Excel To Component Interface Utility
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FAQ

Question: What is the Excel to CI utility?
Answer: The Excel to CI utility has been developed to replace PeopleSoft Import Manager. It enables you, as the user, to upload data into the target PeopleSoft database from an Excel Spreadsheet utilising all the business logic and editing provided by PeopleSoft.

Question: Where can I find the Excel to CI utility?
Answer: Every PeopleSoft installation will have a copy of the Excel to CI utility. The file is called ExcelToCI.xls and can be found in <PS_HOME>\excel directory.

Question: Are there any limits to this utility?
Answer: Yes, Excel allows a maximum 252 columns and 65,000 rows.

Question: Do I need to have database connectivity?
Answer: No, Excel to CI uses HTTP and SOAP messaging removing the need for database connectivity.

Question: Are there any specific settings I need to be aware of?
Answer: Yes, Macro security needs to be set to low or medium. Also, the PeopleSoft user must have access to the ExcelToCI code via permission lists.
Coversheet

The coversheet sheet provides general information about the Excel to CI utility and specific details about the functionality of each tab in the workbook.

This sheet should be reviewed thoroughly before continuing.
Connection

This sheet holds detail about the PeopleSoft environment connectivity. This information will be used for the purposes of downloading component interface templates and submitting data to the target PeopleSoft database.

Looking at the URL address for your PeopleSoft site will provide most of the information you require for this sheet (see example below).

<table>
<thead>
<tr>
<th>Web Server Machine Name:</th>
<th>The name of the PeopleSoft web server to connect to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Protocol:</td>
<td>The protocol used to access the web server.</td>
</tr>
<tr>
<td>HTTP Port:</td>
<td>The port number that the web server uses</td>
</tr>
<tr>
<td>Portal:</td>
<td>The name of the portal</td>
</tr>
<tr>
<td>PeopleSoft Site Name:</td>
<td>The name of the PeopleSoft site.</td>
</tr>
<tr>
<td>Node:</td>
<td>The PeopleSoft node.</td>
</tr>
<tr>
<td>Language Code:</td>
<td>The code for the language used in the data to be submitted to the database</td>
</tr>
<tr>
<td>Chunking Factor:</td>
<td>The number of rows of data to be uploaded to the database at given time</td>
</tr>
</tbody>
</table>
Error Threshold: The total number of errors that are permitted before submission to the database stops. An error message will appear when the number of errors has exceeded.

Action: This field is populated with valid actions when a new Component Interface is downloaded. Valid actions include create (create new rows of data), update (creating and appending new child rows) and updatedata (update existing non-key fields).

Example

URL: http://psoft.company.com:8050/psp/PSPRD/EMPLOYEE/ERP/h/?tab=DEFAULT

Web Server: psoft.company.com
Protocol: HTTP
HTTP Port: 8050 (if no port specified then likely to be 80)
Portal: EMPLOYEE
PeopleSoft Site: PSPRD
Node: PT_LOCAL
Language Code: ENG
Chunking Factor: 40
Template

This sheet allows you to download Component Interface templates from your PeopleSoft database and then select what fields you wish to use in your data load submission.

A template actions toolbar is provided when you open this sheet and helps facilitate the downloading of CI structures, field selection and defaults.

Toolbar Actions

**New Template:** This action will build a new template based on component interface structure. You will be prompted for a PeopleSoft login and password and Component Interface name.

**New Data Input:** This option will build a new data input spreadsheet based on the cells that have been selected and included for submission.

**Select All Input Cells:** This will select all fields for data entry.

**Restore All Input Cells:** This option will restore the template to the original form and clear all default values.

**Insert New Child:** This option will copy the selected row to be inserted as a new child.

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1 Component Interfaces allow you to load data into PeopleSoft using all the business logic and data structures available through normal online transacting.
include all for submission: this will include all fields in the template for data submission. the fields will be included in staging and submission sheet but not in the data input sheet. if the fields are populated in the template sheet then it will default this value for all of the data entry rows.

include for submission: this will allow a field to be included in the data submission. the field will appear in the staging and submission sheet but not in the data input sheet. if the field is populated in the template sheet then it will default this value for all of the data entry rows.

deselect input cell: stops the field from being included in the submission.

clear template: removes the template currently loaded.

do not include for submission: does not include the selected field(s) in the submission.

**template properties**

collection: the name of the component interface.

property: the name of the field in the component.

record type: the type of record. this is a number that represents the parent/child relationship.

field type: the type of field e.g. character, number.

key/required: indicator to show if field is a key and/or required.

sequence: sequence number that represents the field order
Create a New Template

1. Press the New Template button
2. Enter a valid PeopleSoft user id.
3. Enter the password for the user id.
4. Enter a valid Component Interface id.
5. Press OK.

Note: The Generate Log checkbox will provide debug information if checked. This information will be recorded in log files in the c:\temp directory. This will provide XML message data being passed to and received from PeopleSoft.

6. Highlight individual cells or multiple cells you wish to include in the data entry sheet and press the Select Input Cell button.
7. Select individual cells or multiple cells you wish to include in the submission sheet and press the Include for Submission button (this is used for setting up default values).
8. Select individual cells or multiple cells you do not wish to include in the data entry sheet and press deselect input cell button.
9. Press the New Data Input button to generate the data input template based on the cells that you have setup on the Template sheet.
PeopleSoft Toolbox Overviews

Excel To CI Overview
Data Input

The data input sheet is used for the purposes of data entry. After this sheet has been updated with the template column names, data can either be pasted or entered manually.

A data input toolbar is provided when you open this sheet and is used to prepare the data for submission. This will automatically put the data in the correct hierarchical structure as well as adding the blue submission fields defined in the template sheet.

When all the data that you wish to submit has been entered then press the Stage data for submission button on the toolbar.
Staging & Submission

This sheet previews the data that will be submitted to the PeopleSoft database. It will also provide feedback with regards to the submission of data.

The toolbar that is provided has two buttons. The submit data button will post data to the PeopleSoft database. The Post Results button will take the results of data submission and update the Data Input page with submission status.

Submit data and Post results

1. Press the submit data button
2. Enter a valid PeopleSoft user id.
3. Enter the password for the user id.
4. Press the OK button.

The data will now be posted to PeopleSoft via XML messaging. The results of the submission will be written in the status column. There are 3 possible status values returned:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>OK</strong></td>
<td>The row of data has been submitted successfully.</td>
</tr>
<tr>
<td><strong>Error</strong></td>
<td>The row of data has not been saved. Hover the mouse cursor over the cell to display the details of the error.</td>
</tr>
<tr>
<td><strong>Warning</strong></td>
<td>The row of data has been submitted and saved. There are warning messages when this record has been saved. Hover the mouse cursor over the cell to display the details of the error.</td>
</tr>
</tbody>
</table>
Once the data has been submitted the results should be posted back into the Data Input sheet. Any errors can be corrected in this sheet and then the process of staging for submission and then submitting can be executed again (this is an iterative process).
Troubleshooting

**PeopleBooks**

Before using Excel to CI it is worth referring to the Component Interface PeopleBooks. There is a section for the Excel to CI utility.

**Security**

It is important that the user submitting the data has access to the component interface and SOAPTOCI web libraries. Access to the component interface and web library can be granted through permission lists. The SOAPTOCI web library security is normally found in the peoplesoft user permission list.

**Component Interface Tester**

Component Interfaces can be tested via Application Designer. Open Application Designer, open the component interface in question and select Test Component Interface from the tools menu. You will be able to create, update or find records via the tester. Once a record has been loaded or created you can populate the applicable fields and then choose to save the record by right clicking the root node in the tree and choosing save. The feedback window will provide information with regards to edit and lookup failures. Refer to Component Interface PeopleBooks for further information.

**Invalid Characters**

Make sure that there are no invalid characters in the data input screen. Often a single quote (’) will not be accepted and will generate an error during submission.

**Complex Structures and Data volumes**

Be careful when dealing with complex structures and large data volumes. This can often cause the web server to timeout and random errors being generated.
Tracing

When submitting data to the database it is worth checking the Generate Log check box. This will cause two log files to be created each time the data is submitted.

SOAPTOCIxxx.log: This log is created in the application server files directory and shows the peoplecode execution path in the SOAPTOCI application package. The xxx suffix will be replaced with the datetime stamp.

ExcelToCIxxx.log: This log is created in the local temp directory and shows the SOAP formatted messages that are submitted to the PeopleSoft environment.

If the tracing is not adequate enough then the tracing level on the application server can be raised to provide a greater level of information.

Peoplecode Triggering

Certain peoplecode events are not triggered during the submission of data via Component Interface. This may results in effects that you do not expect. Refer to the Component Interface PeopleBooks for further information.

Customer Connection

Search the Solutions available on Customer Connection. Typically ExcelToCI solutions have “ExcelToCI” in the summary.