BP.010.051 – UPLOADING PERSONAL SERVICES RAISES

Purpose	To adjust raise amounts by Position based on a user-created upload spreadsheet.
Description	The Raise Upload process updates the different raise fields (Merit, Promotion, Equity, and Budget Adjust) at the Position and Earn Code level. Data can be exported to a spreadsheet, modified by the user, then loaded back to a staging table using the Personal Service Upload process before being posted with the Personal Service Post process, updating Personal Services data in Budget Prep.
Security Role	BOR_BP_PROCESSES
Dependencies/ Constraints	• User completed all Budget Prep Setup steps. • User ran the HCM Import process in Create Report/Run HCM Import mode.
Additional Information	None

Procedure

Below are complete step-by-step instructions on completing the Raise Upload for Budget Prep Processing.

Step	Action
1.	Click the **NavBar** icon.
2.	Click the **Navigator** icon.
3.	Click the **Reporting Tools** link.
4.	Click the **Query** link.
5.	Click the **Query Manager** link.
6.	Click the **Fringe Update** link.
7.	Search for query "**BOR_BP_PERS_SERV_EXPORT**."
8.	Click the **Run to HTML** link.
9.	Enter the appropriate Business Unit in the **Business Unit** field.
10.	Enter the Budget Reference of the year being developed in the **Budget Reference** field.
11.	Select a specific department to extract or enter a "%" wildcard in the **Department** field to return data for all departments.
12.	Click the **Excel SpreadSheet** link to download results.
13.	Open the downloaded file in Excel and update values in the Merit Amount, Equity Adjustment Amount, Budget Adjustment, and Promotion Amount columns. ***Note**: Remove rows for any positions not being updated. The upload and post process will update all fields to match the upload spreadsheet including overwriting previously entered raises. Any negative amounts entered in Merit, Equity Adjustment, or Promotion fields will result in the Skip checkbox being selected for the applicable position.*
14.	Save the modified file as "Text (Tab Delimited) (*.txt)"
15.	Click the **NavBar** icon.
16.	Click the **Navigator** icon.
17.	Click the **BOR Menus** link.
18.	Click the **BOR Budget Prep** link.
19.	Click the **Budget Prep Processing** link.
20.	Click the **Personal Service Upload** link. The Run Control ID page opens.
21.	Add a new value or use an existing **Run Control ID**.
22.	Enter the appropriate Business Unit in the **Business Unit** field.

Step	Action
23.	Click the **Add** button to open the File Attachment dialog.
24.	Click **Choose File** and attach the *.txt format file from step 14.
25.	Click the **Upload** button to upload the attachment and confirm that the Server File Name: and Local File Name: fields populate.
26.	Click the **Run** button. The Process Scheduler Request page opens.
27.	Verify default values pre-populate.
28.	Click the **OK** button. The system navigates to the Personal Service Upload page.
29.	Click the **Process Monitor** link.
30.	Click the **Refresh** button. Select Refresh until the Run Status displays as 'Success' and the Distribution Status displays as 'Posted.'
31.	Click the **Details** link to view the Process Detail.
32.	Click the **View Log/Trace** link.
33.	Review the .out format file for a list of any positions that were not loaded to staging. ***Note****: The upload process will reject positions with merit raises greater than the defined maximum raise amount. Other positions will still load to staging, but any positions listed on the .out file will need raises entered manually.*
34.	Click the **NavBar** icon.
35.	Click the **Navigator** icon.
36.	Click the **BOR Menus** link.
37.	Click the **BOR Budget Prep** link.
38.	Click the **Budget Prep Processing** link.
39.	Click the **Personal Service Post** link.
40.	The Run Control ID page opens. Add a new value or use an existing **Run Control ID**.
41.	Enter the appropriate Business Unit in the **Business Unit** field.
42.	Click the **Run** button. The Process Scheduler Request page opens.
43.	Verify default values pre-populate.
44.	Click the **OK** button. The system navigates to the Personal Service Post page.
45.	Click the **Process Monitor** link.
46.	Click the **Refresh** button. Select Refresh until the Run Status displays as 'Success' and the Distribution Status displays as 'Posted.'
47.	Click the **Details** link to view the Process Detail.
48.	Click the **View Log/Trace** link.