Overview

Brief overview of module processes.
Notice about the new version of PeopleSoft
All page shots used in this guide are from the previous version of PeopleSoft (HCM 8.9). Please be advised that from the fourth week of February 2012, we are using the new version of PeopleSoft (HCM 9.0) and you may experience a difference in the way the new pages look and feel.

In the new version of PeopleSoft (HCM 9.0), the format of how the Main Menu expands has changed, but the actual navigation path and functionality has not changed. See the sample page shot.

Other minor changes include the following:

- Improved color scheme
- New look for Processing and Save indicators
- Pop-up Search Window and Edit Boxes
- Number of Search Results Option
- Type Ahead Matching
Run C2K Processes

Login to VPN Client

1. Login to VPN Client

2. Click Connect, and enter password.

Login to Secure File

1. Login to Secure File Transfer Client.
2. Go to Profile `ebc2kftp` and enter password.

3. Find the file and open to make sure that all data needed for the transaction is in the file and that the columns line up.

4. If the columns don’t line up for you to read the data, then go to the menu and choose **Format** and click on **Word Wrap**. Once data is verified, close the file WITHOUT saving.

   *Note: If there is data missing (e.g. term), the processes may be successful, but the charges will not post to the students account.*
Login to PS and load the data


1. Enter
   - Language: English
   - Academic Institution: HW001
   - C2K Input Source: C2K
   - C2K Transaction Type: Regular

2. Enter the input file path and name.


4. Make sure the box is selected.

5. Go to Process Monitor to make sure the file ran and posted successfully as seen below.
Review the loaded data

Navigate to East Bay SA > Student Financials > C2K Interface > Use > C2K Int – Loaded Students.

1. Make sure data looks valid and note the Batch Number.

Run the Search/Match process

Navigate to East Bay SA > Student Financials > C2K Interface > Process > C2K Interface – Search/Match.

1. Enter the correct Batch Number.
2. Click on Search/Match Parameters.
3. Enter **EB_TRADITIONAL** for Search Parameter.

4. Select
   - **New: Add**
   - **Order Nbr 10 & 20**
   - **One Match: Update**
   - **Multiple Matches: Suspend**

5. Select **Run** and check the **Process Monitor** to make sure the file ran successfully.

**Review the data**

Navigate to East Bay SA > Student Financials > C2K Interface > Use > C2K Int – Loaded Students.

1. Type in the **Batch Number** and click on **Search**.

2. Make sure data looks valid.
Run the Search/Match Post process

Navigate to East Bay SA > Student Financials > C2K Interface > Process > C2K Interface – Search/Match Post.

1. Make sure to enter the correct Batch Number and all other data shown.

2. Select the Run button.

3. On the Process Scheduler, make sure the box is selected and click OK.

4. Check the Process Monitor to make sure data ran and posted successfully.

Navigate to East Bay SA > Student Financials > C2K Interface > Use > C2K Int – Loaded Students.

5. Type in the Batch Number and click on Search.

6. Make sure data looks valid.

7. Suspended items will not be loaded. Leave them suspended and go back to fix later.

8. Print out this page in landscape and highlight the suspended items so that you will know exactly where they are.

9. Work on the list later (You can always put students into suspended mode.)

10. If all is OK, CONTINUE.
Run the Transaction file process
This process creates a new file and matches the item code to the item type. (We need to create a new file for corrections.)


1. Make sure to change file extension to .dat.

2. Make sure to enter the correct batch number, file name and path, and all other data shown. Select the run button.

3. On the Process Scheduler, make sure the box is selected and click OK.

4. Check the Process Monitor to make sure data ran and posted successfully.
5. Go back to the Secure File Transfer Client.

6. On the remote side, open the .dat file from above and make sure that the data lines up correctly at this point before loading. Refresh the site if you don’t see the file. If all looks fine, close the file.

Note: The totals at the bottom of the file for the next process.
Run the External file process

Navigate to Student Financials > Group Processing > External Files.

1. Make sure to enter correct file and directory information below.

2. There is NO extension needed on the file name.


4. On the Process Scheduler, make sure the box is selected and click OK.

5. Check the Process Monitor to make sure data ran and posted successfully.
Run the Create Group Data Entries process

Navigate to Student Financials > Group Processing > Create Group Data Entries.

1. Search Group ID by your last User ID line and click on it.

2. Enter Original Group ID number.

3. Make sure that Control Total and Entered Total matches the totals from the .dat file.

4. Make sure that Balance Group box is checked.

5. Click the Save button.

Run the Post Transactions process

Navigate to Student Financials > Group Processing > Post Transactions.

1. Enter Group ID for Starting and Ending Group ID.

2. Click the Run button.
3. Make sure **Group Post Process** box is checked.

4. Click **OK**.

5. Check the **Process Monitor** to make sure data ran and posted successfully.

6. Go back to **Create Group Data Entry** to make sure that the data posted. **Posted Total** should match the numbers above and the `.dat` file.

7. Save copies of the files from ebc2kftp.

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**Whom to Contact for Help?**

For additional help or to report problems with this functionality, please log a ticket via the [Service Desk](http://www.csueastbay.edu/servicedesk).