

SESSION #10666

Business Process Weaver – Automation please!

Agenda

- Introductions
- Business Process Weaver Overview
- Solution
- Business Process Weaver Configuration Steps and Security
- Tips and Lessons Learned

Meet the Team



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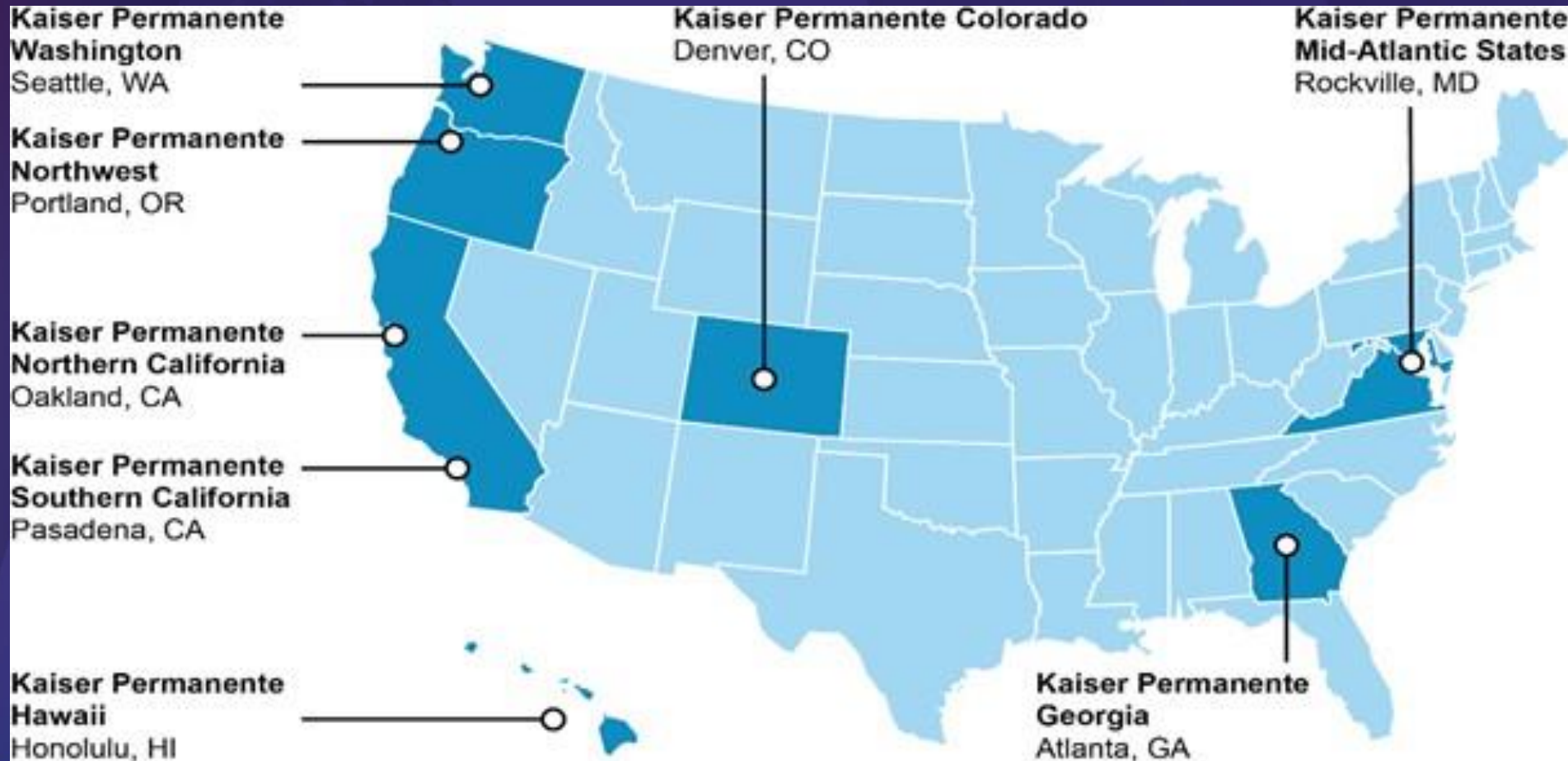
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SpearMC
Managing Director,
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Session Overview

PeopleSoft Business Process Weaver (BPW) provides a framework that allows processes (tasks), such as batch programs, to be defined and executed either in parallel or in sequence as part of a business process. Come learn about the functionality and how Kaiser Permanente rolled out the feature as a part of it's recent Billing Automation project.

KP Grants Markets



About Kaiser Permanente

We Are the Nation's Largest Integrated Health System...

23.7 K +
physicians
deliver high-quality
care to
Kaiser Permanente
members



12.6 M
people
get care + coverage
from Kaiser Permanente


\$93.1B
revenue




217K +
employees
improving the health
of people + communities


39
Hospitals
+

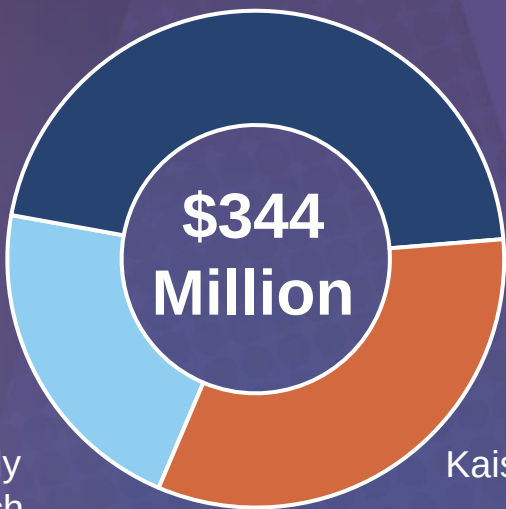
734
medical
offices

65 K +
nurses
are at the center
of our care



Kaiser Permanente Research Fast Facts, 2022

Funding in 2022^a



\$161 M
Federally-funded research

\$84 M
Other externally funded research

\$99 M
Kaiser Permanente support

Research Studies Underway in 2022



30%
Clinical trials

70%
Other studies^a



Research Personnel^a

180
Full-time research leaders



1,640
Research support staff

Research Publications

1,980
Journal articles published in 2022



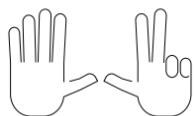
28,100
Articles total since 2000^b

^aRefers to the 9 research centers (8 regional centers and KP COM)

^bRefers to total count of all articles (research and non-research) from 2000 to the present in the Kaiser Permanente Publications Library available at <https://kpresearchpublications.kp.org/>



OUR DEPLOYMENTS



STANDARDIZED
ACROSS ALL OF
OUR 8 REGIONS

900,000

Jobs Processed Monthly

OUR CAPABILITIES

- Systems Strategy
- Systems Implementation
- Governance
- Project Management
- Process Optimization
- Reporting and Analytics
- Production Support



ONELINK BY THE NUMBERS

248,000 Users

Approximately 12,000 employees use OneLink daily, processing over **75 Million** distinct financial, supply chain and general support transactions annually

Accounts Payable

Transactions

9.9 Million

Amount

\$24.6 Billion

Purchase Orders

Transactions

4.3 Million

Amount

\$13.4 Billion

Expense Reports

Transactions

470 K

Amount

\$311 Million

sPro Invoices

Invoices

257 K

Amount

\$789 Million



FAST FACTS

Production Support Tickets

40,700

Tickets Opened
(Oct 17 – Sept 18)

39,500

Tickets Resolved
(Oct 17 – Sept 18)

70%

Tickets resolved
within 2 days

93%

Tickets resolved within
21 days

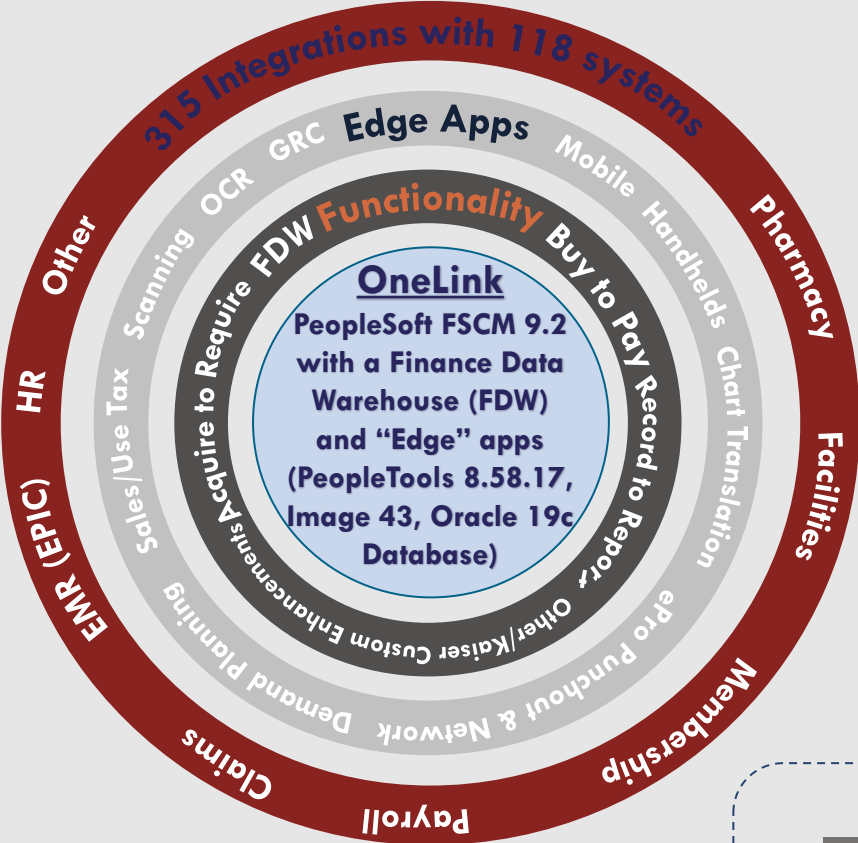
99%

System Availability

**LARGEST PEOPLESFT SINGLE-
INSTANCE IN THE HEALTHCARE
INDUSTRY**

OneLink Platform Overview

Platform Functions



Procure to Pay (Buy 2 Pay)

- eProcurement
- Purchasing
- Inventory & Cost Management
- eSupplier Portal
- Services Procurement
- Accounts Payable
- eSettlements
- Travel and Expenses
- Sourcing
- Supplier Contract Management

Record to Report

- Treasury
- General Ledger
- Grants, AR, Billing, Contracts
- Time Reporting

Acquire to Retire

- Asset Management
- Lease Management
- Project Costing
- Commitment Control

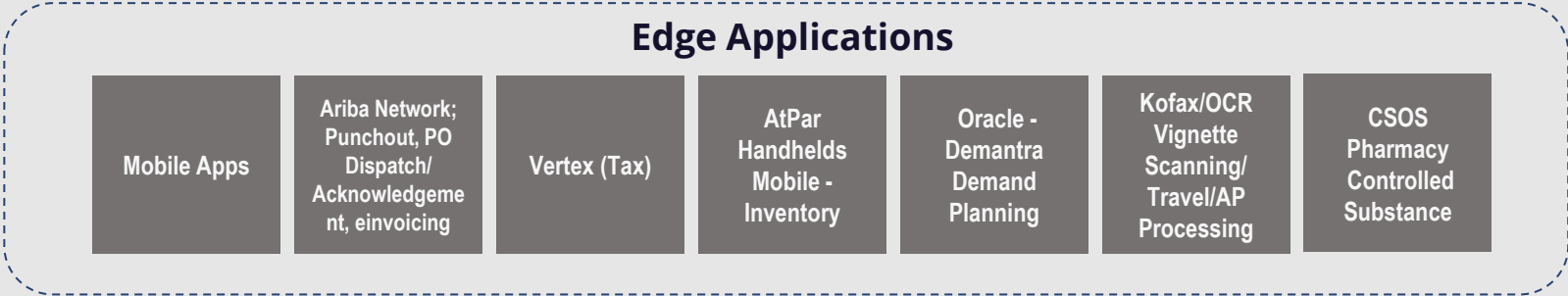
Fin. Data Warehouse (FDW)

- Reporting / Analytics
- Cognos

Kaiser Custom

- POU (Point-of-Use)
- FDA (Funds Disbursement Authorization)
- GL Chartfield Translation Tool

Edge Applications



Recognition and Specializations

Oracle Specialized

ORACLE | Partner

Since joining Oracle's Partner Program in 2006, SpearMC was elevated to Platinum Partner level in 2017 and to Oracle Applications Managed Partner in 2018.

ORACLE | Expertise in PeopleSoft in North America

SpearMC is an authorized PeopleSoft Resale Partner, allowing us to resell, host and finance PeopleSoft at steep discounts.

ORACLE | Expertise in Oracle EPM Cloud in North America

SpearMC is an authorized Oracle EPM Cloud, Analytics and Hyperion Resale and Implementation Partner.

ORACLE | Expertise in Oracle Cloud Platform in North America

SpearMC is an authorized Oracle Cloud Infrastructure (OCI) Resale Partner and North America's only PeopleSoft Partner recognized by Gartner for OCI Professional and Managed Services.

ORACLE | Education Reseller

SpearMC is an authorized Oracle University Education Reseller and PeopleSoft Training Provider. We are the sole PeopleSoft Partner authorized to resell and implement Oracle Guided Learning.

ORACLE | Public Sector Addendum

Reflecting our deep domain expertise in state and local government, SpearMC has a Public Sector Addendum in place allowing us to resell Oracle applications and technology to public sector organizations.

SOC 2 Type II Certified



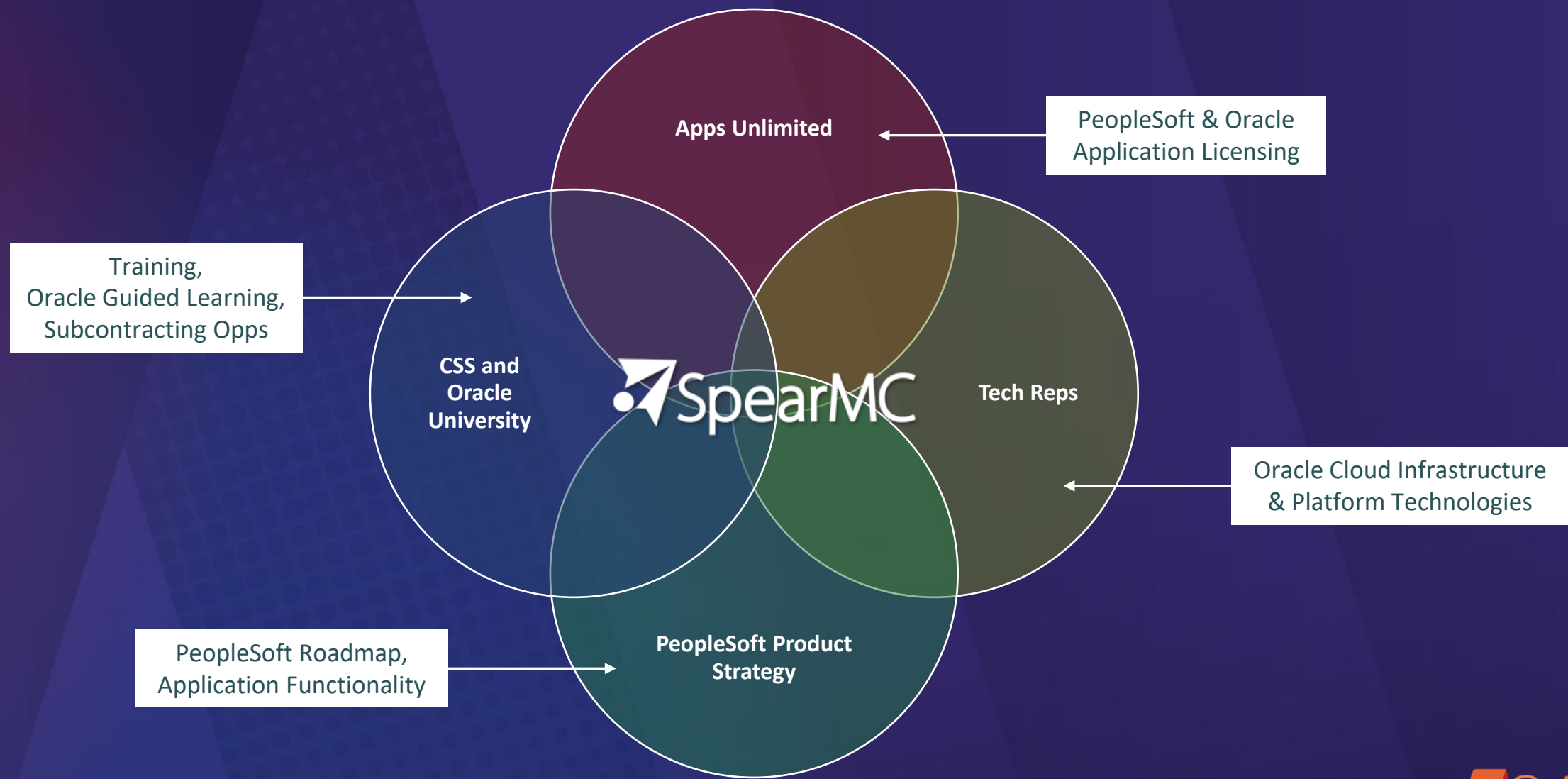
Reduce risk with a partner you can trust. This certification demonstrates our deep commitment to protecting data.

Gartner-Recognized Vendor



SpearMC is the sole featured PeopleSoft vendor in the latest 2023 Gartner Market Guide for Oracle Professional Services.

SpearMC Strategy: Positioning with Oracle



Products and Services

- Managed Services

Application Support
Testing as a Service
System Administration
Infrastructure Hosting

- Consulting Services

Financials and Supply Chain
Test Framework
Human Capital Management
Campus Solutions

- PeopleSoft Training

All-Access Learning Pass
Live Private Training
Oracle Guided Learning
Oracle University Reseller

Oracle PeopleSoft

- Oracle Cloud Platform

OCI Migration
Infrastructure Hosting
Disaster Recovery

- Emerging Technology

Oracle Assessment
Chatbots and Digital Assistants
PeopleSoft Roadmap
OpenSearch Dashboards

- Proprietary Products

PTF Testing Grounds
Grants: LCD/Effort Reporting
Supplier Contracts: Authoring
Lease Admin: GASB 87

PeopleSoft Training Opportunities

Learn from an Oracle University Partner

PeopleSoft Public Training Classes

You will receive Powerful, Practical Learning Experiences covering PeopleSoft Campus Solutions, Human Capital Management, Financials and PeopleTools:

- Campus Solutions: Advisement, Admissions, Registration, 3C's
- PeopleSoft Systems Administration: Maintenance and Troubleshooting
- PeopleTools Bootcamp, PeopleCode and Object-Oriented Programming
- PeopleTools: Fluid Development, and Integration Broker/REST Web Services
- Reporting: OpenSearch Dashboards (formerly Kibana) and Query

Visit our [website](#) for a full listing of available public courses and free webinars



Scan the QR code to view the full listing of offerings and courses

E&I Cooperative Services

Simplify Procurement of PeopleSoft ERP Services and Training



Key Benefits

- SpearMC Consulting is the exclusive PeopleSoft partner available on the E&I contract
- Avoid costly and lengthy RFP cycles. The E&I contract was *competitively bid* and complies with your jurisdiction's procurement rules
- Membership for educational institutions to join the E&I Cooperative is at no cost to the institution
- Visit our [website](#) to learn more



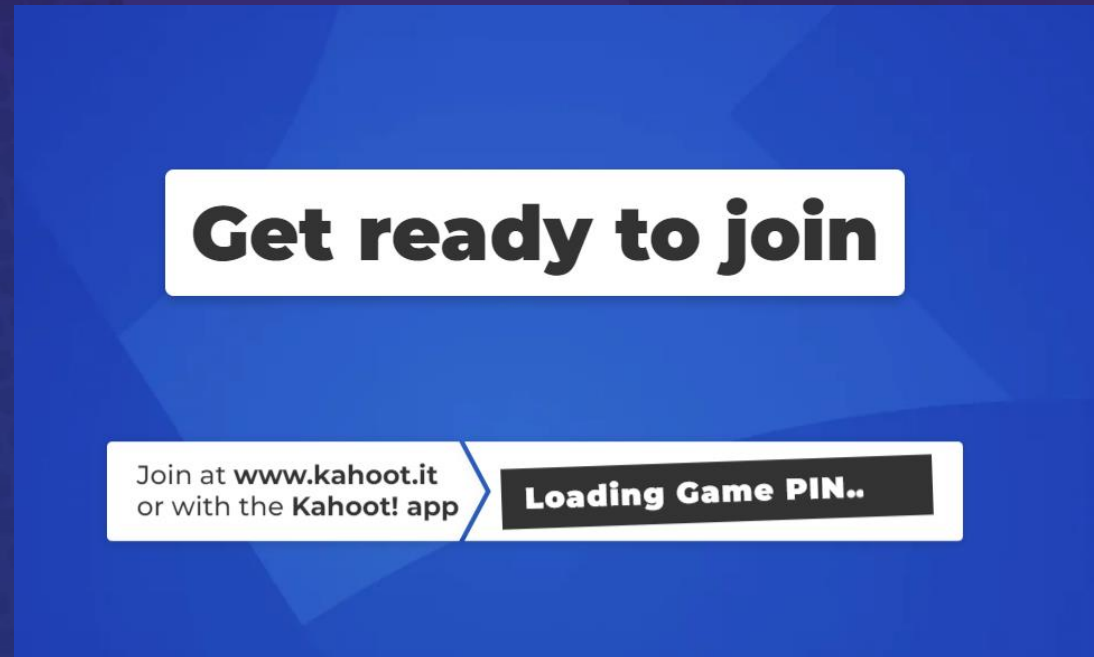
Scan the QR code to determine membership

HEUG Sponsor since 2014



Poll 1

- What are your main types of billing?



Poll 2

- Do you use Streamline Billing today?

Get ready to join

Join at www.kahoot.it
or with the Kahoot! app

Loading Game PIN..

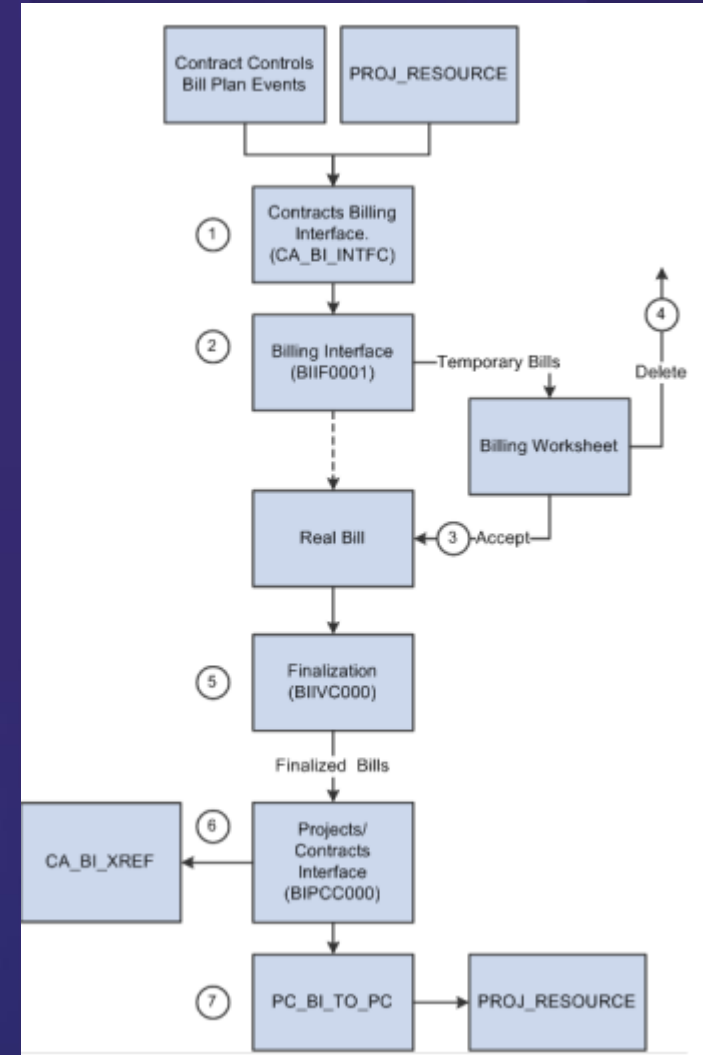
BPW Overview

- PeopleSoft Business Process Weaver (BPW) provides a framework that allows processes (tasks), such as batch programs, to be defined and executed either in parallel or in sequence as part of a business process.

Why BPW?

Business Need

- Grants Billing Process



Streamlined Billing

What about Streamlined Billing?

- Streamline Billing delivered functionality will be made available for Fixed Amount Invoicing which allows an invoice to process through all batch jobs once Contract to Billing is initiated

Streamlined Billing

- Streamlined Billing bypasses the billing worksheet
- Streamlined Billing bypasses invoice approval workflow

The screenshot displays the Oracle Billing and Process Monitor interface. The top navigation bar includes links for Favorites, Main Menu, PeopleTools, Process Scheduler, and Process Monitor. The main content area is divided into several sections:

- Billing Plan General:** Shows Contract HRI0001500, Sold To Customer 10000898, Billing Plan B101, and Description Grants-Fee-Milestone. The Billing Method is set to Milestone.
- Customer Information:** Displays BI Unit R1130, *Bill To Customer 10000488, and Billing To Contact 2.
- Billing Options:** Includes Bill Type HRI, Bill Source GM_CNTRL, and checkboxes for Pre Approved and Direct Invoice.
- Billing Default Overrides:** Shows Invoice Form GM_FIXED_3, Cycle ID ON-DEMAND, and Payment Method Check.
- Process List:** A table listing process instances with columns for Select, Instance, Seq, Process Type, Process Name, User, Run Date/Time, Run Status, Distribution Status, and Details.
- Process Detail:** A pop-up window showing the details for process instance 9180, including a list of sub-processes and their statuses.

Streamlined Billing

- Streamlined Billing bypasses the billing worksheet
- Streamlined Billing bypasses invoice approval workflow

Solution

- **Created two Process Weaver Definitions to link together Contracts to Billing and the Billing Interface**
 - CA_BI_WORKSHEET_INC (delivered)
 - CA_BI_WORKSHEET_AMT (required small enhancement)

Solution

- Background Processes > Business Process Weaver > Business Process Run Control

Search Results

Business Process Run Control

Business Process Run Control

Process Run Control ID CA_BI_INTFC_EGV05

Server Name

Security Notifications

Start Process

Business Process

Process Weaver ID CA_BI_WORKSHEET

Business Process Type User Defined

Description Contracts to Billing

User ID JM

Event Handler ID

Process Threads

*Thread Run Control ID CA_BI_INTFC_EGV05

* If Step Run Control ID is not specified, Thread Run Control ID will be used to execute the step.

Server Name

Process Steps

Step ID	Task ID	Multiple Threads	Server Name	Step Run Control ID	RC Status	Run Control Setup	Description	Predecessors
CA_BI_INTFC	PS_CA_BI_INTFC_02	☐					Process As Incurred Billing	
INTERFACE	PS_BIIF0001	☐					Billing Interface	CA_BI_INTFC

Task Type

RC Status

Legend

Flowchart

Legend

Business Process Run Control

Find an Existing Value

Add a New Value

Look Up Process Weaver ID

Process Weaver ID: begins with

Search Clear Cancel Basic Lookup

Search Results

View 100 1-2 of 2

Process Weaver ID

CA_BI_WORKSHEET_AMT

CA_BI_WORKSHEET_INC

24

ORACLE Partner

Expertise in PeopleSoft in North America

Expertise in Oracle Cloud Platform in North America

Expertise in Oracle EPM Cloud in North America

ORACLE Education Reseller

Gartner Recognized Vendor

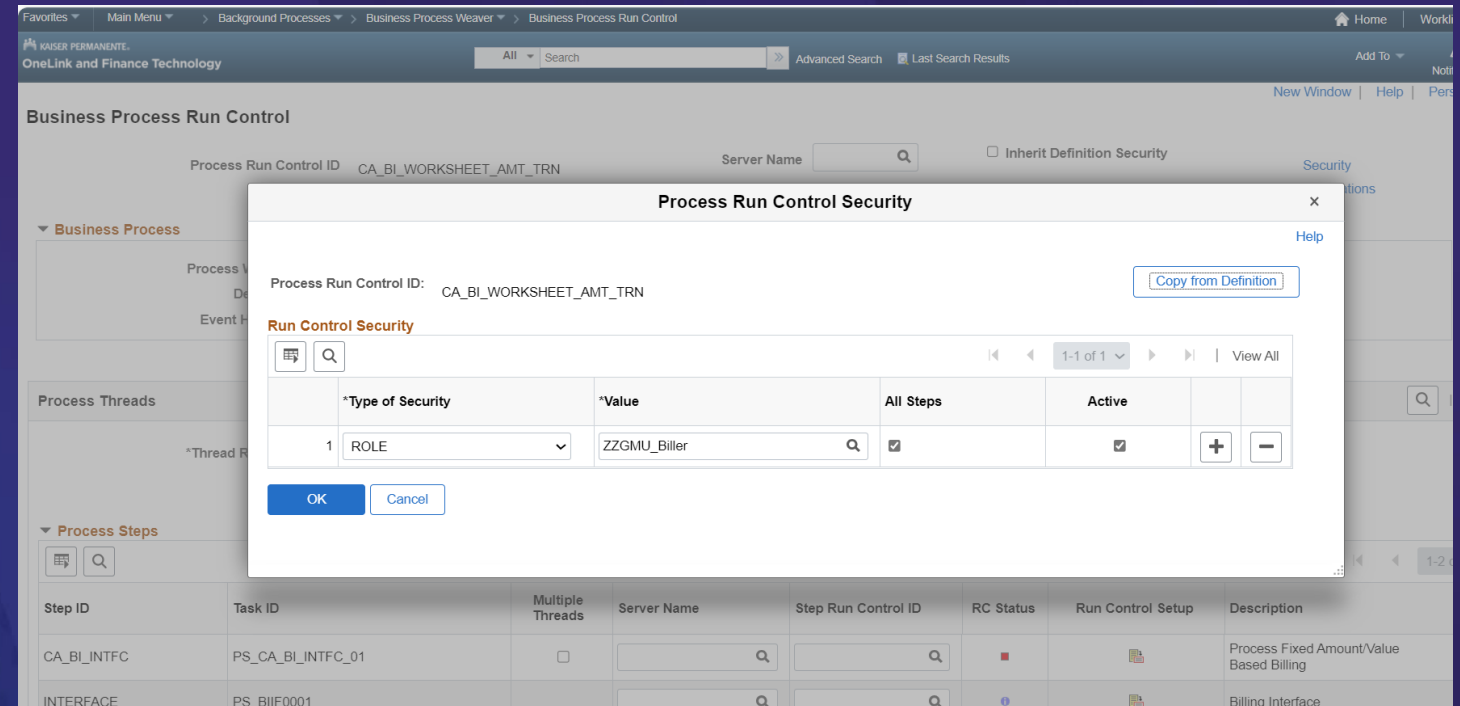
AICPA SOC 2

ALLIANCE 24

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Solution

- When creating a new run control, users must set the security
- Click Security and check “Copy From Definition” so it looks like the below, click OK



Solution

- Thread Run Control ID must = Contracts to Billing Run Control ID

The screenshot displays the Oracle Business Process Weaver interface. The left pane shows the 'Business Process Run Control' configuration for 'CA_BI_WORKSHEET_AMT_TRN'. The right pane shows the 'Process Other Billing Methods' configuration window.

Business Process Run Control (Left Pane):

- Process Run Control ID: CA_BI_WORKSHEET_AMT_TRN
- Business Process:
 - Process Weaver ID: CA_BI_WORKSHEET_AMT
 - Description: Contracts to Billing - Fixed Amount
 - Event Handler ID:
- Process Threads:
 - *Thread Run Control ID: CA_BI_WORKSHEET_AMT_TRN
 - Server Name:
- Process Steps:

Step ID	Task ID	Multiple Threads	Server
CA_BI_INTFC	PS_CA_BI_INTFC_01	☐	
INTERFACE	PS_BIIF0001	☐	
- Flow Diagram: A sequence diagram showing the process flow from 'CA_BI_INTFC [P]' to 'INTERFACE [P]' and finally to 'CA_BI_WO_RN [D]'.

Process Other Billing Methods (Right Pane):

- Run Control ID: CA_BI_WORKSHEET_AMT_TRN
- Program Name: CA_BI_INTFC
- Process Frequency: Always
- Process Billing Details:
 - Request Number: 1
- Contract Options:
 - Business Unit: R1130
 - Contract Type:
 - Contract Class:
 - Sold To:
 - Contract: HRI0001795
 - Master Contract:
- Billing Options:
 - Billing Business Unit:
 - Bill To:
 - Billing Plan:
 - Billing Method:
 - Billing Specialist:
 - Billing Cycle Identifier:
 - Event Date Option: Specify Date
 - Event Date: 01/31/2024
 - Invoice Date Option: Specify Date

Solution

- **INTERFACE** does not need to be defined. Run Control will be created dynamically
- There is an Event Handler ID defaulted /displayed on both steps - **CA_BI_INTFC** and **INTERFACE**

The screenshot displays the 'Business Process Run Control' window. It shows the 'Process Steps' table with two rows: 'CA_BI_INTFC' and 'INTERFACE'. Both rows have an 'Event Handler ID' of 'PS_CA2BINTFC' and 'KP_BINTFC1' respectively. The 'INTERFACE' row is highlighted with a red box. Below the table, a process flow diagram shows the sequence of steps. The 'Task ID' column shows 'PS_CA_BI_INTFC_01' for 'CA_BI_INTFC' and 'PS_BIF0001' for 'INTERFACE'.

Step ID	Task ID	Description	Predecessors	Event Handler ID
CA_BI_INTFC	PS_CA_BI_INTFC_01	Process Fixed Amount/Value Based Billing	CA_BI_INTFC	PS_CA2BINTFC KP_BINTFC1
INTERFACE	PS_BIF0001	Billing Interface	CA_BI_INTFC	PS_CA2BINTFC KP_BINTFC1

- Will start in “Started” Status – status is visually represented below. Click Refresh.

Business Process Instance

Process Run Control ID	CA_BI_WORKSHEET_AMT_TRN	Started	01/31/2024 10:22:47AM	Process Status	Started
Process Instance Number	104276775	By	H2 [REDACTED]	At	01/31/2024 10:22:47AM
Search Process Instance		Server Name		Process Action	[Select] [Refresh]

► Business Process

Process Threads

Thread Run Control ID	CA_BI_WORKSHEET_AMT_TRN	Started	01/31/2024 10:22:47AM	Process Status	Started
Thread Instance Number	104276775	By	H2 [REDACTED]	At	01/31/2024 10:22:47AM
Server Name					

► Process Steps

```

graph LR
    Start(( )) --> Step1[CA_BI_INTFC [P]  
Started  
Actions]
    Step1 --> Step2[INTERFACE [P]  
Not Started  
Actions]
    Step2 --> End(( ))
  
```

Task Type ■ J - Job ■ P - Process ■ A - App Class

Solution

- Will start in “Started” Status – status is visually represented below. Click Refresh.

Navigation: Favorites > Main Menu > Background Processes > Business Process Weaver > Business Process Run Control > Business Process Instance

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OneLink and Finance Technology

Process Run Control ID: CA_BI_WORKSHEET_AMT_TRN
Process Instance Number: 104276775
[Search Process Instance](#)

Started: 01/31/2024 10:22:47AM
By: H2
Server Name:

Process Status: **Started**
At: 01/31/2024 10:23:50AM
Process Action: ..Select
[Refresh](#)

Business Process

Process Threads

Thread Run Control ID: CA_BI_WORKSHEET_AMT_TRN
Thread Instance Number: 104276775
Server Name:

Started: 01/31/2024 10:22:47AM
By: H2
Server Name:

Process Status: **Started**
At: 01/31/2024 10:23:50AM

Process Steps

Task Type: ■ J - Job ■ P - Process ■ A - App Class

Solution

- Complete and Paused After is expected (since it creates a TMP bill)

Navigation: Favorites ▾ Main Menu ▾ > Background Processes ▾ > Business Process Weaver ▾ > Business Process Run Control ▾ > Business Process Instance

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Process Run Control ID: CA_BI_WORKSHEET_AMT_TRN
Process Instance Number: 104276775
[Search Process Instance](#)

Started: 01/31/2024 10:22:47AM
By: H2
Server Name: [Redacted]

Process Status: **Paused After**
At: 01/31/2024 10:24:30AM
Process Action:

Business Process

Process Threads

Thread Run Control ID: CA_BI_WORKSHEET_AMT_TRN
Thread Instance Number: 104276775
Server Name: [Redacted]

Started: 01/31/2024 10:22:47AM
By: H2
Process Status: **Paused After**
At: 01/31/2024 10:24:30AM

Process Steps

Task Type ■ J - Job ■ P - Process ■ A - App Class

Solution

- Notice, the Process Monitor looks like you ran them individually (unlike Streamlined Billing)

[Favorites](#) | [Main Menu](#) | [PeopleTools](#) | [Process Scheduler](#) | [Process Monitor](#)

[KADAR PERMADITE](#)
[OneLink and Finance Technology](#)

[All](#) | Search | [Advanced Search](#) | [Last Search Results](#)

[Process List](#) | [Server List](#)

View Process Request For

User ID: Type: Last: 10 Days Run Control ID:

Server: Name:

Run Status: Dist Status: Instance: To:

[Report Manager](#) Elapsed >

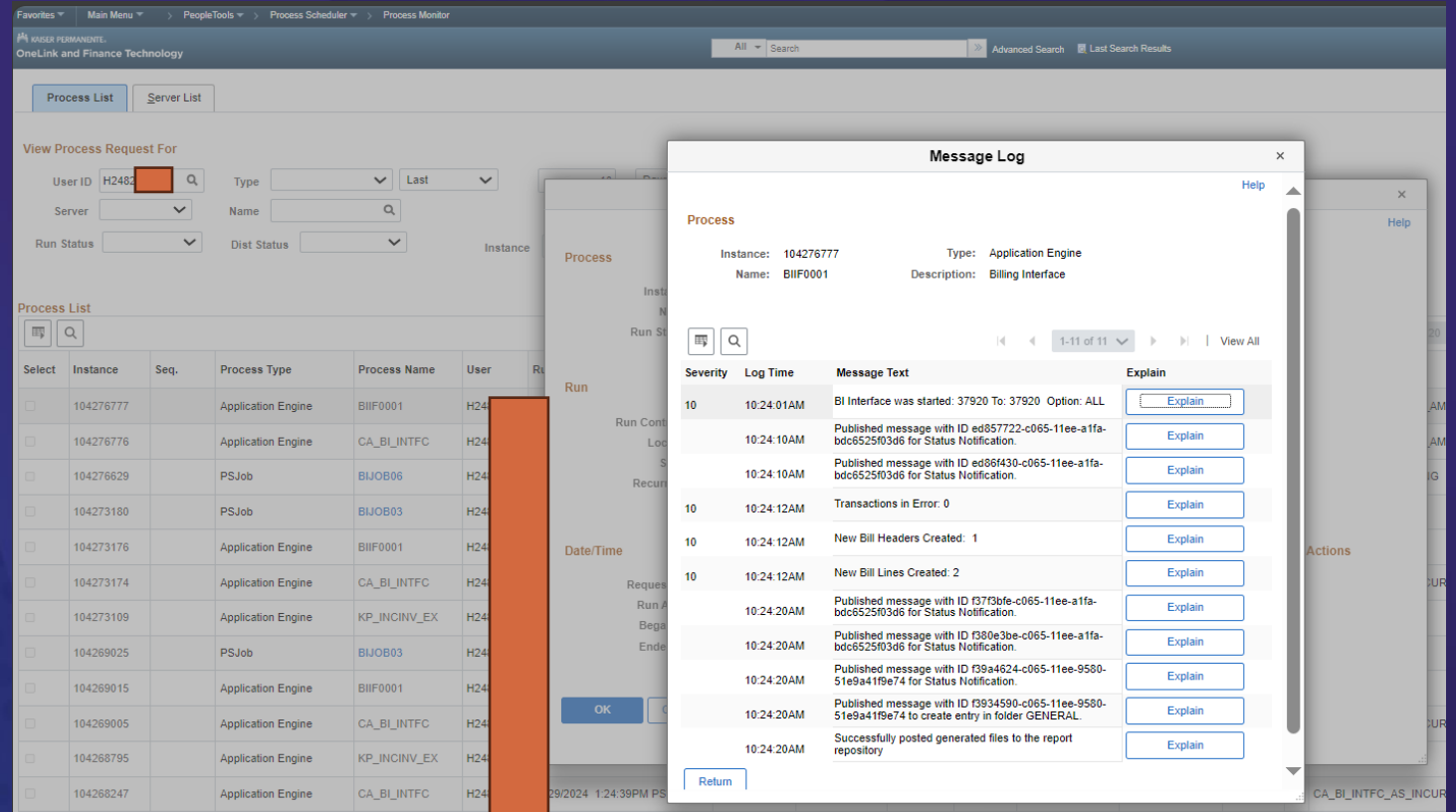
☒ Save On Refresh Queued >

Process List

Select	Instance	Seq.	Process Type	Process Name	User	Run Date/Time	Run Status	Distribution Status	Details	Elapsed Minutes	Begin Date/Time	End Date/Time	Queued Minutes	Run Control ID	Server Name
☐	104276777		Application Engine	BIIF0001	H248	01/31/2024 10:23:49AM PST	Success	Posted	Details	0.3	01/31 10:24:00	01/31 10:24:20	0.2	CA_BI_WORKSHEET_AMT_TRN	PSUNXDB
☐	104276776		Application Engine	CA_BI_INTFC	H248	01/31/2024 10:22:47AM PST	Success	Posted	Details	0.3	01/31 10:22:59	01/31 10:23:19	0.2	CA_BI_WORKSHEET_AMT_TRN	PSUNXDB
☐	104276629		PSJob	BIJOB06	H248	01/31/2024 9:47:09AM PST	Success	Posted	Details	1.0	01/31 09:47:18	01/31 09:48:18	0.1	CREATE_ACCOUNTING	
☐	104273180		PSJob	BIJOB03	H248	01/30/2024 2:18:56PM PST	No Success	Posted	Details	3.0	01/30 14:19:00	01/30 14:22:00	0.1	PSBIINVWA0010298	

Solution

- Notice, the Process Monitor looks like you ran them individually (unlike Streamlined Billing)



Solution

- Background Process > Business Process Weaver > Business Process Instance

[Favorites](#) > [Main Menu](#) > [Background Processes](#) > [Business Process Weaver](#) > [Business Process Instance](#)

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All Search Advanced Search Last Search Results

Business Process Instance

Search

▼ Search Criteria

Process Run Control ID	begins wi		Q
Business Process Type	=		▼
Process Weaver ID	begins wi		Q
Process Status	=		▼
Process Instance Number	=		
Started Date/Time	Last	1 Days	▼
Started By User	=		Q

☐ Save search criteria

2 matching process instances found

Business Process Instances

1-2 of 2 View All

Process Instance Number	Process Run Control ID	Process Status	Started Date/Time	Business Process Type	Process Weaver ID	User ID
104276775	CA_BI_WORKSHEET_AMT_TRN	Paused After	01/31/2024 10:22:47AM	User Defined	CA_BI_WORKSHEET_AMT	H248

Solution

- Can also drill to the Message Log from the Business Process Instance by clicking on the process

Business Process Instance

Process Run Control ID: CA_BI_WORKSHEET_AMT_TRN
Started: 01/31/2024 10:22:47AM
By: H248
Server Name: [Redacted]

Process Status: Paused After
At: 01/31/2024 10:24:30AM
Process Action: ..Select
Refresh

Process Log
Message Log
Step Threads
Reports
Log/Trace
Delete
Resume
Repeat
Rerun
Manage BI Worksheet
Interface Error Correction
Mass Update Interface Errors

Task ID: PS_BIIF0001
Task Name: Billing Interface
Status: Paused

Task Type: J - Job P - Process A - App Class

Solution

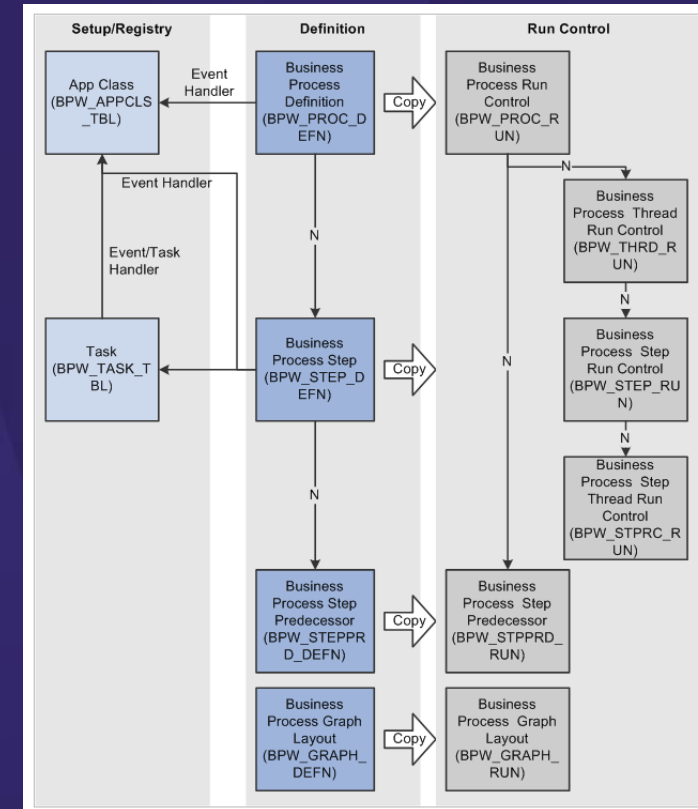
- Can also drill to the Message Log from the Business Process Instance by clicking on the process

The screenshot displays the Oracle Business Process Weaver interface. On the left, the 'Business Process Instance' panel shows details for Process Run Control ID CA_BI_WO and Process Instance Number 10427677. The 'Process Steps' section shows a flow diagram with a green box labeled 'CA_BI_WO' and a 'Complete' status. The main panel, titled 'Business Process Instance Message Log', shows a table of log entries. The table has columns for Sequence, Message Severity, Log Date/Time, Message Text, Step Thread Run Control ID, Step Thread Instance Number, Process Instance, and Process Name. The log entries show a sequence of messages, including status notifications and successful postings, dated 01/31/2024.

Sequence	Message Severity	Log Date/Time	Message Text	Step Thread Run Control ID	Step Thread Instance Number	Process Instance	Process Name
11		01/31/2024 10:24:20AM	Published message with ID f39a4624-c065-11ee-9580-51e9a41f9e74 for Status Notification.	CA_BI_WORKSHEET_AMT_TRN	104276777	104276777	BIIF0001
10		01/31/2024 10:24:20AM	Successfully posted generated files to the report repository	CA_BI_WORKSHEET_AMT_TRN	104276777	104276777	BIIF0001
9		01/31/2024 10:24:20AM	Published message with ID f5934590-c065-11ee-9580-51e9a41f9e74 to create entry in folder GENERAL.	CA_BI_WORKSHEET_AMT_TRN	104276777	104276777	BIIF0001
8		01/31/2024 10:24:20AM	Published message with ID f380e3be-c065-11ee-a1fa-bdc6525f03d6 for Status Notification.	CA_BI_WORKSHEET_AMT_TRN	104276777	104276777	BIIF0001
7		01/31/2024 10:24:20AM	Published message with ID f37f3bfe-c065-11ee-a1fa-bdc6525f03d6 for Status Notification.	CA_BI_WORKSHEET_AMT_TRN	104276777	104276777	BIIF0001
6	10	01/31/2024 10:24:12AM	New Bill Lines Created: 2	CA_BI_WORKSHEET_AMT_TRN	104276777	104276777	BIIF0001
5	10	01/31/2024 10:24:12AM	New Bill Headers Created: 1	CA_BI_WORKSHEET_AMT_TRN	104276777	104276777	BIIF0001
4	10	01/31/2024 10:24:12AM	Transactions in Error: 0	CA_BI_WORKSHEET_AMT_TRN	104276777	104276777	BIIF0001
3		01/31/2024 10:24:10AM	Published message with ID ed86f430-c065-11ee-a1fa-bdc6525f03d6 for Status Notification.	CA_BI_WORKSHEET_AMT_TRN	104276777	104276777	BIIF0001
2		01/31/2024 10:24:10AM	Published message with ID ed857722-c065-11ee-a1fa-bdc6525f03d6 for Status Notification.	CA_BI_WORKSHEET_AMT_TRN	104276777	104276777	BIIF0001

BPW Configuration and Security

- Application Class Registry – System or User Defined
- Business Process Entry Point Registry Page
- Business Process Task Registry Page



BPW Configuration and Security

- Application Class Registry – System or User Defined

Application Class Registry

System Defined

*App Class ID	*App Class Type	*Description	*Root Package ID	Qualified Package/Class Path	*Application Class ID
PS_ALLOC_HANDLER	Event Handler	Create Run Control	RTBL_GL_RUNHANDLER	RUNCONTROLS	Allocations
PS_ARUPDATEEVENTHANDLER	Event Handler	ARUPDATE EVENTHANDLER	AR_BPW	:	ARUPDATEEVENTH
PS_BIINTFC	Event Handler	Billing Interface EventHandler	BI_BPW	:	BIIntfcEventHandler
PS_BILOC	Event Handler	Billing LOC draw eventhandler	BI_BPW	:	LOCDrawEventHandl
PS_BIPRELD	Event Handler	preload process EventHandler	BI_BPW	:	PreloadEventHandler
PS_BIPVAT00	Event Handler	Process VAT Defaults Process	BI_BPW	:	BIPVATEventHandler
PS_BUDGETCHECK	Event Handler	budget checking eventhandler	BI_BPW	:	BudgetcheckEventHa
PS_CA2BIINTFC	Event Handler	Contract to Billing EventHandler	BI_BPW	:	CA2BIEventHandler
PS_CLOSE_HANDLER	Event Handler	Create Run Control	RTBL_GL_RUNCLOSE	RUNCONTROLS	LedgerClose
PS_EDIT_HANDLER	Event Handler	Create Run Control	RTBL_GL_RUNHANDLER	RUNCONTROLS	Edit
PS_FINALIZE	Event Handler	billing finalize	BI_BPW	:	FinalizeInvoiceEventh
PS_FSJGEN	Event Handler	fsjgen eventhandler	BI_BPW	:	FSJGENEventHandle
PS_LOADTOGL	Event Handler	load to GL eventhandler	BI_BPW	:	LoadToGLEventHand
PS_MCURR_HANDLER	Event Handler	Create Run Control	RTBL_GL_RUNMCURR	RUNCONTROLS	MultiCurrency

* System defined ID should start with "PS_" prefix

User Defined

*App Class ID	*App Class Type	*Description	*Root Package ID	Qualified Package/Class Path	*Application Class ID
KP_BIINTFC1	Event Handler	Billing Interface EventHandler - AMT	BI_BPW	:	KPBilIntfcEventHandler

Business Process Definition

Process Weaver ID: CA_BI_WORKSHEET_INC ☒ Active ☐ Public Security Notifications Copy from...

Business Process Type: User Defined

Description: Contracts to Billing - As Incurred

Event Handler ID:

Process Steps

*Step ID	*Task ID	Description	Predecessors	Select	Pause Before	Skip Step	Continue on Error	Pause on Warning	Pause After	Event Handler ID
CA_BI_INTFC	PS_CA_BI_INTFC_02	Process As Incurred Billing		☐	☐	☐	☐	☐	☐	PS_CA2BIINTFC
INTERFACE	PS_BIIF0001	Billing Interface	CA_BI_INTFC	☐	☐	☐	☐	☐	☐	PS_BIINTFC

Preview Auto Layout

```

graph LR
    Start(( )) --> Task1[CA_BI_INTFC [P]  
PS_CA_BI_02]
    Task1 --> Task2[INTERFACE [P]  
PS_BIIF0001]
    Task2 --> End((( )))
  
```

Task Type: ■ J - Job ■ P - Process ■ A - App Class

Created Date/Time: 04/13/2023 9:50:15AM By: P4... Updated Date/Time: 04/13/2023 9:52:19AM By: P4...

Save Return to Search Previous in List Next in List Notify Add Update/Display

BPW Configuration and Security

- Business Process Definition – As Incurred

Business Process Definition

Process Weaver ID: CA_BI_WORKSHEET_INC
 Business Process Type: User Defined
 Description: Contracts to Billing - As Incurred
 Event Handler ID: [Search]

☒ Active ☐ Public **Security**

Process Steps

*Step ID	*Task ID	Description
CA_BI_INTFC	PS_CA_BI_INTFC_02	Process As Incurred
INTERFACE	PS_BIIF0001	Billing Interface

Business Process Security

Business Process Type: User Process Weaver ID: CA_BI_WORKSHEET_INC

Process Security

Type of Security	Value	All Steps	Active
1 ROLE	ZZGMU_Biller	☒	☒

Task Type: ☒ J - Job ☐ P - Process ☐ A - App Class

Created Date/Time: 04/13/2023 9:50:15AM By: P [Redacted]
 Updated Date/Time: 04/13/2023 9:52:19AM By: P [Redacted]

Business Process Definition

Process Weaver ID: CA_BI_WORKSHEET_AMT
 Business Process Type: User Defined
 Description: Contracts to Billing - Fixed Amount
 Event Handler ID:

☒ Active ☐ Public

Security [Copy from...](#)
 Notifications

Process Steps

*Step ID	*Task ID	Description	Predecessors	Select	Pause Before	Skip Step	Continue on Error	Pause on Warning	Pause After	Event Handler ID
CA_BI_INTFC	PS_CA_BI_INTFC_01	Process Fixed Amount/Value B		☐	☐	☐	☐	☐	☐	PS_CA2BIINTFC
INTERFACE	PS_BIIF0001	Billing Interface	CA_BI_INTFC	☐	☐	☐	☐	☐	☐	KP_BIINTFC1

[Preview](#) [Auto Layout](#)

Task Type: ☒ J - Job ☒ P - Process ☒ A - App Class

Created Date/Time: 04/13/2023 9:54:25AM By: P [Redacted]
 Updated Date/Time: 12/19/2023 2:21:05AM By: F [Redacted]

[Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Notify](#) [Add](#) [Update/Display](#)

BPW Configuration and Security

- Business Process Definition – Fixed Amount

Business Process Definition

Process Weaver ID: CA_BI_WORKSHEET_AMT
 Business Process Type: User Defined
 Description: Contracts to Billing - Fixed Amount
 Event Handler ID: [Search]

Process Steps

*Step ID	*Task ID	Description
CA_BI_INTFC	PS_CA_BI_INTFC_01	Process Fixed Amount/Value B
INTERFACE	PS_BIIF0001	Billing Interface

Business Process Security

Business Process Type: User Process Weaver ID: CA_BI_WORKSHEET_AMT

Process Security

Type of Security	Value	All Steps	Active
1 ROLE	ZZGMU_Biller	☒	☒

BPW Tips and Lessons Learned

- Business Process Weaver did not pass the interface ID for Fixed Amount Billing
 - Delivered Event Handler hard coded to PS_CA_BI_INTFC_02 (As Incurred)

```

BIIntfcEventHandler (application_class)  OnExecute

If $obj.ObjectType = $obj.Manager.EnumObjectType.StepInstance Then;
$step = ($obj As BUSINESS_PROCESS_WEAVER:BUSINESS_PROCESS:COMPONENT:StepInstance);
$threadInst = $step.ParentThread;

/*LYL's API. get process instance number By taskID .*/
Local array of BUSINESS_PROCESS_WEAVER:BUSINESS_PROCESS:COMPONENT:StepInstance $pristepArray;
Local number $priorStepInsNum;
Local array of number $priorStepInsNumArr;
rem $pristepArray = $step.GetPriorStepsByTask($step.TaskId, False);
$pristepArray = $step.GetPriorStepInstancesByTask("PS_CA_BI_INTFC_02");
If ($pristepArray <> Null) And
    $pristepArray.Len > 0 Then
    $priorStepInsNumArr = $pristepArray [$pristepArray.Len].StepThreadInstanceNumbers; /*check this, multi thread?*/
    If ($priorStepInsNumArr <> Null) And
        $priorStepInsNumArr.Len > 0 Then
        $priorStepInsNum = $priorStepInsNumArr [$priorStepInsNumArr.Len];
        SQLExec("SELECT INTFC_ID FROM PS_INTFC_BI WHERE PROCESS_INSTANCE = :1", $priorStepInsNum, $intfcID);
        If $intfcID <> 0 Then;
            Local date $CURRENT_DT, $EXPIRE_DT;
            Local string $RUNID, $RUNID_CHAR, $SELECTION, $BIBU;
            Local string $RUNID_CONST;
            Local string $PRINT_LISTING, $BI_JOB_RUN_OPT, $SERVERNAME;
            Local number $CADIR_LENGTH, $MAXVAL, $MAXLEN, $NBR, $INC;
            Local number $TO_INTFC_ID, $LENGTH, $SEQ_NUM;

```

BPW Tips and Lessons Learned

- **Business Process Weaver did not pass the interface ID for Fixed Amount Billing**
 - Temporary work around: Set Run Control to Business Unit
 - Long Term solution: create Copy of delivered EventHandler
 - Add the new App Class on App Class Registry > Event Handler ID
 - Add the above Event Handler ID on Business Process Definition at Step INTERFACE

BPW Tips and Lessons Learned

- Users can see other's run controls -> Recommendation: Save your Search Criteria

Business Process Run Control

Enter any information you have and click Search. Leave fields blank for a list of all values.

[Find an Existing Value](#) [Add a New Value](#)

Search Criteria

Use Saved Search: H248 [redacted]

User ID: begins with H248 [redacted]

Business Process Type: begins with

Process Weaver ID: begins with

Process Run Control ID: begins with

☐ Case Sensitive

[Basic Search](#) [Save Search Criteria](#) [Delete Saved Search](#)

Search Results

View All 1-3 of 3

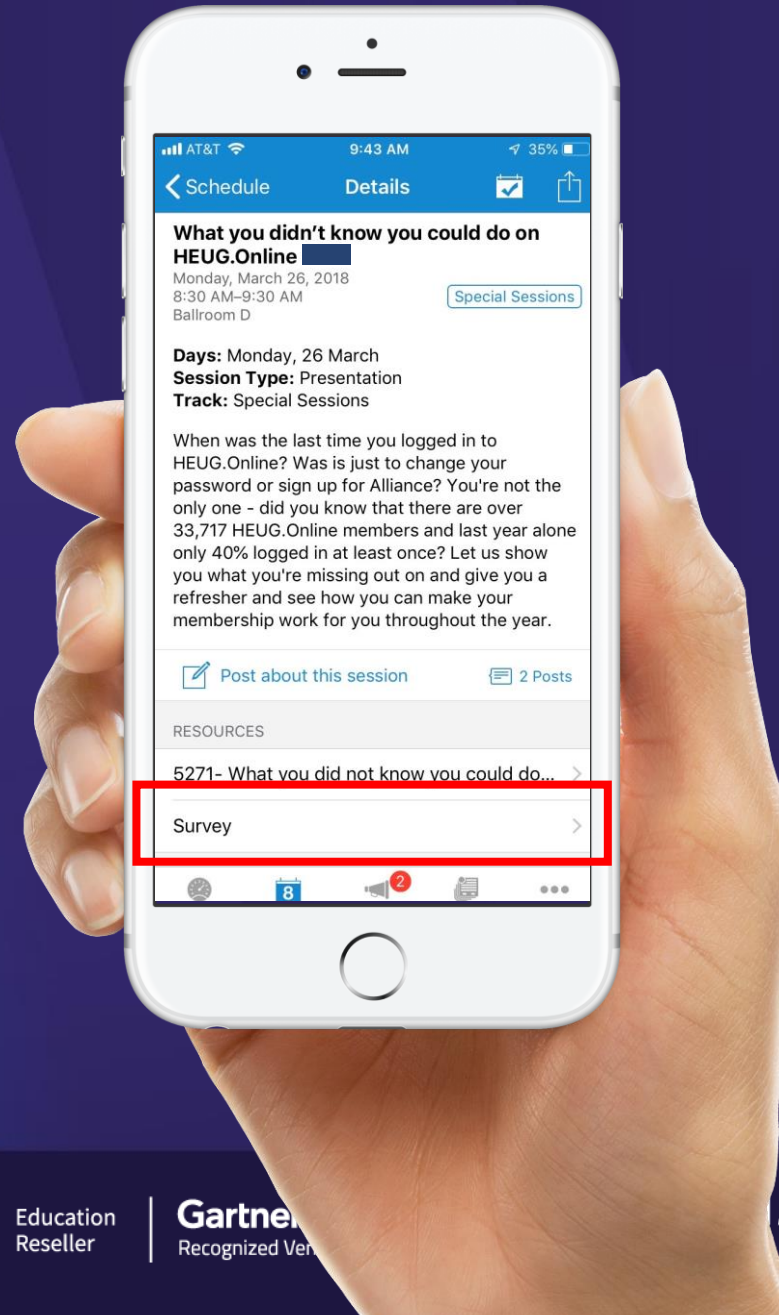
User ID	Business Process Type	Process Weaver ID	Process Run Control ID
H248 [redacted] USER	CA_BI_WORKSHEET	CA_BI_WORKSHEET	CA_BI_R1130
H248 [redacted] USER	CA_BI_WORKSHEET_AMT	CA_BI_WORKSHEET_AMT	BPW_CA_TO_BI_AMT_R1130
H248 [redacted] USER	CA_BI_WORKSHEET_INC	CA_BI_WORKSHEET_INC	CA_BI_AS_INC_R1130

BPW Tips and Lessons Learned

- Allow time to define/update security for billers
- Processing time is not necessarily faster, but less clicks for the user

Session Surveys

1. Open the HEUG Events App on your phone, tablet, or laptop
2. Click on this session in your schedule
3. Then click the “Resources” button and “Survey”
You will be required to login once with your Eventsential username and password.



Questions?

Meet the Team



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THANK YOU!

This presentation and all Alliance 2024 presentations will be available for download from the conference site at:
www.alliance-conference.com



SpearMC Sessions at Alliance

Date	Time	Session Title	Presenters	Session #
3-Mar	12:00 - 3:00 PM	Extending and Customizing PeopleSoft Activity Guides using AG Composer Framework	Logesh Balasubramaniam – SpearMC	10637
3-Mar	4:30 - 7:30 PM	Welcome Reception: Sponsored by SpearMC		Conference
4-Mar	10:00 - 11:00 AM	Business Process Weaver – Automation please!	Yuliya Ivanova – Kaiser Jessica Mann – SpearMC	10666
4-Mar	2:00 PM - 3:00 PM	Supplier Enablement at the J Paul Getty Institute	Zach Scholnick – The J. Paul Getty Trust Randall Johnson – SpearMC	10714
4-Mar	3:00 – 3:30 PM	Stop and Share: Grants Dashboards and Forecasting	Jessica Mann – SpearMC	11114
5-Mar	10:00 – 11:00 AM	How UMASS Utilized Kibana to Monitor Student Billing Process	Susan McHugh – University of Massachusetts Randall Johnson – SpearMC	11037
5-Mar	2:00 - 3:00 PM	State of North Dakota Implementation of Oracle Guided Learning (OGL) in PeopleSoft	Lisa Berg – State of North Dakota Cameron McClurg – SpearMC	10650
5-Mar	3:30 - 4:30 PM	Slate CRM Integrations transform UMass System, Implementation & Renewal	Tom Paret – University of Massachusetts Dan Moran – SpearMC	10697
5-Mar	3:30 - 4:30 PM	PeopleSoft Grants Portal - Overview and Tips on Rolling Out the Grants Portal	Ron Lujan – Southern Methodist University Jessica Mann – SpearMC	10737
6-Mar	11:30 - 12:30 PM	User Panel: Oracle Guided Learning in PeopleSoft	Ben Amster – City of Seattle Lisa Berg – State of North Dakota Cameron McClurg – SpearMC	10720

2024 Training Calendar

Upcoming Class Schedule

Date	Courses
March 12	PeopleSoft 9.2 Query Basic & Intermediate for HCM
March 13	PeopleSoft 9.2 Query Advanced for HCM
March 26	PeopleSoft 9.2 Query Basic & Intermediate for Campus Solutions
March 27	PeopleSoft 9.2 Query Advanced for Campus Solutions
April 9	PeopleSoft 9.2 HCM Bootcamp – Core HR
April 10	PeopleSoft 9.2 HCM Bootcamp – NA Payroll
April 11	PeopleSoft 9.2 HCM Bootcamp – Benefits
April 9 – 11	PeopleSoft 9.2 HCM Bootcamp – Core HR / NA Payroll / Benefits (All 3-Days)
May 7	PeopleTools 8.59 – 8.60 Open Search Dashboards (formerly Kibana)
June 11	Automated Testing with PeopleSoft Test Framework

Visit our [website](#) for more information