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TRIUNE INFOMATICS, INC



PeopleSoft Integration Tips and Techniques

– Rahul Kuruvilla

PeopleSoft HR Scorecard

– Tejune Kang

January 2008 – Northern California OAUG

ORACLE PARTNER





Agenda

- Six Dimensions – Who Are We? – Jason Akima
- Presenters Overview
- Integration Tips and Techniques, Rahul Kuruvilla
- PeopleSoft EPM - HR Scorecard, Tejune Kang
- Questions
- *IPOD Give-Away!*



Six Dimensions



Six Dimensions is a privately held San Ramon, California-based company that provides expert staff augmentation solutions for enterprise software and technology projects. We help organizations secure the greatest value from their technology investments by providing top-tier talent to augment current staff.

The Oracle Partner logo, featuring the word "ORACLE" in white on a red background, followed by the word "PARTNER" in black on a white background, all enclosed in a rounded rectangle.

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Six Dimensions



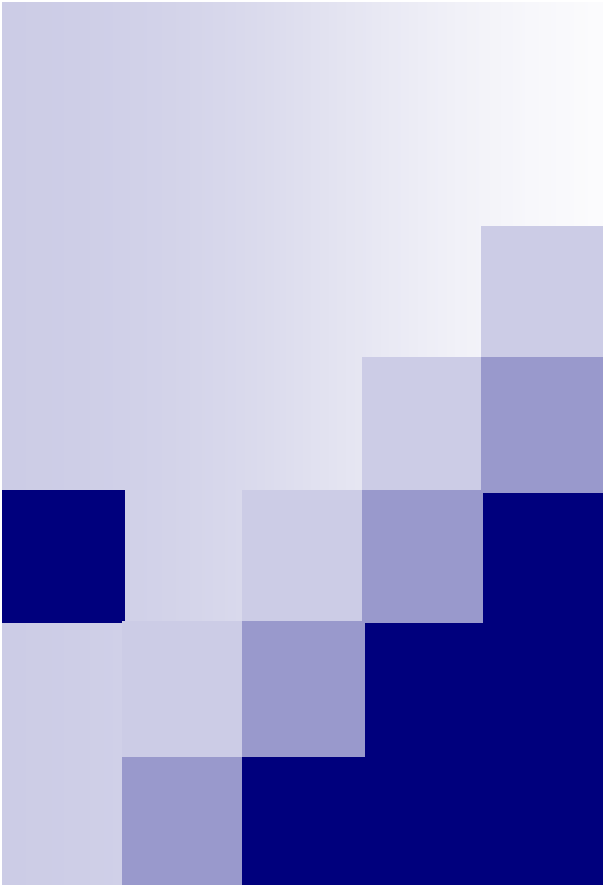
- Founded in 2004
- Based in San Ramon
- Certified PeopleSoft Consultants
- Former PeopleSoft Employees
- Current Clients Include:
 - Boeing
 - PMI
 - Business Objects
 - Dolby
 - Cal State East Bay
 - HP
 - Arizona Public Services (APS)
 - ...and more!

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Presenters

- Rahul Kuruvilla, Principal of Triune Infomatics, Inc.
 - Six Dimensions Partner
 - Former PeopleSoft Employee
 - Technical Engineer
- Tejune Kang, Founder of Six Dimensions
 - Former PeopleSoft Employee
 - PeopleSoft EPM Specialist
 - Modules: Budgeting, Enterprise Scorecard, WFA, and more..



Integration Tips and Techniques

- Rahul Kuruvilla



ExcelToCI

- Excel to Component Interface utility to upload data from Microsoft Excel into your PeopleSoft database, using component interfaces



- The component interface executes all the necessary PeopleCode events and the field-level edits.
- Based upon results from saving the component interface, another DOM is created in the PeopleCode that returns success, warnings, and/or errors to the Microsoft Excel document.
- Records in error can be corrected and resubmitted



Word of Caution

- A Microsoft Excel spreadsheet has a physical limitation of 252 columns and 65,000 rows
- Also because of Microsoft Excel's high memory requirements, performance with more complex component interfaces will be inhibited.
- Number of cells containing values on any one sheet should be less than **1,000,000**. Failure to ensure this can potentially result in serious performance issues with Microsoft Excel, including crashes



How to Use ExcelTOCI

- To launch the Excel to Component Interface utility, you will need to locate the ExcelToCI.xls executable file in the PS_HOME\excel folder.
- In addition, you will need to perform the following tasks:
 - Grant access to the iScript WEBLIB_SOAPTOCI.
 - Enable macros in Microsoft Excel.



Enable macros in Excel

- Open the Excel to Component Interface utility.
- From the Excel menu, select Tools, Macros, Security.
- Select either Medium or Low to enable the macros.
- Select OK.



Flat File Import Using File Layout

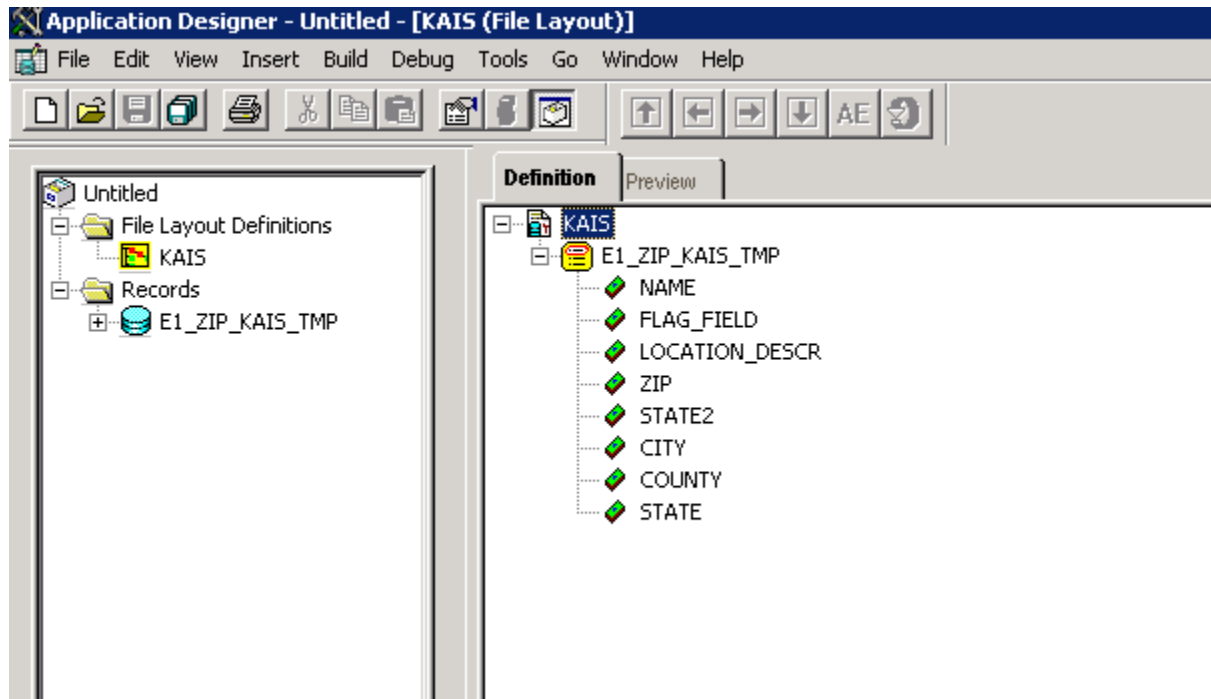
- ExcelToCI is a great utility when you want to use CI to validate the data being imported.
- If you want to load data without validation and with minimum effort –Flat File Import using File Layout is the one of the best options.

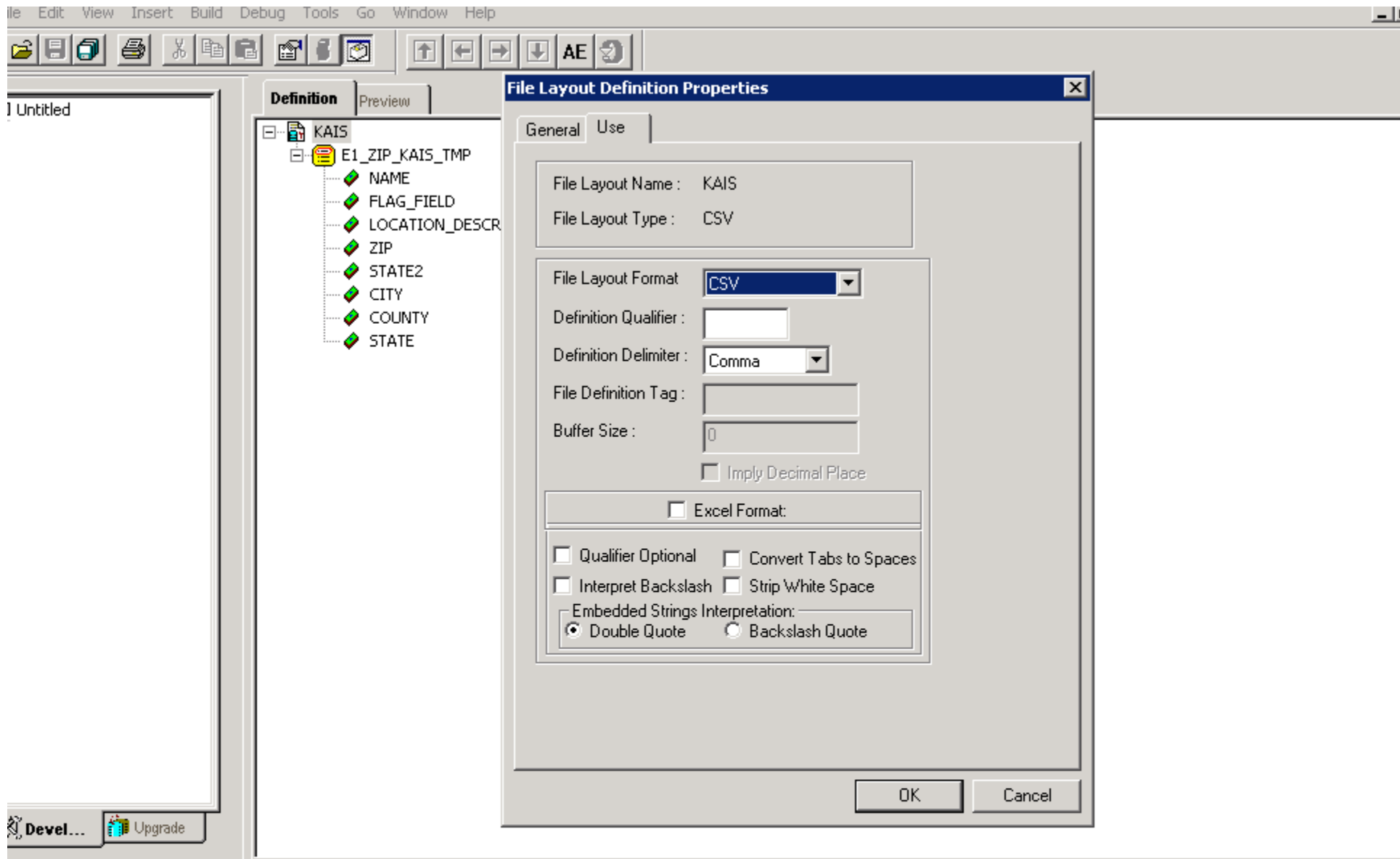


Steps to Use File Layout

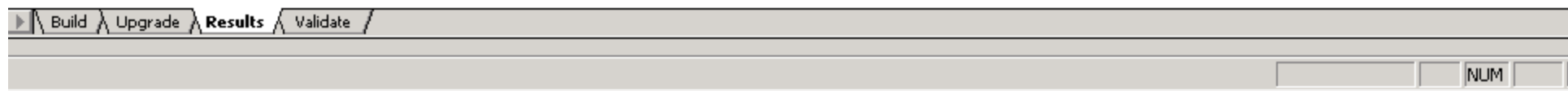
- Create a Record definition to correspond to the data being imported.
- Create a file Layout based on the record.
- Make sure to preview the file being imported to validate that the file layout is correct.

File Layout Definition





ening project ...
otal definition(s) in project.



Application Designer - Untitled - [KAIS (File Layout)]

File Edit View Insert Build Debug Tools Go Window Help



Untitled
File Layout Definitions
KAIS
Records
E1_ZIP_KAIS_TMP

Definition Preview

Segment Name

E1_ZIP_KAIS_TMP

☐ Trim Spaces

Default File Name:

C:\KAIS.csv

Browse

Field Type

Character

☐ Upper Case

Decimal Position

0

Description

	Field Name
1	NAME
2	FLAG_FIELD
3	LOCATION_DESCR
4	ZIP
5	STATE2
6	CITY
7	COUNTY
8	STATE

Field Length

0

Field Qualifier

Strip Characters

Default Value

Field Inheritance

Record

Field

	NAME	FLAG_FIELD	LOCATION_DESCR	ZIP	STATE2	CITY	COUNTY	STATE
1	Kaiser Found		Northern California	93230	NCAL	HANFORD	KINGS	CA
2	Kaiser Found		Northern California	93232	NCAL	HANFORD	KINGS	CA
3	Kaiser Found		Northern California	93242	NCAL	LATON	FRESNO	CA
4	Kaiser Found		Northern California	93601	NCAL	AHWAHNEE	MADERA	CA
5	Kaiser Found		Northern California	93602	NCAL	AUBERRY	FRESNO	CA



ep01 [aestep]

OnExecute

```

End-If;
Else
    &LOGFILE.WriteRowset(&RS);
    &LOGFILE.WriteLine("****Correct error in this record and delete all error messages");
    &LOGFILE.WriteRecord(&REC2);
    For &L = 1 To &RS2.GetRow(&I).ChildCount
        &RS1 = &RS2.GetRow(&I).GetRowset(&L);
        If (&RS1 <> Null) Then
            &LOGFILE.WriteRowset(&RS1);
        End-If;
    End-For;
End-If;
End-For;
End-Function;

em *****;
em * PeopleCode to Import Data *;
em *****;

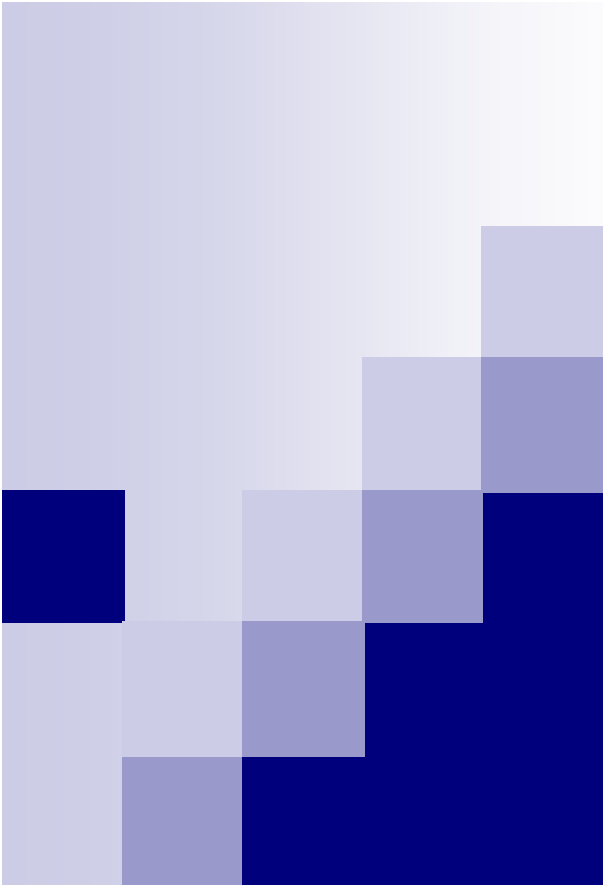
local File &FILE1;
local Record &REC1;
local SQL &SQL1;
local Rowset &RS1, &RS2;
local integer &M;

FILE1 = GetFile("C:\KAIS.csv", "r", "a", %FilePath_Absolute);
LOGFILE = GetFile("C:\KAIS.csv.err", "w", %FilePath_Absolute);
FILE1.SetFileLayout(FileLayout.KAIS);
LOGFILE.SetFileLayout(FileLayout.KAIS);
RS1 = &FILE1.CreateRowset();
RS = CreateRowset(Record.El_ZIP_KAIS_TMP);
SQL1 = CreateSQL("%Insert(:1)");
RS1 = &FILE1.ReadRowset();
while &RS1 <> Null;
    ImportSegment(&RS1, &RS);
    &RS1 = &FILE1.ReadRowset();
end-while;
FILE1.Close();
LOGFILE.Close();

```

```
SELECT * FROM PS_E1_ZIP_KAIS_TMP
```

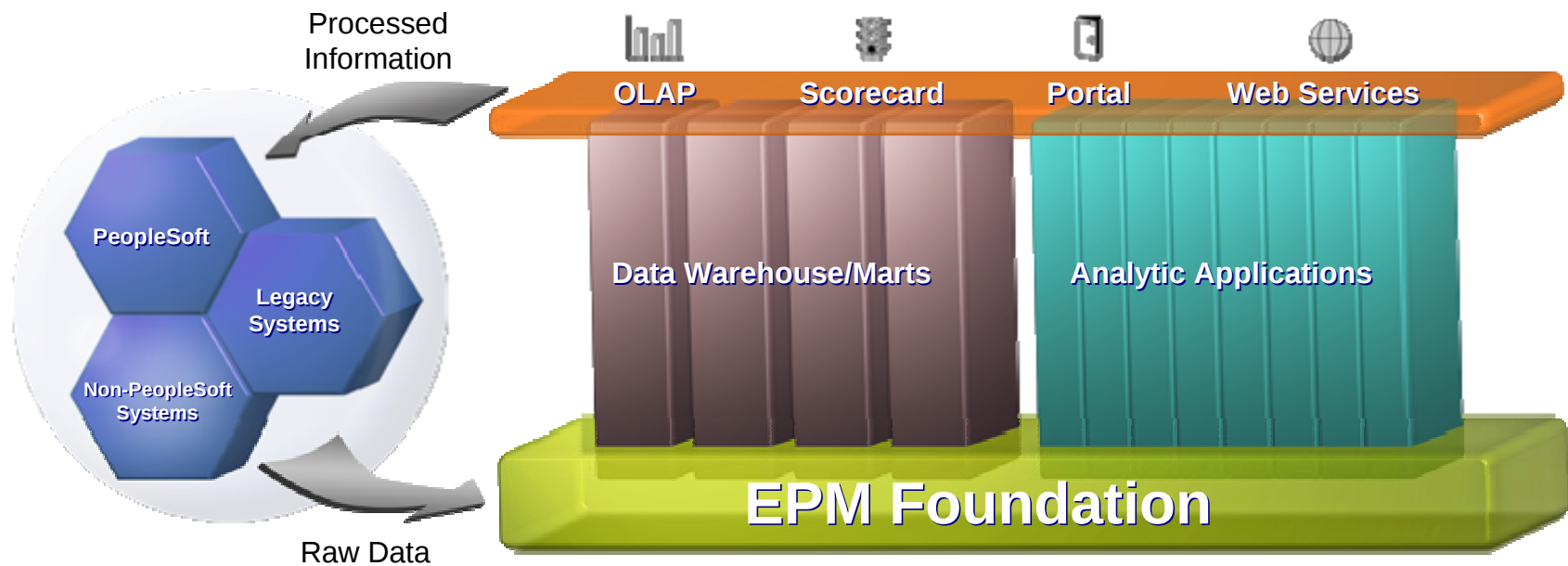
	NAME	FLAG_FIELD	LOCATION_DESCR	ZIP	STATE2	CITY	COUNTY	STATE
	Kaiser Foundation Health Plan Inc.		Southern California	93544	SCAL	LLANO	LOS ANGELES	CA
	Kaiser Foundation Health Plan Inc.		Southern California	93550	SCAL	PALMDALE	LOS ANGELES	CA
	Kaiser Foundation Health Plan Inc.		Southern California	93551	SCAL	PALMDALE	LOS ANGELES	CA
	Kaiser Foundation Health Plan Inc.		Southern California	93552	SCAL	PALMDALE	LOS ANGELES	CA
	Kaiser Foundation Health Plan Inc.		Southern California	93553	SCAL	PEARBLOSSOM	LOS ANGELES	CA
	Kaiser Foundation Health Plan Inc.		Southern California	93560	SCAL	ROSAMOND	KERN	CA
	Kaiser Foundation Health Plan Inc.		Southern California	93561	SCAL	TEHACHAPI	KERN	CA
	Kaiser Foundation Health Plan Inc.		Southern California	93563	SCAL	VALYERMO	LOS ANGELES	CA
	Kaiser Foundation Health Plan Inc.		Southern California	93581	SCAL	TEHACHAPI	KERN	CA
	Kaiser Foundation Health Plan Inc.		Southern California	93584	SCAL	LANCASTER	LOS ANGELES	CA
	Kaiser Foundation Health Plan Inc.		Southern California	93586	SCAL	LANCASTER	LOS ANGELES	CA
	Kaiser Foundation Health Plan Inc.		Southern California	93590	SCAL	PALMDALE	LOS ANGELES	CA
	Kaiser Foundation Health Plan Inc.		Southern California	93591	SCAL	PALMDALE	LOS ANGELES	CA
	Kaiser Foundation Health Plan Inc.		Southern California	93599	SCAL	PALMDALE	LOS ANGELES	CA
	Kaiser Foundation Health Plan Inc.		Southern California	93036	SCAL	OXNARD	VENTURA	CA



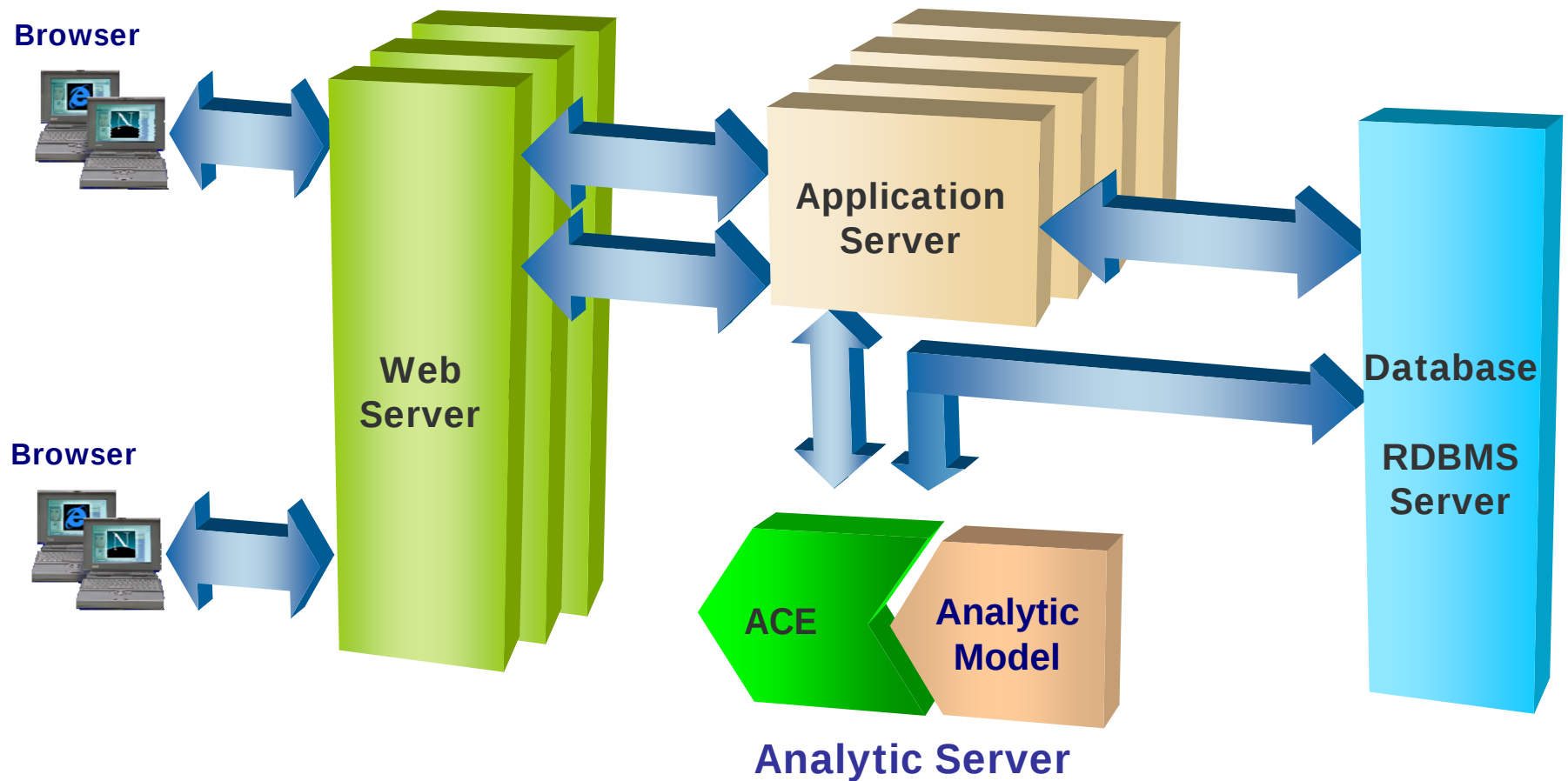
PeopleSoft EPM Scorecard

- Tejune Kang

EPM Architectural Overview

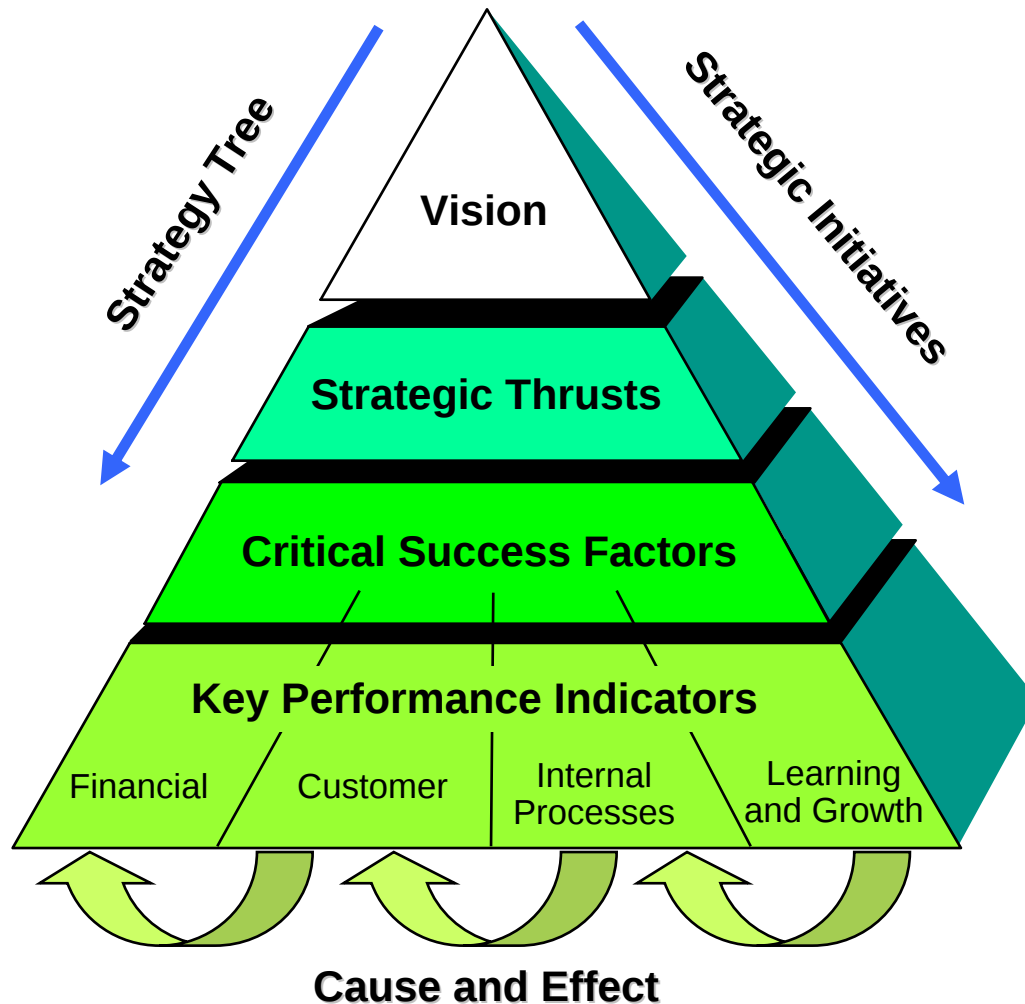


PeopleSoft EPM Architecture



Balanced Scorecard Framework

Measure the factors that create value for the organization



- Where is the organization going?
- What is our strategy?
- What do we need to do well to achieve our strategy?
- How do we measure how well we are doing?



Enterprise Scorecard

Key Terminology

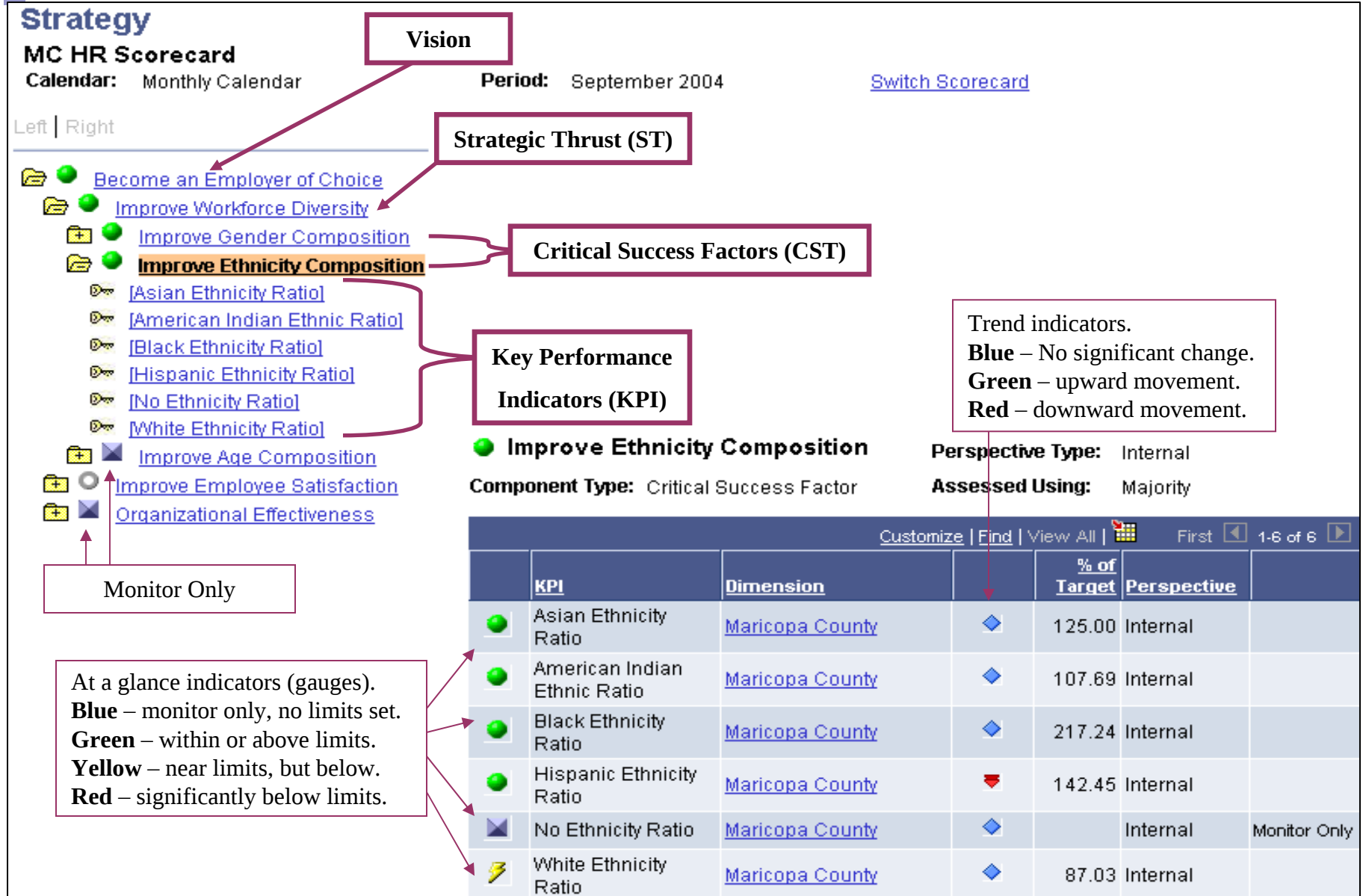
- Vision - The highest level of your strategy.
The general **Theme** that states what you want to achieve.
- Strategic Thrusts (ST) - Core components of your strategy.
Goals your organization is striving to achieve.
- Critical Success Factors (CSF) - Specific **Tasks** that an organization must do well, or excel at, to achieve its goals.
- Key Performance Indicators (KPI) - **Measurements** of how well an organization is doing in achieving the CSFs.



It is all in a name....

- Where is the organization going?
 - What are the key components of our strategy?
 - What do we need to do well to achieve our strategy?
 - How do we measure how well we are doing?
- Corporate Vision
 - Mission statement
 - Statement of Direction
 - Strategic Thrust (ST)
 - Strategic Theme
 - Strategic Directive
 - Critical success factors (CSF)
 - Strategic Objectives
 - Objectives
 - Key Performance Indicators (KPI)
 - Measures
 - Metrics

Example – Maricopa County Scorecard





1. Questions?
2. IPOD Giveaway!





Contact Information

Jason Akima

- Director of Business Development
- jason.akima@six-dimensions.com
- 510.633.1262

Come visit us at our booth later today!
- another IPOD drawing!



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