AIR FORCE GUIDE

TO

PROCESSING

LN MASS REALIGNMENTS

07 OCT 2002

(Updated 12 Oct 2002)

LN MASS REALIGNMENTS (NOAC 790A)

Stage 1. Fill out the LN Mass Realignment screen and source criteria

Once you have the information required to process the LN mass realignment, use the LN PERSONNELIST responsibility for your country (or the LN responsibility CIVDOD LN HR MGR for your country), and navigate to *Mass Actions --> Mass Realignment --> LN Mass Realignment Final* (or *LN Mass Realignment Preview*).

- NOTE: Currently global access is required to process mass realignments. Until this is fixed, one of the above responsibilities must be used. Except for the countries not specifically identified (Norway is one), the appropriate country must be displayed after the responsibility as well. For example, LN PERSONNELIST - Italy, LN PERSONNELIST - Japan, LN PERSONNELIST (for Norway). As these LN responsibilities by countries dictate which RPA/NPAs are created, the global "CIVDOD PERSONNELIST" responsibility is not appropriate for the LN Mass Realignment process.

- You can select either the "Final" or "Preview" LN mass realignment. Normally you would select the "final" version which includes the <Execute> button which allows you to actually process the action. If you start by selecting LN *Mass Realignment Preview* (the non-final version), you will still be able to execute the action later (after you have saved the realignment).

STAGE 1: SCREEN SHOT-NAVIGATOR WINDOW
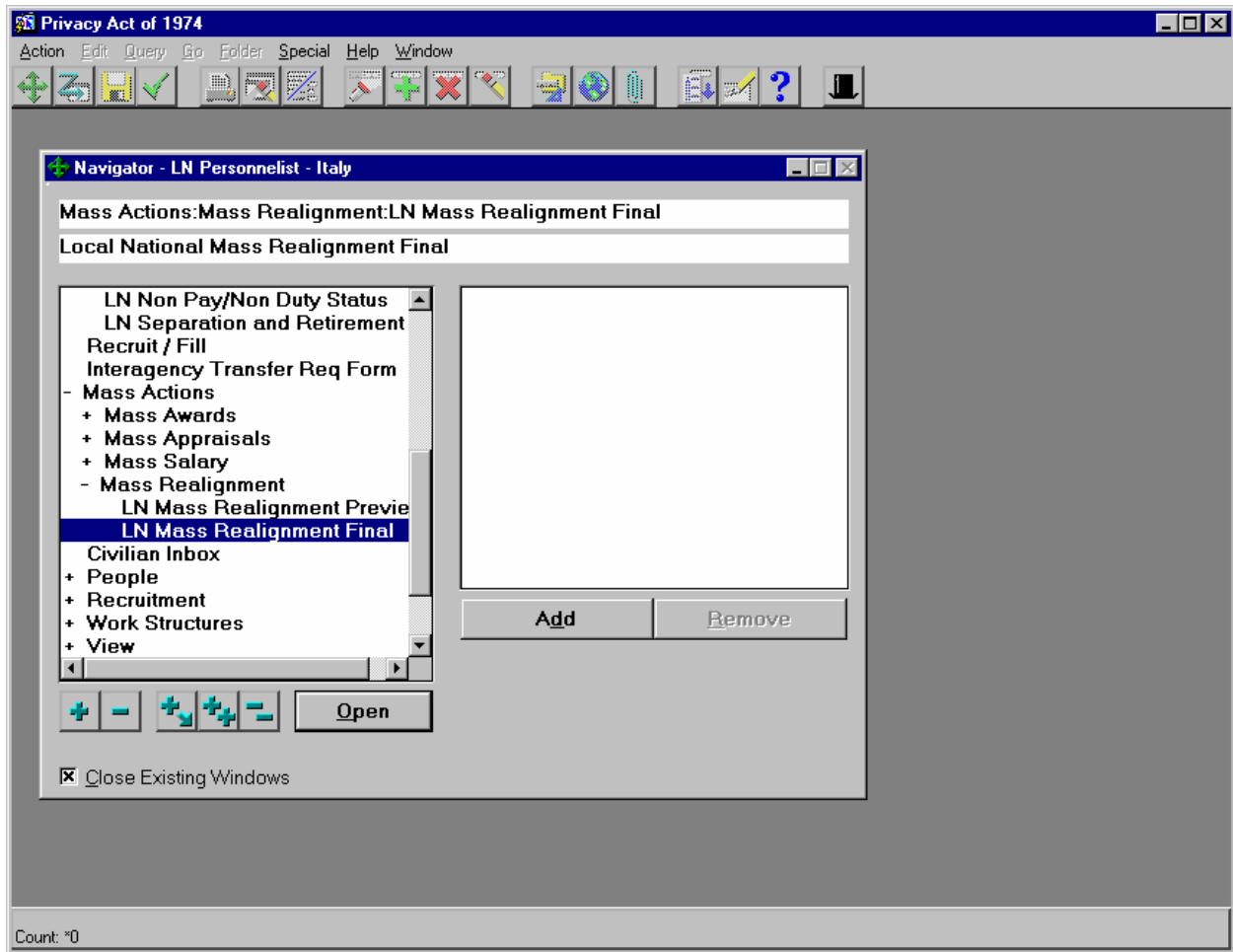
STAGE 1(cont.): SCREEN SHOT- MASS REALIGNMENT SCREEN

Complete the items in the Mass Realignment screen as follows:

INPUT REQUIREMENTS and HINTS

NAME: Input a name to identify the mass realignment so you can retrieve/search for action later (can be searched on using standard search methods (F7/enter criteria, F8 to process). Recommend CPF ID or Name be used as part of the name to readily identify whom the Mass Realignment belongs to.

EFFECTIVE DATE: The date of the realignment (can also be searched on)
   Can be input in advance of the effective date, so long as the date the action is executed is after the effective date

STATUS: Controlled by the system

DESCRIPTION: Narrative field for additional information about action

SOURCE BLOCK

ORGANIZATION: enter **losing** organization. Can enter %PAS CODE% for AF organizations or %UIC% for non-AF organizations or partial organization name% and hit tab. This will either auto populate the field or give you a list of values to select from. Insure the correct one is selected; can use the "Edit Field" icon to see the complete data for this field.

ORGANIZATION HIERARCHY: Can leave blank.

TARGET BLOCK

TARGET ORGANIZATION: enter **gaining** organization. Can enter %PAS CODE% for AF organizations or %UIC% for non-AF organizations or partial organization name% and hit tab. This will either auto populate the field or give you a list of values to select from. Insure the correct one is selected; can use the "Edit Field" icon to see the complete data for this field.

ADDITIONAL SOURCE CRITERIA

ORGANIZATION STRUCTURE ID: When building the Mass Realignment file, the user can now use a wildcard (%) in Additional Source Criteria Section/Org Structure ID field. This functionality allows more than one Org Structure for the source organization. For instance, if a user inputs LD%, records with LD, LDA, LDAA, LDB, LDE, LDEEG, etc. will appear in the preview. This functionality provides flexibility in doing a Mass Realignment on an entire organization. Leave blank to retrieve all records for the losing organization; input a specific Org Structure to retrieve only one specific Org Structure.

OFFICE SYMBOL: Optional field to further limit source criteria.

PERSONNEL OFFICE ID: Enter your 4-character POI.

Stage 2. Complete the Position Details screens as necessary

Click on the <**Position Details**> button to access the Position details screen. There are actually two screens; the second screen is accessed by clicking the <**Additional Details**> button at the bottom of the first Position Details screen.

- On these screens, you will identify the data element changes that are being made in this realignment action.
- The basic rule of thumb is, if the data element is not changing, leave it blank. If data elements are changing to different values for different records, use the most common value (this will become the default value in the comparable "target" field on the preview screen). One exception is the Duty Station code -- this defaults to the location of the primary organization and therefore should always be checked and changed if necessary.
- Changes you make here will be made on all selected records (employee and/or vacant position records), but you can change them for specific records, if needed, on the Preview screen (Stage 3). For instance, if you indicate that the Competitive Area is changing to "A000", but for some of the records it will be "A001", you can change those specific records during Stage 3. Same holds true for Office Symbol, Organization Structure ID, POA, etc.
- Any fields that you leave blank will not be affected during the realignment (unless you have made changes to specific records in the "Preview" screen). They will retain their current values.
- Once you have saved the preview screen (during Stage 3) you will not be able to make any further changes via the "Position Details" screens. Any subsequent changes to the position details screens will not be reflected in the individual records on the preview screen. You will need to make any additional changes to each individual record on the preview screen.
- When you select records on the preview screen (Stage 3), each selected record will, by default, take on the value of any of the data elements that you have included on these position details screens (after following the instructions for Stage 3 -- that is, selecting the records, saving and exiting the preview screen, then returning to the preview screen). Once changes have been made in the Target fields on the Preview Screen and been saved, any additional changes to the Position Details screens will overlay any data that was individually updated for that field on the Preview Screen.

STAGE 2 SCREEN SHOT-COMPLETING POSITION DETAIL FIELDS

NOTE: At a minimum, you will need to enter PAS Code (if AF)/Unit Id Code (if non-AF) when the target organization changes.
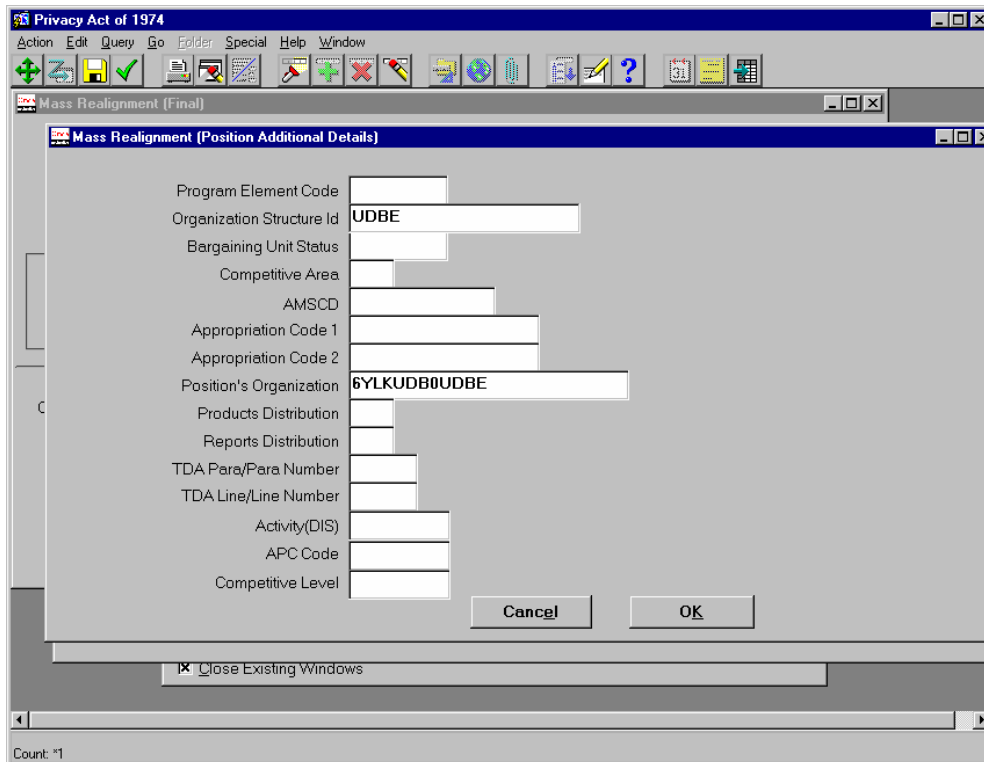
PAS Code: Enter the 8-digit "Owning PAS Code" if an AF organization.
Unit ID Code: Enter the UIC if a non-AF organization.
Duty Station: Autopopulated from the Organization Record; change if not the appropriate one.

Enter applicable data in the other blocks when it is changing!

SELECT ADDITIONAL DETAILS

NOTE: You complete at least these two fields on this screen

ORGANIZATION STRUCTURE ID: Type in the Organization Structure Code of the target or gaining organization

POSITION'S ORGANIZATION: Type in %PAS CODE% if AF or %UIC% for non-AF records of the target activity. Select the appropriate Position Organization Address from the list of values. (This is your "Table 30" entry.)

- **Note**: When a new position is created, upon validation of the position the Position Organization Address (POA) is autopopulated based on SOID + Last 6 of PAS CODE for AF/UIC for non-AF + Org Structure. As positions are not "validated" in the Realignment process, the POA must also be input in the Position Details DDF if this field is changing. If more than one Org Structure is included in your Mass Realignment process, those that differ from the default used for POA must also be individually updated in the Target Position Organization field on the Preview Screens.

Enter applicable data in the other blocks when it is changing!

- **Note:** As positions are not "validated" in the Mass Realignment process, the Appropriation Code 1 must also be input in the Position Details DDF if this field is changing. If the Appropriation Code 1 differs for the records involved, those that differ from the default used for Appropriation Code 1 must also be individually updated in the Target Appropriation Code 1 field on the Preview Screens. However, the Appropriation Code 1 must be on the LOV in order to input the changed data in this field. When the fields used by the components (FAC/PEC for AF) are input on the Position Details screens, the new combination will be automatically added to the LOV and will then be available for selection when inputting Appropriation Code 1. If more than one new combination is required for the selected records, repeat update of the appropriate fields (i.e., FAC/PEC) in the Position Detail screens until all are on the LOV before going to the Preview. Note: If the Appropriation Code 1 is changing, the data in Target Appropriation Code 1 in the Preview must be correct for each selected record in order for the resulting NPAs to print the new Appropriation Code in Block 36.

Select OK, this returns you to the previous screen, select OK, this will ask you to save; say yes

Stage 3. Preview the realignment

Make sure you have made the appropriate changes to the Position Details screens (Stage 2 above) before doing this stage. Once you save the preview screen (step 4 below), any further changes you make on the position details screens will not be reflected in the preview screen.

- ■ Note: Recent fixes to the process changed this. Now once changes have been made in the Target fields on the Preview Screen and been saved, any additional changes to the Position Details screens will overlay any data that was individually updated for that field on the Preview Screen. Caution: Before executing your Mass Realignment, verify that the "Target" data in the Preview Screen is correct for the selected records.

Select / Deselect

When the records display on the preview screen, they have a check block next to them in the "Realign" column that indicates if the record will be processed during the realignment. This is where you select the specific records to be included in the realignment action, and de-select those that are not to be realigned. The <**Select / Deselect All**> button at the bottom of the preview window allows you to toggle all the check blocks to selected (X) or de-selected.

Displaying selected records only: You can use the [F7] and [F8] keys (the query function) to limit the preview screen to selected records only. This reduces the amount of scrolling needed, particularly if you are doing a realignment with lots of unselected records. Once you have selected (checked) the records to be included in the realignment (and saved and exited, then returned to, the preview screen to populate the changes to the selected records - steps 4 and 5 below), push [F7] (to start a query). This clears the records from the preview screen, but leaves one checked checkbox. Click the checkbox to clear the checkmark from this box, then re-select it, then push [F8] (to "run" the query). The preview screen will re-display with only the selected records visible.

Exporting realignment data: You can use Oracle's "folder tools" to hide or restore columns, make the columns wider or narrower, rearrange the order, etc. Also, at this point, you can "export" the data. Only the displayed records will export -- if you have filtered the preview screen to show only selected records, as described immediately above, only these selected records will export. One problem with the export function: only the data on the left-to-right "scrolling" part of the screen will export -- the name and SSAN columns on the left hand side of the screen will not. You will need to "manually" annotate the name and SSAN in the exported data file in order to identify which record is which.

The Preview Screen:

- • The preview screen is divided into two "panes" -- the left side of the screen shows the employee name (or "VACANT") and Employee ID.   This pane is frozen (does not scroll left-to-right).
- • The right side of this screen scrolls from left to right and contains two types of information. The first set of columns show the existing data from the employee's position record, and these are for reference only (not to be changed). The rest of the columns are for TARGET data. This is where you indicate what each of the data elements should be once the realignment is processed. These should show the same items that you included in the "Position Details" screens (Stage 2 above), but here you can make changes to specific records. Changes here will override any changes made in the Position Details screen. For instance, if the AMS code for one or a small group of positions is going to be different than what you entered in the Position Details screen, you can make that change here. Here is where the changes for POA, Org Structure, Appropriation Code 1, Office Symbol, etc. are made when these fields differ from the default values used in the Position Details screens.

Stage 3 process:

The changes that you included on the Position Details screens (Stage 2 above) do not show up on the preview screen for any "unselected" records until after you have selected the records, exited and saved the preview screen, and then returned to the preview screen.

## STAGE 3: SCREEN SHOT-PREVIEW TO SELECT RECORDS

SELECT PREVIEW

Be patient, this will take some time, as it has to search the database to determine if the record meets your source criteria identified in the source information on the main Mass Realignment page; using POI helps reduce this time.
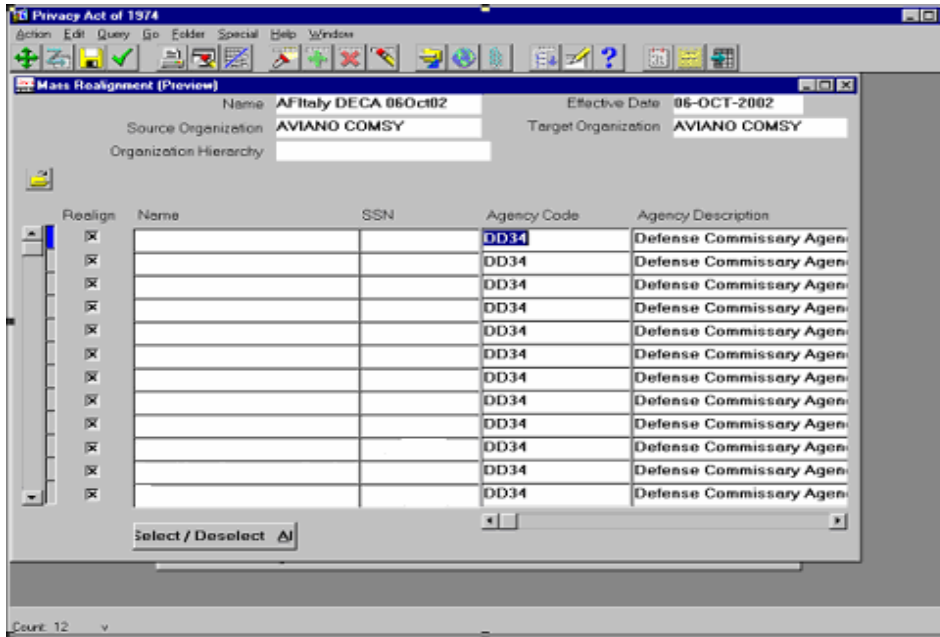
Note: Names and SSANs were omitted for printing purpose.

STAGE 3: SCREEN SHOT-EXAMPLE DATA UPDATED IN PREVIEW
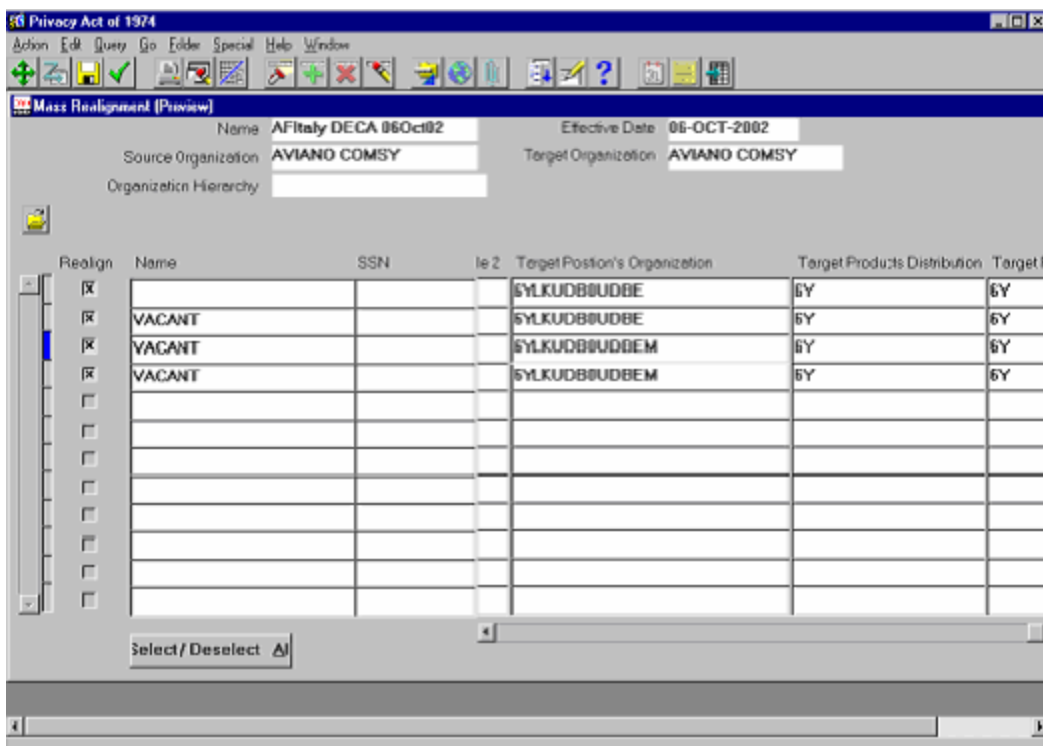
Note: Name and SSAN were omitted for printing purpose.

NOTE: If you have not selected this organization for any realignment in the past, the default is all selected, but if you have, then the default is deselected. (This is why you want your reference records to be in alpha order) Identify either by selecting or deselecting for movement.

Save and close once selection is completed and the changes to Target information have been accomplished; this will then return you to the main Mass realignment window.

## Stage 4. Complete the LAC/Remarks screen

Click on the <**LAC/Remarks**> button to access the authority code and remarks screen. On this screen, you will enter the legal authority code and add any remarks that should be printed on the Notification of Personnel Actions (NPAs) that are generated. Note: While this can be done at any time before actually executing the action, recommend that it is not done until after the Position Details and Preview Screen information is finalized.

**STAGE 4: SCREEN SHOT- LOCAL AUTHORITY CODE (LAC) & REMARKS**
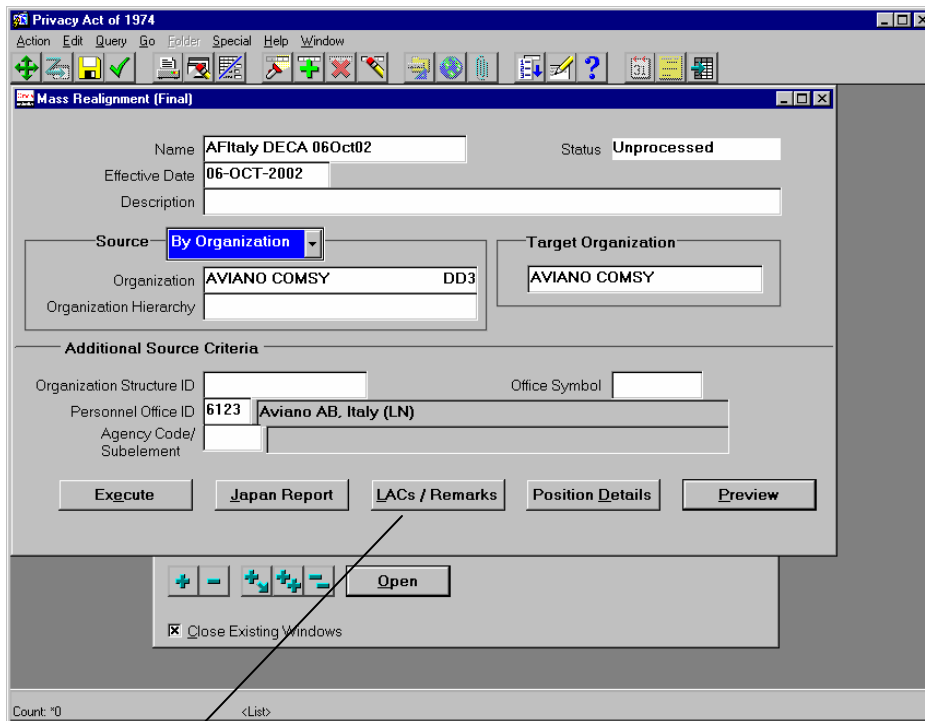
Click here

STAGE 4 (cont.): SCREEN SHOT- LOCAL AUTHORITY CODE & REMARKS SCREEN
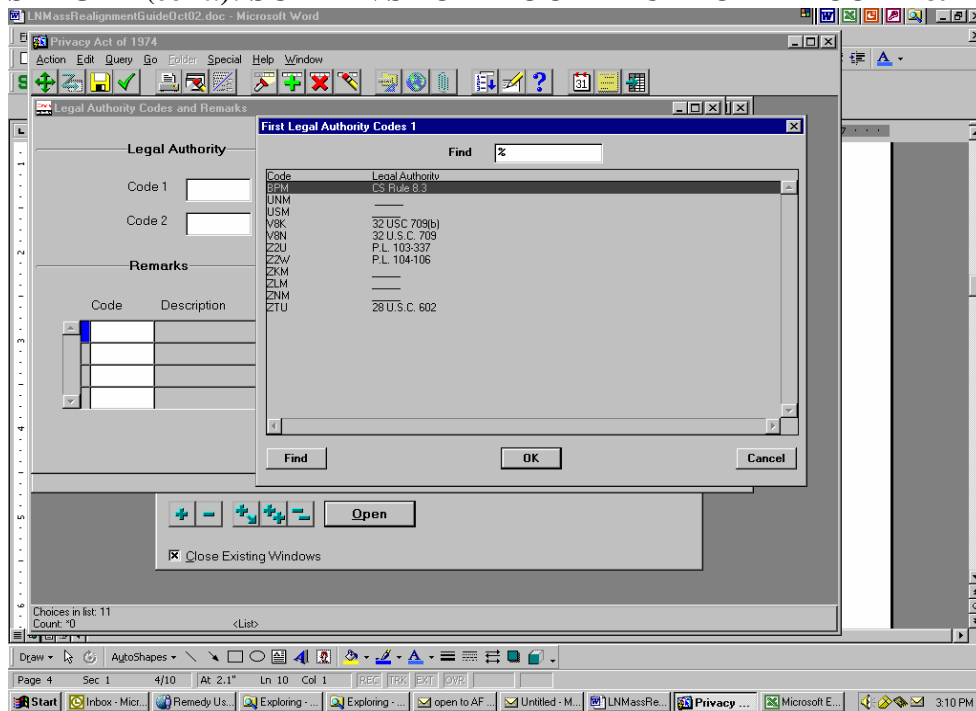
Enter Legal Authority Code if required. Note: The "Legal Authority" Code LOV contains both US and LN legal authority codes. The three that can be used for Local National actions are: BPM, USM and ZLM. If USM or ZLM, hit tab to bring up data field shown below:
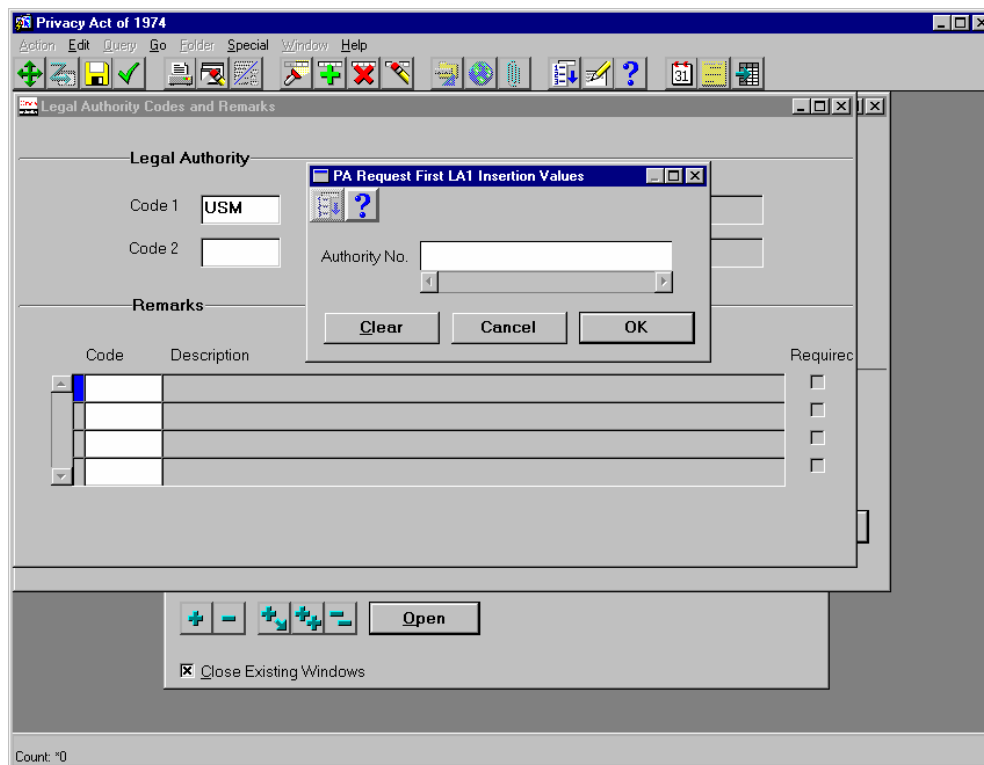
Enter reason for action e.g. DECA Memo Dated 01Aug02, then hit OK
If remarks are required on the NPA, use the Remarks Code block to enter them. Remark code ZZZ will normally be

used to type in the text required.
Close or "X" out may ask for save; say yes. This will return you to first screen

Stage 5. Execute (process) the realignment

CAUTION: There is no "Mass UN-DO", if you execute it wrong you will have to correct it person by person or Cancel all to RE-DO if it affects the NPA.

Note: Only one realignment with the same effective date will process on the same record. Therefore, if a realignment action has already been processed on a selected record with the same effective date, that record will automatically be excluded from the mass realignment process. Also, if an individual realignment RPA has been created on a record selected in your mass realignment process, that record will also be automatically excluded from the process; the individual RPA must be deleted to preclude the exclusion.

You can now execute the realignment if the time is appropriate (effective date is current or past). Read NOTE below before you execute.

NOTE: The August 2002 stress test uncovered a problem with the Futures process in HR when processing a mass realignment. In the interim, until the problem with Futures can be corrected, use the following procedure for processing any Mass Realignment.

1. If processing a mass realignment, DO NOT EXECUTE.
2. Email the process name and number of records to your AFPC/DPCXO-W PSM Team Leader for additional guidance.

STAGE 5: SCREEN SHOT-EXECUTE REALIGNMENT
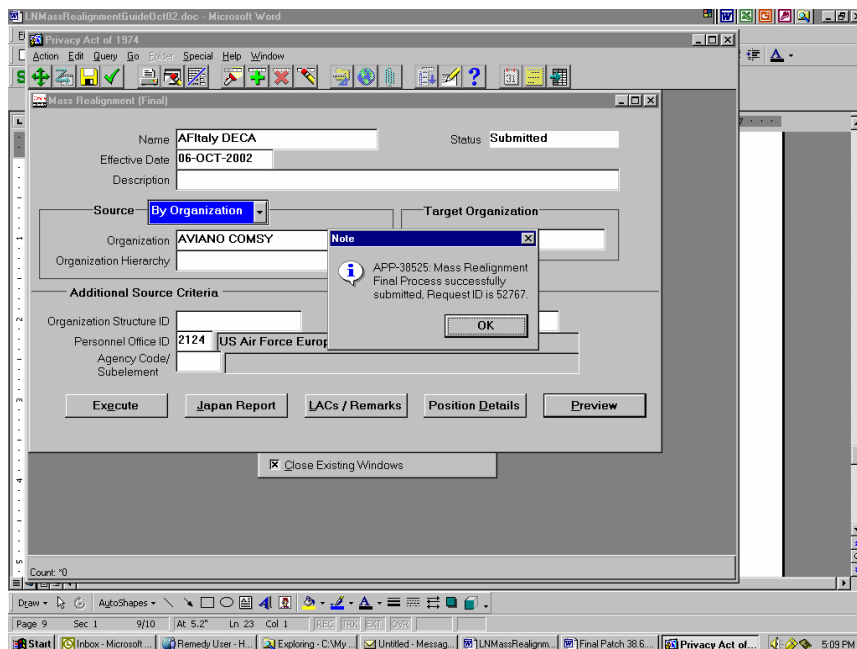
"Help/View My Requests" of the User that Executed the process will show the status of the Mass Realignment Final Process. Once successfully completed, the RPAs are created and will be processed in the next Futures run. Once Futures has successfully processed, the position/employee record will be updated and the subsequent NPAs will be printed once Batch Print is processed.

Stage 6. Check the resulting output

It is always important to carefully check the output from any personnel actions in modern DCPDS, but particularly from mass realignments to insure all date has been correctly updated. The things to check include:

- NPAs that are generated. Make sure the changes from the mass realignment are reflected on the NPA.
- Position records. Make sure the changes from the mass realignment have correctly updated the position records (both vacant and encumbered) and the employee Assignment record.
  - o **Note: If a vacant position is in an "Invalid" status and selected in the Mass Realignment Process, the position will be realigned but will remain in an "Invalid" status and must be "Validated" before using. If an encumbered position is in an "Invalid" status and selected in the Mass Realignment Process, the position will not be realigned and the Realignment RPA will be routed to the "WGI" box for further processing; i.e., validation of the pre-realignment position and subsequent updating of HR.**
- Process Logs. The process logs will identify any problem records that could not be realigned (as well as the actions that were successful). Query for processes that begin with GHR_MRE_ to more quickly locate mass realignment information, and include the date the process was run in your query if desired.

WGI PERSONNEL (or Check Action) box. Although it does not appear that the mass realignment process is sending projected WGIs to this box (when system-generated WGIs are produced for employees who have been realigned, their WGI NPA should be refreshed and reflect the new realigned data), it will send other rejected mass realignment actions there; i.e., if the encumbered position is in an "Invalid" status, the RPA will go to the WGI box for "Validation" of the prealignment position and then reprocessing of the RPA.

Retrieving the Mass Realignment Action

You will use the mass realignment name to retrieve the mass realignment record at a later date. This is needed in a number of situations -- for instance, if you do not complete preparing the action in one sitting, or if you began by using the "non-final" version of custom mass realignments (this is the version without the <Execute> button), or if you want to review it after it's been processed.

Follow these steps to retrieve a mass realignment action:

Step	Action
1	Navigate to *Mass Actions* --> *Mass Realignment* --> *LN Mass Realignment Final* (or LN Mass Realignment Preview).
2	Push [**F7**] to begin a query. Enter query criteria, usually by entering all or part of the mass realignment name in the "Name" block. Use wildcards (%) if desired. For example, if your mass realignment action is named "WXQ999 MAR02" you could enter "WXQ%". NOTE: This field is case sensitive; upper/lower Case must be exactly as entered in the "Name" block.
3	Push [**F8**] to run the query and retrieve the record. If more than one mass realignment record exists that matches your criteria, you can use the PgDn key or down arrow on your keyboard to move from one to another until you reach the one you want.