PeopleSoft Integration for Payments and Holds

> This article outlines the OperationsCommander (OPSCOM) **integration process with PeopleSoft**, designed for administrators at organizations using PeopleSoft for student and staff account management. The integration uses a scheduled SFTP data transfer to place or release account holds in PeopleSoft based on outstanding violation balances recorded in OPSCOM. This ensures that parking enforcement actions are reflected in the central institutional system.

Setup & Configuration

> If you want to use people soft integration, **you must contact OPSCOM Support** and have them enable a setting for you on your system before you start. Once completed, continue with the steps below.

Peoplesoft Reports are sent by email on a regularly scheduled basis, so for this feature to work you will need to decide on an email address that will be used and monitored for PeopleSoft Holds reporting, then the System Task will need to be enabled to run automatically.

- Go to **System Configuration**, and click **System Settings**.
- Click on the tab labeled **Third Party**
- Scroll to the bottom, and under **PeopleSoft Holds**, enter an email address in the box for **PeopleSoft Holds Notification Email**

- Then navigate to the **Tools** menu, and click on **View System Task Logs**. Find PeopleSoft Holds Report and click on the checkbox to Enabled. Your report will run immediately and then schedule for the next frequency.

> The **PeopleSoft** report is delivered by email, so this is required for functionality.

The integration is an automated process that ***requires*** initial setup and **coordination between your organization and the OPSCOM support team**. The primary components are data mapping, and scheduling.

1. **Initial Consultation & Data Mapping** The first step is to define the data fields for the export. The standard process pushes key details required by PeopleSoft to create and manage holds. Common fields include:
   - Student/Staff ID
   - Total Amount Owed
   - User Type (Student, Staff, etc.)
   - Violation Type
   - Violation Date
2. **File Structure and Scheduling** The integration relies on two distinct files, which are generated and delivered on a mutually agreed-upon schedule (e.g., nightly).
   - **Holds Added File:** This file contains a list of all users with a new or updated outstanding balance. The amount provided is the final total owed and is intended to overwrite any existing hold value in

PeopleSoft.

- **Holds Released File:** This file contains a list of all users whose outstanding balance has been cleared ($0.00). This file signals PeopleSoft to release the account hold.

3. **Testing and Verification** Before going live, the OPSCOM team can provide a test account and sample data files. This allows your IT team to schedule testing, verify record uploads, and ensure the data mapping is correct within your PeopleSoft environment.

Using this Feature

Once configured, the PeopleSoft integration is a fully automated background process that requires no daily intervention from an administrator.

How it Works

- On the configured schedule, OPSCOM generates the **Holds Added** and **Holds Released** files based on real-time user account data.
- These files are automatically filed, and emailed to the designated email address configured earlier, in settings. The filename can be customized, but the field structure and file type (e.g., tab-separated `.txt`) must remain consistent.
- Your internal **PeopleSoft** system must be configured to automatically retrieve and process these files from the emails, to update the account holds accordingly.
- You can configure the body of the **PeopleSoft** reporting email under;
  - Go to **System Configuration**, then **Content and Designs**, and click on **Email Templates**
  - Select the template labeled **PeopleSoft Holds Report**

Best Practices & Considerations

- **Keep the System of Record Clear. The financial debt should remain exclusively within OPSCOM.** The integration's purpose is only to share an *indicator* of the debt with PeopleSoft to manage holds. This strategy eliminates the risk of fees being paid in two different systems and simplifies reconciliation.
- **Establish a Consistent Schedule.** While the report schedule can be customized (e.g., daily, weekly), a daily overnight process is recommended to ensure holds are applied and released in a timely manner.
- **Coordinate with your IT Team.** Successful implementation requires collaboration with your organization's PeopleSoft administrators to ensure files are processed correctly on your end.
- **Understand Hold Triggers.** The integration is typically configured for violation-related debts only. Any unpaid violation, regardless of the amount, will result in a user being included in the **Holds Added** file.

Revision #7
Created 20 August 2025 13:12:20
Updated 3 September 2025 08:43:15