

UNITED STATES COAST GUARD



Person Profile

Honors/Awards or Competency Mass Update

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Step by step instructions performing a Mass Update of member Competencies or Awards in DA

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Process Overview

Introduction This section provides the process and procedure for entering award or competency data for a large group of members (25 or more) who are authorized the same honor, award or competency on the same date.

Effective Date This mass update process is effective on 30 April 2012.

Multiple Awards or Competency Data Entry/Mass Update Under this process, the SPO will review proposed data changes and will perform the steps to execute the update. The data changes will be *staged* in the system by PPC based on the honor/award /competency roster submitted by the SPO.

The table on the following provides an overview of the mass update process:

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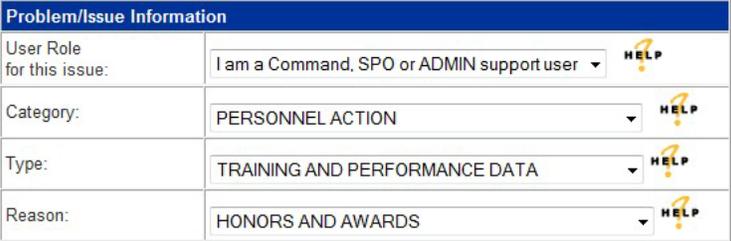
Process Overview, Continued

Multiple Awards or Competency Data Entry/Mass Update (**continued**)

Stage	Who does it	What happens
1	SPO	Prepares a roster of personnel authorized the honor/award or competency. The roster shall be in Microsoft Excel (spreadsheet) file format and include, at a minimum, the employee IDs (The employee IDs must appear in a single column and must be the first column in the spreadsheet) and names of personnel authorized the award or competency.
2		<p>Transmits the following to PPC Customer Care via trouble ticket (http://cgweb.ppc.uscg.mil/ccb/):</p> <ol style="list-style-type: none"> 1. The roster (spreadsheet prepared in stage 1 above) and the data for the entry (2.A – Honor/Award or 2.B – Competency) 2. A. Data for the award entry: <ol style="list-style-type: none"> (a) Honor/Award (Required) – Provide the award code and title of the honor or award (A listing of award codes is available at http://www.uscg.mil/ppc/da/awards.xls). Example – <i>CGMA/CG Unit Commendation Ribbon</i> (b) Issue Date (Required): Provide the date the award was granted . (c) From Date (Optional): If the award is for a specific period of time, provide the beginning date for that time frame. If the From Date is provided, the To Date must be provided as well. (d) To Date (Optional): If the award is for a specific period of time, provide the ending date for that time frame. (e) Grantor (Optional): The agency or organization granting the award. 2.B. Data for a competency entry: <ol style="list-style-type: none"> (a) Competency Code (Required) – Provide the competency code and title as listed in the Competency Dictionary (http://www.uscg.mil/ppc/da/CompetencyDictionary.xls) (b) Effective Date (Required) (c) Proficiency (Required) – Normally the default “3-Good” is used. Other options, as listed on the <i>Add New Competencies</i> screen for an individual are also valid. (d) Verified by (Required) – Normally the default “On the Job Training” is used”. Other options, as listed on the <i>Add New Competencies</i> screen for an individual are also valid.

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Multiple Awards or Competency Data Entry/Mass Update (**continued**)

Stage	Who does it	What happens
2	SPO	<p>Complete the Problem/Issue Information section of the trouble ticket as shown below:</p>  <p>Note: For the “Reason” line, select “HONORS AND AWARDS” or “COMPETENCIES” as appropriate. Follow the instructions at http://cgweb.ppc.uscg.mil/ccb/attachment.asp#guide to attach the spreadsheet to the trouble ticket.</p>
3	PPC	Defines and creates a unique Mass Update ID (the HEAT ticket number without any leading zeros) for the requester using the data provided.
4		Notifies the SPO point of contact when the Mass Update is ready for review and execution.
5	SPO Data Entry Technician (CGHRS Role User)	Reviews the mass update and forwards to the SPO Supervisor/Auditor (CGHRSUP Role User) when ready. (See <i>Manage Mass Update—Validate the Data on page 4.</i>)
6	SPO Supervisor/Auditor	Executes the mass update when ready. (See <i>Executing the Mass Update—Committing the Data Change on page 6</i>)

Manage Mass Update—Validate the Data

Introduction Managing the mass update allows a user to validate the transactions prior to applying them. Individual EMPLIDs can be removed or double-checked to ensure that the proper information is being updated.

Navigation **Portal Link:** Manage Mass Update

Menu Path: Main Menu > Workforce Administration > Collective Processes > Mass Update > Manage Mass Update

Procedure Follow the steps to manage the mass update:

1. Use the magnifying glass to search for the correct mass update ID (*The Mass Update ID is the PPC Customer Care (HEAT) Ticket Number without any leading zeros prefixed with “CGAWD” (for Awards) or “CGCOMP” (for Competency) (e.g. The Mass Update ID for PPC Customer Care Ticket #01177108, Award Mass Update is is CGAWD1177108).*)

Manage Mass Updates

Running Instances

Search Criteria

Mass Update ID: Test mass update for user Initiated
guide

Section:

Element:

Empl ID:

Transaction Status:

2. Click "Search."
3. Validate the results.

Manage Mass Updates

Running Instances

Search Criteria

Mass Update ID: Test mass update for user Initiated
guide

Section:

Element:

Empl ID:

Transaction Status:

Total Transactions per Status

1 to 1 on 1

Mass Update	Person ID	Empl Record	Name	Transaction Status	Details	Execute
CMS USER GUIDE				Ready		<input type="button" value="Execute"/>

Continued on next page

Manage Mass Update—Validate the Data, Continued

Procedure (Cont'd)

4. To see the status of each EMPLID, check the “Transaction Status” field.
 - a. An EMPLID that is ready to be executed will show “Ready.”
 - b. An EMPLID that has been executed without error will show “Success.”
 - c. An EMPLID that encountered an error during execution will show “Failure.”
 - d. Setting an EMPLID to “Cancel” will remove them from the mass update when it is executed. This can be used to remove EMPLIDs that should not be included in the mass update.
 - e. The “Warning” status indicates that there is a potential problem with the EMPLID’s set up. Click the “Details” icon to check the warning messages.
 5. Remove any individuals that need to be removed by clicking the “-“ button on the row to be removed or by setting the EMPLID’s Transaction Status to “Cancel.”.
 6. Save.
 7. CG SPOs will notify the SPO manager that the mass update is ready for execution (see the next section). Note: The Notify button at the bottom of the screen can be used to create and send an email to the SPO manager if desired.
-

Executing the Mass Update—Committing the Data Change

Introduction There are two ways to execute a mass update. Each EMPLID can be executed from the Manage Mass Updates page or all EMPLIDs can be executed from the Execute Mass Update page.

Executing from Manage Mass Updates Follow these steps to execute the mass update from Manage Mass Updates page:

1. Verify that the Transaction Status for each EMPLID is set to “Ready.” (see previous section).



Mass Update	Person ID	Empl Record	Name	*Transaction Status	Details	Execute
CMS_USER GUIDE		0		Ready		Execute 

2. Click the “Execute” button.
 3. Repeat for each EMPLID.
-

Executing from Execute Mass Update SPO supervisors should review the Mass Update from the Manage Mass Update page as described above prior to executing the mass update.

Navigation **Portal Link:** Execute Mass Update

Menu Path: Main Menu > Workforce Administration > Collective Processes > Mass Update > Execute Mass Update

Procedure Follow these steps to execute the mass update using the Execute Mass Update page:

1. Create a new Run Control ID by clicking on the Add a New Value tab. (Note: You can reuse Run Control ID’s. If you’ve used this process before, just open the ID you created and update the Mass Update ID field to match the ID provided by PPC for this update).
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Executing the Mass Update—Committing the Data Change, Continued

Procedure (Cont'd)

(Creating a new run control ID)

Execute Mass Updates

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**

Maximum number of rows to return (up to 300): 300

Run Control ID: begins with

Case Sensitive

Search Clear Basic Search Save Search Criteria

(The Add a New Value page)

Find an Existing Value **Add a New Value**

Run Control ID:

Add

Find an Existing Value | Add a New Value

- If creating a new Run Control ID, enter a name for the Run Control ID (use your initials for example) and click the Add button.
- Enter the Mass Update ID (*The Mass Update ID is the PPC Customer Care (HEAT) Ticket Number without any leading zeros prefixed with “CGAWD” or “CGCOMP” (e.g. The Mass Update ID for PPC Customer Care Ticket #01177108 is CGAWD1177108)*, or if using an existing Run Control ID, verify that the correct Mass Update ID is displayed.

Execute Mass Updates

Run Control ID: cms9 [Report Manager](#) [Process Monitor](#) **Run**

Seq	Mass Update ID	Description	Mass Update Status
1	CMS USER GUIDE	Test mass update for user guide	Initiated

Parallel Processing

Run Instances in Parallel Maximum of Instances: Transactions per Instance:

Save Return to Search Notify Add Update/Display

- Click the “Run” button.

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Executing the Mass Update—Committing the Data Change, Continued

Procedure (cont'd)

5. Set the server to "PSUNX."

The screenshot shows a 'Process Scheduler Request' dialog box. At the top, it displays 'User ID: 68746' and 'Run Control ID: cms9'. Below this, there are fields for 'Server Name' (set to 'PSUNX'), 'Run Date' (set to '05/27/2011'), 'Recurrence' (empty), and 'Run Time' (set to '12:08:00PM'). A 'Reset to Current Date/Time' button is located next to the Run Time field. Below these fields is a 'Time Zone' field with a search icon. The main part of the dialog is a table titled 'Process List' with columns: 'Select', 'Description', 'Process Name', 'Process Type', 'Type', 'Format', and 'Distribution'. The table contains one row with a checked checkbox in the 'Select' column, 'Mass Update' in the 'Description' column, 'HR_MASS_UPD' in the 'Process Name' column, 'Application Engine' in the 'Process Type' column, 'Web' in the 'Type' column, 'TXT' in the 'Format' column, and a link labeled 'Distribution' in the 'Distribution' column. At the bottom of the dialog are 'OK' and 'Cancel' buttons.

6. Ensure that the mass update intended to be run is checked.
7. Click "OK."
8. Go to the Process Monitor.
9. Refresh periodically until the process shows that it successfully completed.

After the mass update is executed, you can verify that the data populated correctly by looking at a member's Person Profile.

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