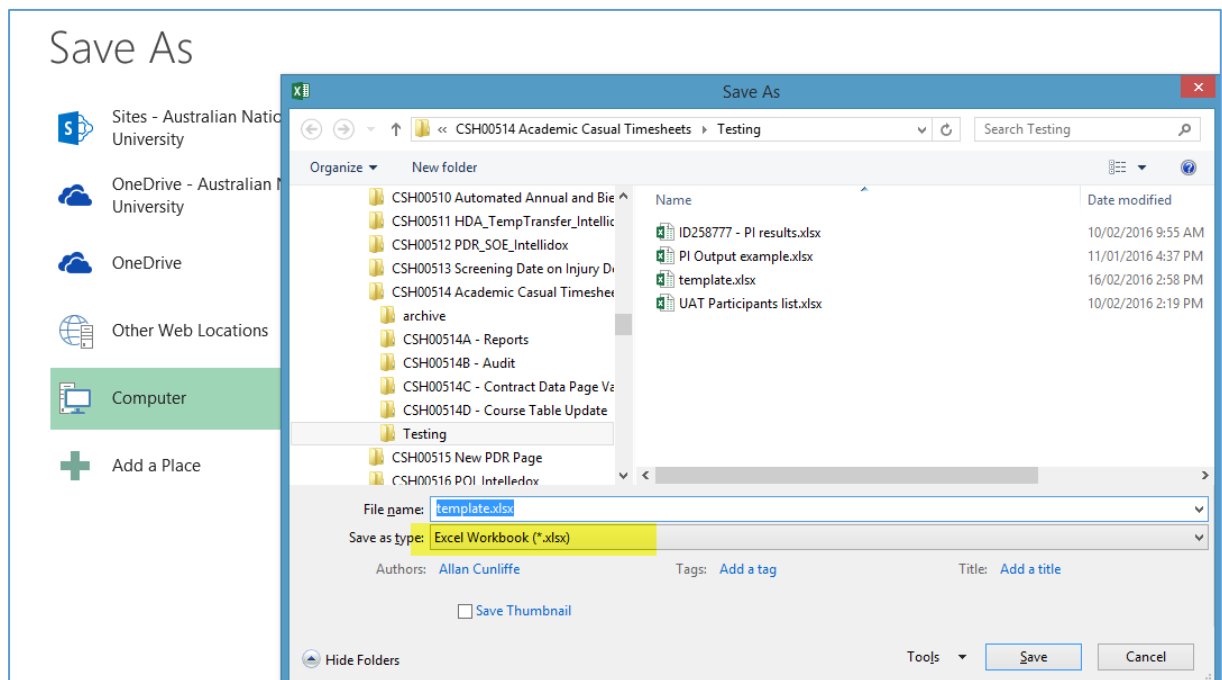
Empl ID	Empl Rcd	Contract Start	Contract End	Course Code	GL Department	Fund	Project	Element Name	Total Units	Add/update
---------	----------	----------------	--------------	-------------	---------------	------	---------	--------------	-------------	------------

You now need to save and populate the Excel spreadsheet with your contract source data (see [Save the Excel spreadsheet](#)).

2.2 Save the Excel spreadsheet

Note: This step will create an Excel version of the file, which will be used as a master copy of your data. Later on, you will save this as a comma-separated file (.CSV) which is then uploaded.

1. Select: **File – Save As**
2. Select a location for the file.
3. Enter the file name.
4. In the *Save as type* field, select Excel Workbook (*.xlsx).



5. Click **Save**.

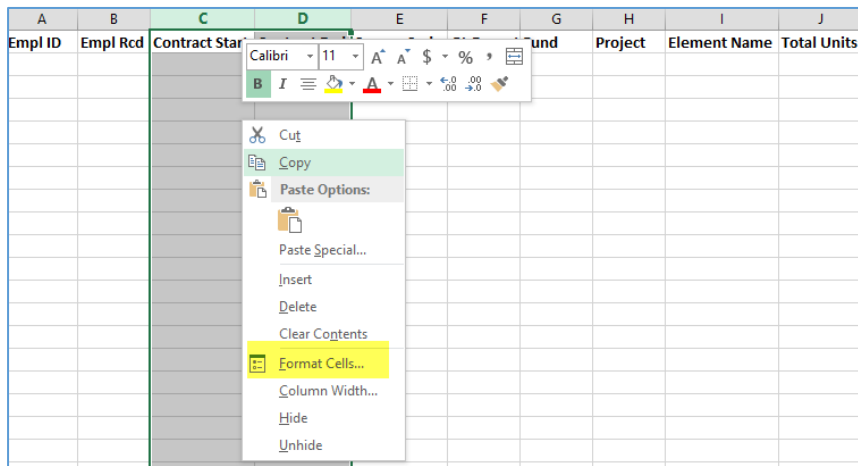
Result: You now have an Excel spreadsheet version that you will populate with your upload data. You now need to [format the date columns](#) to ensure they are the correct date format for upload.

2.3 Format the Date columns

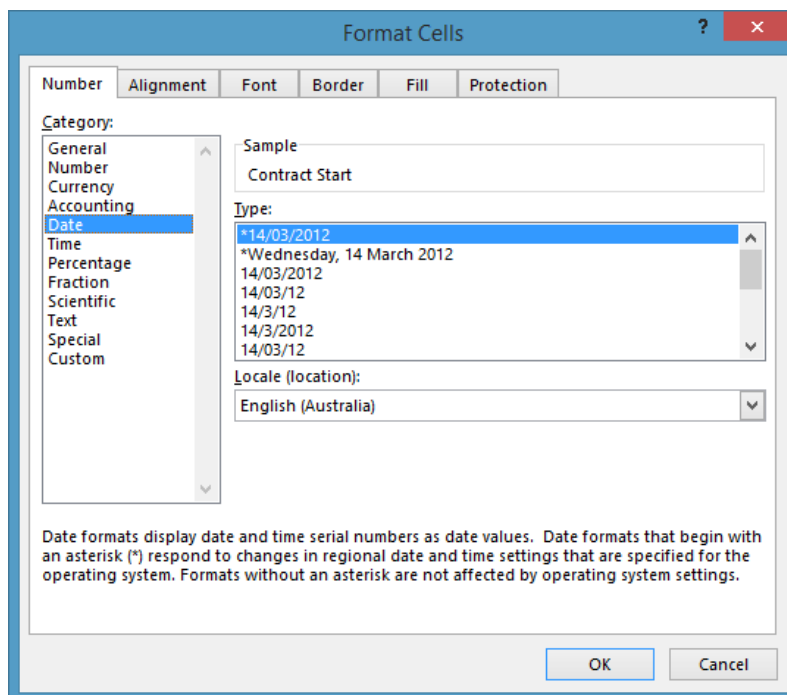
1. Select the *Contract Start* and *Contract End* columns, by selecting the **entire** C and D columns:

A	B	C	D	E	F	G	H	I	J
Empl ID	Empl Rcd	Contract Start	Contract End	Course Code	GL Depart	Fund	Project	Element Name	Total Units

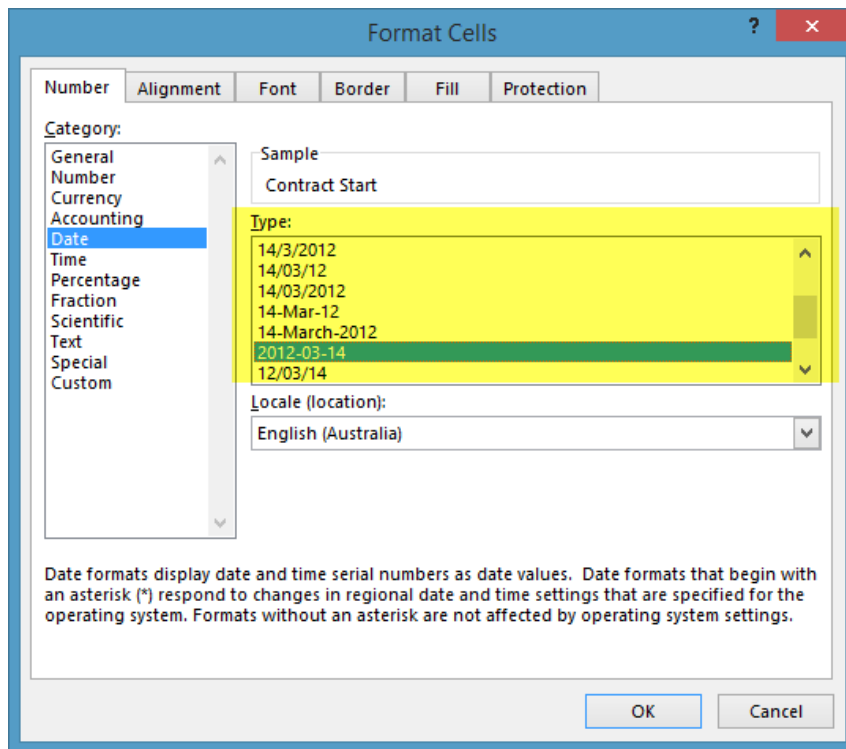
2. Open the *Format Cells* dialogue window by either:
 - pressing **CTRL + 1**, or
 - right click in the highlighted area a select *Format Cells*:



Result: The *Format Cells Dialogue* window is displayed:



3. In the *Format Cells* dialogue window, in the *Category* pane, select *Date*.
4. In the *Type* pane, scroll down the list and select the option: *2012-03-14*



5. Click **OK**.

Result: The *Contract Start* and *Contract End* columns are now formatted to the correct date format for upload. When you enter a date in these fields, it will automatically be converted to the date format required for the bulk upload.

You now need to [populate the spreadsheet](#) with the data to upload.

2.4 Populate the spreadsheet

1. Enter the data you wish to upload.

Notes:

- All uploads must specify the change action for each row, in the *Add/update* column:
 - A – to add to a new contract
 - U – to update an existing contract
- Ensure that all data is sorted first by Employee ID, then Record, then Course
- CSA Lump Sum amounts – enter the total value of the lump sum for the contract period.
- GL Details – Only enter GL Details (GL Department, Fund and Project) if you are overriding the default GL distribution overrides for (in Job Data).

2. Save the file.

Result: you now have an Excel spreadsheet containing all the data you wish to upload. The next step is to convert this file to a comma-separated file that can be uploaded.

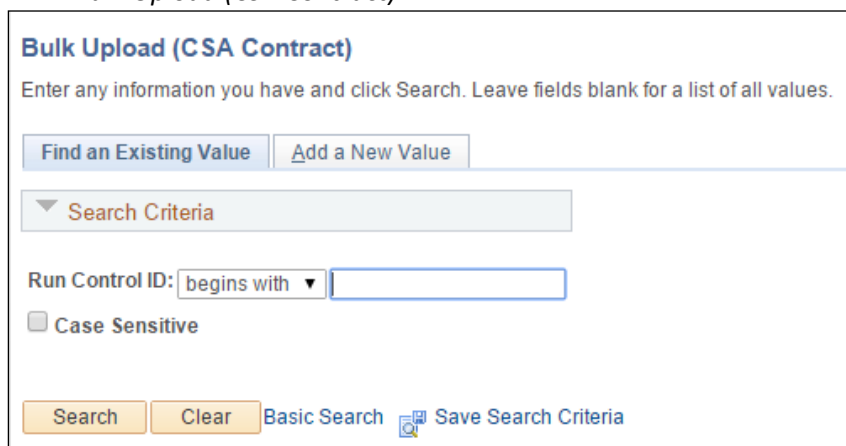
3 Correcting or editing your data

There are two main reasons you may wish to edit your source data:

- preparing new data for upload for a new teaching period.
- there are errors when you uploaded the CSV version of your data.

To edit your data:

1. Open the Excel spreadsheet containing the source data.
2. Make the required changes.
3. Save the Excel spreadsheet as a CSV (see [Creating a comma-separated file](#)).
4. Navigate to: *Global Payroll & Absence Mgmt > Payee Data > Assign Earnings and Deductions > Bulk Upload (CSA Contract)*



Bulk Upload (CSA Contract)
Enter any information you have and click Search. Leave fields blank for a list of all values.

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

▼ Search Criteria

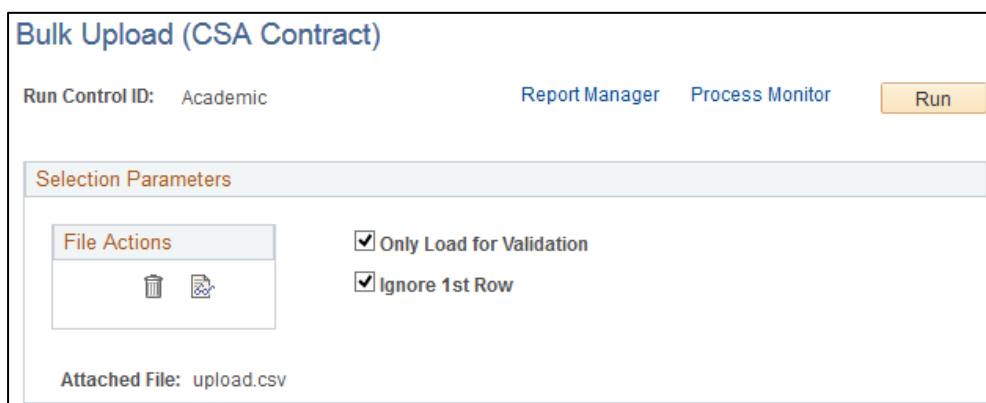
Run Control ID: begins with ▼

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

5. Enter the run control name and click **Search**.

Result: The run control is displayed.




Bulk Upload (CSA Contract)


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

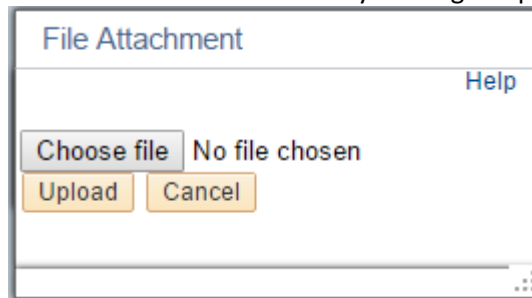
Selection Parameters

File Actions Only Load for Validation
 Ignore 1st Row

Attached File: upload.csv

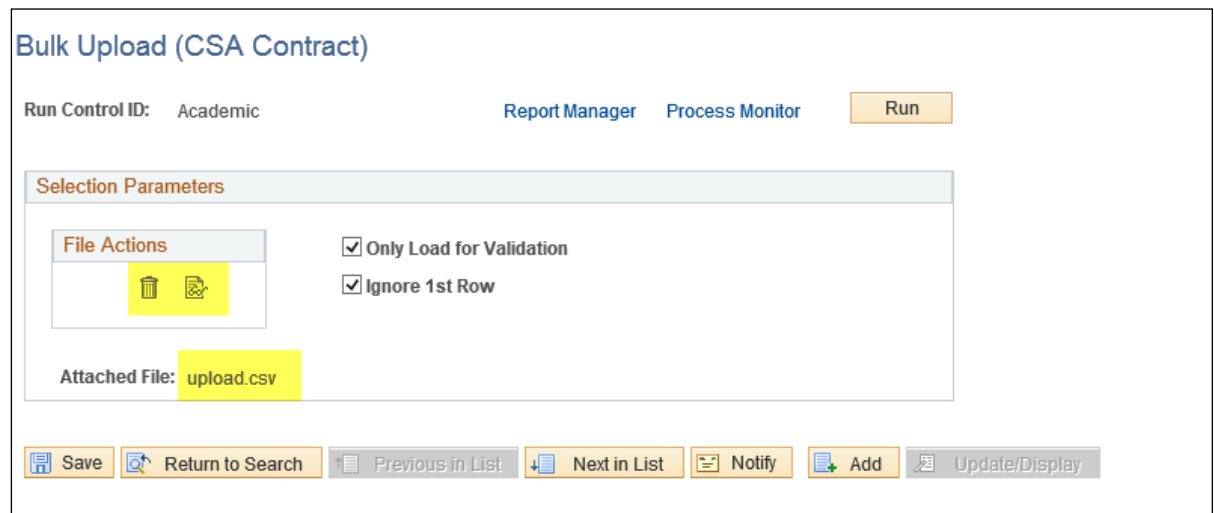
6. Delete your old file by clicking the Trash icon  .

7. Attach the new CSV file by clicking the paperclip icon  .



8. Click the **Choose File** button.
9. Select the new or updated upload file.
10. Click **Upload**.

Result: The upload file is added and you will see the filename against the *Attached File* field:



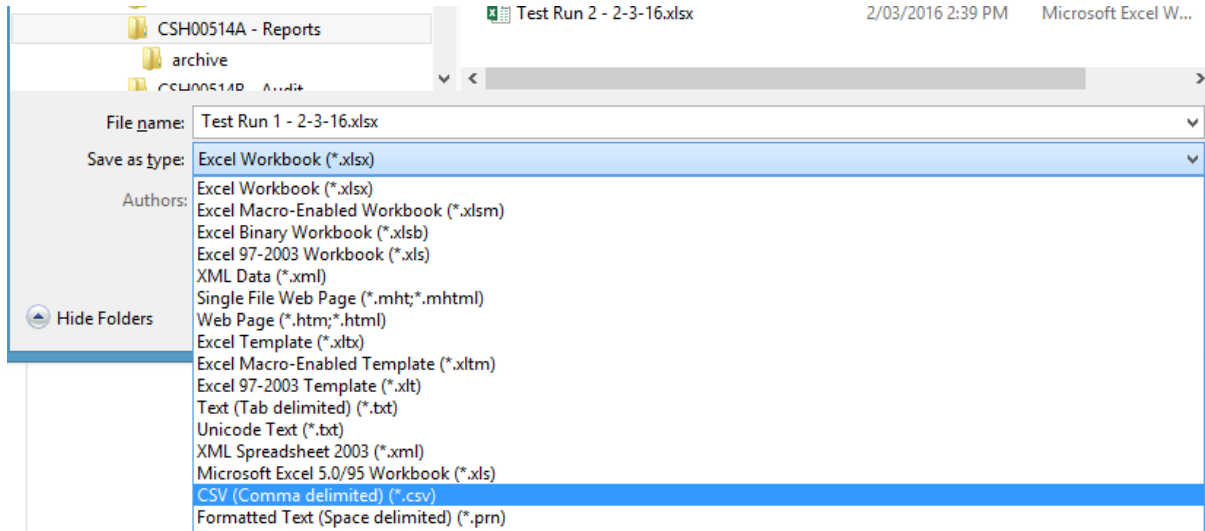
11. Ensure the *Only Load for Validation* checkbox is checked.
12. Ensure the *Ignore 1st Row* checkbox is checked.
13. Click **Run**.
14. Click **OK**.

Result: You will need to [review any messages](#) and if there are any errors, [correct your data](#).

4 Creating a comma-separated file

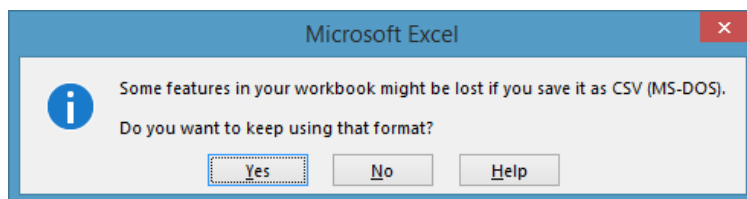
This step describes how to convert the Excel spreadsheet containing your upload data to a comma – separated file (.CSV):

1. Open the Excel spreadsheet containing the upload data.
2. Select: Select: **File – Save As**
3. Select a location for the file.
4. Enter the file name.
5. In the *Save as type* field, select: *CSV (Comma delimited)(*.csv)*

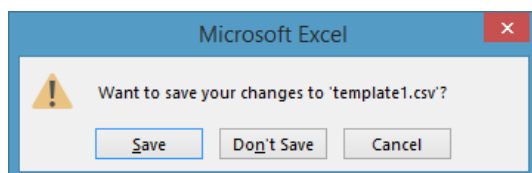


6. Click **Save**.

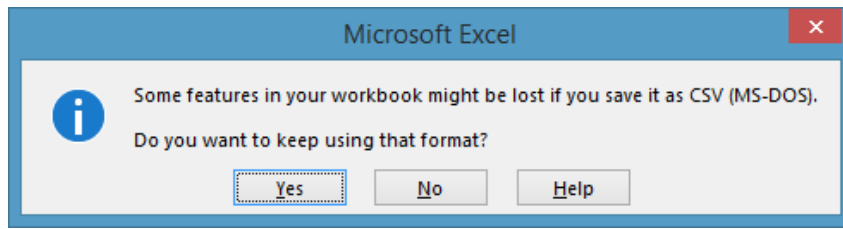
Result: You will be asked to confirm.



7. Click **Yes**.
8. When you close Excel, it will attempt to annoy you by repeatedly prompting you to save changes, even if changes have not been made.



9. Click **Save**.



10. Click **Yes**.

Result: You now have a CSV file that you can [upload](#). See [Sample Upload File](#) for an example of what your upload file should look like.

5 Upload Contract Data

This step describes how to upload your CSV data file to create the casual academic contract data.

5.1 Validate your data

It is advisable to run the *Only Load for Validation* process to validate data prior to running the process in update mode.

1. Navigate to: *Global Payroll & Absence Mgmt > Payee Data > Assign Earnings and Deductions > Bulk Upload (CSA Contract)*

Bulk Upload (CSA Contract)
Enter any information you have and click Search. Leave fields blank for a list of all values.

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

▼ Search Criteria

Run Control ID: begins with ▼

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

2. Do one of the following:
 - If you already have a run control, enter the name and click **Search**.
 - If you have not previously set up a run control, click the *Add a New Value* tab:

Bulk Upload (CSA Contract)

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

Run Control ID:

[Add](#)

3. Enter a name for the new run control and click **Add**

Result: The new run control is displayed.

Bulk Upload (CSA Contract)

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

Selection Parameters


File Actions

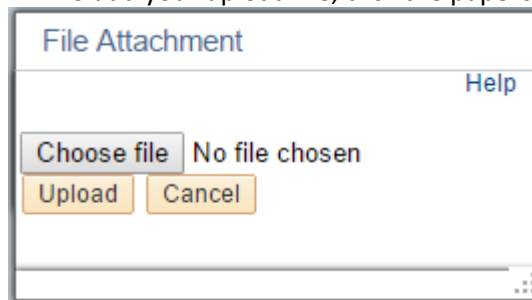
Only Load for Validation

Ignore 1st Row

Attached File:

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

4. To add your upload file, click the paperclip icon .



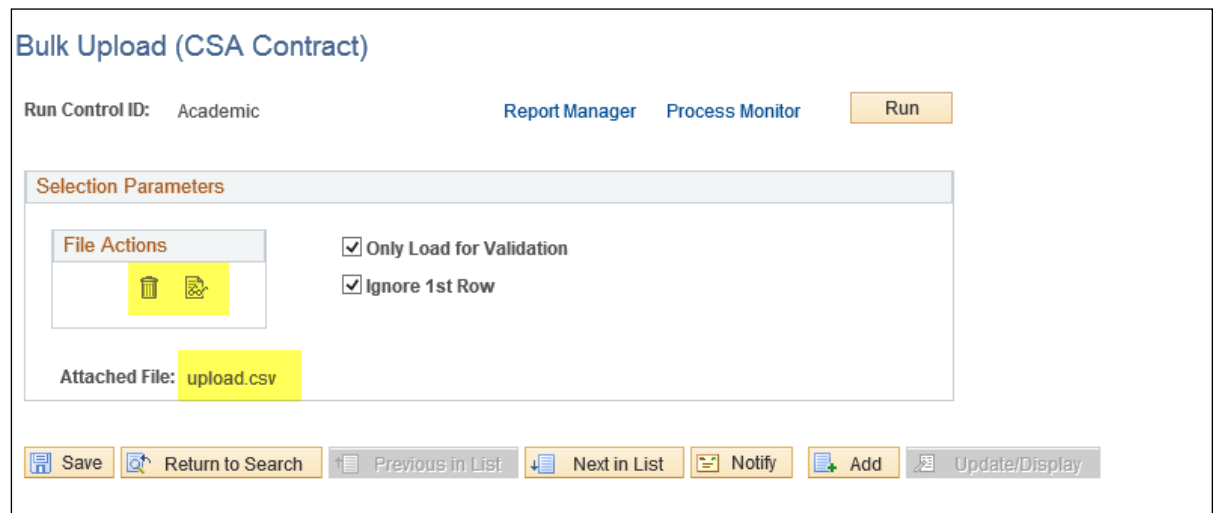
5. Click the **Choose File** button.

6. Select the upload file

Note: The upload file must be in CSV format (see [Creating the CSV file](#))

7. Click **Upload**

Result: The upload file is added and you will see the filename against the *Attached File* field:



8. Ensure the *Only Load for Validation* checkbox is checked.

9. Ensure the *Ignore 1st Row* checkbox is checked.

10. Click **Run**.

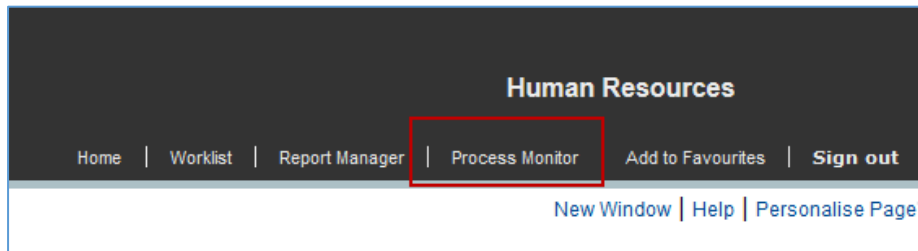
11. Click **OK**.

Result: You will need to [review any messages](#) and if there are any errors, [correct your data](#).

5.2 Review messages

After validating your file, you need to check the messages to ensure that the data is correct format.

1. Go to Process Monitor:



Result: The *Process Monitor* screen is displayed. Note that the *Process Name* for the upload process is: *ANU_CSA_UPLD*

Process List

View Process Request For

User ID: U3516972 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"/>	3931269		Application Engine	ANU_CSA_UPLD	U3516972	17/02/2016 10:03:55 AEDT	Success	Posted	Details

2. Check the Run Status of the process. It should equal *Success*:

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details
<input type="checkbox"/>	3931269		Application Engine	ANU_CSA_UPLD	U3516972	17/02/2016 10:03:55 AEDT	Success	Posted	Details

Note: If the Run Status = *No Success*, it is most likely due to the use of an [incorrect date format](#).

3. Click the *Details* link.

Result: The *Process Detail* screen is displayed.

Process Detail

Process

Instance: 3931269 Type: Application Engine

Name: ANU_CSA_UPLD Description: Bulk Upload (CSA Contract)

Run Status: Success Distribution Status: Posted

Run [] Update Process []

Run Control ID: ACAD_PI

Location: Server

Server: PSNT

Recurrence: []

Hold Request
 Queue Request
 Cancel Request
 Delete Request
 Restart Request

Date/Time

Request Created On: 17/02/2016 10:03:59 AEDT

Run Anytime After: 17/02/2016 10:03:55 AEDT

Began Process At: 17/02/2016 10:04:27 AEDT

Ended Process At: 17/02/2016 10:04:42 AEDT

Parameters: Transfer

Message Log: View Locks

Batch Timings

View Log/Trace

OK Cancel

4. Click the *View Log/Trace* link.

Result: The *View Log/Trace* screen is displayed.

View Log/Trace

Report

Report ID: 1955753 Process Instance: 3931269 Message Log
Name: ANU_CSA_UPLD Process Type: Application Engine
Run Status: Success

Bulk Upload (CSA Contract)

Distribution Details

Distribution Node: HR92ACEP Expiration Date: 04/03/2016

File List

Name	File Size (bytes)	Datetime Created
AE_ANU_CSA_UPLD_3931269.stdout	511	17/02/2016 10:04:42.243000 AEDT
CSA_LOAD_3931269.bt	94	17/02/2016 10:04:42.243000 AEDT

Distribute To

Distribution ID Type *Distribution ID
User U3516972

5. Click the *CSA_LOAD_ .txt* link:

File List

Name	File Size (bytes)	Datetime Created
AE_ANU_CSA_UPLD_3931269.stdout	511	17/02/2016 10:04:42.243000 AEDT
CSA_LOAD_3931269.bt	94	17/02/2016 10:04:42.243000 AEDT

Distribute To

Distribution ID Type *Distribution ID
User U3516972

Result: The log is displayed:

```
Run for Validation Only - changes not committed

Valid contracts: 2
Contracts in error: 0
```

Note: If there are any errors you will need to [correct your data](#) (see [Common Error Messages](#)).

5.3 Run the upload

Note: This step assumes you have [validated your data](#) and [reviewed any messages](#).

1. Navigate to: *Global Payroll & Absence Mgmt > Payee Data > Assign Earnings and Deductions > Bulk Upload (CSA Contract)*

Bulk Upload (CSA Contract)
Enter any information you have and click Search. Leave fields blank for a list of all values.

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

▼ Search Criteria

Run Control ID: begins with

Case Sensitive

[Search](#) [Clear](#) [Basic Search](#) [Save Search Criteria](#)

2. Enter the run control name and click **Search**.

Result: The run control is displayed.

Bulk Upload (CSA Contract)

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

Selection Parameters

File Actions Only Load for Validation
 Ignore 1st Row

Attached File: upload.csv

3. Deselect the *Only Load for Validation* checkbox:

Bulk Upload (CSA Contract)

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

Selection Parameters

File Actions Only Load for Validation
 Ignore 1st Row

Attached File: upload.csv

4. Click **Run**.
5. Click **OK**.

Result: The process is run and you will see the Process ID in the Bulk Upload run control page:

Bulk Upload (CSA Contract)

Run Control ID: Academic Report Manager Process Monitor Run

Process Instance:3931281

Selection Parameters

File Actions

Only Load for Validation
 Ignore 1st Row

Attached File: upload.csv

6. Click the *Process Monitor* link:

Bulk Upload (CSA Contract)

Run Control ID: Academic Report Manager Process Monitor Run

Process Instance:3931281

Selection Parameters

File Actions

Only Load for Validation
 Ignore 1st Row

Attached File: upload.csv

Result: The Process List is displayed. When the process has completed, you will see the *Run Status* = Success and the *Distribution Status* = Posted.

Process List

View Process Request For

User ID: Type: Last: Days:

Server: Name: Instance: to:

Run Status: Distribution Status: Save On Refresh

Process List							Personalise	Find	View All	First	1 of 1	Last
Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details			
<input type="checkbox"/>	3931273		Application Engine	ANU_CSA_UPLD	U3516972	17/02/2016 10:53:18 AEDT	Success	Posted	Details			

7. Optional. [Review the messages.](#)

6 Common Error Messages

When the upload process displays errors, the Log/Trace file will display the rows with the errors. For example:

```
Run for Validation Only - changes not committed
```

```
Contract Data in Error:
```

```
1004,0,2015/10/01,2016-12-31,STAT10,,,,,21,24
```

6.1 No Change Action specified

All uploads must specify the change action for each row:

- A – to add to a new contract
- U – to update an existing contract

If no value is entered, the system will display an error:

```
0,0,E,Change Action of '' not recognised.,,
```

6.2 Not a valid academic

All casuals being uploaded must be valid academics. That is, EmplID/Rcd job code must = ACSA.

```
Component Interface Messages:
```

```
0,0,E,Emplid/EmplRcd Not a Valid Academic: 1004/0,,
```

6.3 Contract Start / End Dates

Date format must follow this convention: **YYYY-MM-DD**. For example, **2015-12-31**.

Note: The course end date should allow enough time for any marking that may take place at the end of a semester.

An example of a date format error is:

```
15,54,M,The highlighted field is required. You must enter a value for it
before
proceeding.{ANU_CSA_CNTRCT,ANU_CSA_CNTRCT_CI.ANU_CSA_EFFDT(1).START_DATE,
15,54,M,The highlighted field is required. You must enter a value for it
before
proceeding.{ANU_CSA_CNTRCT,ANU_CSA_CNTRCT_CI.ANU_CSA_EFFDT(1).END_DATE,
```

6.4 Course Code

```
0,0,E,Invalid Course Code: STAT10,,
```

The course code entered must correspond *exactly* to the course code in the Students system. There should be no space between the alpha and numeric components of the course code. For example, LAWS8900F, *not* LAWS 8900F.

6.5 GL Details

Component Interface Messages:
0,0,E,Invalid GL Dept,,

GL details must be correct and in the correct sequence. If a project code is not relevant, enter the value: **N/A**

Note: You only need to enter GL Details (GL Department, Fund and Project) if you are overriding the default GL distribution overrides for (in Job Data).

6.6 Element / T-code

0,0,E,Invalid Timesheet Code 21,,

All Element Names entered must be valid elements. In the above example, 21 was entered but the correct element name is T21.

6.7 Adding a contract that overlaps with an existing contract

All timesheet periods that are included in the Contract Start Date and Contract End Dates are “owned” by that contract. The system will not permit you to add a contract where it overlaps with the timesheet period owned by an existing contract. The system will tell you the nearest available date (Start or End) that can be used in the contract, that corresponds with the start of the next available timesheet period.

6.7.1 Adding a new contract *following* an existing contract

25610,24,E,Overlap with existing contract for T20160703. Earliest available start date is 04/07/2016.,,

6.7.2 Adding a new contract *before* an existing contract

25610,25,E,Overlap with existing contract for T20150913. The latest available end date is 30/08/2015.,,

6.7.3 Updating a Contract that does not exist

You can only update an existing contract if you specify the same Empl Id and Record and Course of an existing contract. If the combination you enter does not exist and the row is specified as U (Update), you will get the following error:

Component Interface Messages:
0,0,E,Could not find current contract to update.,,

7 Updating an Existing Contract via Bulk Upload

Note: Updating existing contracts using bulk upload should be done with caution as you are not able to specify the effective date of the change. This can result in negative remaining unit values in a CSA timesheet, preventing managers from approving timesheets.

If there are only a few contracts to be updated or the change is likely to result in negative T-code budgets in timesheets, you should update each relevant contract directly in HRMS via: *Global Payroll & Absence Mgmt > Payee Data > Maintain Timesheets > CSA Contract*

To update contract/s via the bulk upload:

1. Create a new master copy of your upload spreadsheet, containing only the Empl ID / Record / Course combinations that you want to update.
2. Include the new changes (for example, T-codes that need to be added to the contract or existing T-code budgets that need to be changed).
3. Ensure that the *Add/update* column is showing as **U** for all rows.
4. Save the Excel spreadsheet as a new version.
5. [Create a comma-separated file](#).
6. [Upload the contract data](#). Note that the effective date of each updated contract will be changed to the date of your new upload and may result in negative remaining units in existing timesheets.

7.1 Adding a new T-code

You can do this by entering a new row with the new T-code and budget in your upload file. Make sure the row specifies it is an update: Add/update value = **U**.

For example, let's say you created a contract for a CSA for course LING1002, with 25 units of T44. You discover that you need to add 10 units for T12. In your new upload file, you need to have a row for T-code T12. Your upload for update will look like this:

```
Employ ID,Empl Rcd#,Contract Start,Contract End,Course Code,GL Dept,Fund,Project,Element Name ,Total Units , Add/update  
5001312,2,2017-02-15,2017-07-14,LING1002,,,,,T12,10,U
```

7.2 Updating Dates Only

The dates in your original upload file rows can be edited and the file uploaded. GL and T-code columns can be blank.

Example upload file:

```
Employ ID,Empl Rcd#,Contract Start,Contract End,Course Code,GL Dept,Fund,Project,Element Name ,Total Units , Add/update  
5001312,2,2017-02-16,2017-07-15,LING1002,,,,,U
```

8 FAQs

8.1 What Contract End Date do I enter?

The *Contract Start Date* and *Contract End Date* determine the timesheet periods available to the academic. When setting the *Contract End Date*, you should allow for marking time (where applicable) and the end of the exam period (for the relevant teaching period).

8.2 What happens when I upload my CSV file more than once?

When administrative staff are uploading the data into HRMS, sometimes multiple or secondary entries may occur.

All uploads must specify the change action for each row:

- A – to add to a new contract
- U – to update an existing contract

If the bulk upload is done on the same day, the re-uploaded version will overwrite the first, if the *Add/update* column is set to **U**.

For example, if the original upload was 3 units of T21 and the second upload was 2 units of T21, the result would be the latest upload: 2 units for T21. If the re-upload occurs on a different day, you will get the same result with the only difference being the creation of a new row with the effective date of the day of the re-upload.

Note: If you want to add more T-codes and run a bulk upload to update an existing contract, you will need to ensure that the upload file contains:

- the old T-codes, with any revised budgeted units (where applicable)
- the new T-codes.

9 Sample Upload File

The following examples show you what a typical CSV bulk upload file will look like.

9.1 Viewed in Excel

Employ ID	Empl Rcd#	Contract Start	Contract End	Course Code	GL Dept	Fund	Project	Element Name	Total Units	Add/update
4021972	2	4/04/2016	3/11/2016	BIOL3103				T44A	13	A
4021972	2	4/04/2016	3/11/2016	BIOL3103				116	2000	A
4021972	2	4/04/2016	3/11/2016	RUSS1900				T44A	12	A
4021972	2	4/04/2016	3/11/2016	RUSS1900				116	1080	A
3431614	0	11/02/2016	11/09/2016	RUSS1900				116	1300	A
3431614	0	11/02/2016	11/09/2016	RUSS1900				T21	15.5	A
3965528	0	11/02/2016	11/09/2016	SEAS6926				116	1307	A
3965528	0	11/02/2016	11/09/2016	SEAS6926				T12	13.5	A

9.2 Viewed in Notepad

Employ ID,Empl Rcd#,Contract Start,Contract End,Course Code,GL Dept,Fund,Project,Element Name
,Total Units , Add/update

```
4021972,2,2016-04-04,2016-11-03,BIOL3103,,,,,T44A,13,A
4021972,2,2016-04-04,2016-11-03,BIOL3103,,,,,116,2000,A
4021972,2,2016-04-04,2016-11-03,RUSS1900,,,,,T44A,12,A
4021972,2,2016-04-04,2016-11-03,RUSS1900,,,,,116,1080,A
3431614,0,2016-02-11,2016-09-11,RUSS1900,,,,,116,1300,A
3431614,0,2016-02-11,2016-09-11,RUSS1900,,,,,T21,15.5,A
3965528,0,2016-02-11,2016-09-11,SEAS6926,,,,,116,1307,A
3965528,0,2016-02-11,2016-09-11,SEAS6926,,,,,T12,13.5,A
```