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EmpowHR: Section 17 - Excel to Component Interface Utility

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HR and Payroll Processing

PROCEDURE MANUAL
EmpowHR

SECTION 17
Excel to Component Interface Utility

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Excel to Component Interface Utility

The Excel to Component Interface (CI) utility is a tool used to create and update data in *EmpowHR* via remote connection to the application. The Excel CI utility workbook is composed of seven worksheets:

- Job Code Data or Position Data Cover Sheet
- Connect Information
- Template
- Data Input
- Staging & Submission
- Required Fields
- Translate Values

Each worksheet provides a distinct function to accommodate the flow of data from the user's computer to *EmpowHR*.

Note: The CI utility updates production data when the production workbook is used.

This section includes the following topics:

System Requirements

To run the Excel CI, basic system requirements are needed.

- Microsoft Excel version 2003 or greater installed on the local workstation.
- Macros enabled in Excel; the CI utility relies on macros to build the file for transmission to the National Finance Center (NFC).

Note: Microsoft Excel version 2003 has a limitation of 256 columns and 65,536 rows; however, if you are using Microsoft Excel version 2007 (or higher), the limitation is 16,384 columns and 1,048,576 rows.

Users should submit data input records in multiple of 1,000 to eliminate performance issues when using the CI utility.

Security

A role must be assigned to a user of the CI utility. Agencies should limit the number of users as production data will be updated by this utility. For more information, refer to Title I, Chapter 17, *EmpowHR*, Section 2, User Security.

User Productivity Kit (UPK) Online Training

User Productivity Kit (UPK) training is available for the Excel CI utility in *EmpowHR*. This training provides step-by-step instructions and examples of how to use the Excel CI utility.

To access UPK training:

1. Access the ***NFC Home Page*** (***http://www.nfc.usda.gov***).
2. Select the ***Training*** tab.
3. On the Training tab, select *EmpowHR* under ***Online Training (UPK)***.
4. On the list of available *EmpowHR* training courses, select ***Excel CI Utility***.

Using the Component Interface Utility

For more information see:

Job Codes and Positions

This section contains the steps and tabs used to process job code and position transactions through the EmpowHR Excel CI utility.

Note: Before beginning a worksheet, you must enable the macros by clicking **Options** at the top of each worksheet.

Coversheet Tabs

There are Coversheet tabs in the CI utility workbook (for job code and position). The Coversheet tabs explain how to execute business logic for each transaction (Job Code and Position). To access these tabs and complete the applicable transaction follow the steps below:

1. Access the CI utility on the EmpowHR Web site at *www.empowhr.gov*.

2. Select the ***Publications*** link at the top of the page.

3. Under ***EmpowHR Tools & Utilities***, click the ***EmpowHR Job Code Mass Action Template*** link to download the Job Code workbook template. This template will be used to create or update fields on the job code. The Job Code Data coversheet is displayed.

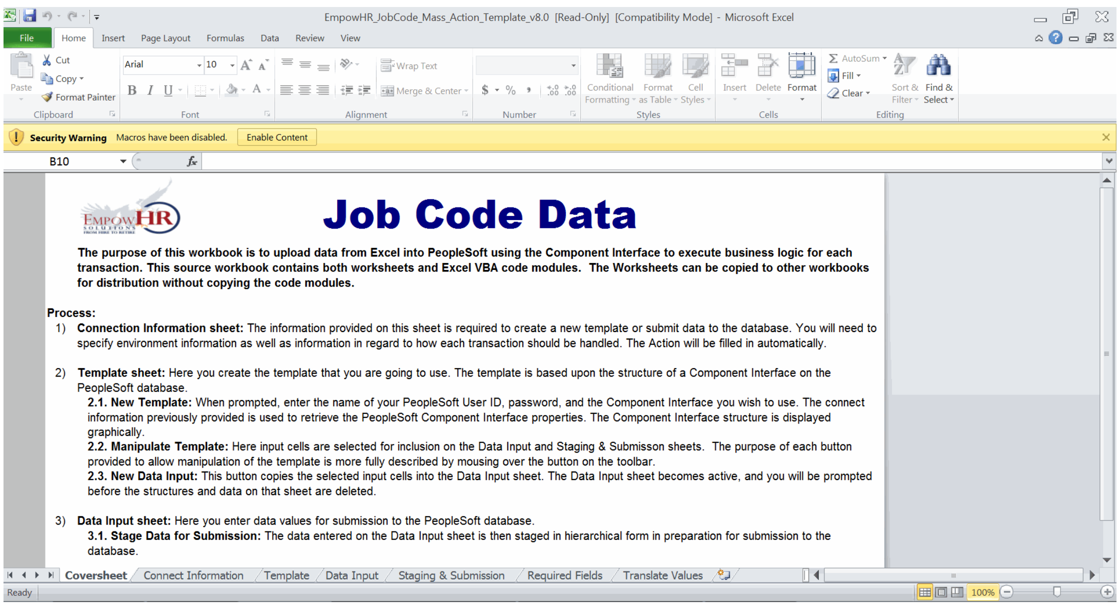

Figure 1: Job Code Data Coversheet

OR

Click the ***EmpowHR Position Data Mass Action Template*** link to download the Position Data workbook template. This template is used to create or update fields on the position. The Position Data coversheet is displayed.

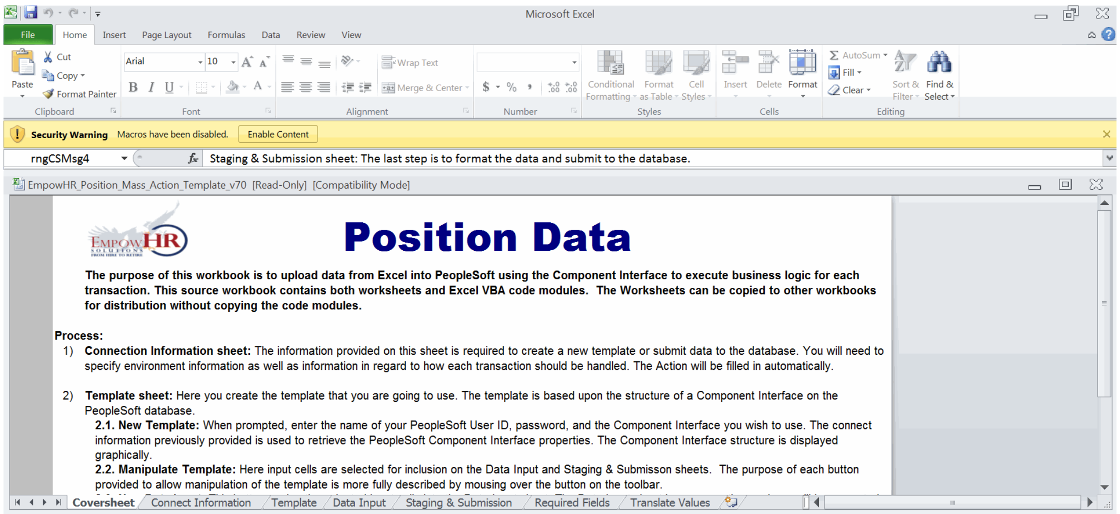

Figure 2: Position Data Coversheet

Connect Information Tabs

Connect Information is a tab on the Excel worksheet. To access the Connect Information tab, follow the steps below.

1. Select the ***Connect Information*** tab. The applicable Connect Information worksheet for the Job Code or the Position is displayed.

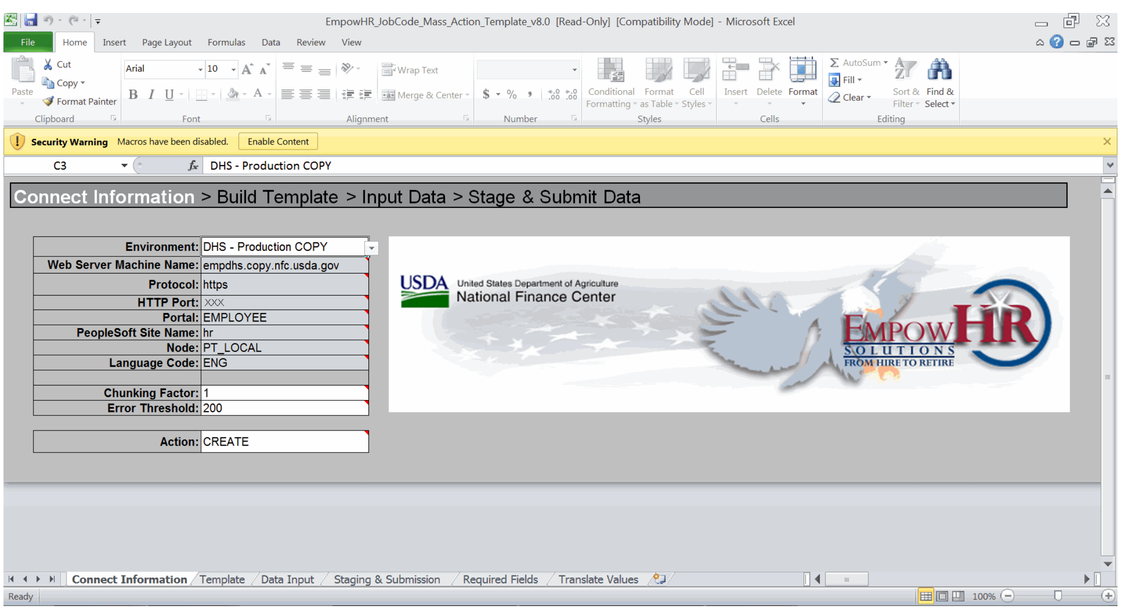

Figure 3: Connect Information Worksheet (for the Job Code or Position Data)

2. Complete the fields as follows:

Field	Description/Instruction
Environment	Select the applicable environment. The valid values are as follows: **`AG Production Copy`** - United States Department of Agriculture (USDA) environment that mirror images production. This environment does not modify the production database. **`AG Production`** - environment where processing of data takes place to add, modify, or delete information in EmpowHR. **`DHS Production Copy`** - Department of Homeland Security (DHS) environment that mirror images production. This environment does not modify the production database. **`DHS Production`** - environment where processing of data takes place to add, modify, or delete information in EmpowHR. **`USDA UAT`** - User Acceptance Testing (UAT) environment used to test modifications before moving the modification to the production environment. **`DHS UAT`** - environment used to test modifications before moving the modification to the production environment. **`HRUSDAQA`** - human resources (HR) USDA QA environment used to test functionality. **`HRDHSQA`** - DHS QA environment used to test functionality. **`HRTEST9`** - HR test environment. **`DHS Test`** - environment used by DHS to test functionality. **`Training`** - environment used to train EmpowHR users. **`Development`** - environment used to develop EmpowHR functionality.
Web Server Machine Name	Field populated with the EmpowHR Web server. The server name will be different depending on the environment.
Protocol	Access used for the Web server. The field is populated and cannot be changed.
HTTP Port	The number used by the Web server. The field is populated and cannot be changed.
Portal	The portal used. The field is populated and cannot be changed.
PeopleSoft Site Name	The environment used in the component interface. This field is based on the Environment and template type selected. The field is populated and cannot be changed.
Node	Field defaults to the local node name. The field is populated and cannot be changed.
Language Code	Code populated with **`English`** and cannot be changed.

Field	Description/Instruction
Chunking Factor	The number of rows of data submitted to the database at one time (1 collection of 10). The field can be changed.
Error Threshold	The total number of errors that are permitted before submission to the database ceases. When the error threshold is exceeded, an error message appears on the Staging & Submission Results tab.
Action	Select an action from the drop-down list. This field is required. The type of action performed is determined by the selection in this field. Valid values are **`Create`** (creates new positions or job codes) and **`Update`** (uses an existing position or job code and adds a new record to update the data).

3. Click the applicable ***Template*** tab. The Template tab for the Job Code or Position is displayed. For more information on the Template tabs, refer to Templates in this procedure.

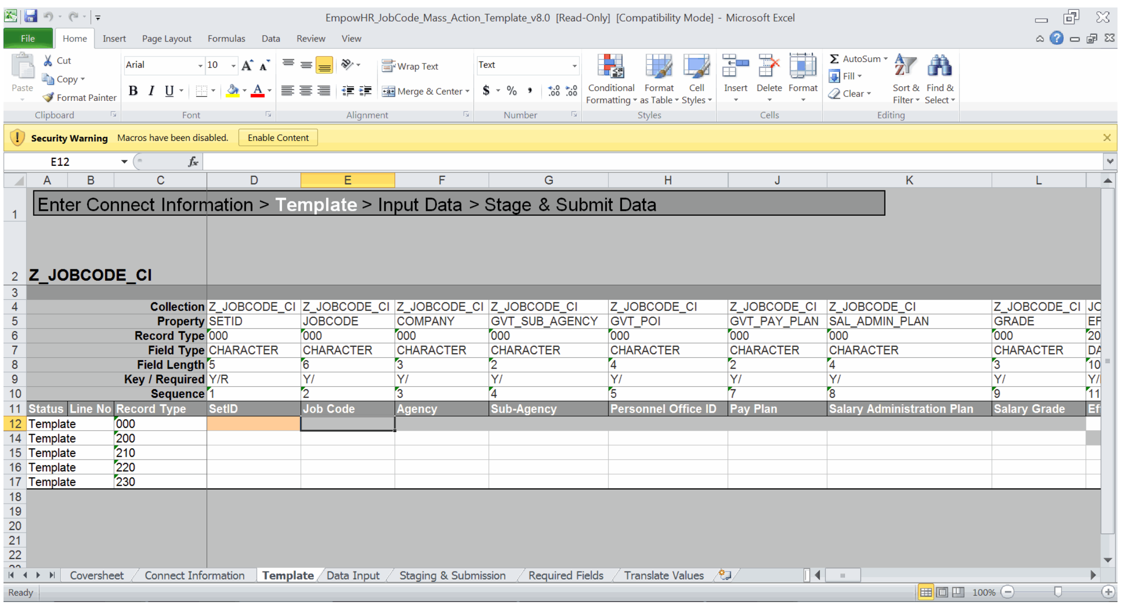

Figure 4: Job Code Mass Action Worksheet (Template Tab)

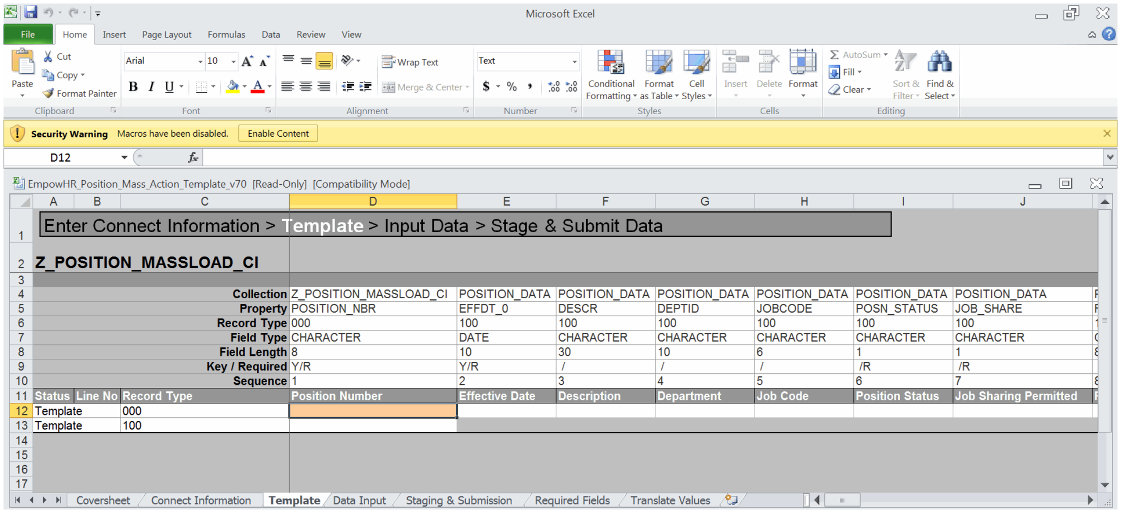

Figure 5: Position Data Mass Action Worksheet (Template Tab)

Templates

The Templates tab is a graphical representation of the CI structure that will be used to load data into EmpowHR. Templates for each type of component in EmpowHR are populated with the fields that may be updated in EmpowHR. The template is used to build the structure for the data that will be sent to EmpowHR. In this workbook, you will select fields used for transmission, omit fields, and enter any default or common values. For a list of mandatory fields, refer to the Required Fields tab for the Job Code or Position. For a list of translate values, refer to the Translate tab for the Job Code tab or for the Position.

The data on the top of the workbook contains database details of the fields on the EmpowHR page.

The header row displays the field label visible within EmpowHR.

The Record Type fields represent the child and parent record levels within EmpowHR.

Note: It is not necessary to understand the hierarchical structure as the worksheet is structured so that the user may only select fields in the correct structure; all other fields are unavailable (locked).

The fields that are open at the Record Type 000 are key search fields. These fields are required when creating a new record. When updating a record, it is important to complete some of these fields to ensure that the correct record is being updated.

Use the Required Fields worksheet to ensure that all required fields (for the applicable action type) are selected on the Template worksheet.

1. Select the applicable Template tab (the Job Code template or the Position template). The Template tab has a tool bar at the top.

2. Click ***Add-Ins*** on the top menu bar to display a custom toolbar for the worksheet. The options available on this toolbar are used to build the template. Each tool bar option has help text that describes the purpose and use of each of the options when the cursor is placed over the option. Below is a description for each tool bar option.

Tool Bar Options	Description
New Data Input	Builds a new Data Input worksheet based upon the selected input cells. This option is used-once the template is built-to begin data entry. This will erase any structure or data previously entered on the Data Input tab; therefore, it is recommended that the template is completed before entering data.
Select Input Cell	Selects an individual cell to be updated on the Template worksheet. This is used for a list of values that are different from one row to the next (e.g., job code, position). Cells selected as input cells are highlighted. All cells highlighted on the template worksheet will appear on the Data Input worksheet. This option will make the highlighted cell available for data entry on the Data Input tab.
Deselect Input Cell	Changes a cell that was previously selected as an input cell to a cell that is included on the Staging & Submission tab. The cell is no longer included on the Data Input worksheet, but appears as part of the structure on the Staging & Submission worksheet. This option will remove a previously-selected cell from the Data Input tab. This cell will still display on the Staging & Submission worksheet.
Restore Input Cells	Restores the Templates worksheet to its original state and clears default values. The fields in the template will be shaded, indicating that these fields will not be included for the Staging & Submission tab. This option restores the Template worksheet to the default values. It is recommended that this is selected to refresh the template before creating a new template.
Include for Submission	Includes a single Property to be included on the Staging & Submission worksheet. Properties that use default values from the Templates worksheet must be included for submission. This is used when the value is not changing between rows on the spreadsheet (i.e., set identification (ID) or effective date). Cells that are included for submission generally are properties that contain default values or properties that could be seen in the structure of the Staging & Submission worksheet. Properties that are included for submission are highlighted. This option selects the highlighted cell to display on the Staging & Submission worksheet. This option does not select these cells for data input on the Data Input worksheet. This is generally used when the user wants certain default values to apply to all data input records (e.g., Agency, SubAgency, POI, etc.). If you are adding a default value: • Select the cell • Click **Include for Submission** • Enter the default value in the cell
Do Not Include for Submission	Does not include the selected property for submission to the database. If a property is not included for submission, it will not appear in the

Tool Bar Options	Description
	structure that is submitted to the database on the Staging & Submission worksheet. Properties that are not included for submission will only appear on the Template worksheet and not submitted to the database. Properties that are not included for submission are shaded. This option removes a previously selected cell from the Staging & Submission worksheet. This option also removes the cell from the Data Input worksheet.

The rows 4-10 on top of the Excel worksheet are populated and protected. These fields can only be updated by NFC and are different based on the environment (UAT, Copy, Production) and the template type (Job Code and Position.)

Below are the fields for the Position and the description of each:

Field	Description
Collection	Job Code or Position Data - Template Type.
Property	Field names that may be updated on the Position.
Record Type	Type generated from the Template worksheet.
Field Type	Alpha/numeric character or date of the Property.
Field Length	Length of the field.
Key/Required	Key field or a required field.
Sequence	Sequential number of the column.

Note: Use the bar at the bottom to scroll for more field information.

1. Select the ***Data Input*** tab once the template is built. For more information regarding Data Input, refer to the Data Input section in this manual.

Data Input

The field labels that appear on the data input sheet are those properties that were selected as input cells on the Template worksheets. The Record Type from the Template worksheet is also displayed for each Property.

The Data Input sheet is also used to correct data to submit to the database. Errors that are flagged on the Staging & Submission Results worksheet are posted to the Data Input worksheet; and when corrected, the items marked in error can be staged again on the Staging & Submission worksheet (for the Job Code or the Position).

The Data Input worksheet is used to enter data that will be submitted to EmpowHR with the fields that are modified. The Data Input Job Code tab or the Data Input Position tab displays only required fields to update.

The same record-type structure that is on the Template worksheet is displayed on the Data Input worksheet.

The fields listed as a Record Type 000 are key search fields. For updates, these fields are used to locate the record to be updated.

Note: The Effective Date for a job code should always be prior to the effective date of the personnel action. The Effective Date for a position should always be equal to or greater than the Effective Date for the job code.

Select the Staging & Submission tab for the Job Code or Position. This will open the final worksheet in the Excel workbook.

Staging and Submission

This tab is where the Excel CI workbook reformats the data entered on the Data Input worksheets so that EmpowHR can update the record. The Staging & Submission worksheet displays all of the fields and data from the Data Input worksheet (and those selected for Submission Only). These fields have the same Record Type structure as the fields on the Template and Data Input worksheets. You must verify that the populated data fields are the same as the Data Input worksheets.

Note: There is a blank Effective Date column for the 000 Record Type on the Staging & Submission worksheet. This default is necessary for transmission.

1. Select the Staging & Submission tab. The Staging & Submission worksheet for the Job Code or Position is displayed. The custom toolbar is also available on this worksheet.

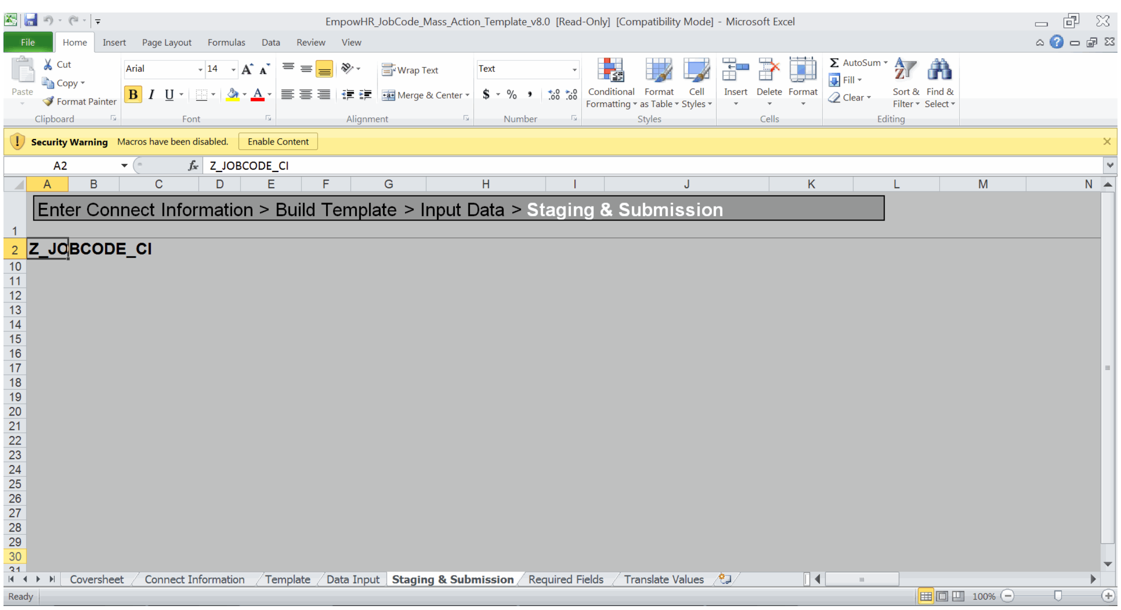

Figure 6: Job Code Mass Action Template Worksheet (Staging & Submission Tab)

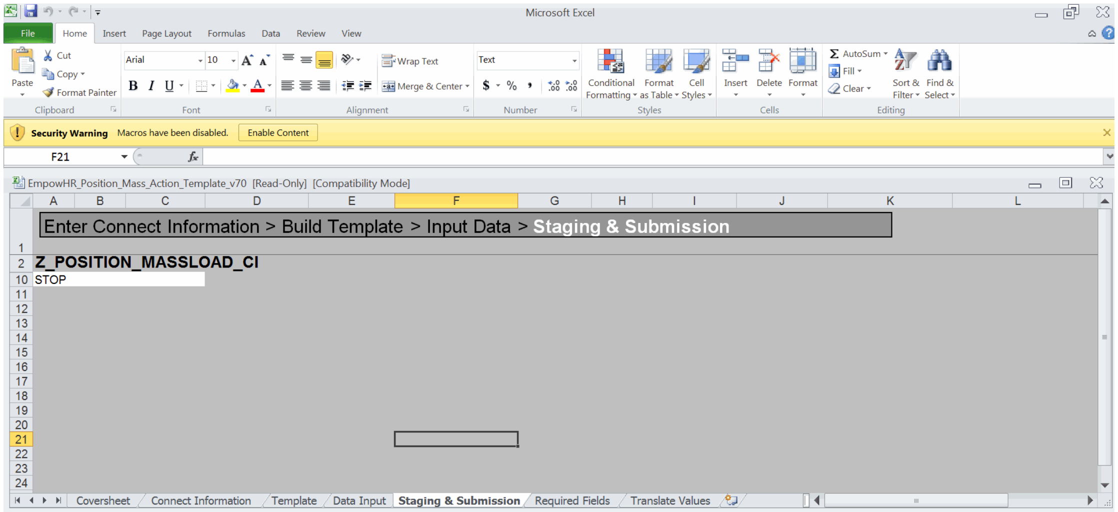

Figure 7: Position Data Mass Action Template Worksheet (Staging & Submission Tab)

2. Click ***Add-Ins*** at the top of the worksheet. For definitions of the ***Add-Ins*** options, see Templates.

3. Select ***Submit Data***. The Login popup appears.

Figure 8: Login Popup

4. Complete the fields as follows:

Field	Description/Instruction
User ID	Enter the EmpowHR user ID assigned.
Password	Enter your specific EmpowHR password.
Component Interface Name	Populated based on the Environment selected from the NFC Home Page. The valid Environments are **`UAT`**, **`Copy`**, and **`Production`**.
Generate Log	Box that can be changed. This checked box is used to create one log file for ExcelToCI.xls and for the SOAPTOCIWeb Library. These files are used for troubleshooting.

5. Click **OK**. The utility submits the data to the EmpowHR database. If there are no errors, **OK** displays in the Status column on the Staging & Submissions results tab.

   If there are errors on this page, the Status field will contain a red box with the word **Error**. Move the mouse over the red box to reveal the error(s) that were encountered during the submission. A **Warning** may display during submission. The warning information can be viewed online. This is a rare occurrence.

6. To view the results of the utility on one page, select **Post Results**. The results of the submission are copied to the Data Input worksheet to view the status of each row and make any necessary corrections to rows that have the status of **Error**.

7. To view the updates that are **OK**, log into EmpowHR to view the applicable modified data.

Note: Always review your data before submission to EmpowHR. Any updates to be made should be made on either the Template worksheet or the Data Input worksheet.

Once this process is complete, the Status column of the Staging & Submission worksheet will be updated.

To validate results:

Once results have been posted to the Excel CI utility, you can view the status for each transaction. After the batch process runs, you can validate the results. For any rows that have been successfully updated, you can navigate to the record in EmpowHR and validate the changes. Results reflecting an **OK** status can be verified in EmpowHR by navigating to the employee's record via the applicable Job Code or Position Information page. When the row is added, the record will reflect **NFC Ready** status.

Results reflecting an **Error** status can be viewed in EmpowHR by navigating to **Query Manager** and running a query. The query will contain each data record that could not be applied and its error message(s). These records need to be corrected and resubmitted in the EmpowHR Excel CI utility.

Note: When creating a new job code or position, you can either view the work list item created after processing or you can run an ad hoc query in EmpowHR to view the newly-created job code/position.

Required Fields

The Required Fields tab displays mandatory fields and values needed for each type of transaction (Job Code and Position). The Required Fields tab for the Job Code will become available when the Data Template Type for the Job Code is selected. The Required Fields tab for the Position will become available when the Template Type for the Position is selected.

Translate Values

The Translate Values tab displays the translate values needed for each type of transaction (Job Code and Position). The Translate Values for the Job Code will become available when the Template Type for the Job Code is selected. The Translate Values tab for the Position will become available when the Template Type for the Position is selected.

Awards

The *EmpowHR* Excel CI utility for Awards allows users to submit new award actions through the Excel CI utility to process a mass amount of awards simultaneously. When the records are submitted through the Excel CI utility, the data is parsed into a readable format for *EmpowHR* and then saved to a staging table. A batch job will run after the noon export and again after the nightly import to validate that the current Personnel Action Request (PAR) row does not have a transaction status of **`Ready`**, **`In Process`**, **`Sent`**, or **`Worklist Ready`**. *EmpowHR* will also validate that there is not a pending history correction package being processed for any employee included in the mass transaction. The records that pass this validation will be transmitted to PAR and updated to reflect an **`NFC Ready`** status. The records that do not pass the validation and cannot be transmitted to PAR due to the current existing PAR row or history correction package are available for the user to review by running a query. Once the cleanup has been done on the current existing PAR row or the history correction package has applied, the user will need to reprocess the action using the Excel CI utility. The flowchart below shows how the Excel CI utility processes awards.

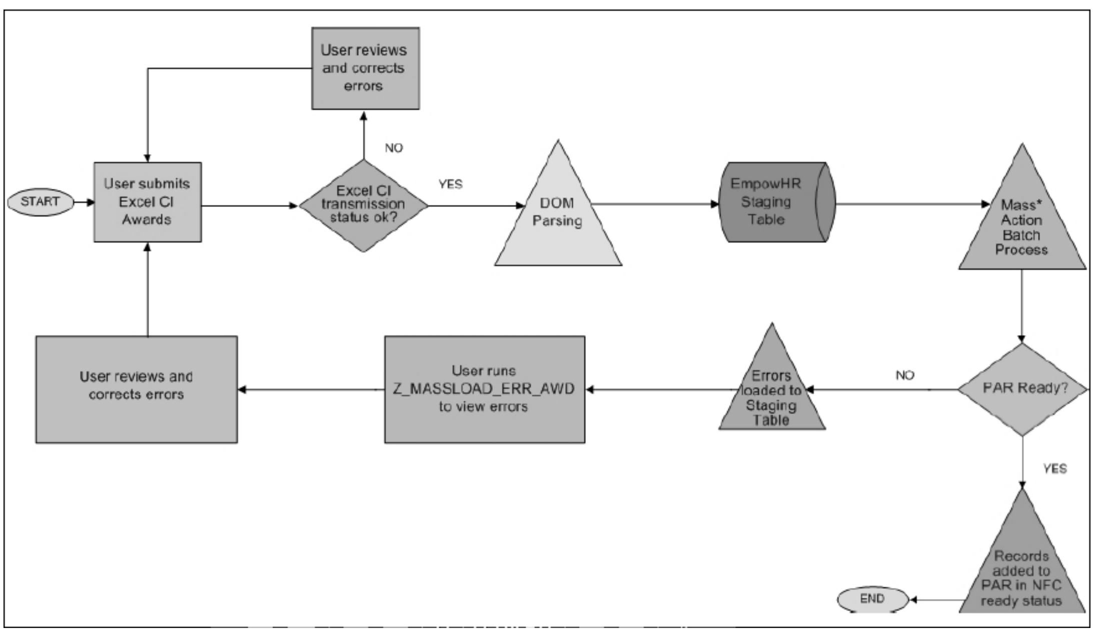

Figure 9: EmpowHR CI Utilities for Awards Flowchart

The *EmpowHR* Excel CI utility template for awards contains six worksheets.

- Coversheet - provides directions on using the Excel CI utility for awards.
- Connect Information - allows users to select the applicable environment, update the Nature of Action Code (NOAC) and generate the Data Input template.
- Template - is used to manipulate the Data Input Worksheet.
- Data Input Worksheet - allows users to enter the applicable data to send to *EmpowHR*.
- Staging & Submission - provides users with a final view of the data, allows them to submit it, and then validates the results.
- Remarks Codes-Descriptions - provides users with a list of descriptions based on the remarks code which enables users to copy and paste the descriptions in the appropriate fields.

This section contains the steps and tabs used to complete an award mass action transaction.

Note: Before beginning a worksheet, you must enable the macros by clicking **Options** at the top of each worksheet.

Connecting to the Award Mass Action Component Interface Utility

1. Access the CI utility on the *EmpowHR* Web site at *www.empowhr.gov*.
2. Select the ***Publications*** tab from the top menu.
3. Select ***EmpowHR Tools & Utilities***.
4. Select ***EmpowHR AWD Mass Action CI***.

Award Mass Action Coversheet

The Award Mass Action Coversheet tab provides users with an overview of the Award Mass Action workbook and a guide for processing award transactions.

1. Click the ***EmpowHR AWD Mass Action CI*** link to download the Award Mass Action workbook template. The Award Mass Action coversheet is displayed.

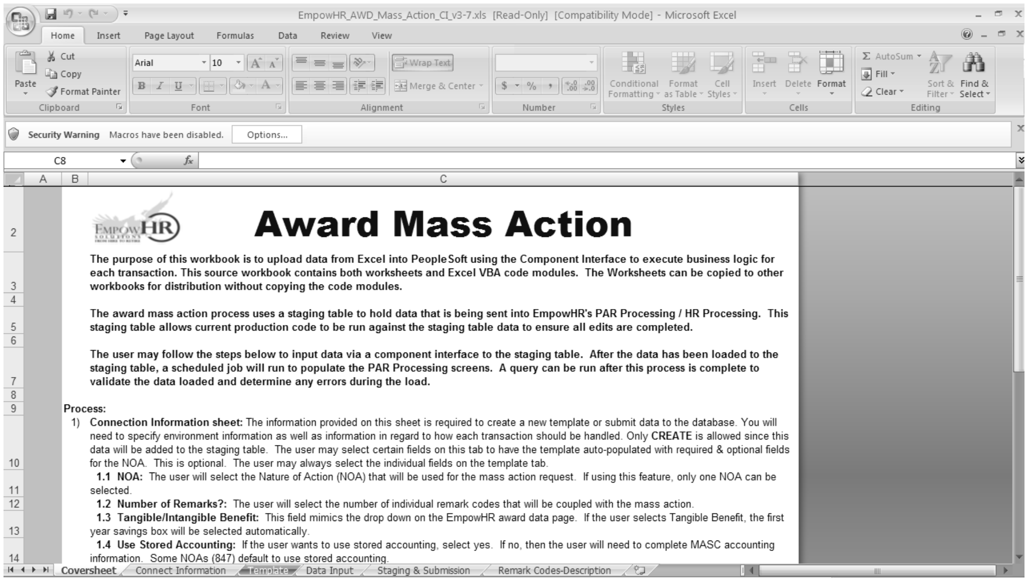

Figure 10: Award Mass Action Coversheet

Award Mass Action Connect Information

The Connect Information tab provides users with information that is required to create a new template or submit data to the database.

Note: The only action permitted in Award Mass Action is Create since the data entered will be added to HR Processing/Personnel Action Request (PAR) Processing.

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1. Select the ***Connect Information*** tab. The AWD Mass Action worksheet (Connect Information tab) is displayed.

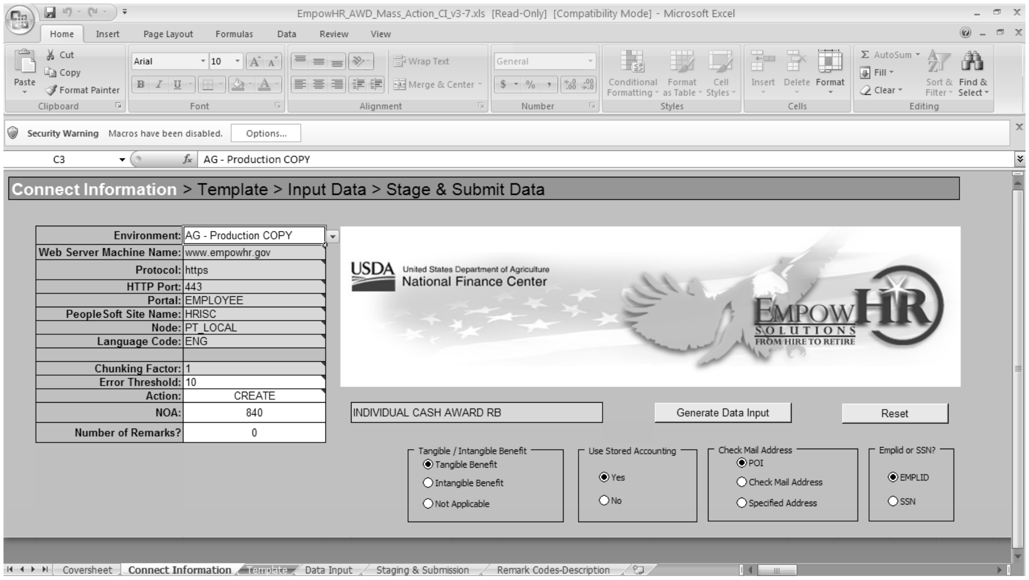

Figure 11: AWD Mass Action Worksheet (Connect Information Tab)

Note: You must click **Options** to enable macros before you can generate data input.

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2. Complete the fields as follows:

Field	Description/Instruction
Environment	Select the applicable environment. The valid values are as follows: **AG Production Copy** - USDA Copy is the USDA environment that mirror images production. This environment does not modify the production database. **AG Production** - USDA Production is the environment where processing of data takes place to add, modify, or delete information in *EmpowHR*. **DHS Production Copy** - DHS Copy is the DHS environment that mirror images production. This environment does not modify the production database. **DHS Production** - DHS Production is the environment where processing of data takes place to add, modify, or delete information in *EmpowHR*. **USDA UAT** - USDA UAT is the UAT environment. This environment is used to test modifications before moving the modification to the production environment. **DHS UAT** - DHS UAT is the DHS UAT environment. This environment is used to test modifications before moving the modification to the production environment. **HRUSDAQA** - HRUSDAQA is the HR USDA QA environment used to test functionality.

	HRDHSQA - HRDHSQA is the DHS QA environment used to test functionality. **HRTEST9** - HRTEST9 is the HR test environment. **DHS Test** - DHS Test is the environment used by DHS to test functionality. **Training** - Training is the environment used to train *EmpowHR* users. **Development** - Development is the environment used to develop *EmpowHR* functionality.
Web Server Machine Name	Field populated with the *EmpowHR* Web server. The server name will be different depending on the environment.
Protocol	Access used for the Web server. The field is populated and cannot be changed.
HTTP Port	The number used by the Web server. The field is populated and cannot be changed.
Portal	The portal being used. The field is populated and cannot be changed
PeopleSoft Site Name	The environment used in the component interface. This field is based on the Environment and Template type selected. The field is populated and cannot be changed.
Node	Field defaults to the local node name. The field is populated and cannot be changed.
Language Code	Code populated with **English** and cannot be changed.
Chunking Factor	The number of rows of data submitted to the database at one time (1 collection of 10). The field can be changed.
Error Threshold	The total number of errors that are permitted before the submission to the database ceases. When the error threshold is exceeded, an error message appears on the Staging & Submission Results tab.
Action	Option defaults to **Create**. When processing awards, **Create** is the only option available.
NOA	Enter the applicable NOAC for the award being processed (i.e., 840 for Individual Cash Award RB).
Number of Remarks?	Enter the number of remarks, if applicable.
Tangible/Intangible Benefit	Select the applicable radio button to designate whether or not there is a tangible or intangible benefit associated with the award. Valid values are **Tangible Benefit**, **Intangible Benefit**, and **Not Applicable**.

Use Stored Accounting	Select the applicable radio button to designate whether or not to use stored accounting when paying out this award. Valid values are **Yes** and **No**.
Check Mail Address	Select the applicable address for the payment to be made. Valid values are **POI**, **Check Mail Address**, and **Specified Address**.

3. Click **Generate Data Input** to create the Data Input worksheet with all available entry fields. The AWD Mass Action worksheet (Data Input tab) is displayed.

   OR

   Click **Reset** to reset the Connect Information worksheet and clear all selected cells on the Template worksheet.

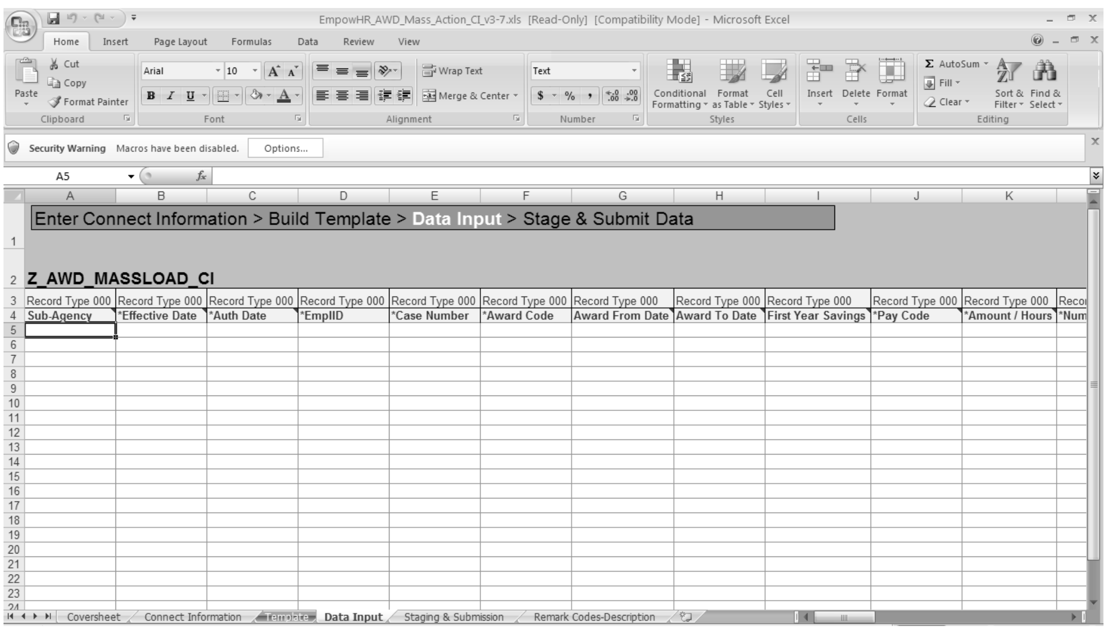


Figure 12: AWD Mass Action Worksheet (Data Input Tab)

Award Mass Action Template

The Award Mass Action Template tab provides advanced users with the ability to create and modify the structure for the data that will be sent to *EmpowHR*. Advanced users can select additional fields used for transmission, omit fields, or enter default information that is applicable to all records. The template is automatically populated when the **Generate Data Input** button on the Connection Information worksheet is selected. The template is used to build the structure for the data that will be sent to *EmpowHR*. In this workbook, you will select fields used for transmission, omit fields, and enter any default or common values.

Note: Normal users will be able to bypass this tab and continue to the Data Input tab.

Some columns in the Template worksheet have specific formatting or certain translate values. These fields will be indicated with a red triangle in the top right corner of the cell. To view this information, place the cursor on the top of the red triangle.

The data on the top of the workbook contains database details of the fields on the *EmpowHR* page.

The header row displays the field label visible in the *EmpowHR* component.

The Record Type fields represent the child and parent record levels within *EmpowHR*.

Note: It is not necessary to understand the hierarchical structure as the worksheet is structured so that the user may only select fields in the correct structure; all other fields are unavailable (locked).

The fields that are open at the Record Type 000 are key search fields. These fields are required when creating a new record. When updating a record, it is important to complete some of these fields to ensure that the correct record is being updated.

Use the Required Fields worksheet to ensure that all required fields (for the applicable action type) are selected on the Template worksheet.

1. Click the ***Template*** tab. The AWD Mass Action worksheet (Template tab) is displayed.

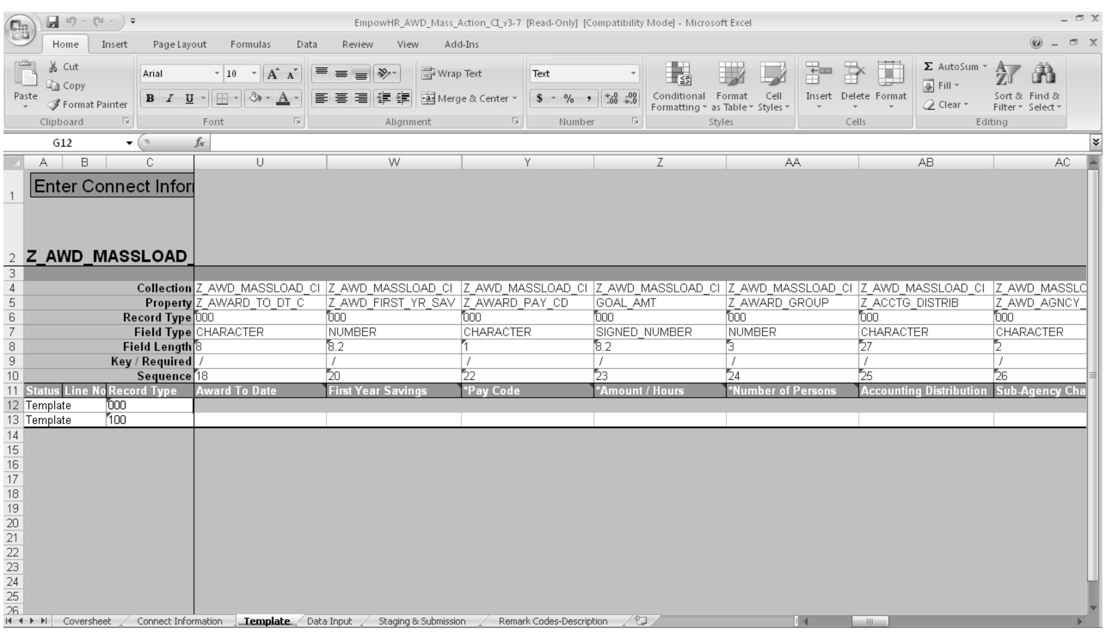


Figure 13: AWD Mass Action Worksheet (Template Tab)

2. Click ***Add-Ins*** from the top menu bar to display the custom toolbar for the template worksheet. Below is a description of each option.

Tool Bar Options	Description

Tool Bar Options	Description
New Data Input	Builds a new Data Input worksheet based upon the selected input cells. This option is used, once the template is built, to begin data entry. This will erase any structure or data previously entered on the Data Input tab; therefore, it is recommended that the template is completed before entering data.
Select Input Cell	Selects an individual cell to be updated on the Template worksheet. This is used for a list of values that are different from one row to the next (e.g., job code, position). Cells selected as input cells are highlighted in pink. All cells highlighted in pink on the template worksheet will appear on the Data Input worksheet. This option will make the highlighted cell available for data entry on the Data Input tab.
Deselect Input Cell	Changes a cell that was previously selected as an input cell to a cell that is included on the Staging & Submission tab. The cell is no longer included on the Data Input worksheet, but appears as part of the structure on the Staging & Submission worksheet. This option will remove a previously selected cell from the Data Input tab.
Restore Input Cells	Restores the Templates worksheet to its original state and clears default values. The fields in the template will be highlighted in gray, indicating that these fields will not be included for the Staging & Submission tab. This option restores the Template worksheet to the default values. It is recommended that this is selected to refresh the template before creating a new template.
Include for Submission	Includes a single Property to be included on the Staging & Submission worksheet. Properties that use default values from the Templates worksheet must be included for submission. This is used when the value is not changing between rows on the spreadsheet (i.e., set ID or effective date). Cells that are included for submission generally are properties that contain default values or properties that could be seen in the structure of the Staging & Submission worksheet. Properties that are included for submission are highlighted in blue. This option selects the highlighted cell to display on the Staging & Submission worksheet. This option does not select these cells for data input on the Data Input worksheet. This is generally used when the user wants certain default values to apply to all data input records (e.g., Agency, SubAgency, POI, etc.). If you are adding a default value: • Select the cell, • Click **Include for Submission**, and • Enter the default value in the cell.
Do Not Include for Submission	Does not include the selected property for submission to the database. If a property is not included for submission, it will not appear in the structure that is submitted to the database on the Staging & Submission worksheet. Properties that are not included for submission will only appear on the Template worksheet and not submitted to the database. Properties that are not included for submission are highlighted in gray. This option removes a previously selected cell from the Staging & Submission worksheet. This option also removes the cell from the Data Input worksheet.

Note: Each option under the ***Add-Ins*** menu has help text that describes the purpose and use of each option when the cursor is placed over the option.

1. Modify the template structure for the data that will be sent to *EmpowHR.* Additional fields may be added and used for transmission, fields may be omitted, and default and common values may be entered.

2. After all the modifications are made to the template, click **New Data Input** to build a new Data Input worksheet that includes all the applicable modifications.

3. Click **Yes** on the confirmation popup if you want all existing data on the Data Input worksheet to be deleted.

Award Mass Action Data Input

The Data Input worksheet is automatically updated to include all relevant data entry fields for the type of award and options selected when the **Generate Data Input** button is selected. The Data Input tab provides users with the ability to enter data values for submission to *EmpowHR*. The user may use a stored query to populate data in these fields.

The Data Input sheet is also used to correct data to submit to the database. Errors that are flagged on the Staging & Submission Results worksheet are posted to the Data Input worksheet. When corrected, the items marked in error can be staged again on the Staging & Submission worksheet.

Some columns in the Data Input worksheet have specific formatting or certain translate values. These fields will be indicated with a red triangle in the top right corner of the cell. To view this information, place the cursor on the top of the red triangle.

The same record-type structure that is on the Template worksheet is displayed on the Data Input worksheet.

The fields listed as a Record Type 000 are key search fields. For updates, these fields are used to locate the record to be updated.

Note: The Effective Date must be equal to or greater than the current date.

1. Click the ***Data Input*** tab. The AWD Mass Action worksheet (Data Input tab) is displayed.

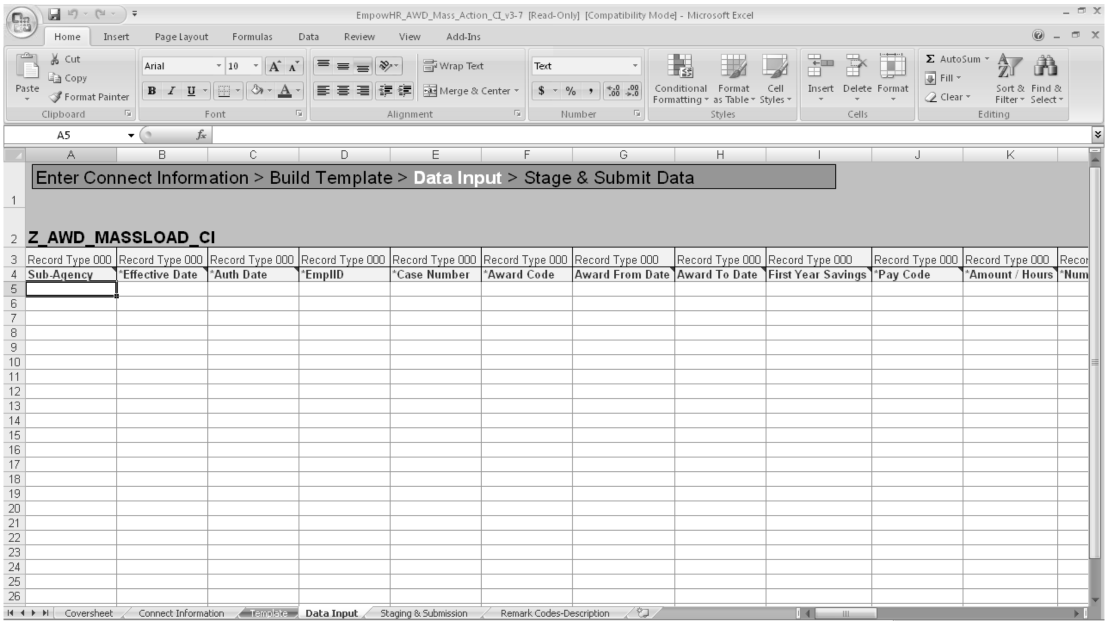


Figure 14: AWD Mass Action Worksheet (Data Input Tab)

2. Enter the data to be submitted to *EmpowHR*.

3. Click ***Add-Ins*** from the top menu bar to display the custom toolbar for the Data Input worksheet. For definitions on the ***Add-Ins*** options, see Award Mass Action Template.

4. Select **Stage Data for Submission** to apply the data to the Staging & Submission worksheet.

Award Mass Action Staging and Submission

This tab is where the Excel CI workbook reformats the data entered on the Data Input worksheets so that *EmpowHR* can update the record. The Staging & Submission worksheet displays all of the fields and data from the Data Input worksheet (and those selected for Submission Only). These fields have the same Record Type structure as the fields on the Template and Data Input worksheets. You must verify that the populated data fields are the same as the Data Input worksheets.

Note: There is a blank Effective Date column for the 000 Record Type on the Staging & Submission worksheet. This default is necessary for transmission.

1. Select the ***Staging & Submission*** tab. The AWD Mass Action worksheet Staging & Submission tab is displayed.

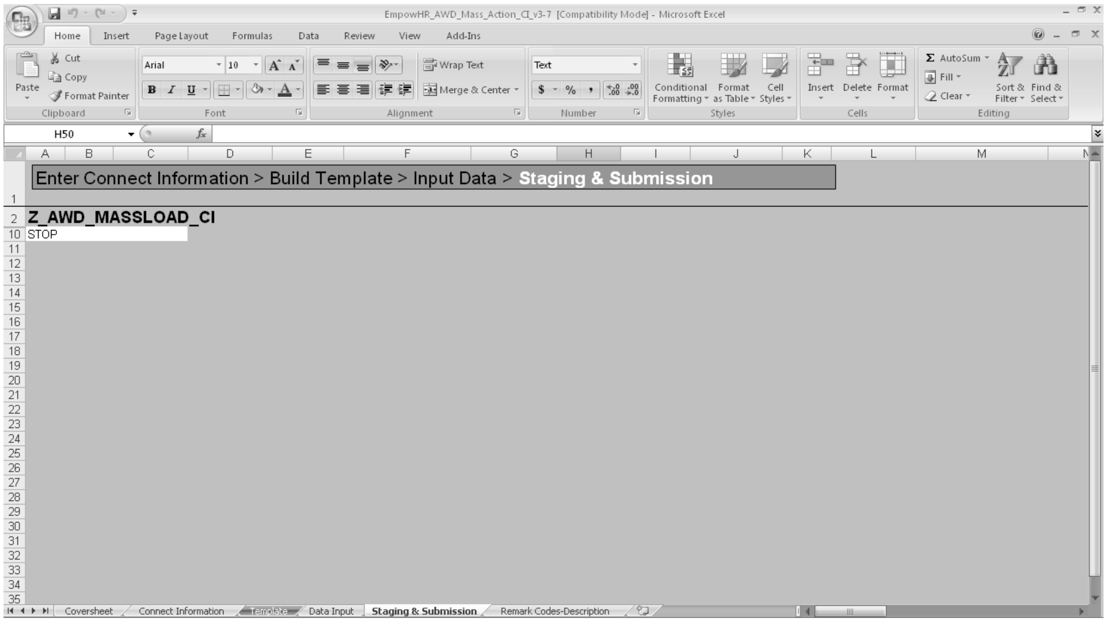


Figure 15: AWD Mass Action Worksheet (Staging & Submission Tab)

2. Verify the data populated in the fields is the same as the data in the Data Input worksheet. Any changes must be made on either the Template worksheet or the Data Input worksheet.

3. Click ***Add-Ins*** from the menu at the top of the worksheet to display the custom toolbar for the worksheet. For definitions on the Add-Ins options, see Award Mass Action Template.

4. Click **Submit Data** to submit the award mass action. The Login popup appears.

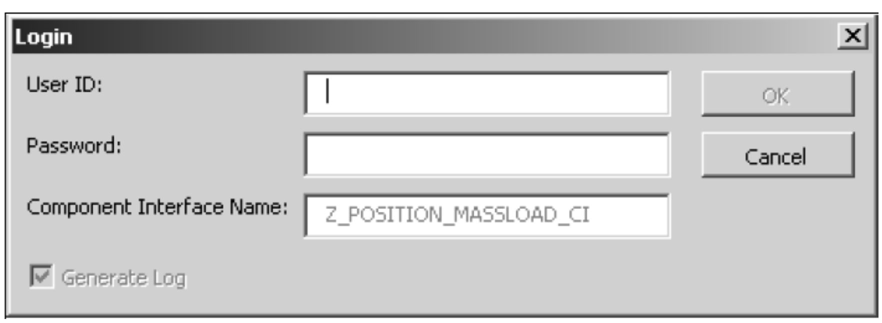


Figure 16: Login Popup

5. Complete the fields as follows:

Field	Description/Instruction
User ID	Enter the applicable *EmpowHR* user ID.

Field	Description/Instruction
Password	Enter the applicable *EmpowHR* password.
Component Interface Name	Populated based on the CI utility selected from the NFC Home Page.
Generate Log	Box that can be changed. This checked box is used to create one log file for ExcelToCI.xls and for the SOAPTOCIWeb Library. These files are used for toubleshooting.

6. Click **OK** to submit the data to the *EmpowHR* database. Although a mass amount of awards is being submitted, each action is processed individually. Once this process is completed, the Status column will be updated. If no errors occur during the process, a green box with **OK** will be displayed in the Status column next to the applicable action. If errors occur, a red box with **Error** will be displayed in the status column next to the applicable action. Move the mouse over the red box to reveal a description of the error(s) that were encountered during the submission. A yellow box with a **Warning** may be displayed during submission. The warning information can be viewed online. This is a rare occurrence.

7. Click **Post Results** to transmit the results of the submission to the Data Input worksheet where users can view the status of each transaction and make any necessary corrections to rows that reflect an **Error** status.

Note: Always review your data before submission to *EmpowHR*. Any updates to be made should be made on either the Template worksheet or the Data Input worksheet.

Once this process is complete, the Status column of the Staging & Submission worksheet will be updated.

To validate results:

Once results have been posted to the Excel CI utility, you can view the status for each transaction. After the batch process runs, you can validate the results. For any rows that have been successfully updated, you can navigate to the record in *EmpowHR* and validate the changes. Results reflecting an **OK** status can be verified in *EmpowHR* by navigating to the employee's record via the applicable Job Code or Position Information page. When the row is added, the record will reflect an **NFC Ready** status.

Results reflecting an **Error** status can be viewed in *EmpowHR* by navigating to **Query Manager** and running a Z_MASSLOAD_ERR_AWD query. The query will contain each data record that could not be applied and its error message(s). These records need to be corrected and resubmitted in the *EmpowHR* Excel CI utility.

Award Mass Action Remark Codes - Description

The Remark Codes-Description tab allows users to view the description for each Remark Code, and it helps users identify whether or not they should insert data for a particular Remark Code.

The Remark Codes - Description tab also enables users to copy and paste its text to an applicable line on the Data Input worksheet.

1. Select the ***Remark Codes - Description*** tab. The AWD Mass Action Remark Codes - Description worksheet is displayed.

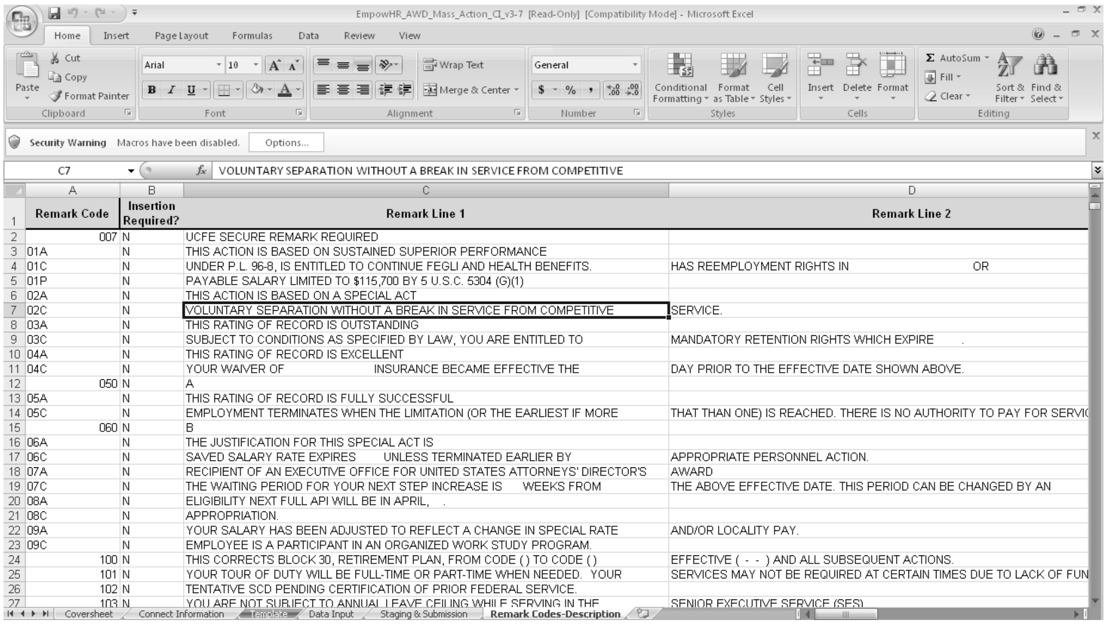


Figure 17: AWD Mass Action Remark Codes - Description Tab

Personnel Action Request (PAR)

The *EmpowHR* Excel CI utility for PAR allows users to submit new PARs through the Excel CI utility to process a mass amount of PARs simultaneously. When the records are submitted through the Excel CI utility, the data is parsed into a readable format for *EmpowHR* and then saved to a staging table. A batch job will run after the noon export and again after the nightly import to validate that the current PAR row does not have a transaction status of **`Ready`**, **`In Progress`**, **`Sent`**, or **`Worklist Ready`**. *EmpowHR* will also validate that there is not a pending history correction package being processed for any employee included in the mass transaction. The records that pass this validation will be transmitted to PAR and updated to reflect an **`NFC Ready`** status. The records that do not pass the validation and cannot be transmitted to PAR, due to the current existing PAR row or history correction package, are available for the user to review by running a query. Once the cleanup has been done on the current existing PAR row or the history correction package has applied, the user will need to reprocess the action using the Excel CI utility. The flowchart below shows how the Excel CI utility processes PARs.

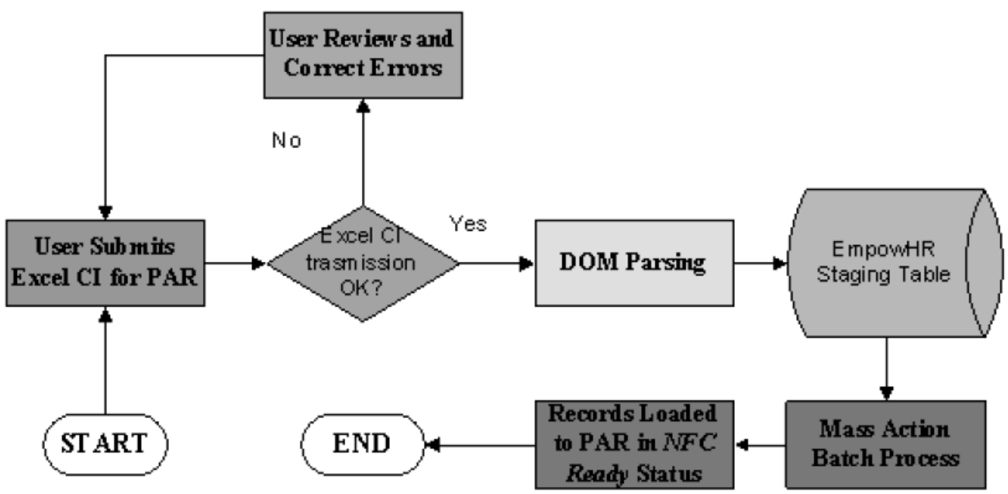


Figure 18: EmpowHR CI Utilities for PAR Flowchart

The *EmpowHR* Excel CI utility template for PARs contains six worksheets.

- Coversheet - provides directions on using the Excel CI utility for PARs.
- Connect Information - allows users to select the applicable environment, update the NOAC, and generate the Data Input template.
- Template - is used to manipulate the Data Input worksheet.
- Data Input Worksheet - allows users to enter the applicable data to send to *EmpowHR*.
- Staging & Submission - provides users with a final view of the data and allows them to submit it and then validates the results.

- Remarks Codes-Descriptions - provides users with a list of descriptions based on the remarks code which enables users to copy and paste the descriptions in the appropriate fields.

This section contains the steps and tabs used to complete PAR mass action transactions.

Note: Before beginning a worksheet, you must enable the macros by clicking **Options** at the top of each worksheet.

Connecting to the PAR Mass Action Component Interface Utility

1. Access the CI utility on the *EmpowHR* Web site at *www.empowhr.gov*.
2. Select the ***Publications*** tab from the top menu.
3. Select ***EmpowHR Tools & Utilities***.
4. Select ***EmpowHR PAR Mass Action CI***.

PAR Mass Action Coversheet

The PAR Mass Action Coversheet tab provides users with an overview of the PAR Mass Action workbook and a guide for processing PARs.

1. Click the ***EmpowHR PAR Mass Action CI*** link to download the PAR Mass Action workbook template. The PAR Mass Action coversheet is displayed.

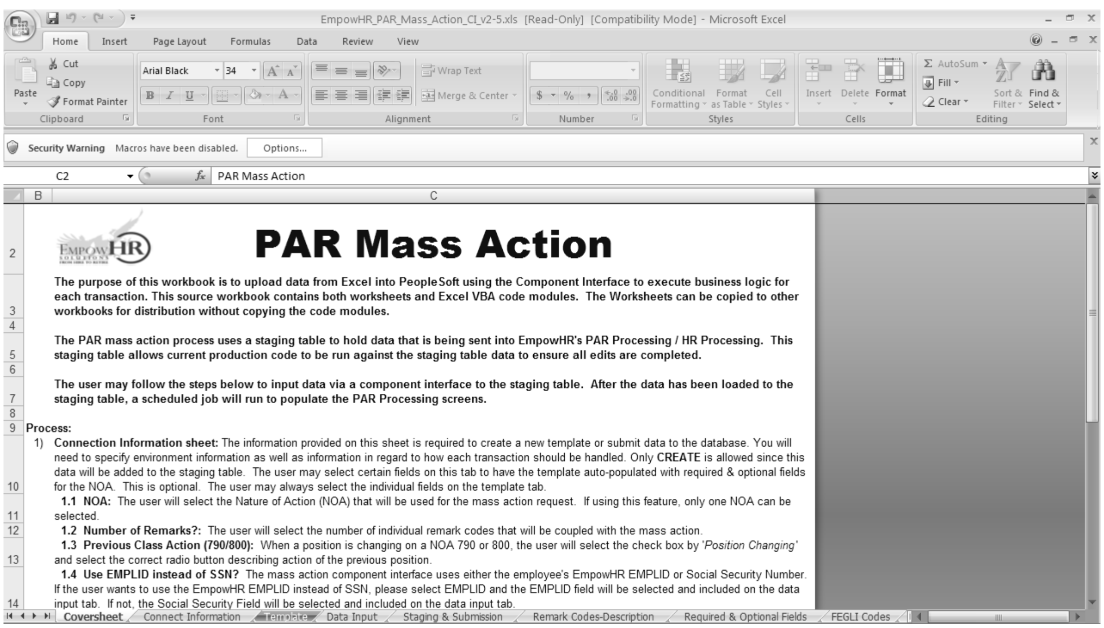


Figure 19: PAR Mass Action Coversheet

PAR Mass Action Connect Information

The Connect Information tab provides users with information that is required to create a new template or submit data to the database.

Note: The only action permitted in PAR Mass Action is Create since the data entered will be added to the staging table.

---

1. Select the ***Connect Information*** tab. The PAR Mass Action worksheet (Connect Information tab) is displayed.

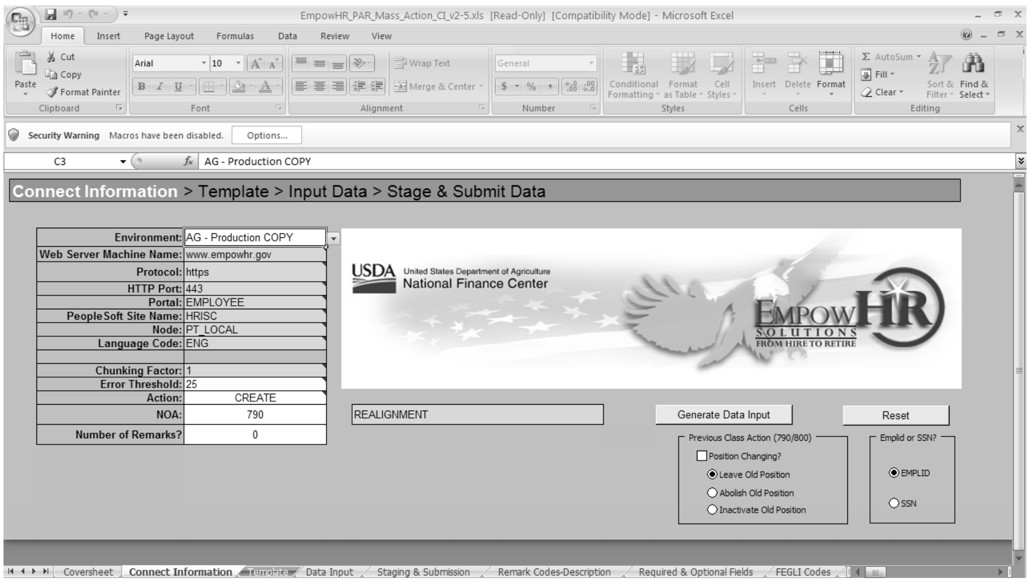


Figure 20: PAR Mass Action Worksheet (Connect Information Tab)

2. Complete the fields as follows:

Field	Description/Instruction
Environment	Select the applicable environment. The valid values are as follows: **`AG Production Copy`** - USDA Copy is the USDA environment that mirror images production. This environment does not modify the production database. **`AG Production`** - USDA Production is the environment where processing of data takes place to add, modify, or delete information in *EmpowHR*. **`DHS Production Copy`** - DHS Copy is the DHS environment that mirror images production. This environment does not modify the production database. **`DHS Production`** - DHS Production is the environment where processing of data takes place to add, modify, or delete information in *EmpowHR*. **`USDA UAT`** - USDA UAT is the UAT environment. This environment is used to test modifications before moving the modification to the

Field	Description/Instruction
	production environment. **DHS UAT** - DHS UAT is the DHS UAT environment. This environment is used to test modifications before moving the modification to the production environment. **HRUSDAQA** - HRUSDAQA is the HR USDA QA environment used to test functionality. **HRDHSQA** - HRDHSQA is the DHS QA environment used to test functionality. **HRTEST9** - HRTEST9 is the HR test environment. **DHS Test** - DHS Test is the environment used by DHS to test functionality. **Training** - Training is the environment used to train *EmpowHR* users. **Development** - Development is the environment used to develop *EmpowHR* functionality.
Web Server Machine Name	Field populated with the *EmpowHR* Web server. The server name will be different depending on environment.
Protocol	Access used for the Web server. The field is populated and cannot be changed.
HTTP Port	The number used by the Web server. The field is populated and cannot be changed.
Portal	The portal being used. The field is populated and cannot be changed.
PeopleSoft Site Name	The environment used in the component interface. This field is based on the Environment and Template type selected. The field is populated and cannot be changed.
Node	Field defaults to the local node name. The field is populated and cannot be changed.
Language Code	Code populated with **English** and cannot be changed.
Chunking Factor	The number of rows of data submitted to the database at one time (1 collection of 10). The field can be changed.
Error Threshold	The total number of errors that are permitted before the submission to the database ceases. When the error threshold is exceeded, an error message appears on the Staging & Submission Results tab.
Action	Select an action from the drop-down list.

3. Click **Generate Data Input** to create the Data Input worksheet with all available entry fields. The PAR Mass Action Data Input worksheet is displayed.

OR

Click **Reset** to reset the Connect Information worksheet and clear all selected cells on the Template worksheet.

PAR Mass Action Template

The PAR Mass Action Template tab provides advanced users with the ability to create and modify the structure for the data that will be sent to *EmpowHR*. Advanced users can select additional fields used for transmission, omit fields, or enter default information that is applicable to all records. The template is automatically populated when the **Generate Data Input** button on the Connection Information worksheet is selected. The template is used to build the structure for the data that will be sent to *EmpowHR*. In this workbook, you will select fields used for transmission, omit fields, and enter any default or common values.

Note: Normal users will be able to bypass this tab and continue to the Data Input tab.

Some columns in the Template worksheet have specific formatting or certain translate values. These fields will be indicated with a red triangle in the top right corner of the cell. To view this information, place the cursor on the top of the red triangle.

The data on the top of the workbook contains database details of the fields on the *EmpowHR* page.

The header row displays the field label visible in the *EmpowHR* component.

The Record Type fields represent the child and parent record levels within *EmpowHR*.

Note: It is not necessary to understand the hierarchical structure as the worksheet is structured so that the user may only select fields in the correct structure; all other fields are unavailable (locked).

The fields that are open at the Record Type 000 are key search fields. These fields are required when creating a new record. When updating a record, it is important to complete some of these fields to ensure that the correct record is being updated.

Use the Required Fields worksheet to ensure that all required fields (for the applicable action type) are selected on the Template worksheet.

1. Click the ***Template*** tab. The PAR Mass Action worksheet (Template tab) is displayed.

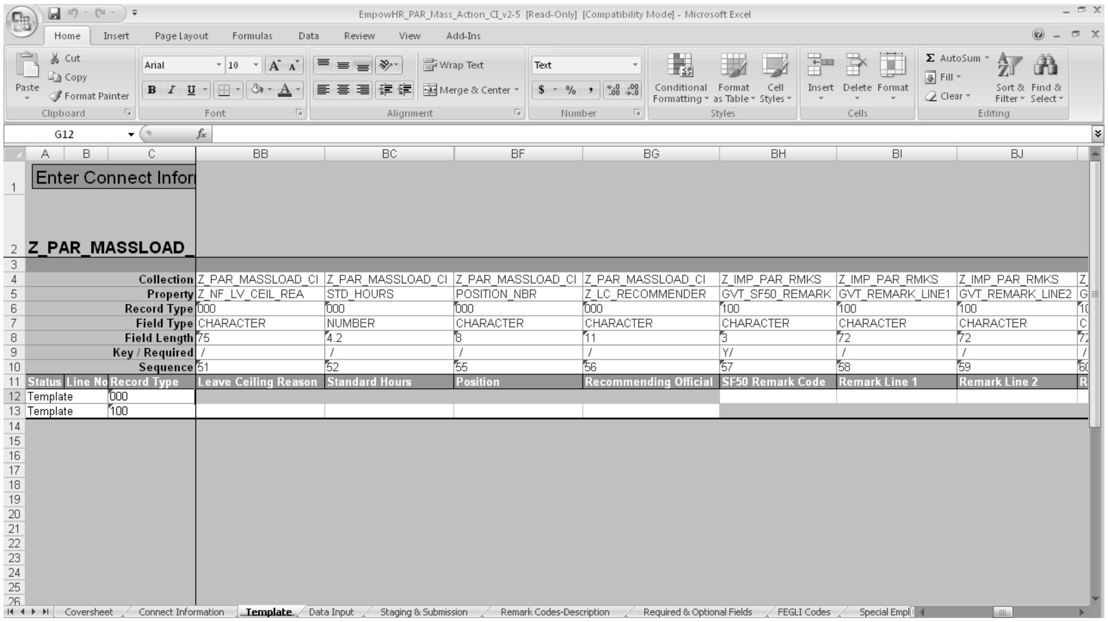


Figure 21: PAR Mass Action Worksheet (Template Tab)

2. Click ***Add-Ins*** from the top menu bar to display the custom toolbar for the template worksheet. Below is a description of each option.

Tool Bar Options	Description
New Data Input	Builds a new Data Input worksheet based upon the selected input cells. This option is used, once the template is built, to begin data entry. This will erase any structure or data previously entered on the Data Input tab; therefore, it is recommended that the template is completed before entering data.
Select Input Cell	Selects an individual cell to be updated on the Template worksheet. This is used for a list of values that are different from one row to the next (e.g., job code, position). Cells selected as input cells are highlighted in pink. All cells highlighted in pink on the template worksheet will appear on the Data Input worksheet. This option will make the highlighted cell available for data entry on the Data Input tab.
Deselect Input Cell	Changes a cell that was previously selected as an input cell to a cell that is included on the Staging & Submission tab. The cell is no longer included on the Data Input worksheet, but appears as part of the structure on the Staging & Submission worksheet. This option will remove a previously selected cell from the Data Input tab.
Restore Input Cells	Restores the Templates worksheet to its original state and clears default values. The fields in the template will be highlighted in gray, indicating that these fields will not be included for the Staging & Submission tab. This option restores the Template worksheet to the default values. It is recommended that this is selected to refresh the template before creating a new template.

Tool Bar Options	Description
Include for Submission	Includes a single Property to be included on the Staging & Submission worksheet. Properties that use default values from the Templates worksheet must be included for submission. This is used when the value is not changing between rows on the spreadsheet (i.e., set ID or effective date). Cells that are included for submission generally are properties that contain default values or properties that could be seen in the structure of the Staging & Submission worksheet. Properties that are included for submission are highlighted in blue. This option selects the highlighted cell to display on the Staging & Submission worksheet. This option does not select these cells for data input on the Data Input worksheet. This is generally used when the user wants certain default values to apply to all data input records (e.g., Agency, SubAgency, POI, etc.). If you are adding a default value: • Select the cell, • Click **Include for Submission**, and • Enter the default value in the cell.
Do Not Include for Submission	Does not include the selected property for submission to the database. If a property is not included for submission, it will not appear in the structure that is submitted to the database on the Staging & Submission worksheet. Properties that are not included for submission will only appear on the Template worksheet and not submitted to the database. Properties that are not included for submission are highlighted in gray. This option removes a previously selected cell from the Staging & Submission worksheet. This option also removes the cell from the Data Input worksheet.

Note: Each option under the ***Add-Ins*** menu has help text that describes the purpose and use of each option when the cursor is placed over the option.

1. Modify the template structure for the data that will be sent to *EmpowHR*. Additional fields can be added and used for transmission, fields can be omitted, and default and common values can be entered.

2. After all the modifications are made to the template, click **New Data Input** to build a new Data Input worksheet that includes all the applicable modifications.

3. Click **Yes** on the confirmation popup if you want all existing data on the Data Input worksheet to be deleted.

PAR Mass Action Data Input

The Data Input worksheet is automatically updated to include all relevant data entry fields for the type of PAR and options selected when the **Generate Data Input** button is selected. The Data Input tab provides users with the ability to enter data values for submission to *EmpowHR*. The user may use a stored query to populate data in these fields.

The Data Input sheet is also used to correct data to submit to the database. Errors that are flagged on the Staging & Submission Results worksheet are posted to the Data Input worksheet. When corrected, the items marked in error can be staged again on the Staging & Submission worksheet.

Some columns in the Data Input worksheet have specific formatting or certain translate values. These fields will be indicated with a red triangle in the top right corner of the cell. To view this information, place the cursor on the top of the red triangle.

The same record-type structure that is on the Template worksheet is displayed on the Data Input worksheet.

The fields listed as a Record Type 000 are key search fields. For updates, these fields are used to locate the record to be updated.

Note: The Effective Date for a PAR should reflect the action date of the personnel action. Predate information to add historical data, or postdate information to enter before actually goes into effect.

1. Click the ***Data Input*** tab. The PAR Mass Action worksheet (Data Input tab) is displayed.

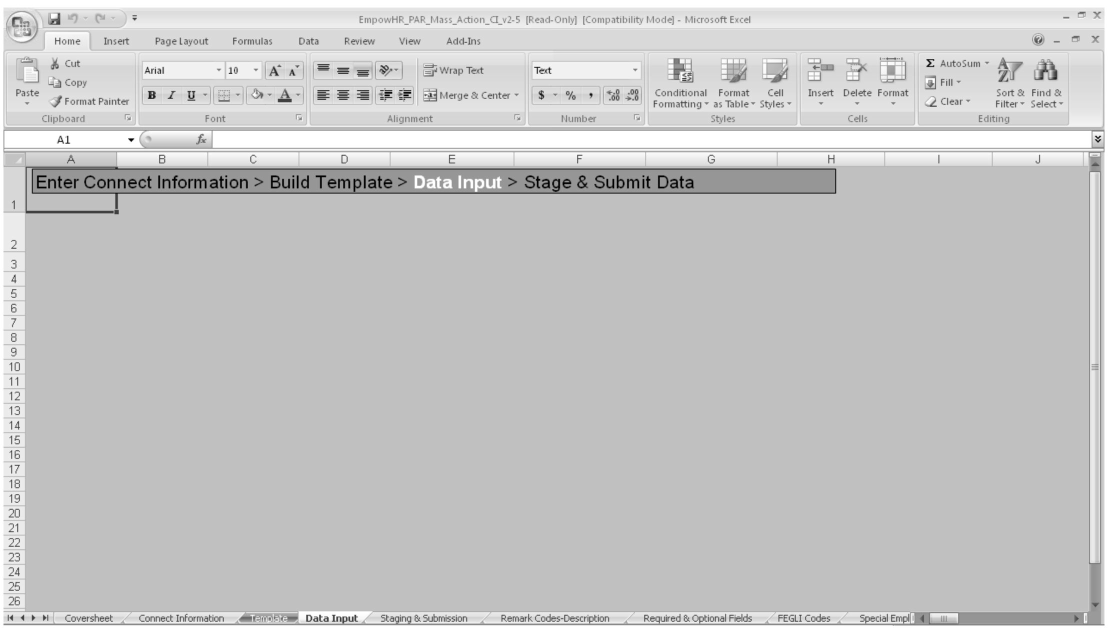


Figure 22: PAR Mass Action Worksheet (Data Input Tab)

2. Enter the data to be submitted to ***EmpowHR***.

3. Click ***Add-Ins*** from the top menu bar to display the custom toolbar for the Data Input worksheet. For definitions of the ***Add-Ins*** options, see PAR Mass Action Template.

4. Select **Stage Data for Submission** to apply the data to the Staging & Submission worksheet.

PAR Mass Action Staging & Submission

This tab is where the Excel CI workbook reformats the data entered on the Data Input worksheets so that *EmpowHR* can update the record. The Staging & Submission worksheet displays all of the fields and data from the Data Input worksheet (and those selected for Submission Only). These fields have the same Record Type structure as the fields on the Template and Data Input worksheets. You must verify that the populated data fields are the same as the Data Input worksheets.

Note: There is a blank Effective Date column for the 000 Record Type on the Staging & Submission worksheet. This default is necessary for transmission.

---

1. Select the ***Staging & Submission*** tab. The PAR Mass Action worksheet (Staging & Submission tab) is displayed.

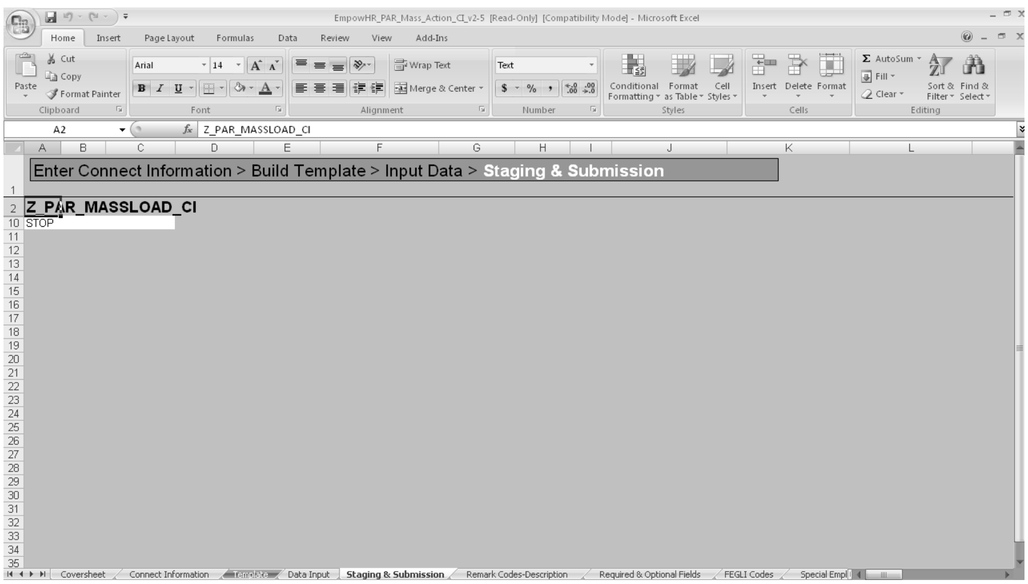


Figure 23: PAR Mass Action Worksheet (Staging & Submission Tab)

2. Verify the data populated in the fields is the same as the data in the Data Input worksheet. Any changes must be made on either the Template worksheet or the Data Input worksheet.

3. Click ***Add-Ins*** from the menu at the top of the worksheet to display the custom toolbar for the worksheet.

4. Click **Submit Data** to submit the PAR mass action. The Login popup appears.

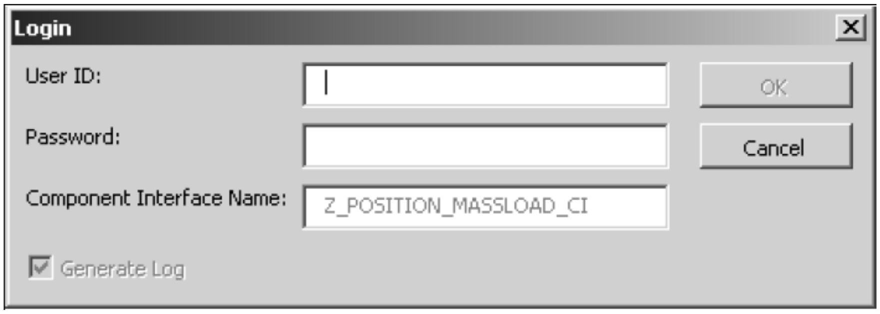


Figure 24: Login Popup

5. Complete the fields as follows:

Field	Description/Instruction
User ID	Enter the applicable *EmpowHR* user ID.
Password	Enter the applicable *EmpowHR* password.
Component Interface Name	Populated based on the CI utility selected from the NFC Home Page.
Generate Log	Box that can be changed. This checked box is used to create one log file for ExcelToCI.xls and for the SOAPTOCIWeb Library. These files are used for toubleshooting.

6. Click **OK** to submit the data to the *EmpowHR* database. Although a mass amount of PARs is being submitted, each action is processed individually. Once this process is completed, the Status column will be updated. If no errors occur during the process, a green box with **OK** will be displayed in the Status column next to the applicable action. If errors occur, a red box with **`Error`** will be displayed in the Status column next to the applicable action. Move the mouse over the red box to reveal a description of the error(s) that were encountered during the submission. A yellow box with a **`Warning`** may be displayed during submission. The warning information can be viewed online. This is a rare occurrence.

7. Click **Post Results** to transmit the results of the submission to the Data Input worksheet where users can view the status of each transaction and make any necessary corrections to rows that reflect an **`Error`** status.

Note: Always review your data before submission to *EmpowHR*. Any updates to be made should be made on either the Template worksheet or the Data Input worksheet.

Once this process is complete, the Status column of the Staging & Submission worksheet will be updated.

To validate results:

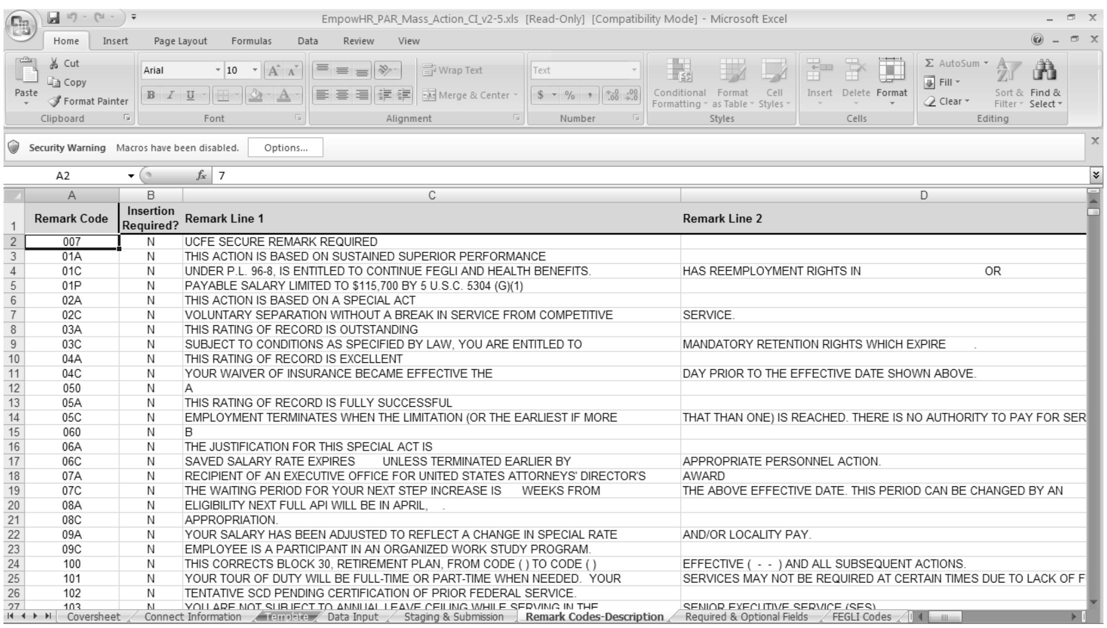
Once results have been posted to the Excel CI utility, you can view the status for each transaction. After the batch process runs, you can validate the results. For any rows that have been successfully updated, you can navigate to the record in *EmpowHR* and validate the changes. Results reflecting an **`OK`** status can be verified in *EmpowHR* by navigating to the employee's record via the applicable Job Code or Position Information page. When the row is added, the record will reflect an **`NFC Ready`** status.

Results reflecting an **`Error`** status can be viewed in *EmpowHR* by navigating to **Query Manager** and running a Z_MASSLOAD_ERR_PAR query. The query will contain each data record that could not be applied and its error message(s). These records need to be corrected and resubmitted in the *EmpowHR* Excel CI utility.

PAR Mass Action Remark Codes - Description

The Remark Codes - Description tab allows users to view the description for each Remark Code and it helps users identify whether or not they should insert data for a particular Remark Code. The Remark Codes - Description tab also enables users to copy and paste its text to an applicable line on the Data Input worksheet.

1. Select the ***Remark Codes - Description*** tab. The PAR Mass Action worksheet (Remark Codes - Description tab) is displayed.



Remark Code	Insertion Required?	Remark Line 1	Remark Line 2
007	N	UCFE SECURE REMARK REQUIRED	
01A	N	THIS ACTION IS BASED ON SUSTAINED SUPERIOR PERFORMANCE	
01C	N	UNDER P.L. 96-8, IS ENTITLED TO CONTINUE FEGLI AND HEALTH BENEFITS.	HAS REEMPLOYMENT RIGHTS IN OR
01P	N	PAYABLE SALARY LIMITED TO $115,700 BY 5 U.S.C. 5304 (G)(1)	
02A	N	THIS ACTION IS BASED ON A SPECIAL ACT	
02C	N	VOLUNTARY SEPARATION WITHOUT A BREAK IN SERVICE FROM COMPETITIVE	SERVICE.
03A	N	THIS RATING OF RECORD IS OUTSTANDING	
03C	N	SUBJECT TO CONDITIONS AS SPECIFIED BY LAW, YOU ARE ENTITLED TO	MANDATORY RETENTION RIGHTS WHICH EXPIRE .
04A	N	THIS RATING OF RECORD IS EXCELLENT	
04C	N	YOUR WAIVER OF INSURANCE BECAME EFFECTIVE THE	DAY PRIOR TO THE EFFECTIVE DATE SHOWN ABOVE.
050	N	A	
05A	N	THIS RATING OF RECORD IS FULLY SUCCESSFUL	
05C	N	EMPLOYMENT TERMINATES WHEN THE LIMITATION (OR THE EARLIEST IF MORE	THAT THAN ONE) IS REACHED. THERE IS NO AUTHORITY TO PAY FOR SER
060	N	B	
06A	N	THE JUSTIFICATION FOR THIS SPECIAL ACT IS	
06C	N	SAVED SALARY RATE EXPIRES UNLESS TERMINATED EARLIER BY	APPROPRIATE PERSONNEL ACTION.
07A	N	RECIPIENT OF AN EXECUTIVE OFFICE FOR UNITED STATES ATTORNEYS' DIRECTOR'S	AWARD
07C	N	THE WAITING PERIOD FOR YOUR NEXT STEP INCREASE IS WEEKS FROM	THE ABOVE EFFECTIVE DATE. THIS PERIOD CAN BE CHANGED BY AN
08A	N	ELIGIBILITY NEXT FULL API WILL BE IN APRIL, .	
08C	N	APPROPRIATION.	
09A	N	YOUR SALARY HAS BEEN ADJUSTED TO REFLECT A CHANGE IN SPECIAL RATE	AND/OR LOCALITY PAY.
09C	N	EMPLOYEE IS A PARTICIPANT IN AN ORGANIZED WORK STUDY PROGRAM.	
100	N	THIS CORRECTS BLOCK 30, RETIREMENT PLAN, FROM CODE ( ) TO CODE ( )	EFFECTIVE (- -) AND ALL SUBSEQUENT ACTIONS.
101	N	YOUR TOUR OF DUTY WILL BE FULL-TIME OR PART-TIME WHEN NEEDED. YOUR	SERVICES MAY NOT BE REQUIRED AT CERTAIN TIMES DUE TO LACK OF F
102	N	TENTATIVE SCD PENDING CERTIFICATION OF PRIOR FEDERAL SERVICE.	
103	N	YOU ARE NOT SUBJECT TO ANNUAL LEAVE CEILING WHILE SERVING IN THE	SENIOR EXECUTIVE SERVICE (SES)

Figure 25: PAR Mass Action Worksheet (Remark Codes - Description Tab)

Troubleshooting

Below are some potential errors and solutions:

- *Row already exists with the specified keys* - If in the Create Action mode, this indicates that the record already exists in *EmpowHR*. Verify this result by logging into *EmpowHR* and navigating to the record. If the added record is correct, modify the Effective Date in the Excel CI workbook.
- *No row exists for existing key* - The record does not exist at Level **0**. Add the data by using the Create action mode.
- *Not Authorized (90,6)* - The user trying to access the CI from ExcelToCI does not have access to the CI. Make a formal request for the specific CI through the NFC Security Office.
- *Add Ins menu is not available* - The **Add Ins** button is not displayed. Enable macros to display the **Add Ins** button.
- *No response on buttons on the Add Ins menu* - The Add Ins menu options are grayed out. Click off of (out of) a data input cell.
- *Access is denied* - The user trying to access the CI from ExcelToCI does not have access to the CI. Make a formal request for the specific CI through the NFC Security Office.

Who to Call

For help on the Excel to CI utility, contact the NFC Contact Center at **1-855-NFC4GOV (1-855-632-4468)**.

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