

STP

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Empowering
the Financial World

FIS

Agenda

- **Clean-up/Best Practices**
- **Multi plan census import**
- **Script automation**
- **XML**

Clean-up/Best Practices

- **Periodic review of the Task Scheduler**
- **What do I need to keep**
- **What can I delete**
- **How does this affect my database**
- **Annual review of tasks**
- **Review daily processes – what can I automate**
- **Payroll providers, global DVC and STP**

Multi plan census import

- Import via DVC, front end or XML
- Planid is required in file
- STP task – Import/Export / Import census payroll data via DER
- Ability to Poll for file
- Payroll frequency / payroll dates

| Element | Type | |
|------------------------|------|--|
| Social Security Number | | |
| Plan ID | | |
| Pay Begin Date | D | |
| Pay End Date | D | |
| Pay Frequency Code | T | |
| Name - First | | |
| Name - Last | | |
| Current Deferral \$ | \$ | |
| Employer Match | \$ | |

Script automation

- **Create Script**
 - **Create and test the script you want to automate**
 - **Always make sure you include the EXIT statement at the very end of your script (no quotes, no semi-colon). Without the EXIT statement, your script will cause DBViewer to hang.**
 - **Filenames cannot have spaces - .BAT cannot be stored in a folder with**
 - **a space in the folder name.**
 -
 - ***Sample script [SimpleSelect.SQL]:***
 - **spool network directory\simple.log**
 - **select planid from planstat;**
 - **spool off;**
 - **EXIT**
 - **NOTE: The Agent manager workstation must have access to write to the “spool” directory**

Script automation

- **Create a Batch File**
- **Batch File Name: xxxxxxxx.bat**
- **Remember that a batch file is a program and double clicking it will cause it to run. You must right-click and choose Edit when you want to open the .BAT for editing.**
-
- ***Sample Batch file [SimpleSelect.bat]:***
- **The command line must be tweaked for each instance:**
- **-directory where Relius programs actually live in their system**
- **-replace @c:\scripts\SimpleSelect.sql with the path and script name**
- **-UserID is the Oracle User Account**
- **- Password is the Oracle Account Password**
- **- ASP Users will need to request this access**

Script automation

- **Installed clients:**
 - **"c:\program files (x86)\Relius\Admin\DBVIEW.EXE" UserID/Password@database**
 - **@ "\\ scriptdirectory\ReliusMenuScript.sql"**
- **ASP clients:**
 - **"c:\program files (x86)\Relius\Admin\DBVIEW.EXE" UserID/Password@database**
@ "\\rlaspxag2\ZZZ100\scriptdirectory\ReliusMenuScript.sql"

Script automation

- Create a Custom Task
- STP>Task Scheduler>File>Custom Tasks>Add(+)
- If ASP make sure path is the UNC path. Example: \\rlaspdxag2\ZZZ100

Add Custom Task

Custom task

Task name: Simple Select Bat SQL

Short name: SimpleSelect

Task process: Other

Program name: c:\batfiles\simpleselect.bat Command/Argument: %1

Task type: Maintenance Task utilizes custom Relius Administration program

Select parameters

Available Parameters

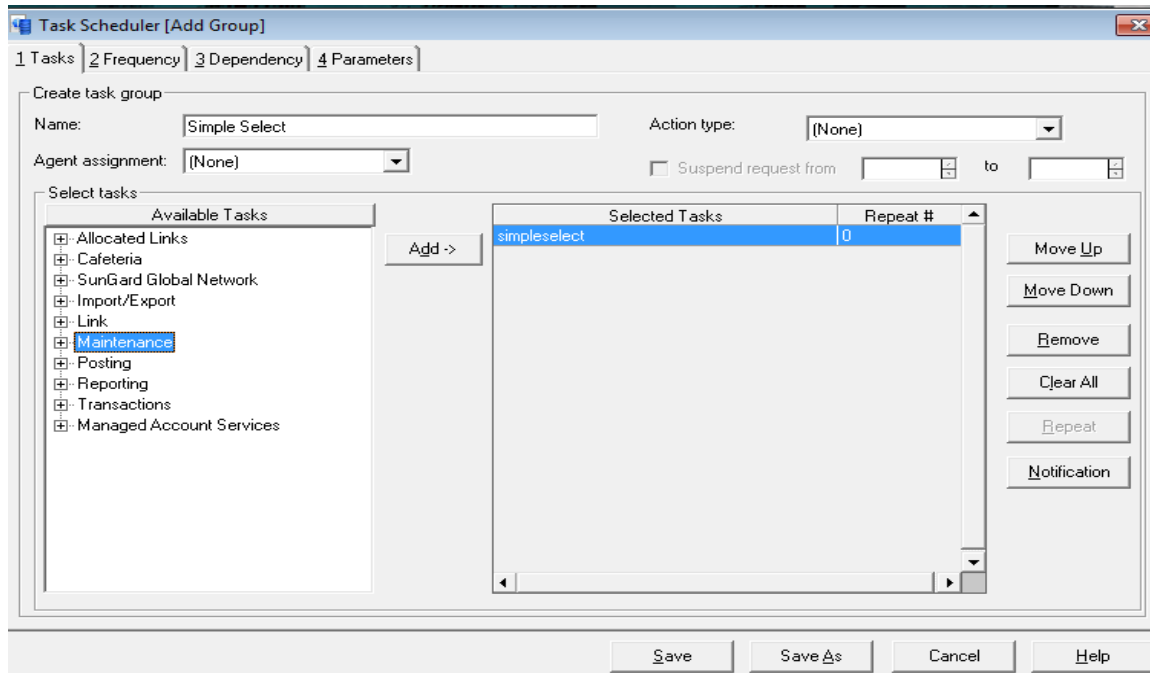
- Account data includes
- Allo % as activity
- Alphanumeric
- Append PlanId to output path
- Boolean
- Calculate activity fees
- Calculate administrative fees
- Calculate asset fees
- Calculate debit card fees
- Calculate general fees

Selected Parameters

Add Cancel Help

Script automation

- Create a Task Group
- The custom task created above will be located under the Maintenance category
- No parameters are needed, queue this task to test



Create Employer/Plan

- **Modify sample scheme files provided**
- **Remember that a XML file is a program and double clicking it will cause it to run. You must right-click and choose Edit when you want to open the .XML for editing.**
- **Task groups needed:**
 - 1) **UAutCreateActionJobs.exe (custom task) – this is the task group that will be selected in the polling task. When Polling task finds an XML file in specified folder, it will put UAutCreateActionJobs.exe in job queue. This task reads the XML file and acts on it (STP will put another set of jobs in the Queue based on the selections in the XML file). This task group must be created first so it can be selected in the Polling Task group.**

Create Employer/Plan

- **FIRST TASK GROUP HAS CUSTOM TASK CREATED FOR UAUTCREATEACTIONJOBS.EXE. ONLY PARAMETER IN THE CUSTOM TASK IS DATA FILE NAME.**

Modify Custom Task

Custom task

Task name: Task ID:

Short name:

Task process:

Program name: Command/Argument:

Task type: Task utilizes custom Relius Administration program

Select parameters:

Available Parameters

- Account data includes
- Allo % as activity
- Alphanumeric
- Append PlanId to output path
- Boolean
- Calculate activity fees
- Calculate administrative fees
- Calculate asset fees
- Calculate debit card fees
- Calculate general fees

Selected Parameters

- Data file name

Modify Cancel Help

Create Employer/Plan

Task Scheduler [Add Group]

1 Tasks | 2 Frequency | 3 Dependency | 4 Parameters

Create task group

Name: Action type:

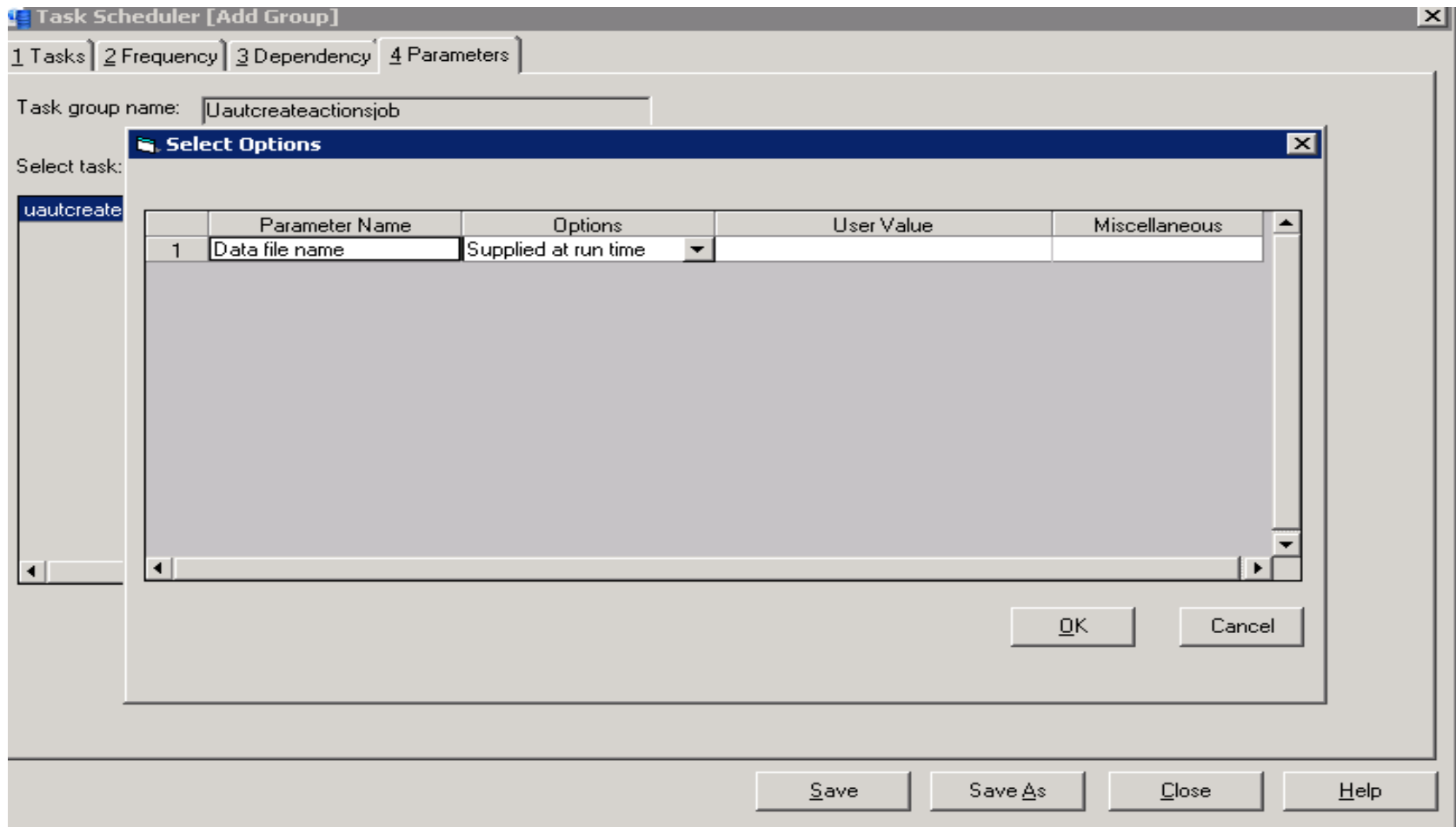
Agent assignment: Suspend request from to

Select tasks

| Available Tasks | Add -> | Selected Tasks | Repeat # | Move Up | Move Down | Remove | Clear All | Repeat | Notification |
|-----------------|--------|----------------------|----------|---------|-----------|--------|-----------|--------|--------------|
| Reporting | | uautcreateactionjobs | 0 | | | | | | |

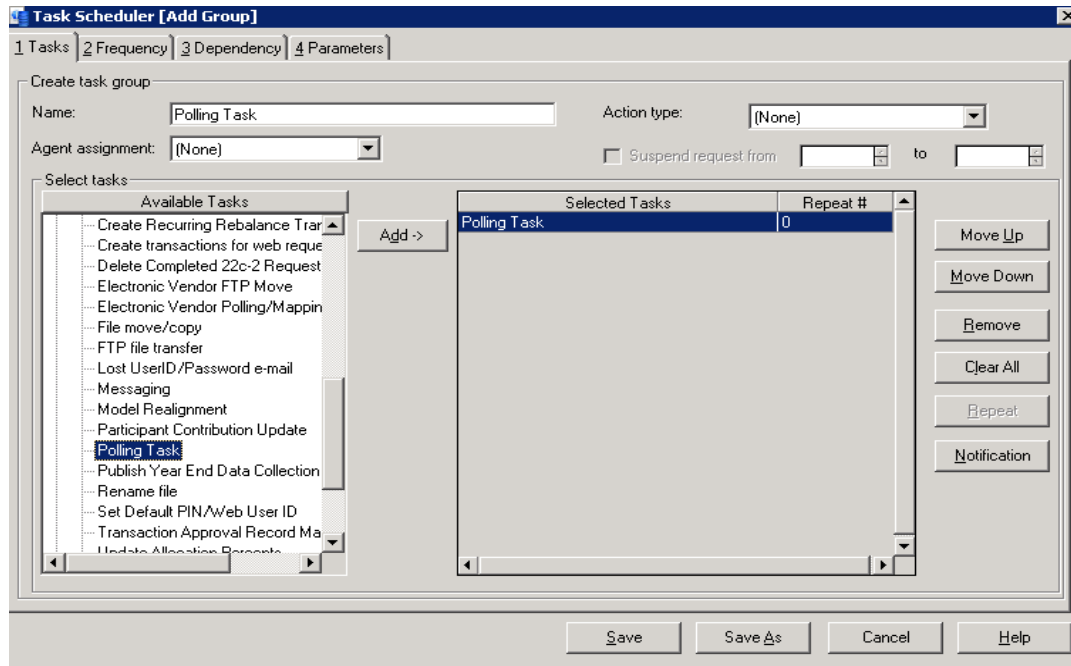
Save Save As Close Help

Create Employer/Plan



Create Employer/Plan

- 2) Polling Task – scheduled to run every day from 8 – 4 pm (or whatever time frame is appropriate). Will look in selected folder for specified files (*.XML). In the parameters for Polling you select the task group you want STP to kick off when it finds one of these files.



Create Employer/Plan

Task Scheduler [Add Group]

1 Tasks | 2 Frequency | 3 Dependency | 4 Parameters

Task group name:

Select task: **Select Options**

Polling Task

| | Parameter Name | Options | User Value | Miscellaneous |
|---|-----------------|----------------------|----------------------|-------------------|
| 1 | Data file name | User entered default | G:*.xml | Select File Name |
| 2 | Task Group ID | User entered default | Uautcreateactionsjob | Select Task Group |
| 3 | Frequency Type | User entered default | Minutes | |
| 4 | Frequency Value | User entered default | 5 | |
| 5 | Time | User entered default | 16:00 | |

OK Cancel

Save Save As Close Help

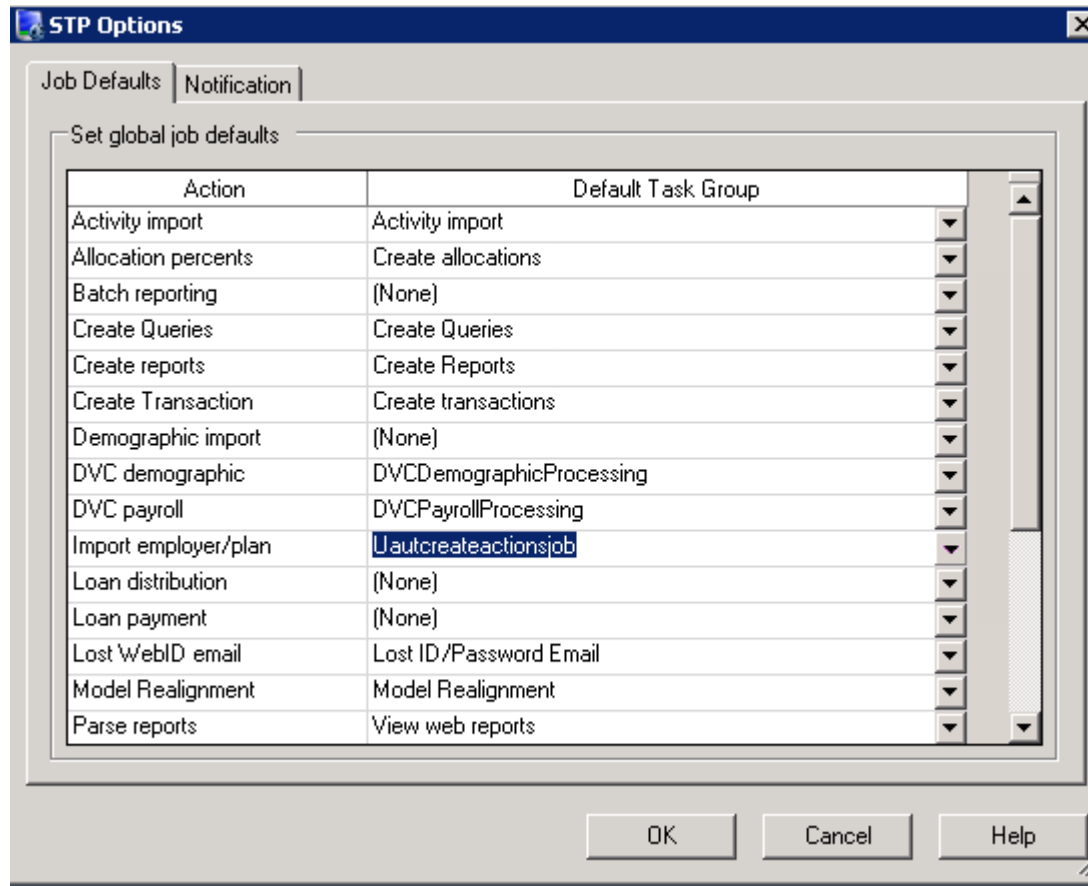
Create Employer/Plan

- **Data file name** – File location and file name
- **Task Group ID** – Select the task group you created in Step 1
- **Frequency Type** – Options are hours or minutes
- **Frequency Value** – How many hours or minutes
- **Time** – What time do you want to stop looking for files

Create Employer/Plan

- **3) In this case, the XML file contains Employer/ Plan setup – STP looks to see which task group is the Default for Employer/Plan setup(first it will look in STP> Options for the global job default, you can select a different task group as an override at the Employer or Plan level). UAutCreateActionJobs.exe reads the XML file and uses the default task group selected for Import/Update employer or plan from web application via .xml to create job/jobs in the Queue.**

Create Employer/Plan



Questions?



Survey on Guidebook



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