GEN Administrator User Guide

Version 2.1

Revision History

Document Name	GEN/EBX Admin User Guide
Project Name	Next GEN (GEN Replacement System)
Document Version	2.1
Document Status	Draft
Date Released	29 July 2019
Author	Sophie Taplin

Version	Date	Update Comments
1.0	12 June 2019	Version for initial go live use covering core functionality, further updates to follow for advanced functions
1.1	18 June 2019	Minor updates
1.2	09 July 2019	Updates to functionality
2.0	29 July 2019	Latest version for release
2.1	17 September 2019	Updates based on new release

Table of Contents

Chapter One – Get Started

Introduction

The GEN (Government Employee Number) is a unique identifier for all NSW government employees and is a key step in thinking about the NSW government sector as one.

GENs are allocated, stored and managed by the GEN/EBX system. For further information about the GEN see www.psc.nsw.gov.au/gen

This Guide provides detailed information about the functions that GEN HR Administrators are responsible for, including creating and managing GENs as well as performing file uploads, to update and maintain employee details.

Request GEN HR Administrator access

To get started and perform the full suite of functions, you'll need to request HR Administrator level access. Contact the GEN team at GEN@psc.nsw.gov.au

If you were a GEN admin using the old system (the Identity Hub) please ensure your access is up to date with the current organisation structure. If you require access to new divisions, you will need to complete a new GEN Admin Access and Confidentiality form and have this endorsed.

To check which divisions you have access to, or request access to new divisions, please contact the GEN team GEN@psc.nsw.gov.au

Browser requirements to access the GEN/EBX system

Accessing the GEN/EBX system requires use of a web browser such as
- Internet Explorer (IE) 9 or higher
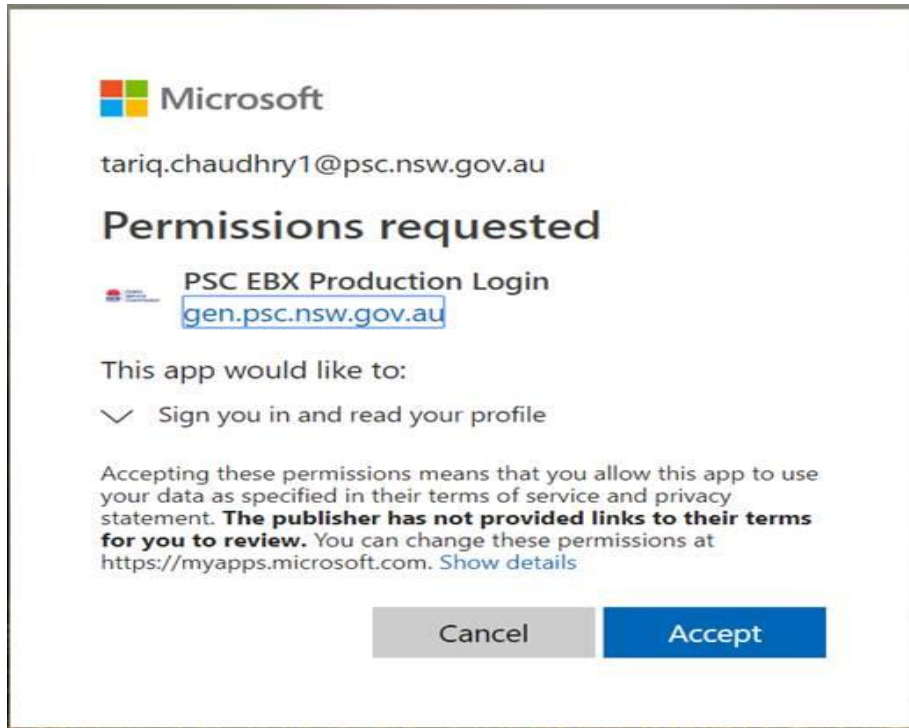- Firefox 31+
- Safari 7+
- Chrome 38+

Note: if you're using a browser that is not listed, some functions may not work as shown in this Guide.

Log in to the GEN/EBX system
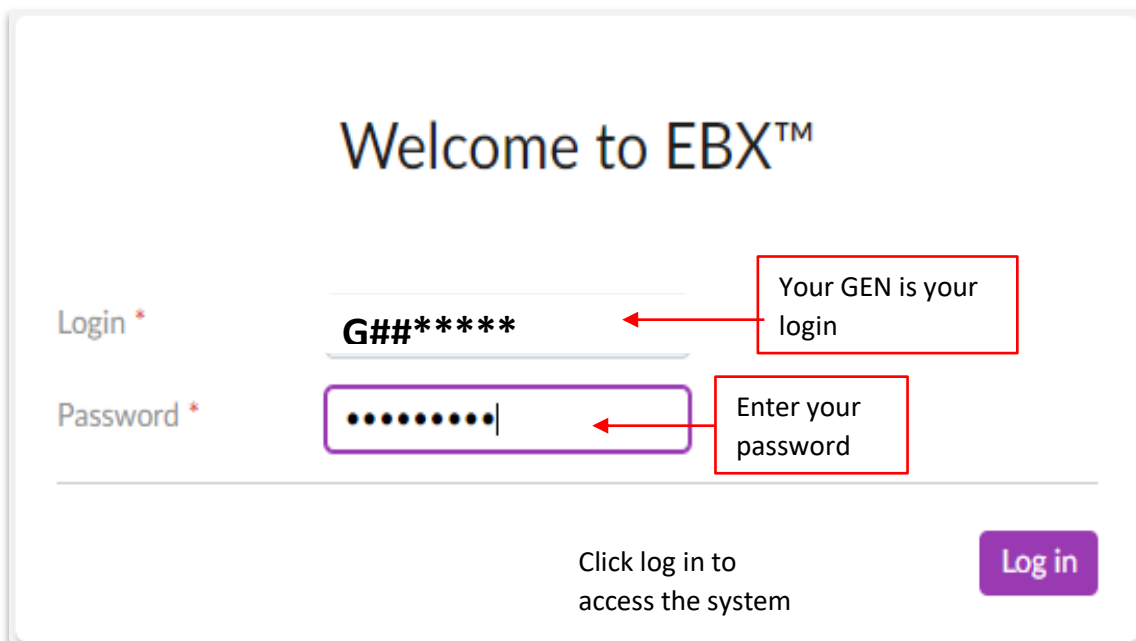
To log into the GEN/EBX system, use the below URL
https://gen.psc.nsw.gov.au/ebx-ui/ui/.

The first time you access GEN/EBX system, you'll receive an extra security screen requiring your acknowledgement**.**

Note: If you receive a permissions error instead of the above popup, there are a couple of steps that can resolve this. If you were prompted to enter a Microsoft account and if your organisation is using Office 365, merely log in with your work email address and password. Alternatively, please contact the GEN helpdesk, as we have a couple of technical options that may assist.

Once the above step has been completed, you'll be taken to the GEN EBX login screen as shown below. Subsequent access will take you directly to this login screen. Only when you use a new browser or new computer will you be prompted for the above permission check again.

To log in to the GEN EBX system, please follow the below steps

1) Enter your GEN as the login
2) Enter your password, which is case sensitive
3) Select the 'Log In' button to access the system

If you are logging in for the first time, you will be prompted to change your password (below screenshot).

Your password has expired.

Change your password now.

Password *

New password *

Confirm password *

Enter in your old password

Enter in new password, remembering it is case sensitive

Select 'Submit' to change the password

Submit

To update your password, please follow the below steps

1) Enter in the previous password for the GEN EBX system
2) Enter in a new password and enter it again to confirm it. Please note it is case sensitive
3) Select submit to change the password and log in

GEN/EBX system at a glance

Home page – at a glance

Once your login is successful, you will be taken to your home page. All major functions can be conducted using the navigation menu on the left-hand side of the screen as illustrated below. These functions are displayed in a logical sequence aligned to your day to day workflow.
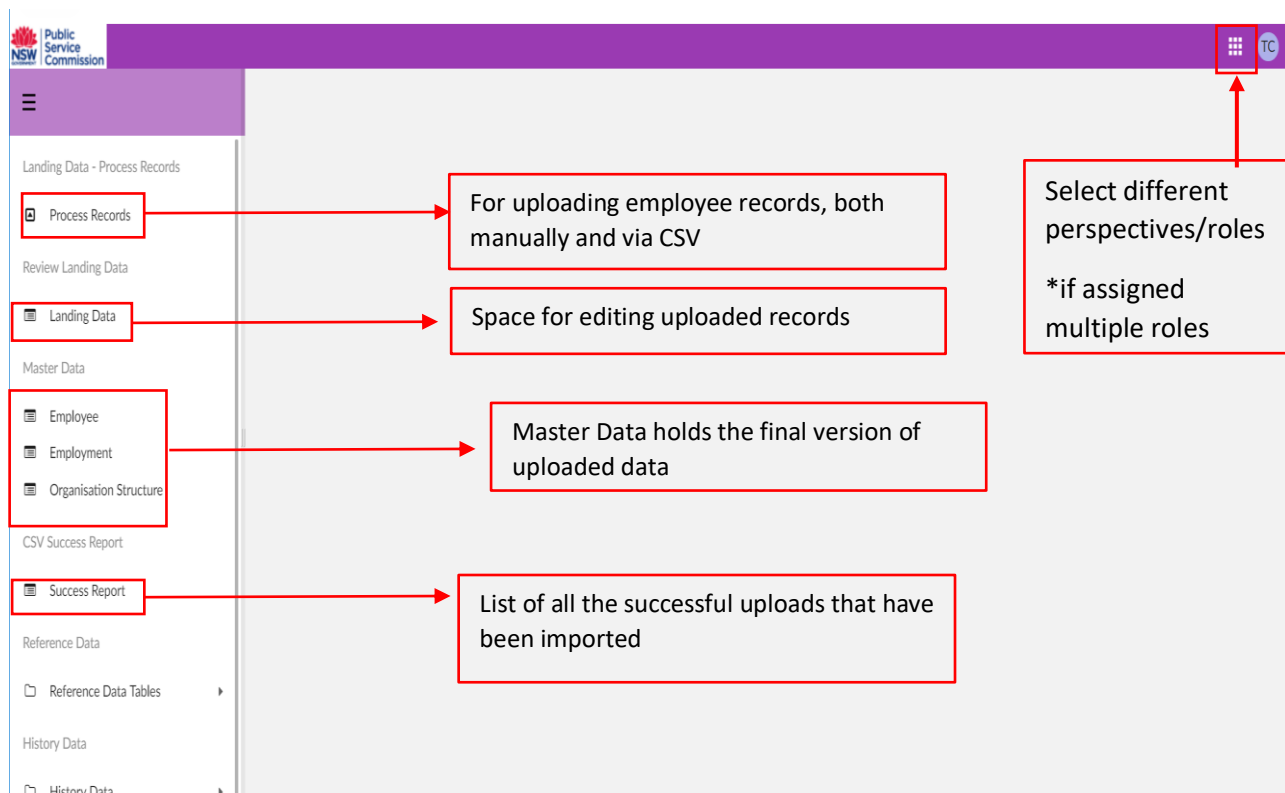
GEN administration and management

About the file upload process

The file upload process enables GEN administrators to process multiple GEN allocations and updates via a file upload using a CSV (Comma Separated Value) file format. The CSV file format that was used previously has been slightly modified. Please request a new blank CSV file from the GEN team – GEN@psc.nsw.gov.au

HR administrators are responsible for creating the file to be uploaded. In a single CSV file the upload can contain

- New employee records
- Updates to existing employee records, and
- Records for multiple divisions, provided that the GEN administrator has access to those divisions

Preparing a CSV file

The diagram below provides an example of a CSV file ready for upload into the EBX system

Note:

- Each data row will be treated as either a GEN creation/allocation or an update of an existing GEN record
- When a GEN is provided in column C, it is treated as an update, whereas if it is left blank, it is treated as a new GEN allocation
- For GEN creations/allocations, valid data must be provided for all mandatory fields (see table below)
- For GEN updates, data must be provided for **all** fields, not just the fields which require update

CSV upload fields

Column	Field Name	Mandatory	Description
A	Operation code	Y	An operation code is used to indicate how to process the record. The valid code for an upload is 'I' – rows containing a capital i should contain details as outlined below
B	Row number	Y	The row or reference number, is a sequential number entered by the GEN administrator (generally starting at 1, e.g. 1,2,3).
C	GEN	N	This is used to specify the GEN where one exists. Records with no GEN will be treated as a new identity, resulting in the allocation of a GEN. Records with a GEN will be treated as an update, with changes made to the existing GEN record based upon the details provided
D	Division ID	Y	Division ID. In the case where a GEN has been specified, the system will check if the Division ID provided already exists on this GEN record. If the Division ID exists, this data row is considered to be an update to the existing employment in that division. If the Division ID does not exist, a new employment in the division specified will be added to the GEN record
E	Agency employee ID	Y	Agency employee ID. This is the employee ID as per the agency's HR system
F	Date of Birth	Y	Date of birth, using format YYYYMMDD
G	Gender	Y	Acceptable options are 1 and M for Male; 2 and F for Female; X for Non-specific; and U for Not Provided
H	Employment start date	Y	Employment start date, using format YYYYMMDD
I	Employment end date	N	Employment end date, using format YYYYMMDD

J	Employment status	Y	Accepts one character: 'I' for inactive or 'A' for active. Note the relationships between columns I and J: when the employment status (column J) is entered as inactive, the system will check that an end date has been provided in column I.
K	Employment category	Y	Employment category, per workforce profile. See GEN Data Specs for valid values
L	First name	Y	Employee first name
M	Middle initial	N	Employee middle initial
N	Last name	Y	Employee last name
O	Known as name	N	Employee known as name/preferred name (i.e. for those with a different name to their given name)
P	Work email address	Y[1]	Work email address
Q	Role/Position title	N	Role/position title
R	Role/Position grade	Y[2]	Role position grade, per workforce profile See GEN data specs for valid values

[1] Work email address is defined as a mandatory field, although a blank entry is accepted. When this field is left blank, this will be interpreted as 'Not Provided'

[2] Role/Position grade is defined as a mandatory field, although a blank entry is accepted. When this field is left blank, this will be interpreted as 'Not an executive employed under the GSE Act'

Uploading a CSV file - overview

Follow the steps below

1. Organise a GEN data extract from the agency's HRIS/ERP system that includes new employee details and existing employee updates
2. Using the CSV file format, create a CSV file with a separate row of data for each employee
3. Using the process records tab, select the 'Launch' option for Import Employees via CSV file
4. Upload the CSV file
   Note: It is recommended that the file first be processed in 'simulation mode'. This mode is similar to the previous 'trial mode'. Please see instructions further below to run a 'simulation' mode
5. Once the records are uploaded, the number of successful records will appear in the result section
6. Select 'save' to move the records into Landing data
   Note: If there are errors within the upload, a red exclamation will be next to the record, you can edit this directly by double clicking
7. Once all records are free from errors, select 'Send to Master'. This will move validated data into the Master section and is the final step for allocating and/or updating GENs
8. For each newly allocated GEN, update the agency's HRIS/ERP system with the new GEN
9. Employees with a work email listed within their GEN record will receive an automatic email containing their GEN[1]. If there is no work email included, the agency HR team will need to provide these details to the employee
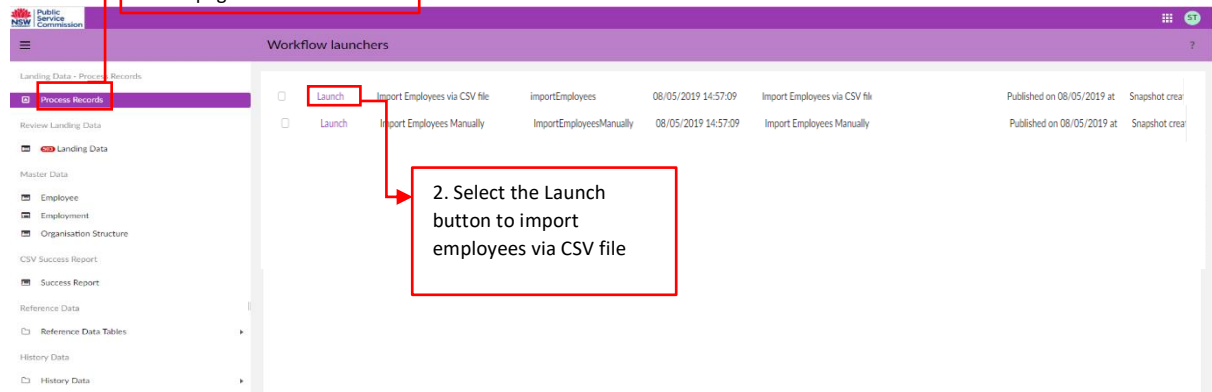
---

[1] The automatic email facility is not available due to a technical issue. Once this is resolved; the system will be able to generate bulk emails as required.
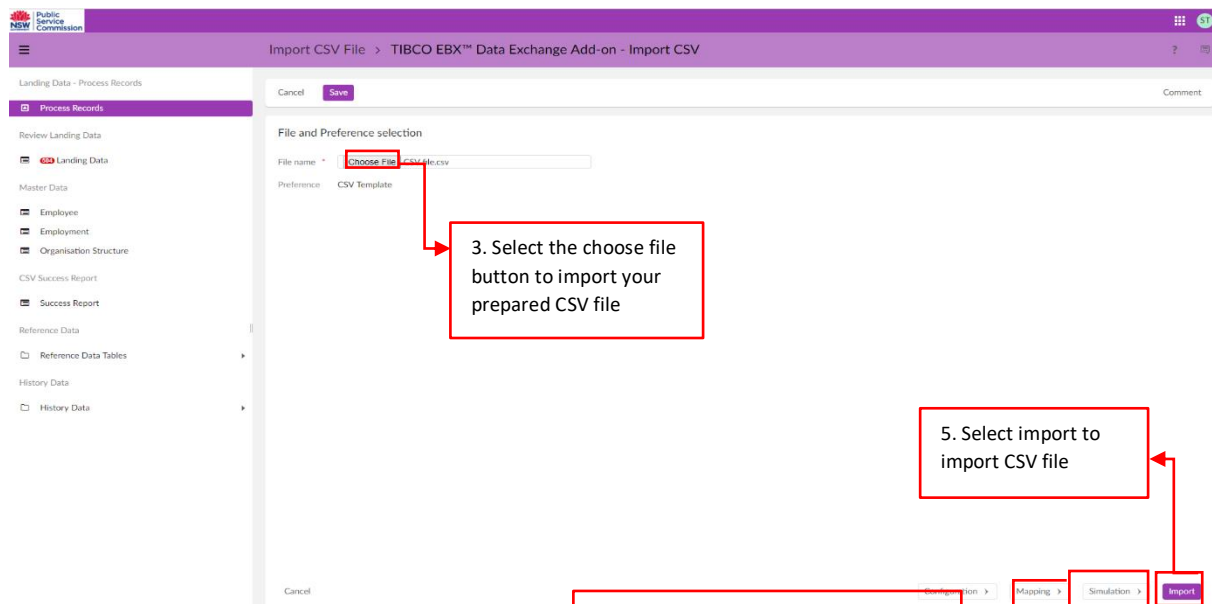
Performing a file upload

Select _____ the Process Records function on the left-hand side of the homepage

1. Select Process Records from the left-hand side of the home page

2. Select the Launch button to import employees via CSV file

3. Select the choose file button to import your prepared CSV file
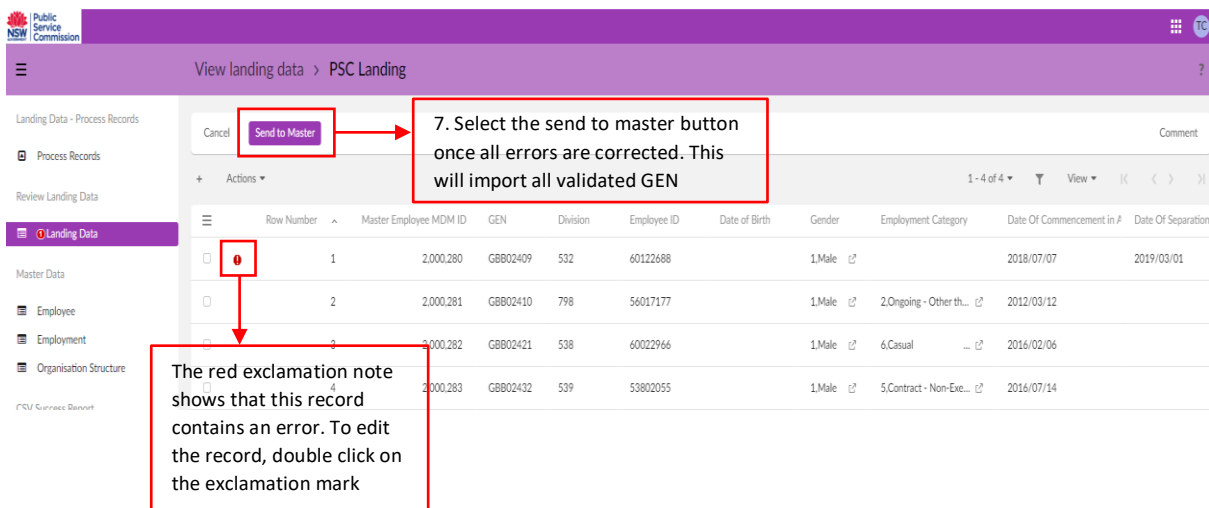
5. Select import to import CSV file

4. Select simulation if you wish to run a 'trial run' of your CSV file. The steps to run a trial run can be found further down in this guide

The status of the import will be displayed below. This shows the number of processed records. The results can include

- X rows inserted (the number of GENs successfully created)
- X rows updated (the number of existing GENS updated)
- X rows deleted - please ignore, there is no Delete function in GEN/EBX
- X rows unchanged would possibly occur if you had previously processed the same file and it had not yet finished processing the previous file

6. Select save to import the records into the landing data

Status of the import
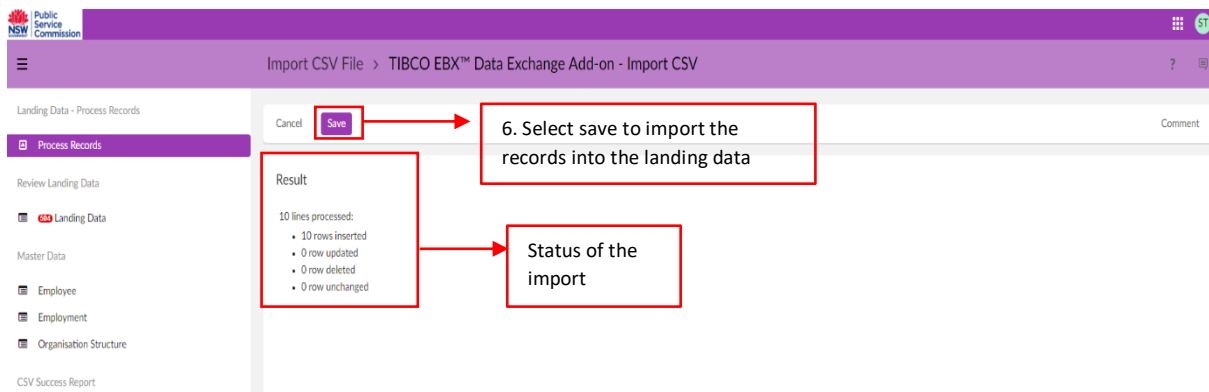
The Landing Data is the space where all GENs that were created and/or updated in the upload are listed prior to being imported into the master data. This is the space were changes can be made to records that contain errors. The landing data is shown in the below screenshot.

7. Select the send to master button once all errors are corrected. This will import all validated GEN

The red exclamation note shows that this record contains an error. To edit the record, double click on the exclamation mark

While the records are being imported into the master data, the system is validating the new GENs to check for potential matches. If there are no potential matches identified in this process, the GENs will be set to 'Golden'. If there are potential matches, please refer to the 'Match and Merge' section in this guide.

Note: Do not hit the cancel button at the top as this will delete the record from the Landing workspace and you will need to re-start the process.

Run a simulation CSV upload

Similar to the old system, in the EBX system, you can run a 'trial run' of your file upload to identity any issues prior to uploading the data into the landing. To do this, please follow the below steps

1. Organise a GEN data extract from the agency's HRIS/ERP system that includes new employee details and existing employee updates
2. Using the CSV file format, create a CSV file with a separate row of data for each employee
3. Using the process records tab, select the 'Launch' option for Import Employees via CSV file
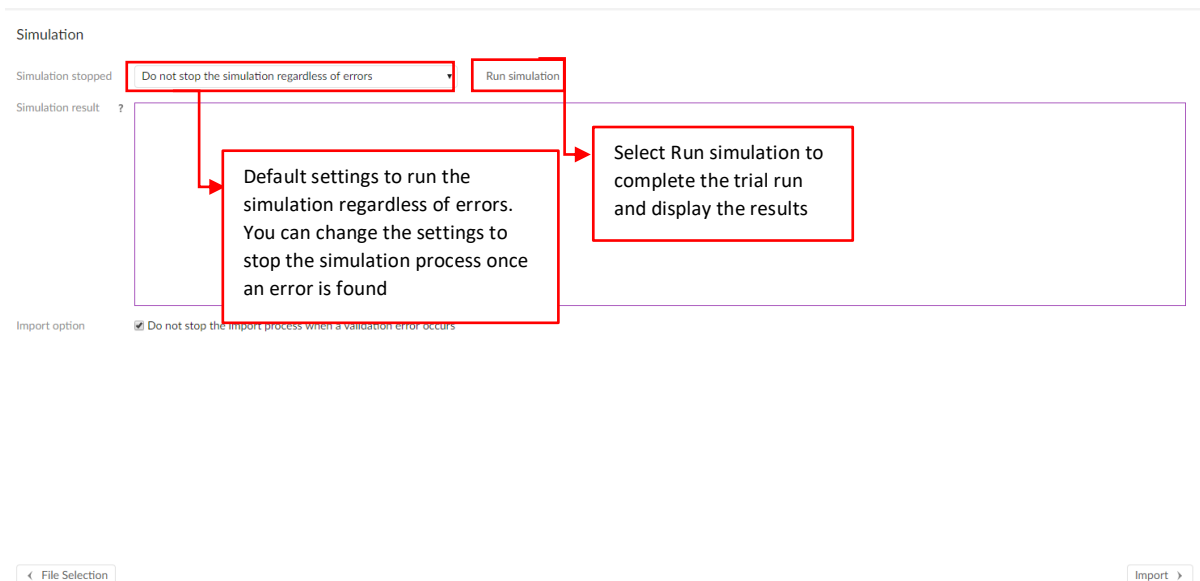4. Select the CSV file you wish to upload

Note: screenshots for steps 1-4 can be found above in the 'Performing a file upload' section of this guide

5. Select 'Simulation' as shown above to complete
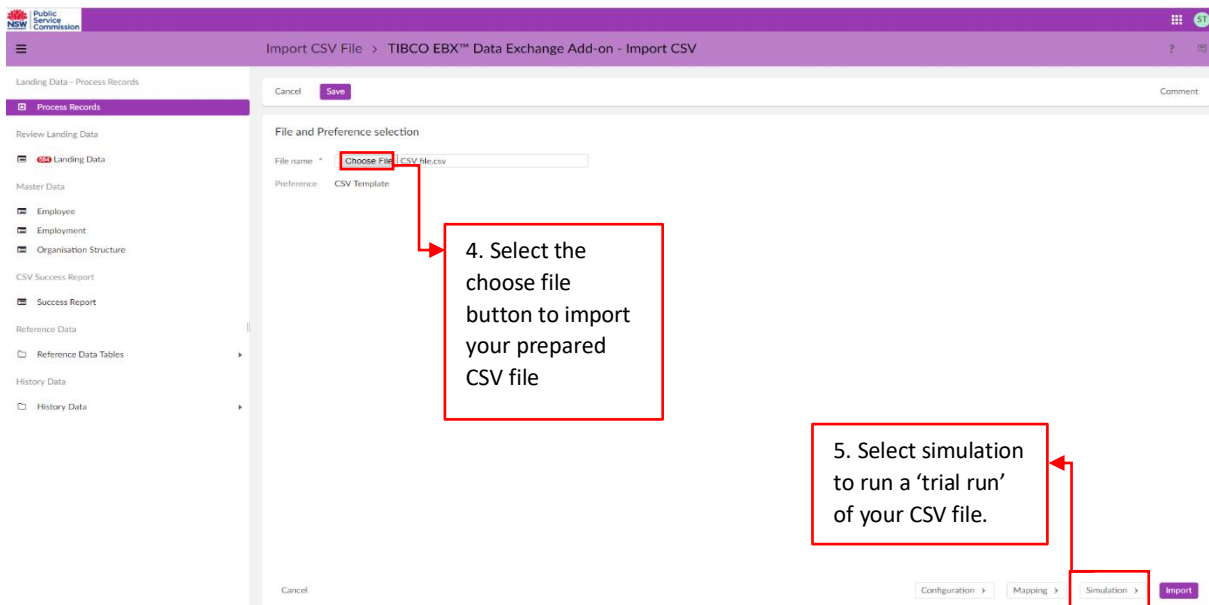
6. The below screen will allow you to select when to stop the simulation
   Note: We recommend leaving the settings to the default options as displayed below

7. Results will be displayed in the simulation result box. The results will display how many records that can be imported and any validation errors within the file.
   To correct the errors within the file, you can either make the corrections within the CSV file and reupload (follow steps 1-7 above) or you can correct them within the EBX system in landing data

8. After the simulation has been run and the results have been displayed, select Import. This will process the records like a regular CSV file upload. You will be taken to a result page displaying the amount of lines (records) processed

9. Select save to send the processed records to the landing data
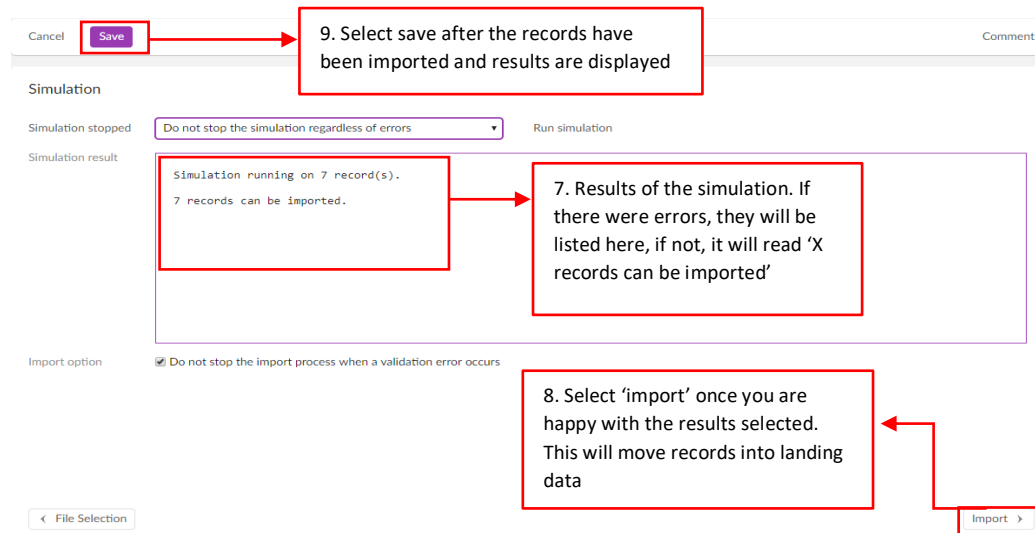
After the records have been imported into the Landing data, the final steps of performing a file upload can be completed. This includes validating errors and sending all validated records to the Master data.

Manually updating / creating GEN records

Performing a manual upload allows GEN administrators the ability to create and/or update a GEN individually rather than completing a bulk upload.

To create or update an identity the following personal and employment details are required to allocate / update the GEN record. The asterisk indicates that the field is mandatory.

GEN	Required if performing an update to an existing GEN. If performing an allocation, no input is required
Division ID *	Unique reference number for the division
Employee ID *	Employee ID within the agency ERP system
Date of Birth *	The date of birth for the employee
Gender *	The employees' gender
Employment Category *	The nature of the employee's employment, for instance ongoing, temporary, executive contract
Date of Commencement in Agency *	The commencement date of employee within their agency
Date of Separation	The date on which the employee left the agency (if applicable)
Employment Status *	Active or inactive
First Name *	The legal given name of the employee
Middle Initials	Initials of employees second or middle name (s)
Last Name *	The legal surname of the employee
Known as Name	Preferred name (where it is different to the employee first name)
Work Email Address *	Work email address for the employee
Role or Position Title	Employee job title, per the ERP system
Role or Position Grade *	Employee grade – applicable only to Executives employed under the GSE Act

Note: There are other fields within the create a record section of EBX, however they do not need to be known/identified when updating and/or creating GEN records

Performing a GEN allocation manually

Select the Process Records function on the left-hand side of the homepage. This will bring up options to 'Launch' a manual or a bulk upload of GEN records

1. Select Process Records from the left-hand side of the home page

2. Select the Launch button to import employees manually
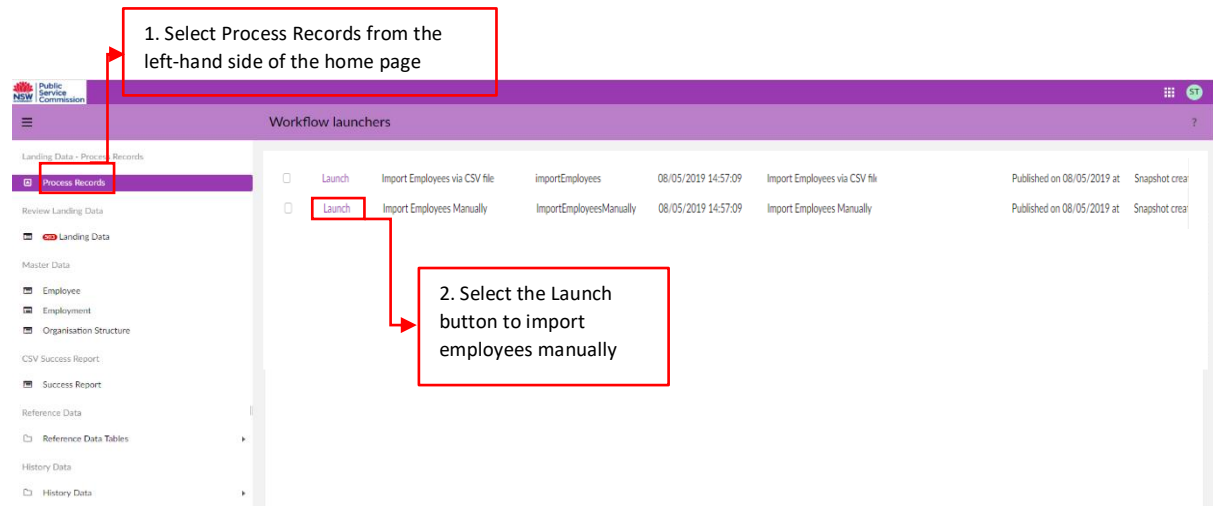
3. Complete each field as shown below and select save

| Master Employee MDM ID | [not defined] |
Row Number	[auto-incremented value]
GEN	
Division ID	
Employee ID	*
	Field 'Employee ID' is mandatory.
Date of Birth	*
Gender	[not defined]
Employment Category	* [not defined]
Date Of Commencement in Agency	*
Date Of Separation	
Employment Status	* [not defined]
First Name	*
Middle Initials	
Last Name	*
Known As Name	
Work Email Address	
Role or Position Title	
Role or Position Grade	NA,Not applicable (not an executive employed under th
Date Created	:

Save

4. Select save once all mandatory fields have been entered

After selecting save as shown in the above screenshot, a second save button will appear at the top of the screen. This will then process the record through to the landing data.
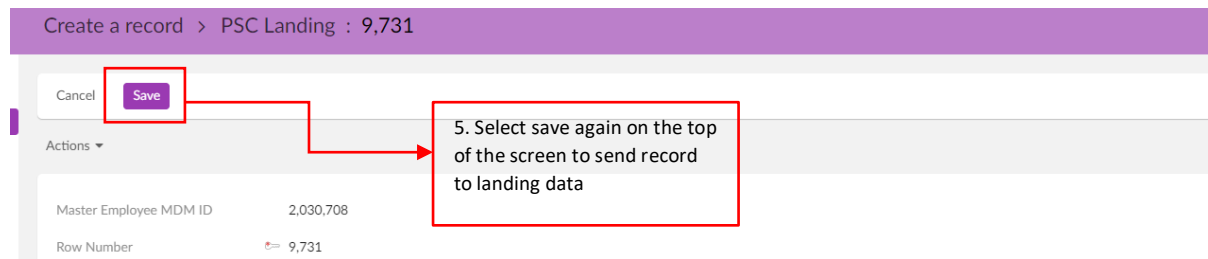
The record will now be displayed in the Landing Data section of EBX. If there are any errors with the record, they will be displayed here, and you will be able to edit them.

Once the errors have been validated, you can then send the record to Master Data.
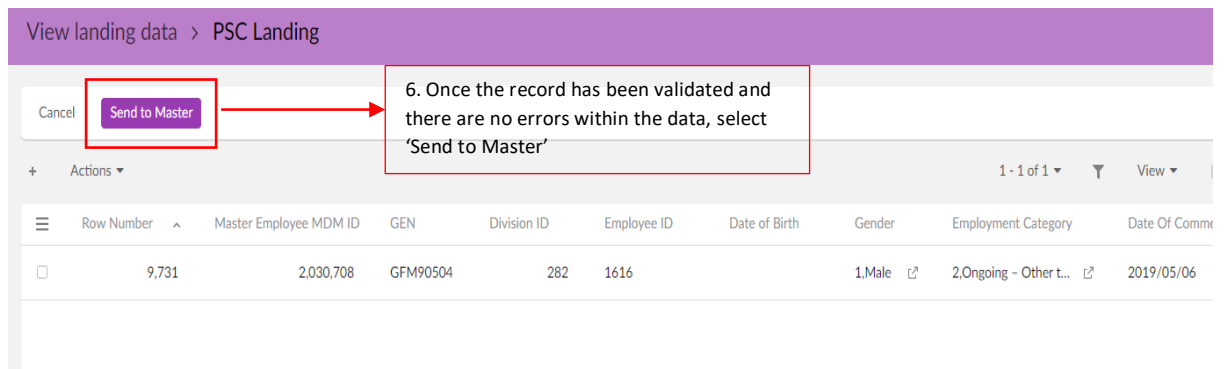
7. Once the GEN record has been finalised and sent to master, add in the GEN details into your agencies ERP system

Performing a GEN update manually

Select the Process Records function on the left-hand side of the homepage. This will bring up options to 'Launch' a manual or a bulk upload of GEN records
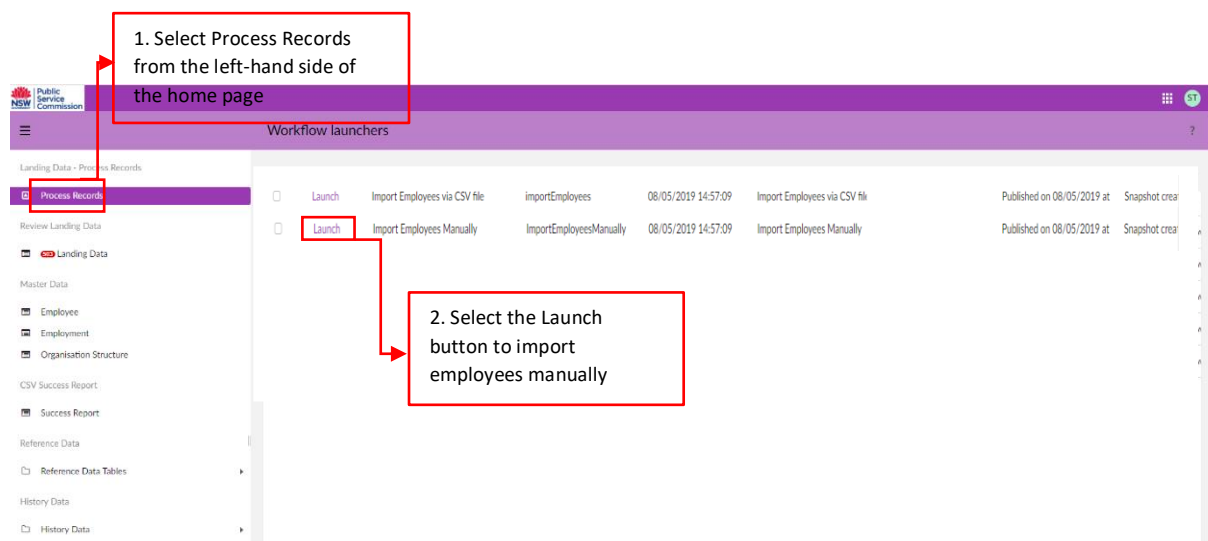
3. Complete the fields below, including the GEN and the updates that are required

Master Employee MDM ID	[not defined]	
Row Number	[auto-incremented value]	
GEN	GFM90504	
Division ID	282	
Employee ID *	1616	
Date of Birth *	1988 / 09 / 09	
Gender	1,Male	
Employment Category *	2,Ongoing – Other than Senior Officers and Senior Exe	
Date Of Commencement in Agency *	2019 / 05 / 06	
Date Of Separation	2019 / 08 / 30	
Employment Status *	I,Inactive	
First Name *		

❶ *Field 'First Name' is mandatory.*

Middle Initials		
Last Name *		
Known As Name		
Work Email Address		

Save

The GEN has been listed to indicate the record requires updating, rather than a new allocation. **Note:** Employee details can be updated/end – dated directly into the Master data table. Refer to "Editing data within the Master data" later in this guide.

In this example, the employee has left their employment. The date of separation has been included as well as a change to their employment status from active to inactive

4. Once all fields have been completed and updates have been entered, select save.

After selecting save as shown above, a second save button will appear at the top of the screen. This will then process the record through to the landing data.

Create a record › PSC Landing : 9,731

Cancel   **Save**

Actions ▾

5. Select save again on the top of the screen to send record to landing data

Master Employee MDM ID	2,030,708
Row Number	9,731

The record will now be displayed in the Landing Data section of EBX. If there are any errors with the record, they will be flagged on the screen. You can edit these errors by double clicking the record and updating the details within the table.

Once the errors have been validated, you can then send the record to Master Data.
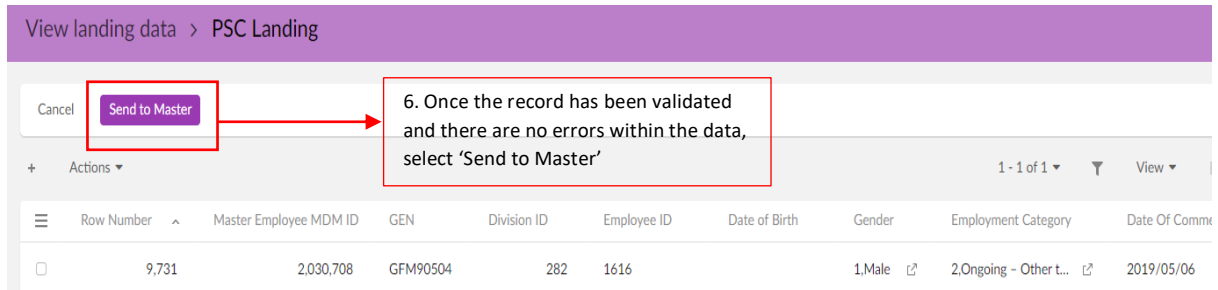
Once these details have been sent to master, ensure GEN details are up to date in the agencies ERP system.

Validation errors

The below table lists all possible validation errors that can occur when performing a bulk upload or a manual upload.

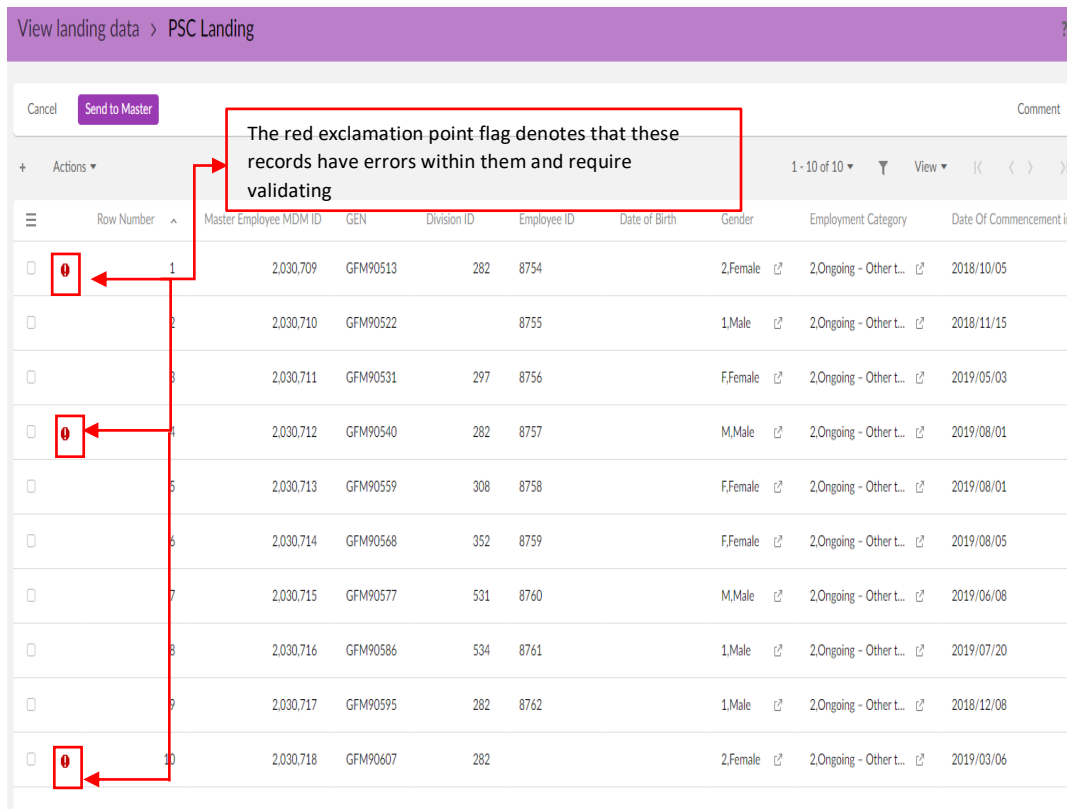| Field	Trigger	Error message
GEN	GEN not found	Valid GEN required
First name	Field left blank	First name is required
First name	Numbers or special characters other than spaces, hyphens or apostrophes	First name may contain only letters, spaces, hyphens and apostrophes
Middle initial(s)	Characters other than letters, full stops, spaces found	Middle initials may only contain letters, full stops or spaces
Last name	Field left blank	Last name is required
Last name	Numbers or special characters other than spaces, hyphens or apostrophes	Last name may contain only letters, spaces, hyphens and apostrophes
Known as name	Numbers or special characters other than spaces, hyphens or apostrophes	Known as name may contain only letters, spaces, hyphens and apostrophes
Date of birth	Field left blank	Date of birth is required
Date of birth	DoB more than 100 years of age	Date of birth falls outside valid range
Date of birth	Current date – DoB < 14yr 9mth	Minimum age requirements not satisfied
Date of birth	Standard date validation e.g. DD>31, MM > 12	Enter a valid date (dd/mm/yyyy)
Gender	Gender not selected or left blank	Gender is required
Gender	Invalid look up code is entered for bulk load	Gender must be either (M,1), (F,2), X or U
Active	For bulk load, invalid look up code is entered	Invalid value for employment status, must be either I or A

Active	For bulk load, employment records assume inactive, but 'A' is given	Attempting to set employment status to inactive, yet the employment start/end date indicate the status is active
Active	For bulk load, employment records assume active, but 'I' is given	Attempting to set employment status to active, yet the employment start/end dates indicate the status is inactive
Employment category	Field left blank	Employment category is required
Employment category	For bulk load – invalid look up code is entered	Value 'XXX' is not valid for lookup 'Employment category'
Employment category	User entered less than the minimum or more than the maximum amount of allowed characters	Employment category must be less than or equal to 2 characters
Employment status	For bulk load – if dates entered and active status do not align e.g. 'end date' indicates an inactive employment but Y is entered	Attempting to set employment status to inactive, yet the employment start/end dates indicate the status is active
Start date	Field left blank	Employment start date is required
Start date	Standard date validation e.g. DD > 31, MM > 12	Enter a valid date (dd/mm/yyyy)
Start date	Start date more than 100 years ago	Date must be at most 100 years in the past
Start date	Start date more than 12 months into the future	Date must be at most 1 year in the future
End date	End date < start date	End date must be on or after the start date is defined
End date	Standard date validation e.g. DD > 31, MM > 12	Enter a valid date (dd/mm/yyyy)
Division ID	Field left blank	Division ID is required
Division ID	If a division ID entered that the user does not have GEN administration permission for	User does not have permission to this division
Agency employee ID	Field left blank	Agency employee ID is required
Agency employee ID	Special characters entered in field	Employee ID may contain only letters and numbers
Agency employee ID	User attempting to enter more than the maximum amount of allowed characters	Employee ID must be less than or equal to 32 characters
Email address	Non-conforming address (per standard library)	Must be a valid email address
Email address	User entering a work email address that already exists in EBX	An identity already exists in the system with the given work email address
Role/position title	User attempting to enter less than the minimum or more than the maximum amount of allowed characters	Role/position title must be more than 2 and less than or equal to 100 characters
Role/position grade	Invalid look up code is entered	Value 'xxx' is not valid for look up 'Role/position grade'

Validating errors in Landing Data

All errors can be corrected within the Landing Data section of EBX, this includes records uploaded by a CSV file or manually created or updated.

To correct errors within the landing data, please follow the below steps. It may also be worthwhile to have the GEN data specs document with you to help with data input.

1. Once records have been uploaded via a CSV file or manually allocated / updated and sent through to landing (instructions to do this are listed within this guide). The errors will be displayed with a red flag next to the record

2. Double click on a record with the red flag to open. This will open the record and will allow you to view the error within the data and make changes as necessary

Cancel   **Send to Master**

Actions ▼

🔽 ❗ 1 error

Date of Birth: *Must be at least 14 years and 9 months old.*

3. Click on the error flag at the top of the page to view the error

Master Employee MDM ID	2,030,709
Row Number	1
GEN	GFM90513
Division ID	282
Employee ID *	8754
Date of Birth *	2019 / 1 / 1 ❗ *Must be at least 14 years and 9 months old.*
Gender	2,Female
Employment Category *	2,Ongoing – Other than Senior Officers and Senior Exe
Date Of Commencement in Agency *	2018 / 10 / 5
Date Of Separation	/ /
Employment Status *	A,Active
First Name *	Michaela
Middle Initials	

4. Update the details to reflect the correct information as well as adhering to the GEN data spec guidelines

Save   Save and close   Revert   Close

5. Select 'save' to save the changes made to the record and review. After review, close the record via the 'close' button.

6. The error red flag will now be removed from the landing data page. Repeat the process for each error that is within the landing data

7. Once all errors have been validated, send the records to Master as per regular CSV file upload, or manual allocation and/or update instructions within this guide
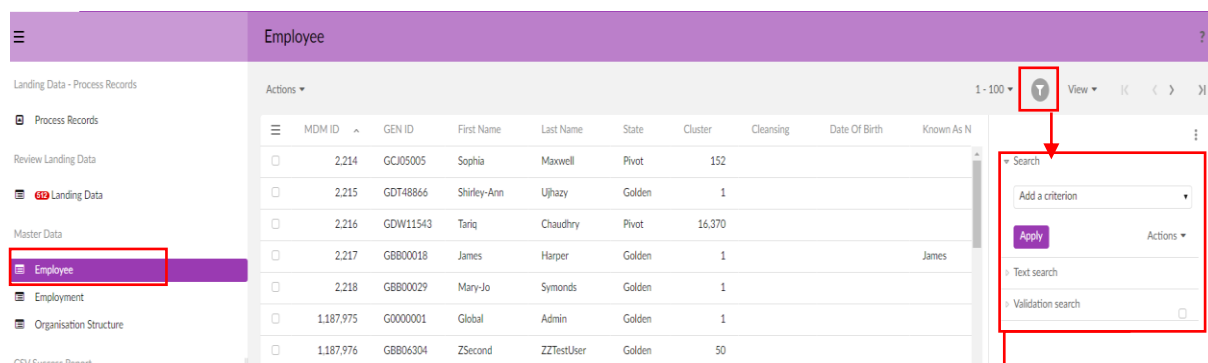
Working with GEN data

Functional searching and exporting

Once data has been uploaded within EBX and sent to the master data tables, GEN administrators are able to search, edit (within their permissions) and export data to excel. These functions are within the Employment table, Employee Table and the Success Table.

Searching and viewing GEN data

GEN administrators can search GENs within the EBX system to edit individual records or confirm GEN data. This can be completed within the Master Data tables.

Select Employee under Master Data and select the filter/search button the right-hand side
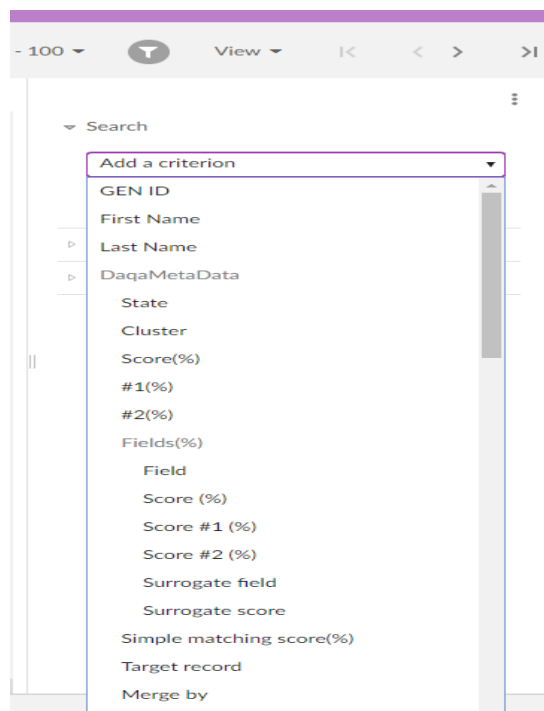
Three categories of search options will appear
- Search
- Text search
- Validation search

The 'Search' function can use multiple criteria as specified by the GEN administrator to search for specific GEN/s.

Select criteria to search for a GEN or multiple GENs. Click on the specific criteria from the list and enter in the details within the text box (after selection).

You can select multiple criteria and repeat the process.

The 'Text Search' function is like the 'Search' function however, you do not need to select individual criteria. The GEN administrator can type the 'search' and is able to the dictate which fields the text will appear in to narrow the search and select Apply to conduct the search.

Enter in the text that you would like to search for. This can include first and last name together e.g. John Smith

Select which fields the search should be conducted

The 'Validation search' is used to find errors within the data. It can also be used to find warnings and information within records. To search for validation errors, you can enter in the message text and specify what type of message you are searching for.

Enter in message and select what type of message to search for.

Select Apply to conduct the search

Note: The "validation search" function is for the users who are uploading large number of records. This search function will facilitate validating error messages that need to be addressed urgently. GEN/EBX system allows the users to export the list of the error messages in excel so that appropriate adjustments could be made in their SAP system.

Editing data within the Master data

GEN records can be edited individually within the Master data. GEN administrators can only edit GEN records from within the division / agency that they have access to. To edit a record, follow the above steps for searching for a record. To edit a specific GEN we recommend using the 'Search' function and using the GEN ID as the criteria to search. If the GEN is unknown, first and last name would suffice if date of birth is also known.

Note Only GENs with active employments can be edited.

Result/s from the search will be displayed within the master data. To edit, double click the record that you wish to modify.

Edit the employment details via the 'Employment' tab at the top of the screen

Main	DaqaMetaData	Employment	Employee History	Emails Sent

GEN ID		GCJ70876
First Name	*	Alfred
Last Name	*	Anteater
Date Of Birth		1990 / 11 / 21
Known As Name		
Initials		
Gender		Male-M
Date Created		2018 / 8 / 24 18 : 36
Created By		GCH83682
Last Update Date		2019 / 7 / 5 16 : 55
Last Updated By		vinodkrishnan
Disabled Reason		
MDM ID		1,442,986
Legacy Successor Person ID		
Legacy Person ID		257236

Edit the Employee fields within the 'Main' data tab

Save | Save and close | Revert | Close

Select 'Save and close' once editing has been finalised.

Success Table

Once data has been transferred to the master data within EBX, you are able to view the uploaded records in the success table.

The success table links both the employee table and employment table from the master data into one report. This report includes GENs from all divisions and agencies within Government however you will only be able to amend data for those GENs within the division you have access to.

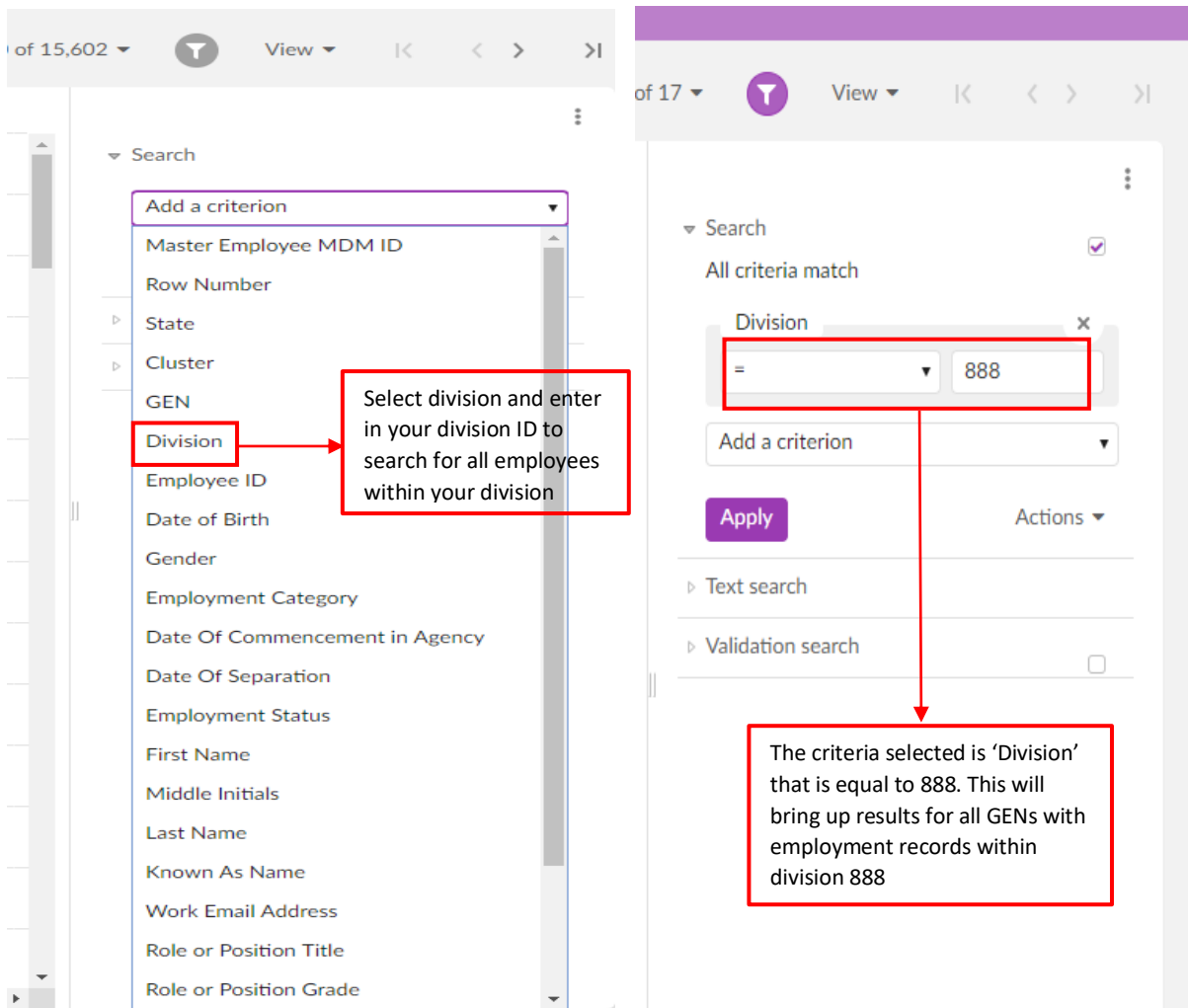## How to use the success report search function

You can use the success report to export data for your division specifically, for example when running a reconciliation report for GENs within your division. To do this, please follow the below instructions

1. Open the success report on EBX and select the search filter button

2. This will open the search criteria. You can add various criteria to enhance your search

Select division and enter in your division ID to search for all employees within your division

The criteria selected is 'Division' that is equal to 888. This will bring up results for all GENs with employment records within division 888

3. The results will be displayed within the success report

Exporting results from the success table to excel

Once you have completed your filtering for your report, you are then able to export the results into a workable excel document.

To do this, firstly complete your filtering / search functions within the Success Report table and follow the below steps

1. Select the records you would like to export. You can select individual records to export, or groups of records, or the whole report (based on filtering)
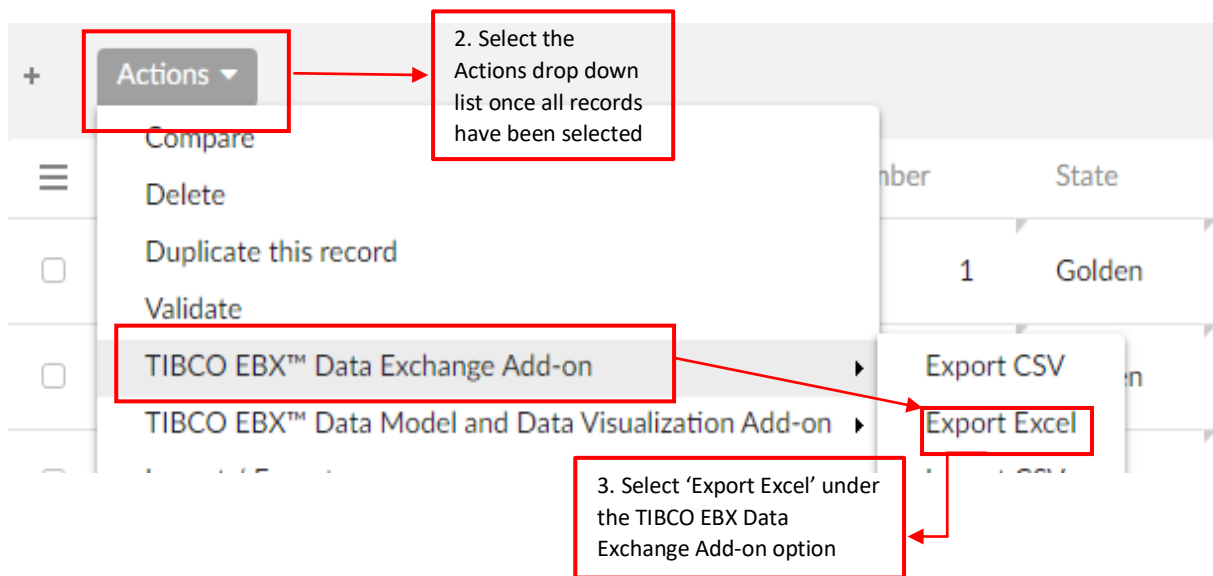   - To select individual records, check the tick box next to the row of data

   - To select either the whole report or a page of records within the report, select the sort button to specify
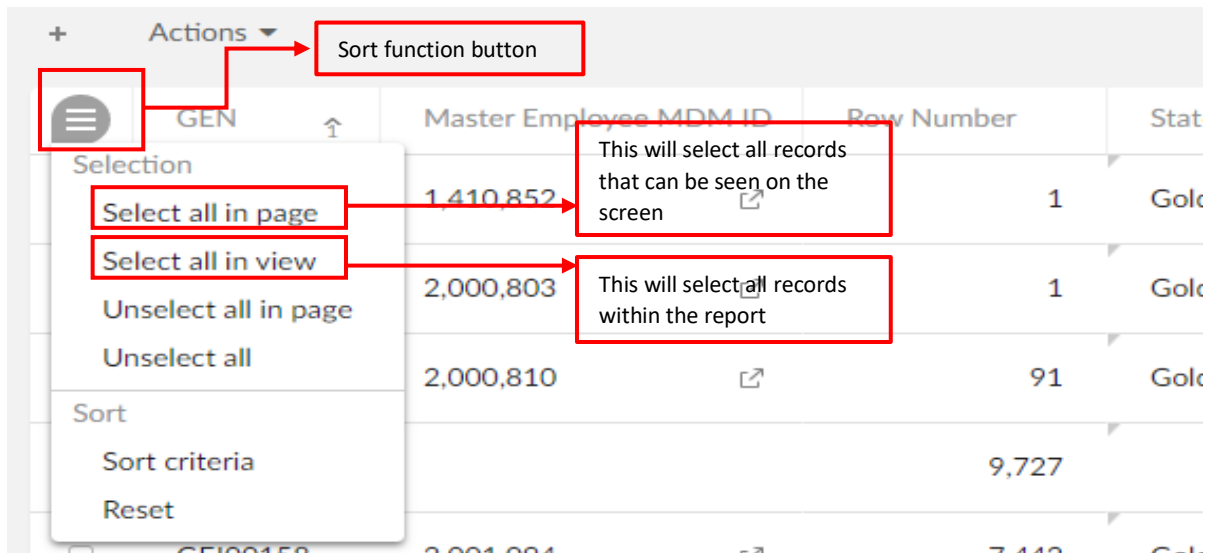
2. Once the records have been selected within the report, select the Actions drop down list.
3. Listed under TIBCO EBX Data Exchange Add-on option, select 'Export Excel'

4. Select 'Mapping' on the bottom left of the Configuration screen. All settings are default and will produce the correct information for the reports – please ignore all settings in here.
   Note: If exporting data from the Employee Table or the Employment table, you will need to change a setting within the Configuration settings to include all data. This is identified below.

Configuration

File name*	Success Report.xls
Save as type	● Excel 97-2003 ○ Excel 2007
First row contains header	○ No header ● Header
Export the ignored field as a blank column	○ Yes ● No
Include validation messages	☑ None ☐ Error ☐ Warning ☐ Info
Export related data	☐ From referenced tables
Primary key	☐ Export label ☐ Permalink
Foreign key	☐ Export label ☐ Permalink
Export enumerations	☐ Export static enumerations
Include computed values	☑ Export computed values
Preference	-- No preference -- ▼
Extensions	-- No extension -- ▼

Note: Select 'Export label' in Foreign key to extract data within the employee or employment table to include all data

Table template

Title template | Subtitle template | Table border | Column title template | Data template

○ No title | ● Title

Cancel   Mapping ▶

Default settings based on reporting requirements.

4. Ignore the settings and select the 'Mapping' button below

---

5. Select 'Export' to export the excel file. These settings within the Mapping column are all default – please ignore the settings in here

Mapping column

Link/Unlink all columns   Link/Unlink unmapped columns

Master Employee MDM ID	🔗 ◀	Employee ⬈
		▷ Foreign key links
Row Number	◀	Row Number ▼ ?
State	◀	State ▼ ?
Cluster	◀	Cluster ▼ ?
GEN	◀	GEN ▼ ?
Division	◀	Division ▼ ?
Employee ID	◀	Employee ID ▼ ?
Date of Birth	◀	Date of Birth ▼ ?
Gender	🔗 ◀	Gender ⬈
		▷ Foreign key links
Employment Category	🔗 ◀	Employment Category ⬈
		▷ Foreign key links
Date Of Commencement in Agency	◀	Date Of Commencement in Agency ▼ ?
Date Of Separation	◀	Date Of Separation ▼ ?
Employment Status	🔗 ◀	Employment Status ⬈
		▷ Foreign key links

◀ Configuration   First Name ▼ ?   Export ▶

Default settings based on reporting requirements.

5. Ignore the settings and select the 'Export' button below

---

6. The exported file will now download

Managing duplicate GEN records

When an employee is provided with multiple GENs, GEN administrators will need to match the duplicate GENs and merge these details so that the employee only has one GEN record. This process ensures that the original GEN is retained, and the most current data is merged with the original data.

Once the uploaded data has been validated and processed from landing through to master data, the potential duplicate GEN records will be identified within the 'State' column of data. The process of merging duplicate GEN records can be completed within the Employee table of the master data. Depending on your agencies BAU process with GEN management, your search criteria may differ to what is listed below.

1. After completing the upload process, navigate to the employee table within Master data, using the filter/search function and complete a search using the following criteria
   - Date created
   - Last update date
   - Created By
   - Last updated By
   - State

2. This will bring the GEN records that have been uploaded or updated today that are either a 'Suspect' or 'Pivot' record. (Please refer to the Glossary for definitions)

State of the GEN record will display whether a GEN is considered Golden, Pivot or Suspect. Pivot and Golden will be linked together through the Cluster number

| ≡	MDM ID ˄	GEN ID	First Name	Last Name	State	Cluster	Cleansing
☐	2,030,943	GFM92313	Andrew	Albatross	Pivot	17,382	
☐	2,030,944	GFM92322	Bonnie	Badger	Pivot	17,383	
☐	2,030,945	GFM92331	Cameron	Catfish	Pivot	17,384	
☐	2,030,946	GFM92340	Darcie	Dalmation	Pivot	17,385	
☐	2,030,947	GFM92359	Eddard	Earwig	Pivot	17,386	
☐	2,030,948	GFM92368	Andrew	Albatross	Suspect	17,382	
☐	2,030,949	GFM92377	Bonnie	Badger	Suspect	17,383	
☐	2,030,950	GFM92386	Cameron	Catfish	Suspect	17,384	
☐	2,030,951	GFM92395	Darcie	Dalmation	Suspect	17,385	
☐	2,030,952	GFM92407	Eddard	Earwig	Suspect	17,386	

Cluster is the grouping of pivot/suspet GENs via a Cluster number.

3. Double click the records to open and view the data to determine whether the two records within the particular Cluster (e.g. 17382) are duplicate GENs. The matching process to determine whether they are duplicate GENs is the same process as before – check the date of birth, first and last names.

4. To merge the GENs, select one record within the Cluster that you would like to process
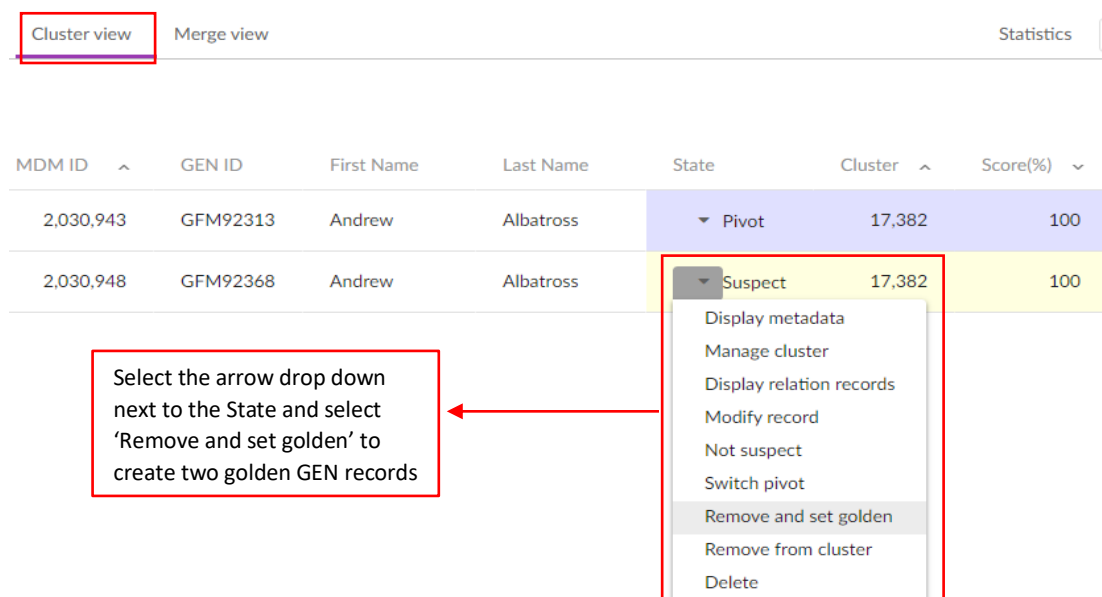
Actions ▾

≡	MDM ID ˄	GEN ID	First Name	Last Name	State	Cluster	Cleansing
☑	2,030,943	GFM92313	Andrew	Albatross	Pivot	17,382	
☐	2,030,944	GFM92322	Bonnie	Badger	Pivot	17,383	
☐	2,030,945	GFM92331	Cameron	Catfish	Pivot	17,384	
☐	2,030,946	GFM92340	Darcie	Dalmation	Pivot	17,385	
☐	2,030,947	GFM92359	Eddard	Earwig	Pivot	17,386	
☐	2,030,948	GFM92368	Andrew	Albatross	Suspect	17,382	

5. Once selected, click on the 'Actions' drop down menu on the top and select TIBCO EBX Match and Data Cleanse Add-on, followed by (Light) Data quality stewardship
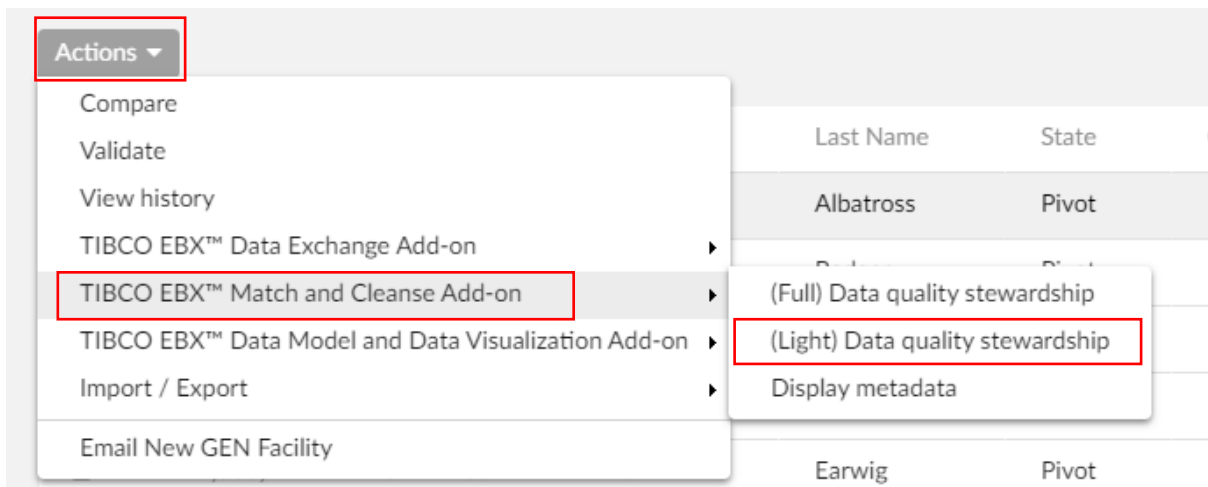
6. The cluster view summary will be displayed. After viewing both GEN records within the Employee table and you believe that they are not duplicates, you can select to remove from this Cluster and set to Golden.

Select the arrow drop down next to the State and select 'Remove and set golden' to create two golden GEN records

This will remove both records out of the Cluster (e.g. 17,382) and will set both records to golden, meaning that the GENs are not duplicates and that it is two separate employees, as shown below.

7. To merge the GEN records, select 'Merge view'. This will display the Employee data listed within the potential matches in the top half of the screen, you can select which pieces of the data are correct and would like to be included/updated in the Golden record which is displayed in 'Preview'

Once you are happy with the selections within preview of the Employee data, select 'Next' to display Employment data

8. Select the 'Merge' button after reviewing the summary.
   Note: All previous potential matches will be flagged as merged and no longer be available to be updated
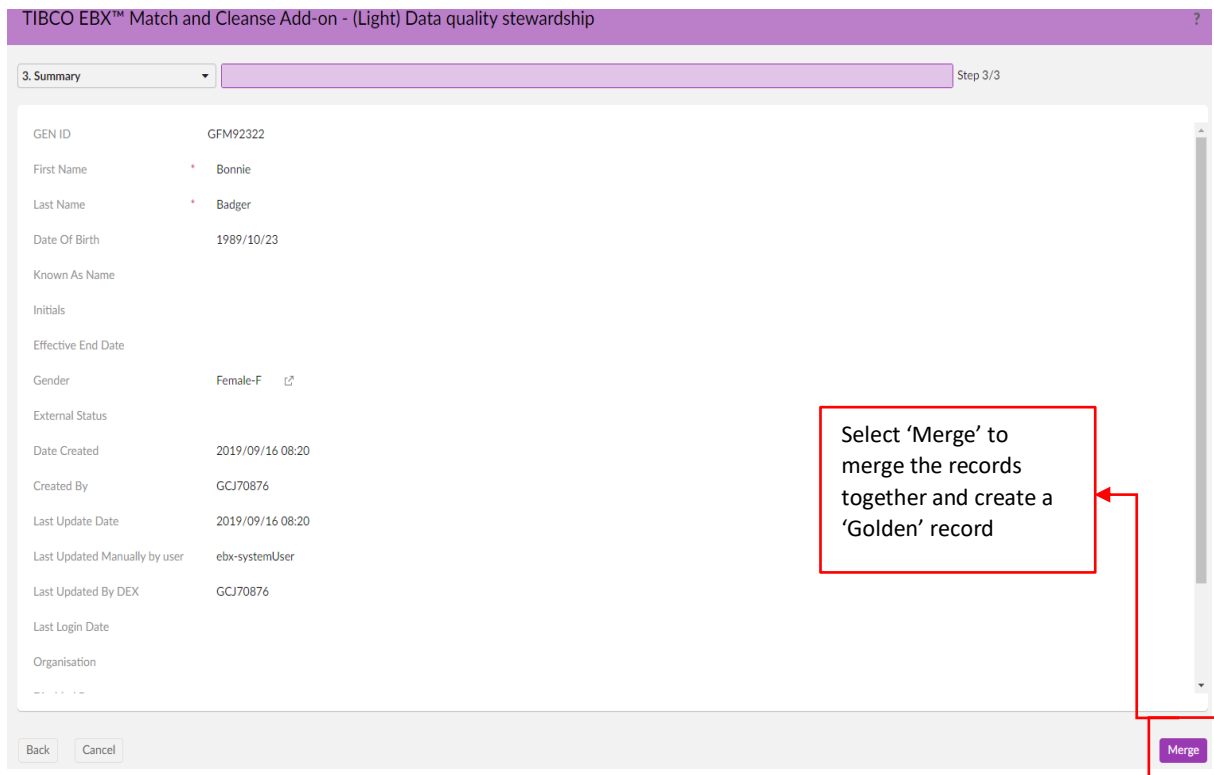
New Features

On the left-hand function menu, you will see a section for Reference data, this is read only access and included for your information.   Further details and screen shots will be provided in the next draft.

ORGANISATION STRUCTURE – full organisation hierarchy – where you can look up all organisation codes

REFERENCE DATA – lookup tables for GEN data items such as Employment Category, Gender, etc.

Glossary

Terms	Description
Landing Data	Temporary workspace for upload of GEN records. Use this workspace to resolve errors; once errors are resolved, records can be transferred to the Master Data workspace.
GEN	Government Employee Number
Master Data	Final workspace for GEN data. This workspace is used to resolve potential duplicate employees (refer also Data quality stewardship)
File upload	Feature used to upload the CSV file
CSV Success Report	Lists all the successful record uploads
Reference Data	Contains the lookup tables for GEN data items e.g. Employment Category, Gender, Role or Position Grade.
History Data	Legacy data imported from the Identity Hub system, which records changes made to records e.g. correction of first or last name spelling.
Golden	The most accurate record, with no duplicates
Pivot	This is the parent record with which the potential matches are merged
Suspect	This is the potential match
Merged	Records which have been identified as duplicates
(Light) Data quality stewardship	Workflow to identify and resolve potential duplicate records
Cluster	The group of potential matches
MDM ID	This an internal ID generated by the EBX system