UNIVERSITY OF TORONTO

Create Absences (IT2001) from Excel Spreadsheet

Contents

Procedure Overview

Overview   To gain an understanding on how to create multiple absence (time management) record from an Excel spreadsheet by recording the following:

- Absence Date
- Absence Type
- Absence Hours (half-day)

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> **INFO TIPS**
>
> **The HRIS Team recommends that uploads be completed before any pay close date due to the nature of the system and the high volume of transactions being completed on those dates, uploads may get put in a queue for processing and miss payroll deadlines.**
>
> Please ensure that prior to preparing this spreadsheet for execution you must verify that all the employees you wish to pay are active and that all entries on the spreadsheet are correct (i.e. correct personnel number, proper funding / cost assignment information, reason codes for wage types which require reason codes, hours for wage types that require hours for payment).

Step 1: Update Excel Spreadsheet

1. Download the Excel Absence Upload spreadsheet at:
   https://utoronto.sharepoint.com/:x:/r/sites/hre-hris/_layouts/15/Doc.aspx?sourcedoc=%7B3B987EA7-B422-434B-A627-1ACD36AD8258%7D&file=Absences-IT-2001.xls&action=default&mobileredirect=true to your local drive.
2. Save the file with the naming convention format **USERPP01XXXX.xls**
   Where:

   > **USER:** Represents the first 4 letters of your **USERID**
   > **PPNN:** Indicates the current pay period (i.e. **PP01** for Payroll Period 01)
   > **XXX:** Any 3 characters

3. Enter the data on the spreadsheet and save.

Excel Absence Spreadsheet

	A	B	C	D	E	F
1	**Please consult the Absence / Attendance Type Chart to ensure that all required information is compl					
2	*Hours Per Day: Leave blank unless partial day(s). Default is full day according to work schedule.					
3	Pers #	Start Date	End Date	Abs./ Att. Type	*Hours Per Day	
4						
5						
6						
7						
8						
9						
10						
11						

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Field	Description
Personnel Number	Enter the personnel numbers for the employee whose absence you are recording.
Start Date	Enter the start date of the absence you are recording. (Please ensure that the format of the date is the HRIS default date format of DD.MM.YYYY or if you are an HRIS user, and have changed your date format use whatever date format you have set your default to.)
End Date	Enter the end date of the absence you are recording. (Please ensure that the format of the date is the HRIS default date format of DD.MM.YYYY or if you are an HRIS user, and have changed your date format use whatever date format you have set your default to.)
Abs. / Att. Type	Select the appropriate absence type from the drop down pick list. Each form of absence is represented by an specific absence type number. To find more information about absence types please see the Absence / Attendance type chart on the HRIS Systems Training and Support Centre website.
Hours Per Day	Enter the hours taken on if partial days were taken. (**Note:** You do not need to enter full day hours as they will default in HRIS once uploaded if this field is left blank.)

Step 2: Run Fast Entry Infotype 2001 Upload Program (Test Session)

1. Enter the Transaction Code ZHMU02001_EXCEL (ZHMU2001_EXCEL) in the top toolbar or;
2. Click on the following Menu Path: **Human Resources → Personnel Management → Administration → HR Master Data →Fas Entry Processing → Fast Entry – Infotype 2001**
3. Enter the saved excel file (with the USERPP01XXX.xls name that you have saved.) in

Excel file [   ].

Click to browse to your local drive to find the excel file.

4. Enure that ☑ Test (No BDC Created) has a **check**.
5. Click to execute a **test** run.

Output Data (Test Session)

The Output Data Screen will appear with the information organized in a table with the following headings

> **INFO TIPS**
>
> Verify if the output is correct and click ⟳ to proceed to Step 3 if no errors. Otherwise, correct the spreadsheet, save and proceed back to Step 2.

Step 3: Run Fast Entry Infotype 2001 Upload Program

> **INFO TIPS**
>
> You may run this operation between the hours of 7:00am – 5:00pm.
>
> If you are running this on a pay close ensure you upload the sheet well in advance of 5:00 pm. Due to the nature of the program and influx on pay close uploads are put in a queue.

1. Enter the saved excel file (with the USERPP01XXX.xls name that you have saved.) in

   | Excel file | | |

   Click 🗗 to browse to your local drive to find the excel file.

2. Remove the **check** in ☐ Test (No BDC Created)

3. Click ⏰ to execute and create a BDC session.

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Output Data

The Output Data Screen will appear with the information organized in a table with the following headings:

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INFO TIPS	Click [icon] to download the output to Excel for comparison or reference **(Optional)** Click **BDC Sessions** to go to **Batch Input: Session Overview** screen and confirm your session has been completed and resolve any errors that might have occurred.

Step 4: BDC Batch Input Session Status Confirmation

1. Check the **Session name**. This is the same name that was created in the output data of Step 3.

2. Check the **Status** which indicates if batch session was processed successfully.
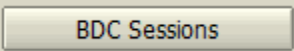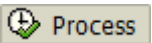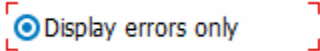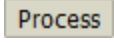
[clock icon]	Indicates batch is in queue to be processed (not yet processed)
[check icon]	Indicates a successfully run batch
[error icon]	Indicates batch has errors and must be corrected.

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> **Note:** Processing time depends on the number of screens that will be processed. If session has not been processed, please return after an hour to check the status again. (See Step 4)

3. Check the total number of transactions $\boxed{\Sigma \text{ Trans.}}$.

4. Check the number of errors $\boxed{\quad}$. These records need to be corrected and re-processed.

5. Check the number of transactions that were processed successfully $\boxed{\checkmark}$
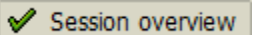
6. If there are no errors, click 🏠 to exit from the screen.

Step 5: BDC Batch Input Session Error Correction

1. In the **Create Infotype 2001 (Absence) from Excel Spreadsheet** screen, click $\boxed{\text{BDC Sessions}}$.

2. In the **Batch Input: Session Overview** screen, click $\boxed{\quad}$ to select the BDC session that has errors and needs to be re-processed.

3. Click $\boxed{\text{⊕ Process}}$.

4. In the **Process Session (BDC Session Name)** pop-up window, choose
   ⊙ Display errors only

5. In the **Process Session (BDC Session Name)** pop-up window, click $\boxed{\text{Process}}$.

6. You will be prompted for all errors. Click ✅ to get to your error. Once at the error, correct it. Then, press **Enter** to accept the correction and move forward to the next error. (Repeat the same process until complete)

> **INFO TIPS**
>
> **Note:** If you need to skip the record to the next, you can type **/n** in the command field $\boxed{\quad}$ (just above the screen title). Type **/bend** to exit from the session overview.

7. Once you have completed all the errors, you will receive a pop up window with the message **"Processing of batch input session completed".** Click $\boxed{\checkmark \text{ Session overview}}$.

   Note: Now you should see the status indicator for the BDC session created in Step 4 has changed to indicate a successfully processed batch input. If there are still errors, repeat No. 5 of this step until all transactions are completely successful.

8. Click 🏠 to exit from the screen.

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