

Position Hierarchy Maintenance

Preview and Final Forms

Introduction

To assist Components in securely maintaining their Self Service (SS) Hierarchies within Defense Civilian Personnel Data System (DCPDS), the following Position Hierarchy Maintenance tool has been developed, with Secure View functionality, for Human Resources (HR) and non-HR users. In order to utilize this tool, the new CIVDOD Position Hierarchy Maintenance responsibility must be assigned to a secure view responsibility in order to maintain Privacy Act Information laws and regulations.

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Position Hierarchy Maintenance Preview and Final Forms

Purpose

To fully implement Self Service My Biz/My Workplace and other upcoming DCPDS functionality, Self Service Hierarchies must be created and in place. From within secure view responsibilities, these forms are useful when connecting/removing employee position(s) to a supervisory position(s). This form can be used for all position types – Appropriated (APPR), Non Appropriated Fund (NAF), Local National (LN), Military (MIL) and Virtual/External (EXT) positions.

Before You Begin

The CIVDOD Position Hierarchy Maintenance responsibility must contain a secure view responsibility specific to Component users– therefore restricting a users access to a defined set of Self Service Hierarchy records. If a secure view is not assigned to this responsibility, a user assigned with this responsibility will have access to all records in their database! In addition, secure views should be applied to this responsibility to avoid violation of Privacy Act laws.

Novice users should use the CIV Hierarchy Maintenance Preview function which will only allow users to create a preview. More advance users should use the CIV Hierarchy Maintenance Final function to create and execute previews. Executing a preview is the function that updates positions into a Self Service Hierarchy.

It is extremely important that the user be cautious when using this tool as the capability to disconnect the hierarchy, create orphan records within the hierarchy, or attach positions to the wrong hierarchy is a possibility. Advance preparation and information collection is extremely important. Organization charts or lists of positions that follow an organizational line of authority are highly desirable and advantageous to the user making the changes.

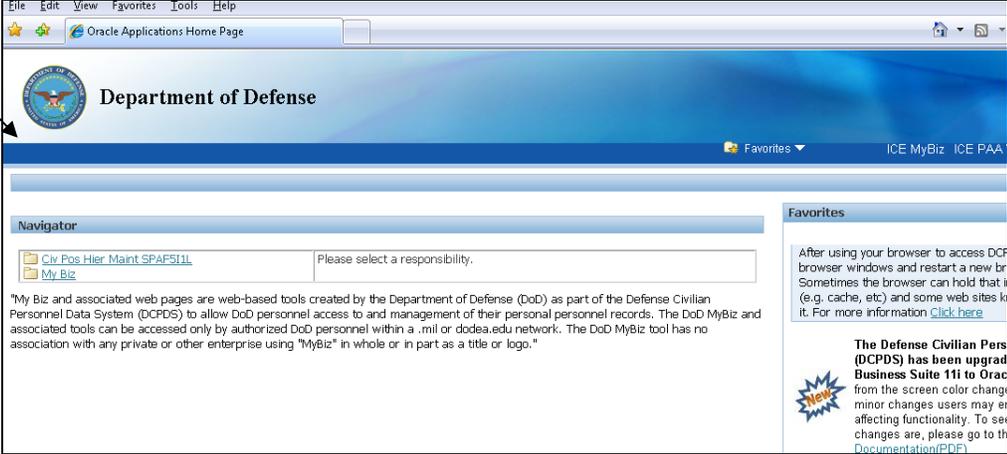
Who Has Access

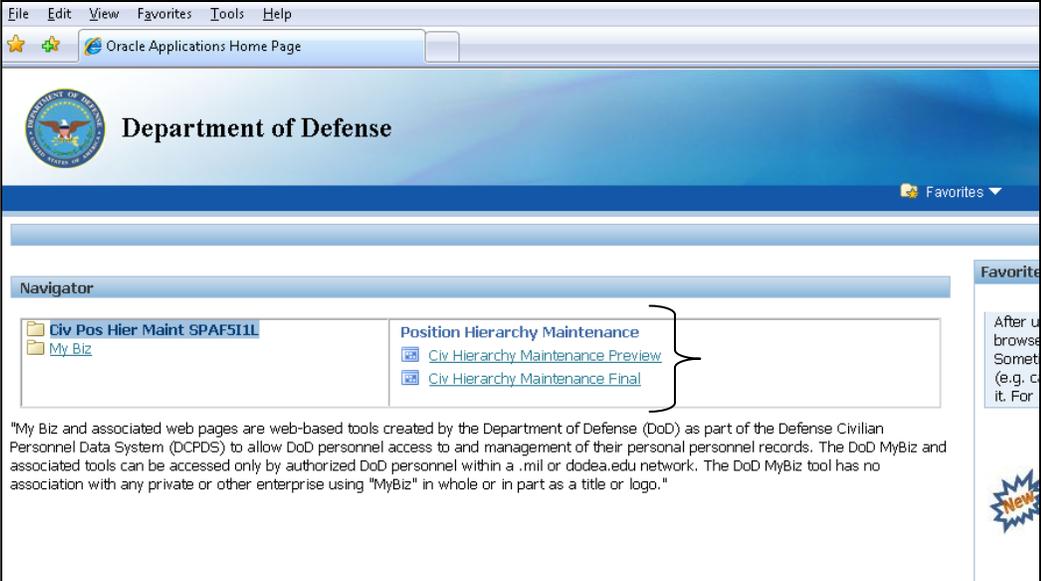


DCPDS Users with the CIVDOD Position Hierarchy Maintenance responsibility (non-secure) or Civ Pos Hierarchy Maintenance XXX (where XXX defines the user's secure view responsibility).

Position Hierarchy Maintenance Form

Navigation

| Step | Action |
|------|--|
| 1 | <p>Select the Civ Pos Hier Maint SPAF511L (secure view) responsibility.</p> <p>Note: Users without a secure view would select the CIVDOD Position Hierarchy Maintenance responsibility.</p>  |
| 2 | <p>After selecting the appropriate position hierarchy responsibility, the following two functions display:</p> <p>Function Descriptions:</p> <ol style="list-style-type: none"> a. Civ Hierarchy Maintenance Preview allows novice users to create, review and save previews without the possibility of executing previews—thus avoiding disconnecting employees from hierarchies, etc.... To execute a preview, you must use the Civ Hierarchy Maintenance Final function. b. Civ Hierarchy Maintenance Final allows users to create, review, save and execute. |

| | |
|----------|---|
| |  <p>Select the Civ Hierarchy Maintenance Final link.</p> <p>Note: Since the only difference between the Civ Hierarchy Maintenance Preview and Civ Hierarchy Maintenance Final forms is the execute functionality, this User Guide will include instructions for utilizing the Civ Hierarchy Maintenance Final function form.</p> |
| <p>3</p> | <p>The Position Hierarchy Maintenance (FINAL) form displays.</p> <p>The form contains 3 regions:</p> <ul style="list-style-type: none"> A. Position Hierarchy Maintenance B. Selection Criteria C. Multiple Selection Criteria <p>See below for additional region and associated data field information.</p> |

Position Hierarchy Maintenance (FINAL)

Position Hierarchy Maintenance

Name Status **Unprocessed**

Description Effective Date **02-JUN-2011**

Note: Name field is mandatory and you must enter at least one Selection Criteria and one Multiple Selection Criteria. Process Date

Selection Criteria

Owning Agency

Servicing Office ID

Personnel Office ID

Multiple Selection Criteria

| Data Elements | Relational Operator | Code | Description |
|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |

Rel. Operator Help Preview Refresh Delete Preview Execute Processed Records

- 3 Regions:
1. Position Hierarchy Maintenance
 2. Selection Criteria
 3. Multiple Selection Criteria

Form Definitions

| Number of Form Fields | Field Name | Definition of Field Name | Minimum/Maximum Character Size | Field Type (LOV or Free Texthort) | Reqd |
|--|-------------|--|--|-----------------------------------|------|
| Position Hierarchy Maintenance Region | | | | | |
| 1 | Name | Unique Name assigned by the user to identify preview. | 60 character | Free Text | Yes |
| 2 | Description | Further describes unique Name. | Recommend using 80 to 100 characters (max 2000 characters) | Free Text | No |
| 3 | Status | Provides Status of request at any given time in the process: Status include: Unprocessed Submitted Preview Ready Processed Error | N/A | Grayed Out | Yes |
| 4 | Effective | Auto populates | DD-MMM- | Grayed | Yes |

| | | | | | |
|--|-------------------------------|---|------------------------------|---|---|
| | Date | with system date. | YYYY | Out | |
| 5 | Process Date | Autopopulates with Date and Time when preview executed. | DD- MMM - YYYY | Autopopulates System Date and Time – Do Not Enter Date (TD submitted to disallow manual entry) | Yes |
| <p>Selection Criteria Region</p> <p>Important Note: At least ONE Selection Criteria MUST be selected.</p> <p>Further narrow your preview by selecting additional criteria in the Multiple Selection region below. If you use several multiple selection criteria, only records meeting both will be retrieved.</p> | | | | | |
| 6 | Owning Agency | 2 digit (alpha) Agency Code with cleartext | N/A | LOV | See Important Note Above. |
| 7 | Servicing Office ID | 2 digit Servicing Office ID with cleartext | N/A | LOV | See Important Note Above. |
| 8 | Personnel Office ID | 4 digit Personnel Office ID with cleartext | N/A | LOV | See Important Note Above. |
| <p>Multiple Selection Criteria Region</p> <p>Important Note: At least ONE Multiple Selection Criteria MUST be selected. Do not use wildcards (%) in your criteria</p> | | | | | |
| 9 | | LOV listed below. | N/A | N/A | At least one data element must be selected. |
| | Data Elements | | | | |
| | Agency Group | | | | |
| | Employee ID | | | | |
| | Full Name | | | | |
| | Functional Account Code (FAC) | | | | |
| | Office Symbol | | | | |
| | Organization Structure | | | | |

| | | | | | |
|----|---------------------------------------|--|-----|--|-----|
| | Personal Accounting Symbol (PAS) Code | | | | |
| | Position Organization Address (POA) | | | | |
| | Position Sequence Number | | | | |
| | Reporting To Position Sequence Number | | | | |
| | Reporting to Supervisor Name | See explanation on page 14. | | | |
| | Unit Identification Code (UIC) | | | | |
| 10 | Relational Operator | Important Note: Select Rel. Operator Help for definitions. | N/A | LOV | Yes |
| | IN | Important Note: Cannot used for Full Name and Reporting to Supervisor Name | | | |
| | EQUALS | | | | |
| | NOT EQUALS | | | | |
| | BEGINS WITH | | | | |
| | IS NULL | | | | |
| | IS NOT NULL | | | | |
| | NOT IN | | | | |
| 11 | Code | Vary depending on Data Element and Relational Operator selected. Example: Full Name BEGINS WITH SMITH% | N/A | Vary depending on Data Element and Relational Operator selected. | Yes |
| 12 | Description | Displays when code value is associated with a look up take containing cleartext. Example: Data Element (Agency | N/A | Grayed Out | N/A |

| | | | | | |
|----|-----------------------|--|---------|-----|-----|
| | | Group) EQUALS Code (AFOD) Description (U.S. Air Forces, Europe (AFOD)) | | | |
| 13 | Rel. Operator Help | Pop Up Window with Relational Operator Definitions | N/ A | N/A | N/A |
| 14 | Preview | Preview Button - has two functions 1) takes the selection criteria and builds a preview. 2) once the preview is created it displays the data in a preview screen. | N/ A | N/A | N/A |
| 15 | Refresh | This button will be grayed out until the Preview button has been clicked. The purpose of this button is to re-query your selection until the Status field changes to Preview Ready. Once the status has changed you will need to select the Preview button again to view records. (Refresh replaces F11, CTRL F11 functionality.) | N/ A | N/A | N/A |
| 16 | Delete Preview | Delete preview should only be used when users are changing selection criteria. DELETE can only be used before records are executed. Note: To delete a preview name (only those previews that have not been executed), select the Red X from the tool bar. | N/ A | N/A | N/A |
| 17 | Execute | Execute is the process that updates the preview/selected records into the Self Service Hierarchy. | N/ A | N/A | N/A |
| 18 | Processed Records | Allows user to view all changed records once the Preview has been executed. | N/ A | N/A | N/A |

Position Hierarchy Maintenance, Civ Hierarchy Maintenance Final Form Process

| Step | Action |
|----------------------------------|---|
| <p>Creating a Preview</p> | |
| <p>1</p> | <p>Use the following steps to create a preview and execute hierarchy changes:</p> <p>Enter a unique Name for the preview in the Name data field.</p> <ul style="list-style-type: none"> • The Status data field autopopulates with Unprocessed. • The Effective Date data field autopopulates with system date. • The Description is an optional field. • Process Date will autopopulate with system date and time after preview is executed (details provided below)  |
| <p>2</p> | <p>Enter at least ONE Selection Criteria for your preview. The available Selection Criteria data elements include:</p> <ul style="list-style-type: none"> • Owning Agency • Servicing Office ID • Personnel Office ID <p>In this example, AF was entered in the Owning Agency field.</p> <p>Important: Ensure your Component unique data is entered into these fields.</p> |

3 Enter at least ONE Multiple Selection Criteria for your preview. The available Selection Criteria data elements include:

- Agency Group
- Employee ID
- Full Name
- Functional Account Code (FAC)
- Office Symbol
- Organization Structure
- Personal Accounting Symbol (PAS) Code
- Position Organization Address (POA)
- Position Sequence Number
- Reporting to Position Sequence Number
- Reporting to Supervisor Name
- Unit Identification Code (UIC)

If you use several multiple selection criteria (e.g., PAS and POA), note that you will receive only records that match this selection (in the example of PAS and POA, you would only receive records matching both criteria).

Important! To review definitions for Relational Operators, select the Rel. Operator Help button **before** clicking into the Data Elements data field. Rel. Operator Help button will only display if either Data Elements, Relational Operator and Code is null or if three fields contain information.

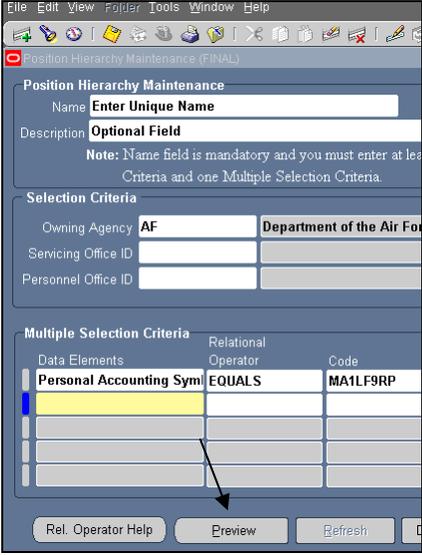
In this example, Personnel Accounting Symbol (PAS) EQUALS in Relational Operation and MA1LF9RP in the Code data fields were entered.

| Data Elements | Relational Operator | Code | Description |
|-------------------------|---------------------|----------|--------------------|
| Personal Accounting Sym | EQUALS | MA1LF9RP | 6 FORCE SUPPORT SQ |
| | | | |
| | | | |
| | | | |

4 Once preview information is entered, select the Save  button.



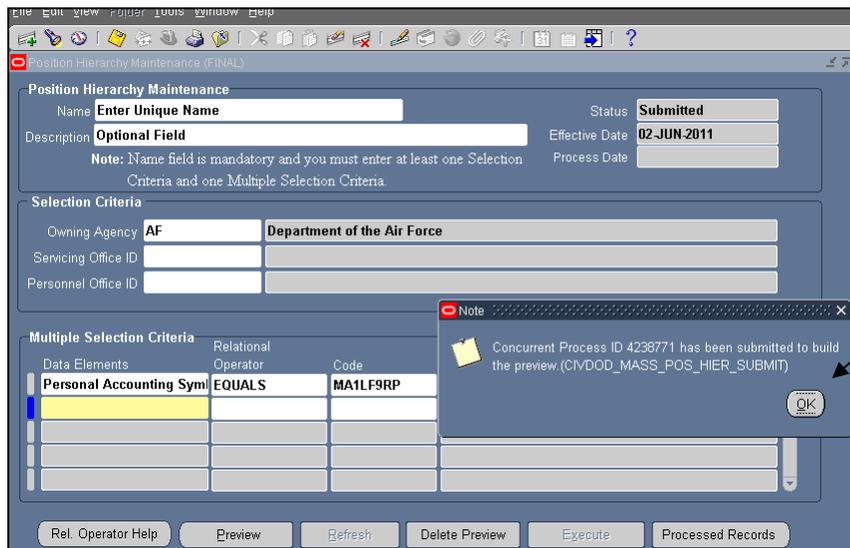
5 After the Save button is selected, select the Preview button.



After selecting Preview, the Status block now reads Submitted.

The concurrent process number will be reflected in the Note box.

Select OK.



Position Hierarchy Maintenance

Name: Status: **Submitted**

Description: Effective Date: **02-JUN-2011**

Note: Name field is mandatory and you must enter at least one Selection Criteria and one Multiple Selection Criteria. Process Date:

Selection Criteria

Owning Agency:

Servicing Office ID:

Personnel Office ID:

Multiple Selection Criteria

| Data Elements | Relational Operator | Code |
|--|-------------------------------------|---------------------------------------|
| <input type="text" value="Personal Accounting Sym"/> | <input type="text" value="EQUALS"/> | <input type="text" value="MA1LF9RP"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |
| <input type="text"/> | <input type="text"/> | <input type="text"/> |

Note: Concurrent Process ID 4238771 has been submitted to build the preview.(CIVDOD_MASS_POS_HIER_SUBMIT)

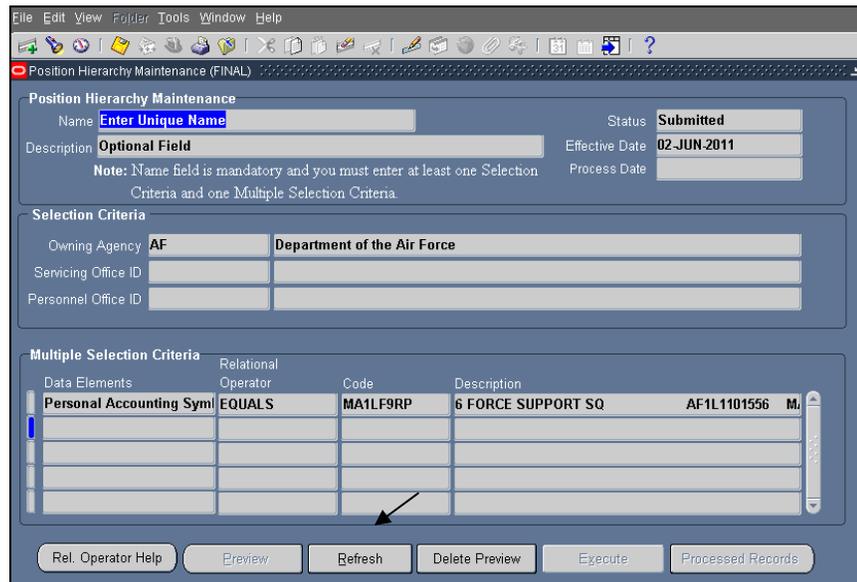
Buttons: Rel. Operator Help, Preview, Refresh, Delete Preview, Execute, Processed Records

Note: Once the preview has been submitted, any changes made to the selection criteria or multiple selection criteria will need to be deleted via the Delete Preview button. After selecting the Delete Preview button, click on the Save icon. By saving, the Delete Preview button deletes any previous selected records (not the preview itself) therefore allowing for new preview selection criteria.

To delete a preview from your database (only those previews that have not been executed), select the Red X from the tool bar.

6 To view the status of your request, select the Refresh button.

Note: The Preview button will be grayed out until the Status data field changes from Submitted to Preview Ready (see next step).



7 Again, use the Refresh button to refresh the screen until Preview Ready displays in the Status data field.

Select the Preview button to view your preview.

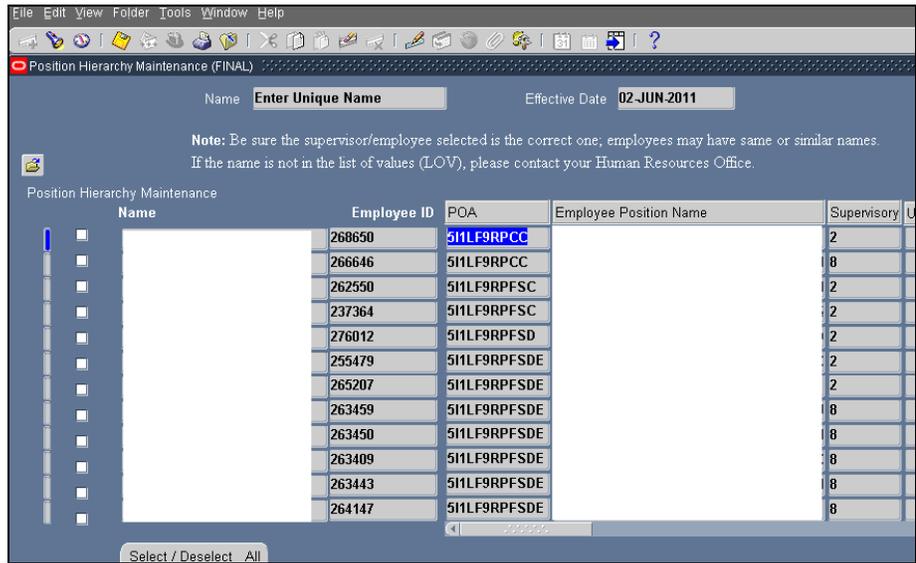
8 After selecting Preview, the Preview Records Decision form displays.

- Keep Existing – Displays saved preview
- Rebuild – Re-queries the selection criteria based on user changes to the Selection Criteria and/or Multiple Selection Criteria. Example, user changes the value of the Code data field from Smith to Smith A.
- Cancel – Returns to previous form

Select Keep Existing.

Review Preview Information

- 9 The Position Hierarchy Maintenance (FINAL) form is used to add/remove employees to a Self Service Hierarchy. It contains the records identified by the initial Selection and Multiple Selection Source criteria that are within your secure view.



- 10 To add, change or remove records within the hierarchies, find the appropriate employee record and scroll across the form to the New Reporting To Position column.

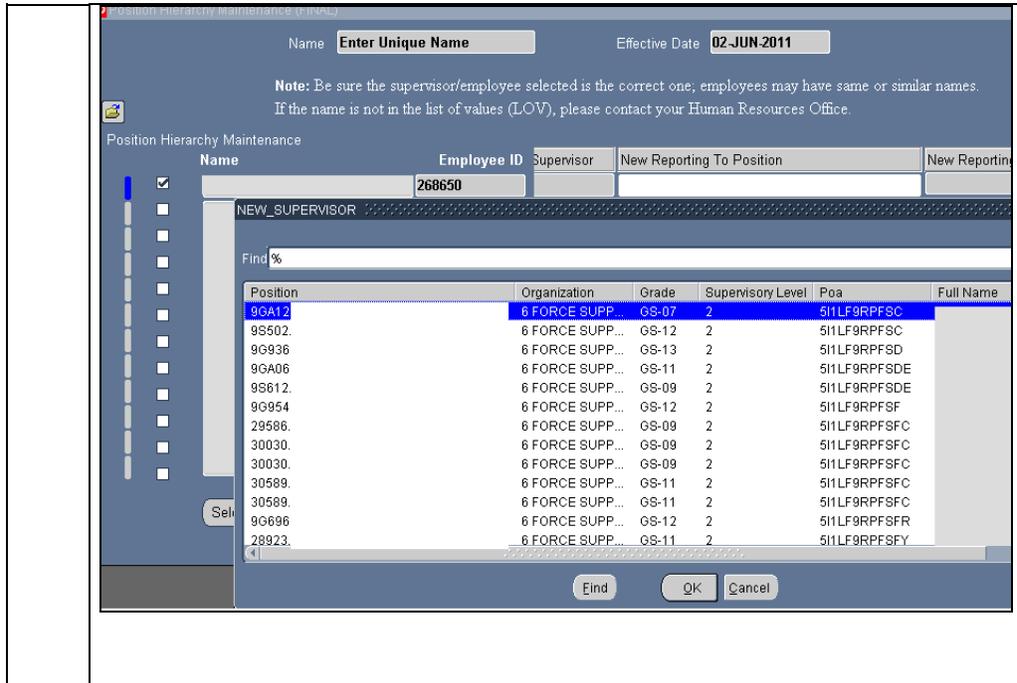
The New Reporting To Position field allows you to connect the appropriate supervisor to a specific employee record in the Self Service Hierarchy.

Supervisors, contained in the New Reporting To Position LOV, are generated with the following logic:

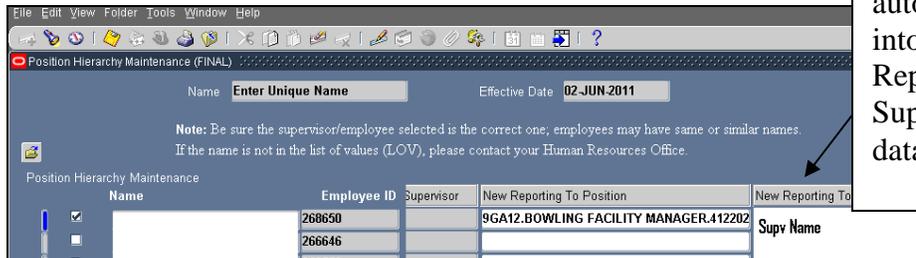
1. All supervisors from the Multiple Selection criteria, and
2. All supervisors in the current Organization as the selected employee record, and
3. All supervisors in the Organization above (one level) the selected employee.

To connect/disconnect a specific employee record to/from a supervisor select the supervisor position from the LOV.

Note: The Find capability is available in the New Reporting To Position LOV to identify a supervisor by name.



- 11 In this example, the highlighted position above was selected. Note the  for this record. In addition, the New Reporting To Supervisor data field autopopulates with Supervisor Name.



Supv name autopopulates into the New Reporting to Supervisor data field.

Note: If multiple employee/positions report to the same supervisory position, copy the supervisory position and move the cursor to the appropriate line and paste the position as appropriate.

Once information is entered, select the Save  button.



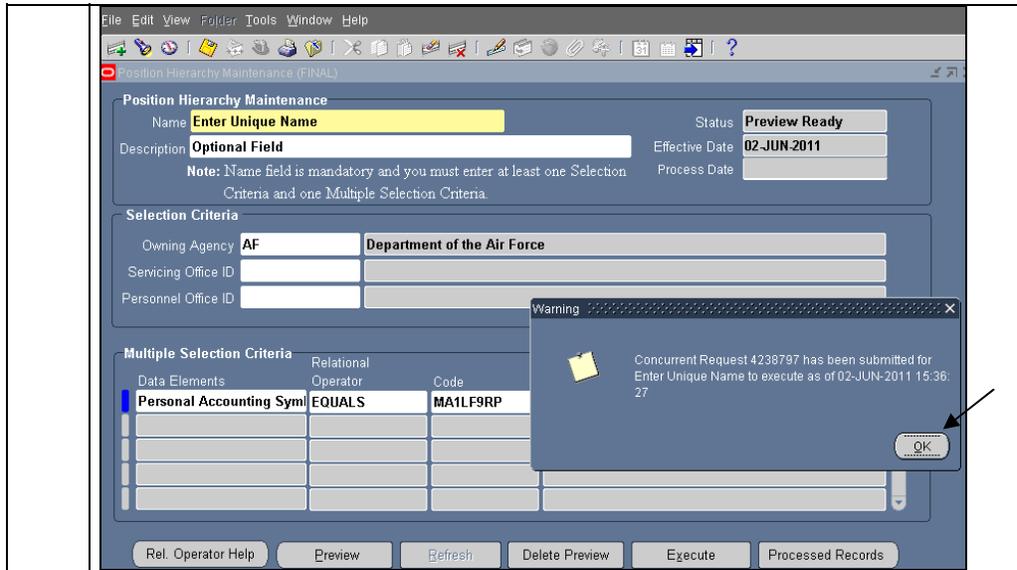
- 12 After selecting Save, close the form by selecting the x. You are now ready to Execute the Preview.

Executing the Preview

- 13 Once the preview has successfully saved select the Execute button.
The Warning form displays, select OK to execute your preview or Cancel to return to the previous form.

| Data Elements | Relational Operator | Code |
|-------------------------|---------------------|----------|
| Personal Accounting Sym | EQUALS | MA1LF9RP |
| | | |
| | | |

- 14 After selecting OK, another Warning form displays with the concurrent request information.
Select OK.



15 Notice the Preview button is available and provides another chance to review your request prior to execution.

Select Execute.

16 After selecting Execute, the Status data field displays Submitted. Select Refresh button until the status changes to Processed.

17

The Status data field will change from Submitted to Processed when the records have been updated to the Self Service Hierarchy. To view these records use the process records button.

In addition, once changes have been executed, the Process Date autopopulates with date and time stamp.

Autopopulates with date and time after preview executes

18

Select Processed Records to view those records updated to the Self Service hierarchy. To return to the previous screen, select the x.

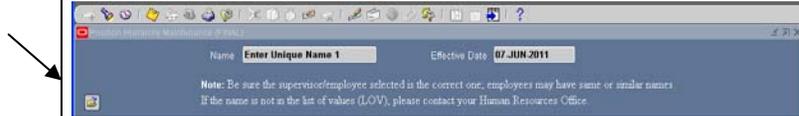
| Name | Employee ID | POA | Employee Position Name | Supervisory | UIC |
|-------------------------------------|-------------|-----------|------------------------|-------------|-----|
| <input checked="" type="checkbox"/> | 268650 | 51LF9RPCC | | 2 | |
| <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | | | | | |
| <input type="checkbox"/> | | | | | |

- Helpful Preview Folder Options**
- A. Moving Preview Columns**
 - B. Ascending/Descending Preview Column**

19 **A. Moving Columns**

To assist users in accessing the New Reporting To Position input field and other key fields from the beginning of the form, folders are available from within the Position Hierarchy Maintenance form.

To access the default folders, select the folder icon.



- 20 Once the folder icon is selected,
- Air Force users will select the PAS folder. Note: New Reporting to Position, New Reporting To Supervisor data fields move to the beginning of the form.
 - All other users will select the UIC folder. Again, note: New Reporting to Position, New Reporting To Supervisor data fields move to the beginning of the form.

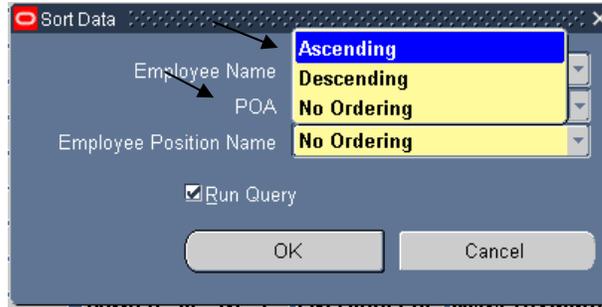
21 To **manually** move columns from within the Preview form. Select in the row (under the column) requiring moving (in this example, the first POA row, under the POA column, was selected).

Note: POA column is after the Supervisory column.

| Name | Employee ID | Employee Position Name | Supervisory | POA | SOID | Ag |
|------|-------------|------------------------|-------------|-------------|------|----|
| | 262767 | | 2 | 511LF9RPFVS | 51 | AF |
| | 258872 | | 8 | 511LF9RPFSC | 51 | AF |
| | 237623 | | 8 | 511LF9RPFVS | 51 | AF |
| | 255649 | | 2 | 511LF9RPFY | 51 | AF |
| | 296665 | | 2 | 511LF9RPFY | 51 | AF |
| | 237428 | | 8 | 511LF9RPFSC | 51 | AF |
| | 237436 | | 8 | 511LF9RPFSC | 51 | AF |
| | 237443 | | 8 | 511LF9RPFSC | 51 | AF |
| | 237445 | | 8 | 511LF9RPFSC | 51 | AF |
| | 237455 | | 8 | 511LF9RPFSC | 51 | AF |
| | 279165 | | 8 | 511LF9RPFSC | 51 | AF |
| | 288504 | | 8 | 511LF9RPFSC | 51 | AF |

22 Then select the folder tools from the menu bar. To move the column to the right, select the right arrow. To move the column to the left, select the left arrow. In this example, the left arrow was selected and therefore the POA column moved to the left. Close or 'X' out of the Folder Tools icon when column is where you want it.

Note: POA column is now in front of the Supervisory column.



26 POA column is now sorted in ascending order.

| Name | Employee ID | Employee Name | POA | Employee Position Name | Supervisor |
|------|-------------|---------------|------------|--------------------------------------|------------|
| | 268650 | | 511F9RPCC | 9G973.DEPUTY FORCE SUPPORT SQUAD | 2 |
| | 266646 | | 511F9RPCC | 9G100.SECRETARY (OFFICE AUTOMATIO | 8 |
| | 237364 | | 511F9RPFSC | 9GA12.BOWLING FACILITY MANAGER.41 | 2 |
| | 262550 | | 511F9RPFSC | 9S502.SUPERVISORY COMMUNITY SERVI | 2 |
| | 276012 | | 511F9RPFSD | 9G936.SUPV FORCE DEVELOPMENT SPE | 2 |
| | 265207 | | 511F9RPFSE | 9GA06.SUPERVISORY EDUCATION SERVI | 2 |
| | 255479 | | 511F9RPFSE | 9S612.SUPERVISORY TRAINING TECHNIC | 2 |
| | 263443 | | 511F9RPFSE | 29613.TRAINING TECHNICIAN.437787.AF1 | 8 |
| | 284879 | | 511F9RPFSE | 29611.EDUCATIONAL TECHNICIAN (OFFIC | 8 |
| | 291934 | | 511F9RPFSE | 29616.TRAINING TECHNICIAN (OFFICE AU | 8 |
| | 291927 | | 511F9RPFSE | 29614.TRAINING TECHNICIAN.465844.AF1 | 8 |
| | 291915 | | 511F9RPFSE | 29610.EDUCATIONAL TECHNICIAN (OFFIC | 8 |

For more information, log into Self Service, select Help on the top menu bar to view the Position Hierarchy Maintenance Training simulation.