

University Mailing Upload Process - Instructions

Purpose

Tub-level HR administrators can use these instructions to assist them in preparing and uploading the University Mailing Address spreadsheet. This is a multi-step procedure that requires you to:

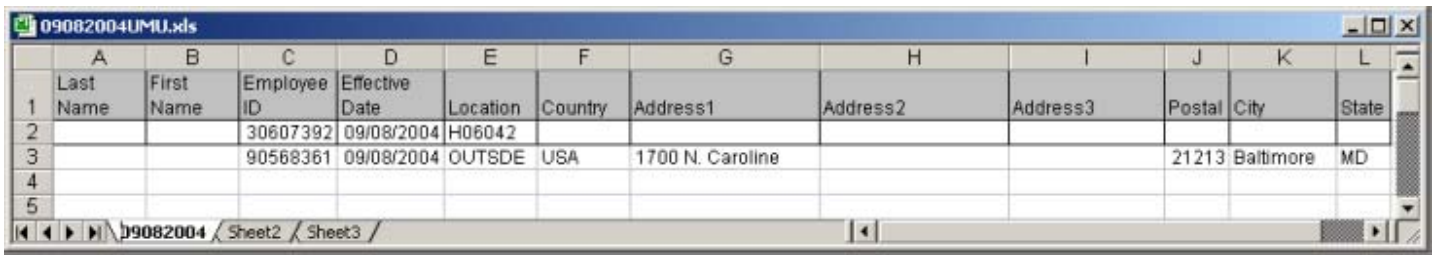
- Download the University Mailing Address Excel spreadsheet from ABLE
- Add employee address information to the spreadsheet
- Upload data into PeopleSoft
- Verify that the changes were successful

Helpful Hints

- Make sure you download the latest version of the Excel "Univ_Mail_Addr_Template.xls" from the ABLE Forms page at <http://able.harvard.edu/documents/search.do>.
- The tool supports two types of University Mailing Address location updates:
 1. Valid Harvard locations (locations that are listed in PeopleSoft).
 2. Non-Harvard locations (location code = 'OUTSDE') that are in the United States.

Note: This process cannot be used for uploading University mailing addresses that use the location code of "OUTSDE" and are not in the United States.

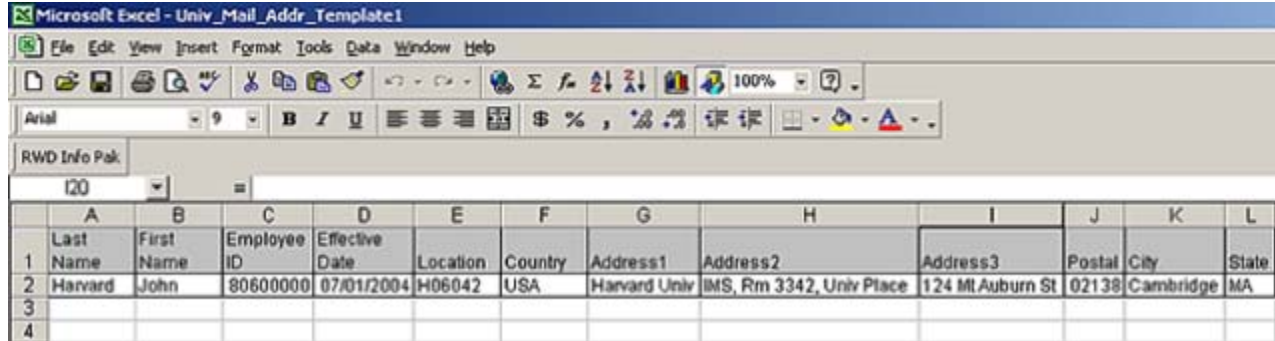
Example spreadsheet



	A	B	C	D	E	F	G	H	I	J	K	L
	Last Name	First Name	Employee ID	Effective Date	Location	Country	Address1	Address2	Address3	Postal	City	State
1			30607392	09/08/2004	H06042							
2			90568361	09/08/2004	OUTSDE	USA	1700 N. Caroline			21213	Baltimore	MD
3												
4												
5												





Procedure

1. Open the Excel "Univ_Mail_Addr_Template.xls" file.



2. Starting in the second row (overwrite or delete the John Harvard example), fill in the Excel spreadsheet as follows:




A. For employees with valid **Harvard office locations**, fill in the following fields:

Required Fields	Description	Notes
Employee ID	Enter the employee's HUID number.	Make sure you enter the correct HUID.
Effective Date	Enter the date the new University mailing address will become effective using the mm/dd/yyyy format.	<p> You cannot use an effective date on the upload file that is earlier than any effective date on the employee's record.</p> <p> To make a correction to an employee's address, use the same date as the current effective date in PeopleSoft. When the file is uploaded, the employee's record will be updated without inserting a new row.</p> <p> To insert a new row, use an effective date that is later than the current effective date in PeopleSoft.</p>
Location	Enter the location code.	<p> If you enter data in the Address3, City, State, or Postal fields, the values MUST match the field values on the PeopleSoft location table. If the fields do not match, the record will fail.</p>

Optional Fields	Description	Notes
Last Name	Enter the employee's last name.	Informational only – no impact on upload process.
First Name	Enter the employee's first name.	Informational only – no impact on upload process.
Address1	Enter the address information.	Use this field only if the Address1 is different from the default location value in PeopleSoft.
Address2	Enter the address information.	Use this field only if the Address2 is different from the default location value in PeopleSoft.

Procedure [cont.]

- B.** For employees with **non-Harvard office locations** (location code = 'OUTSDE') in the United States, fill in the following fields:

Required Fields	Description	Notes
Employee ID	Enter the employee's HUID number.	Make sure you enter the correct HUID.
Effective Date	Enter the date the new University mailing address will become effective using the mm/dd/yyyy format.	<p> You cannot use an effective date on the upload file that is earlier than any effective date on the employee's record.</p> <p> To make a correction to an employee's address, use the same date as the current effective date in PeopleSoft. When the file is uploaded, the employee's record will be updated without inserting a new row.</p> <p> To insert a new row, use an effective date that is later than the current effective date in PeopleSoft.</p>
Location	Enter "OUTSDE."	Using the location code of "OUTSDE" indicates that there is no location code in PeopleSoft for this address.
Address1	Enter the street address information.	You must provide at least one line for the street address.
Postal	Enter the postal code.	The postal code will be used to validate both the city and state values.

Optional Fields	Description	Notes
Last Name	Enter the employee's last name.	Informational only – no impact on upload process.
First Name	Enter the employee's first name.	Informational only – no impact on upload process.
Country	Enter "USA."	If left blank on the spreadsheet it will default to "USA" in PeopleSoft.
Address2	Enter the address information.	This is an optional field.
Address3	Enter the address information.	This is an optional field.
City	Enter the city.	This is an optional field. The city field must correspond to the postal code or the record will fail.
State	Enter the state.	This is an optional field. The state field must correspond to the postal code of the record will fail.

Procedure [cont.]

3. When you have finished entering all of the employee records, choose **File → Save As**.
4. In the **Save As** dialog box, create a new file name for your spreadsheet.
5. Set the **Save as type**: to "Text (Tab delimited) (*.txt)."
6. Click **Save**.
7. When warned that the "selected file type does not support workbooks with multiple sheets," click .
8. When warned that the "file may have features that are not compatible with Text," click .
9. Exit Microsoft Excel.
10. When asked to "save changes," click .
11. Open PeopleSoft and follow the navigation path: **Home → Administer Workforce → Administer Workforce (GBL) → Process → Univ Mailing Address Upload**.
9. Click and select a **Run Control ID** from the list.



If you have never created a **Run Control ID**, click [Add a New Value](#), type a **Run Control ID** name, and then click .

10. Click .
11. Click .
12. Select the appropriate file to upload and click . This will return you to the File Upload screen.
13. Click .
14. Click the drop-down arrow on the **Server Name** field and select **PSUNX**.
15. Click . This will return you to the File Upload screen.



Make a note of the **Process Instance** number that is directly below the RUN button.

16. Click [Process Monitor](#) to view the status of the extract you are uploading.
17. Click .
18. When the run status of your extract changes to "Success," click [Home](#).
19. Follow the navigation path: **Home → Administer Workforce → Administer Workforce (GBL) → Inquire → Univ Mailing Address Upload**.

Procedure [cont.]

20. Enter the **Process Instance** number and click Search .



If you did not use any of the search fields, click on the row that matches the file you just uploaded from the list of search results.

21. Review the fields in the Univ Mailing Addr Inquiry screen. The Process Status fields will tell you what happened to each record you uploaded.

22. For records that were unsuccessful, review the error message (see the error messages section below) and correct the Excel spreadsheet. Repeat the upload process, starting at step 3.

Error Messages

Error Messages	Correction Step
Emplid is invalid	Verify the employee's EMPLID.
Location is invalid	Verify that the location number matches the value on the PeopleSoft location table. For a list of valid Harvard locations, run the Location Listing (SCLOCLS045) report in CREW.
<i>Fieldname</i> is required	Make sure all of the records have values in the following fields: <ul style="list-style-type: none"> ▪ Emplid ▪ Effdt ▪ Location
Future rows exist for this employee	Employee cannot have an effective date greater than the effective date on the upload file.
Mismatch address to location table values	If Address3, City, State, or Postal on upload file are populated, the field values must match the field values on the location table when location <> "OUTSIDE."
City/State field values are not valid for postal code	If Location equals "OUTSIDE" and Country equals "USA," City/State must match the returned values for postal code.

Uploading a Corrected File



When re-uploading a corrected file, it is not necessary to delete the records that were successful from the prior upload. As long as the effective date equals the existing effective date, the current data will overwrite the prior upload without inserting a new row.

Results

You have submitted University Mailing Address information for one or more employees.