

GEN Administrator User Guide

Version 2.1

Revision History

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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 <u>www.psc.nsw.gov.au/gen</u>

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 <u>GEN@psc.nsw.gov.au</u>

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 <u>GEN@psc.nsw.gov.au</u>

Browser requirements to access the GEN/EBX system

Accessing the GEN/EBX system requires use of a web browser such as

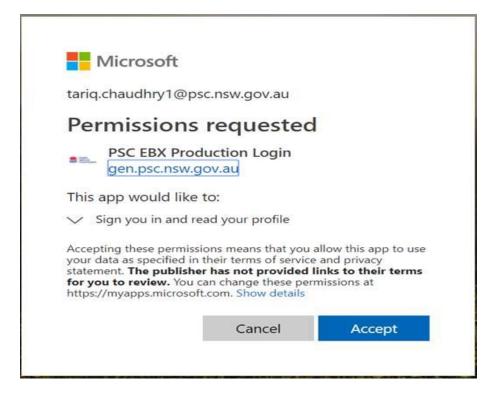
- Internet Explorer (IE) 9 or higher
- Firefox 31+
- Safari 7+
- Chrome 38+

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

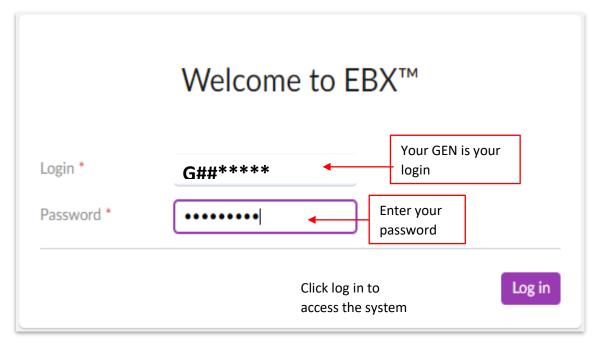
To log into the GEN/EBX system, use the below URL <u>https://gen.psc.nsw.gov.au/ebx-ui/ui/.</u>

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 pas	sword has e	xpired.
Change your password now.		Enter in your old password
New password *		Enter in new password, remembering it is case sensitive
	Select 'Submit' to change the password	Submit

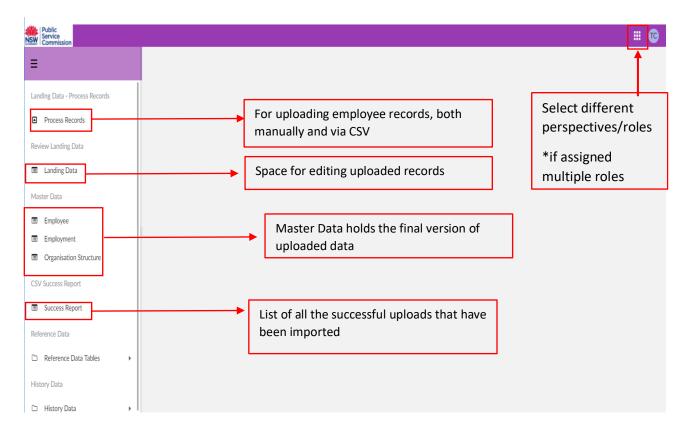
To update your password, please follow the below steps

- 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 – <u>GEN@psc.nsw.gov.au</u>

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

AutoSave (👓 🗄 9·	્ક્ર∙≠										CSV file - I	Excel			-				Sophie Tapli			a /x
File Ho	ome insert Dr	aw Page Layo	out Fo	rmulas C	Data Revi	iew View	Help	, P Tell m	ne what yo	u want to	do										암 Shar	e Po	omments
Paste S Fo	opy *	+ 11 ⊻ + ⊞ +	• A* A*	= = =		방 Wrap Text 텔 Merge & Cr		General \$ • % 9	• •		onal Format	as Calcu		pod Neutral rplanatory Input	* * *		elete Forma	I Fil		AT D Sort & Find & Filter * Select *	Settings		
Clipboa	ard G	Font		5 S	Alignm	ent	5	Numbe	r e				Styles				Cells		Edit	ing	Objective E	м	
W14	* : X V	fx																					
A	B C	D	E	F (5 Н	- I -	J.	K	L	M	N	0	p	Q	R	S	Т	U	V	W	X	Y	Z
XX	Row Num GEN	Division II Age	ncy En Dat	e of Bi Geno	ier Emplo	ym(Employm	Employm	Employme	First Nam	Middle I	i Last Name	Known a	s Work Email Address	Role/Position Title	Role/Posi	Comment							
1	1	282	1123 199	900101	1 20150	128		2	Michael		Angelo	Micky	micky.angelo@test.test.com	Lead Architect	NA								
1	2	282	1124 198	890202	2 20160	227		2	Mona		Lisa		mlisa@test.test.com	Admin support	NA								
1	3	297	1125 199	M 606006	20170	326		2	David		Statue		david.statue@test.test.com	Building manager	NA								
1	4	282	1126 198	880506 F	20180	425		2	Joan		Ovark		jovark@test.test.com	Project lead	NA								
	5	308	1127 198	800216	2 20190	524		2	Bette		Davis		bettedavis@test.test.com	Project support	NA								
	6	352	1128 198	860305	2 20180	523		2	Jane		Calamity		calamityj@test.test.com	Admin support	NA								
	7	531	1129 198	861116	1 20170	722		2	Butch		Cassidy		bcassidy@test.test.com	Admin support	NA								
	8	534	1130 199	900102 M	20160	821		2	Sun		Dancekid		sundancekid@test.test.com	ICT project officer	NA								
0	9	282	1131 199	900304	1 20150	720		2	Thor		Hammer		hammerthor@test.test.com	Architect (junior)	NA								
1	10	282	1132 199	900506 F	20140	519		2	Wanda		Woven		wandawoven@test.test.com	Systems administrator	NA								
2																							
2																							_

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

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 '1' – rows containing a capital i should contain details as outlined below
В	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).
С	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
Н	Employment start date	Y	Employment start date, using format YYYYMMDD
Ι	Employment end date	Ν	Employment end date, using format YYYYMMDD

CSV upload fields

1	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.
К	Employment category	Y	Employment category, per workforce profile. See GEN Data Specs for valid values
L	First name	Y	Employee first name
М	Middle initial	N	Employee middle initial
Ν	Last name	Υ	Employee last name
0	Known as name	N	Employee known as name/preferred name (i.e. for those with a different name to their given name)
Р	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'

²Role/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

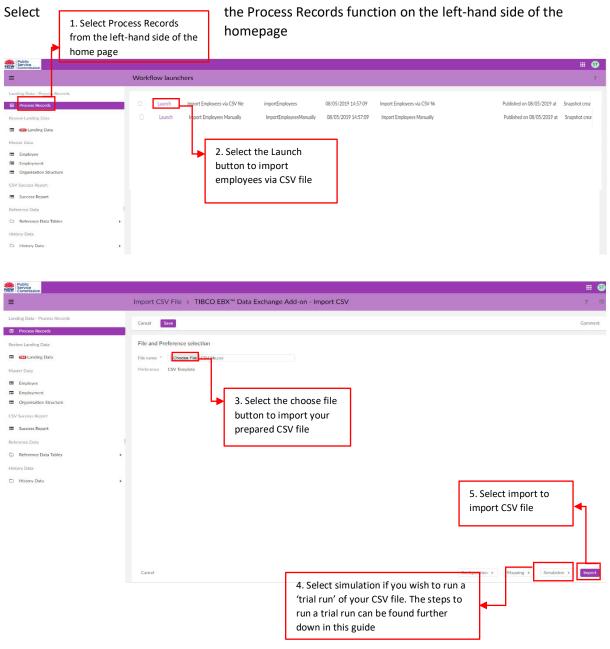
- 1. Organise a GEN data extract from the agency's HRIS/ERP system that includes new employee details and existing employee updates
- 2. Using the CSV file format, create a CSV file with a separate row of data for each employee
- 3. Using the process records tab, select the 'Launch' option for Import 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
- 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 GEN¹. If there is no work email included, the agency HR team will need to provide these details to the employee

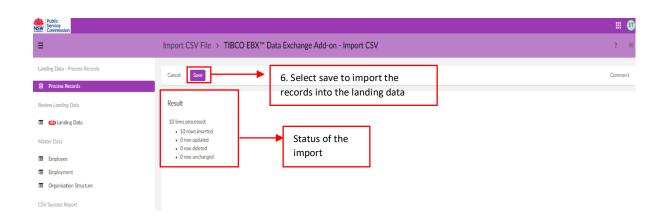
¹ The automatic email facility is not available due to a technical issue. Once this is resolved; the system will be able to generate bulk emails as required.

Performing a file upload



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



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.

NSW Public Service Commission											@ ⊞
Ξ	View landing of	data > PSC Landing	g								?
Landing Data - Process Records	Cancel Send t	o Master				o master bu orrected. T					Comment
Review Landing Data	+ Actions •		will i	mport a	ll valida	ited GEN			1 - 4 of	f4 ▼ ▼ View ▼	
Landing Data	≡ Rov	v Number 🧄 Master En	nployee MDM ID	GEN	Division	Employee ID	Date of Birth	Gender	Employment Category	Date Of Commencement	in A Date Of Separation
Master Data	0	1	2,000,280	GBB02409	532	60122688		1,Male 🖄		2018/07/07	2019/03/01
Employee	0	2	2,000,281	GBB02410	798	56017177		1,Male 🕑	2,Ongoing - Other th 🕑	2012/03/12	
Employment	. 🔻	3	2,000,282	GBB02421	538	60022966		1,Male ⊡	6,Casual 🗹	2016/02/06	
Organisation Structure OSV Surrace Report	The red excla shows that t	amation note his record	2 000,283	GBB02432	539	53802055		1,Male 🕑	5,Contract - Non-Exe 🖸	2016/07/14	
	contains an e										
	the record, d the exclamat	louble click on ion 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.

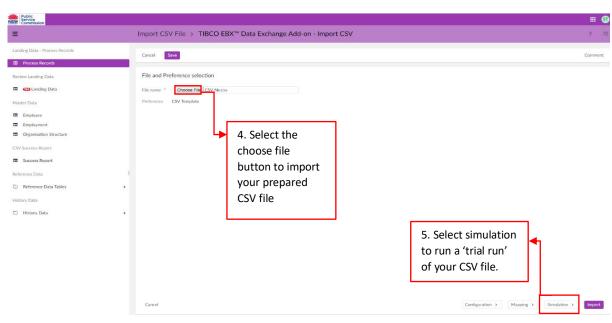
Note: Do not hit the cancel button at the top as this will delete the record from the Landing workspace and you will need to re-start the process.

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

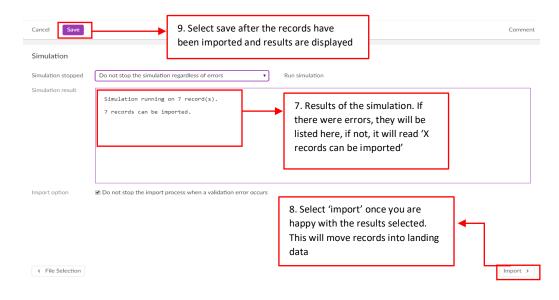
The below screen will allow you to select when to stop the simulation
 Note: We recommend leaving the settings to the default options as displayed below

Simulation	
Simulation stopped Do not stop the simulation regardless of errors Run simulation	Select Run simulation to complete the trial run and display the results

← File Selection

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

- 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

		cess Records fr e of the home						
NSW Public Service Commission								III 💿
=		Workflow launche	ers					?
Landing Data - Proces Rei Process Records Review Landing Data	ords.	Launch	Import Employees via CSV file Import Employees Manually	importEmployees ImportEmployeesManually	08/05/2019 14:57:09 08/05/2019 14:57:09	Import Employees via CSV file Import Employees Manually	Published on 08/05/2019 at Published on 08/05/2019 at	
Landing Data Master Data					_			
Employee Employment Organisation Structur CSV Success Report	v		button	ct the Launch to import yees manually				
Success Report								
Reference Data								
C Reference Data Table	s k							
History Data								
C History Data	ж							

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		
		- 7
Role or Position Grade	NA,Not applicable (not an executive employed under the Source -	Ľ
Date Created	/ / : 🕅 🕄 💿	
Save it Undated	/ / : 🖾 🗊	

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.

	Create a record > PS	C Landing : 9,731		
1	Cancel Save	,	5. Select save again on the topof the screen to send record	
	Master Employee MDM ID	2,030,708	to landing data	
	Row Number	e 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 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.

View	/iew landing data > PSC Landing										
Canc	el Send to Master],	there a	e the record ha re no errors w o Master'				1-1of1▼ ▼	View 🔻		
=	Row Number 🔺	Master Employee MDM ID	GEN	Division ID	Employee ID	Date of Birth	Gender	Employment Category	Date Of Comme		
	9,731	2,030,708	GFM90504	282	1616		1,Male ⊡	2,Ongoing - Other t 🕑	2019/05/06		

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

•	1. Select Proce from the left-ł									
NSW Public Service Commission	the home page	e								9
=		Workflow laund	hers							2
Landing Data - Process P	Records									
Process Records		Launch	Import Em	ployees via CSV file	importEmployees	08/05/2019 14:57:09	Import Employees via CSV fik	Published on 08/05/2019 at	Snapshot creat	
Review Landing Data		Launch	Import Em	ployees Manually	ImportEmployeesManually	08/05/2019 14:57:09	Import Employees Manually	Published on 08/05/2019 at	Snapshot creat	
Landing Data										
Master Data										
Employee				2. Select	the Launch					
Employment				button to	o import					
Organisation Struct	ture				es manually					0
CSV Success Report				cinploye						
Success Report										
Reference Data										
🗅 Reference Data Tal	bles 🕨									
History Data										
D History Data	,									

3. Complete the fields below, including the GEN and the updates that are required

Master Employee MDM ID		[not defined]				
Row Number	<u>ور</u>	[auto-incremented value]				
GEN		GFM90504		N has been listed to the record requires		
Division ID		282	282 updating, rat allocation. No			
Employee ID	*	1616	an be updated/end – irectly into the Master			
Date of Birth	•	1988 / 09 / 09 📓 🕄 🔇	ole. Refer to "Editing thin the Master data"			
Gender		1,Male	later in th			
Employment Category	•	2,Ongoing - Other than Senior Officers and	d Senior Exe	: 🛛 🔻 🗹		
Date Of Commencement in Agenc	y *	2019 / 05 / 06 🕅 🛐 🕲		In this example, the employee has left their employment. The		
Date Of Separation		2019 / 08 / 30 🕅 🕄 🔇		date of separation has been included as well as a change to		
Employment Status	*	I,Inactive		their employment status from active to inactive		
First Name	•					
		Field 'First Name' is mandatory.				
Middle Initials						
Last Name	*			1		
Known As Name				1		
Work Email Address		4. Once all fields have been completed and updates have		10		
Save	•	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 > PS	SC Landing : 9,731		
	Cancel Save			
•	Actions 🔻		5. Select save again on the top of the screen to	
	Master Employee MDM ID	2,030,708	send record to landing data	
	Row Number	t= 9,731		1

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.

View	View landing data > PSC Landing										
Cance	Send to Master	 →		6. Once the record has been validated and there are no errors within the data,							
+	Actions 🔻		select '	Send to Maste	er'			1 - 1 of 1 🔻	T	View 🔻	
Ξ	Row Number 🖍	Master Employee MDM ID	GEN	Division ID	Employee ID	Date of Birth	h Gender	Employment Category		Date Of Comme	
	9,731	2,030,708	GFM90504	282	1616		1,Male ⊡	2,Ongoing - Other t	ľ	2019/05/06	

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	First name may contain only		
	other than spaces, hyphens or	letters, spaces, hyphens and		
	apostrophes	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	Last name may contain only		
	other than spaces, hyphens or apostrophes	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	Gender must be either (M,1),		
	bulk load	(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	Attempting to set employment
	records assume inactive, but 'A' is	status to inactive, yet the
	given	employment start/end date
		indicate the status is active
Active	For bulk load, employment	Attempting to set employment
	records assume active, but 'l' is	status to active, yet the
	given	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	Value 'XXX' is not valid for lookup
	code is entered	'Employment category'
Employment category	User entered less than the	Employment category must be
	minimum or more than the	less than or equal to 2 characters
	maximum amount of allowed	
	characters	
Employment status	For bulk load – if dates entered	Attempting to set employment
	and active status do not align e.g.	status to inactive, yet the
	'end date' indicates an inactive	employment start/end dates
	employment but Y is entered	indicate the status is active
Start date	Field left blank	Employment start date is required
Start date	Standard date validation e.g. DD >	Enter a valid date (dd/mm/yyyy)
Chart data	31, MM > 12	Data must ha at meat 100 years in
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	Date must be at most 1 year in
Start date	into the future	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 >	Enter a valid date (dd/mm/yyyy)
	31, MM > 12	
Division ID	Field left blank	Division ID is required
Division ID	If a division ID entered that the	User does not have permission to
	user does not have GEN	this division
	administration permission for	
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	Employee ID must be less than or
	than the maximum amount of	equal to 32 characters
	allowed characters	
Email address	Non-conforming address (per standard library)	Must be a valid email address
Email address	User entering a work email	An identity already exists in the
	address that already exists in EBX	system with the given work email address
Role/position title	User attempting to enter less	Role/position title must be more
	than the minimum or more than	than 2 and less than or equal to
	the maximum amount of allowed	100 characters
	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

	5 🔻			on point flag s within the				1	1 - 10 of 10 🔻 🍸 Vie	w • < < > >
_		validating		0111 10	5 1 15					
=	Row Number 🔺	Master Employee MDM ID	GEN	Division ID	Employee ID	Date of Birth	Gender		Employment Category	Date Of Commencement in
0	4	2,030,709	GFM90513	282	8754		2,Female	Ľ	2,Ongoing - Other t ⊔"	2018/10/05
	2	2,030,710	GFM90522		8755		1,Male	ď	2,Ongoing - Other t	2018/11/15
	8	2,030,711	GFM90531	297	8756		F,Female	Ľ	2,Ongoing - Other t 🖄	2019/05/03
0	4	2,030,712	GFM90540	282	8757		M,Male	Ľ	2,Ongoing - Other t 🖄	2019/08/01
0	5	2,030,713	GFM90559	308	8758		F,Female	Ľ	2,Ongoing - Other t 🗗	2019/08/01
	6	2,030,714	GFM90568	352	8759		F,Female	Ľ	2,Ongoing - Other t 🖄	2019/08/05
	7	2,030,715	GFM90577	531	8760		M,Male	Ľ	2,Ongoing - Other t 🗗	2019/06/08
	8	2,030,716	GFM90586	534	8761		1,Male	Ľ	2,Ongoing – Other t 🖄	2019/07/20
	9	2,030,717	GFM90595	282	8762		1,Male	ď	2,Ongoing – Other t 🗗	2018/12/08

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

1 error Date of Birth: Must be at least	tc er	. Click on the error flag op of the page to view rror	
Master Employee MDM ID	2,030,709		
Row Number	₺~ 1		
GEN	GFM90513		
Division ID	282		
Employee ID	* 8754	1	4. Update the details reflect the correct
Date of Birth	* 2019 / 1 / 1 🕅 🕄 🕲 Must be at least 14 years and 9 months of	d.	information as well a adhering to the GEN spec guidelines
Gender	2,Female	8	• 2
Employment Category	* 2,Ongoing - Other than Senior Officer	rs and Senior Exe 💿	•
Date Of Commencement in Ager	* 2018 / 10 / 5 🕅 🕄 🔇		
Date Of Separation	/ / 🕅 🕄 🕓		
Employment Status	* A,Active	٥	•
First Name	* Michaela		1
Middle Initials			
Save Save and close	evert		

- 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.

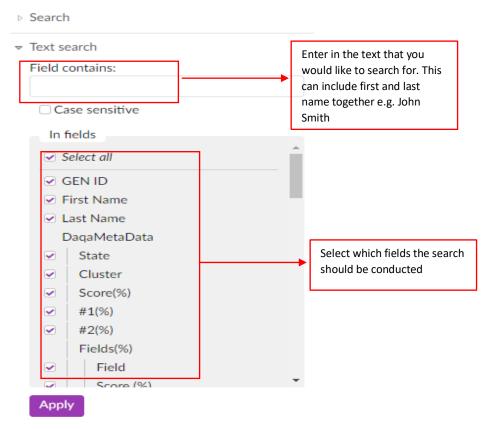
Employee Ξ Landing Data - Process Records 1 - 100 🕶 O View 🕶 Actions • Process Records MDM ID Ξ GEN ID First Nam Last Name State Clear Date Of Birth Review Landing Data GCJ05005 Pivot 152 2,214 Sophia Maxwell 612 Landing Data 2,215 GDT48866 Shirley-Anr Ujhazy Golden 1 Add a criterior 2.216 GDW11543 Tario Chaudhry Pivot 16.370 Apply Actions • 2,217 GBB00018 James Golden Harper lame Employee Text search 2,218 GBB00029 Mary-Jo Symonds Golder Employment Validation 1,187,975 G0000001 Golden Global Admin Organisation Structure 1,187,976 GBB06304 ZZTestUser Golden 50 ZSecond CSV Success Report Three categories of search options will appear Search • Text search • Validation search

Select Employee under Master Data and select the filter/search button the right-hand side

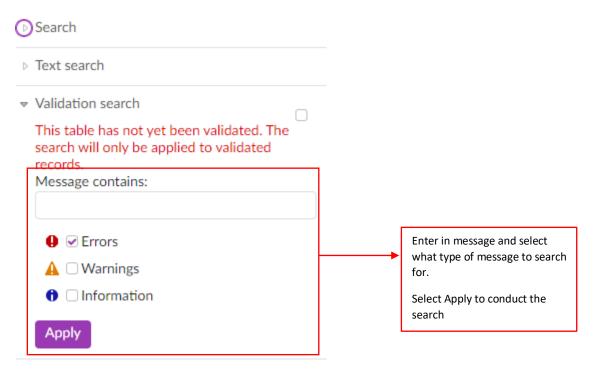
The 'Search' function can use multiple criteria as specified by the GEN administrator to search for specific GEN/s.

View ▼ K Search Add a criterion GEN ID First Name Last Name DaqaMetaData State Cluster Score(%) #1(%) #2(%) Fields(%) Field		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
Score (%) Score #1 (%) Score #2 (%) Surrogate field Surrogate score Simple matching score(%) Target record Merge by		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.



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.



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 empl 'Employment' screen	-		
Main DaqaMetaDa	Employment	Employ	Email	s Sent			
GEN ID		GCJ70876					
First Name	•	Alfred					1
Last Name	•	Anteater					1
Date Of Birth		1990 / 11 / 2	21 🗐 1	1 🛛			
Known As Name							1
Initials							
Gender		Male-M				0	Edit the
Date Created		2018 / 8 / 2	24 18:	36 🗒 🔟	8		Employee
Created By		GCH83682					fields within the 'Main'
Last Update Date		2019 / 7 /	5 16:	55 🗟 🔟	8		data tab
Last Updated By		vinodkrishnan					
Disabled Reason							
MDM ID	***	1,442,986					
Legacy Successor Person I	D						
Legacy Person ID		257236					
Save and close	ie	Revert		Select 'Save and editing has been			

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.

E	Suc	ess Report										
Landing Data - Process Records	Actio	IS 🔻								1-	100 of (539 • • View •
Process Records	=	GEN 🗸	Master Employee MDM I	D Row Number	State	Cluster	Division	Employee ID	Date of Birth	Gender		Employment Category
Review Landing Data		GZZ1234		7,529	7	r	365	231345		1,Male	Ľ	2,Ongoing - Other t
Landing Data		GFJ62987	2,007,390	, 8	Golden	1	307	111111118		1,Male	C ²	9,Trainee 🖉
Master Data		GFJ62978	2,007,389	7	Golden	1	888	111111117		1,Male	Ľ	8,Cadet 🖄
 Employee Employment 		GFJ62969	2,007,388	6	Golden	1	365	111111116		1,Male	ß	7,Sessional or Seaso
Organisation Structure		GFJ62950	2,007,387	5	Golden	1	307	111111115		1,Male	C ²	6,Casual 🖄
CSV Success Report		GFJ62941	2,007,386	4	Golden	1	798	111111114		1,Male	ß	5,Contract - Non-Exe 🖉
Success Report		GFJ62932	2,007,385	, 3	Golden	1	365	111111113		1,Male	Ľ	4, Contract - Executi 🖉
					7	7						

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

Ξ	Success Report		
Landing Data - Process Records	+ Actions •	Search / filt	ter function
Process Records		Row Number State Cluster	Division Employee ID Date of Birth
Review Landing Data	□ GBB04274 2,000,470 2	9,701 Golden 217,617	540 8813332 * Search
Landing Data	□ GCF39232 1,410,852 ♂	1 Golden 1	888 812784 Add a criterion •
Master Data	□ GDH86716 1,595,808 ♂	6 Golden 1	112 867291 Actions •
 Employee Employment 	GDH87287 1,595,865 ♂	4 Golden 1	112 864595 Validation search
Organisation Structure	GDV47633 1,680,473 ♂	39 Pivot 204	534 60116423
CSV Success Report	□ GDW98205 1,695,102 ♂	9,697 Golden 1	288 11032189
Success Report	□ GDY76564 1,712,702 2	8 Golden 1	112 88132622

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

- of 15,602 🔻 T View -> × of 17 🖪 View 🔻 : Search : Add a criterion Search Master Employee MDM ID \checkmark All criteria match Row Number Division State Cluster 888 ۳ Select division and enter GEN in your division ID to Division Add a criterion ٧ search for all employees Employee ID within your division Apply Actions -Date of Birth Gender Text search Employment Category Date Of Commencement in Agency Validation search Date Of Separation Employment Status The criteria selected is 'Division' First Name that is equal to 888. This will Middle Initials bring up results for all GENs with Last Name employment records within Known As Name division 888 Work Email Address Role or Position Title Role or Position Grade F
- 2. This will open the search criteria. You can add various criteria to enhance your search

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

+ Actions - Sort fu	unction button]		
GEN î	Master Emp	loyee MDM ID Roy This will select all records	v Number	Stat
Selection Select all in page	1,410,852	that can be seen on the screen	1	Gold
Select all in view Unselect all in page	2,000,803	This will select all records within the report	1	Gold
Unselect all	2,000,810	ß	91	Gold
Sort				P
Sort criteria Reset			9,727	
	2 001 004	- 7	7 4 4 0	Cale

- 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'

+	Actions Compare	 Select the Actions drop down list once all records have been selected 			
\equiv			nl	ber	State
	Delete				
_	Duplicate this record			1	Golden
0	Validate			T	Golden
	TIBCO EBX™ Data Exch	ange Add-on	•	Export C	sv n
	TIBCO EBX™ Data Mod	lel and Data Visualiz	ation Add-on	Export E	xcel
_		the TIB	t 'Export Excel' under CO EBX Data ge Add-on option		

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			7	
File name*	Success Report.xls			
Save as type	Excel 97-2003 Excel 2007			
First row contains header	○ No header ● Header			Default settings based or
Export the ignored field as a blank column	© Yes ● No	Note: Select		reporting requirements.
Include validation messages	✓ None Error Warning Info	'Export label' in Foreign key to		 Ignore the settings and select the 'Mapping'
Export related data	From referenced tables	extract data		button below
Primary key	Export label	within the employee or		
Foreign key	Export label Permalink	employment table		
Export enumerations	Export static enumerations	to include all data		
nclude computed values	Export computed values			
Preference	No preference	T		
Extensions	No extension	T		
Table template Title template Subtitle template	e Table border Column	title template Data template		

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 co	olumns 🕞
Master Employee MDM ID	 -@: Employee > Foreign key links 	2	
Row Number	-@: Row Number		• ?
State	-@: State		• ?
Cluster	-@: Cluster		• ?
GEN	GEN		• ?
Division	-@ Division		• ?
Employee ID	-œ Employee ID		• ?
Date of Birth	- G: Date of Birth		• ?
Gender	© -@: Gender ⊠ ⊳ Foreign key links		
Employment Category	© -@: Employme ⊳ Foreign key links	nt Category ⊡	
Date Of Commencement in Agen	- 🗣 🛛 Date Of Com	mencement in Agency	• ?
Date Of Separation	-@: Date Of Sepa	ration	• ?
Employment Status	-@: Employme > Foreign key links	nt Status 🖸	
< Configuration			

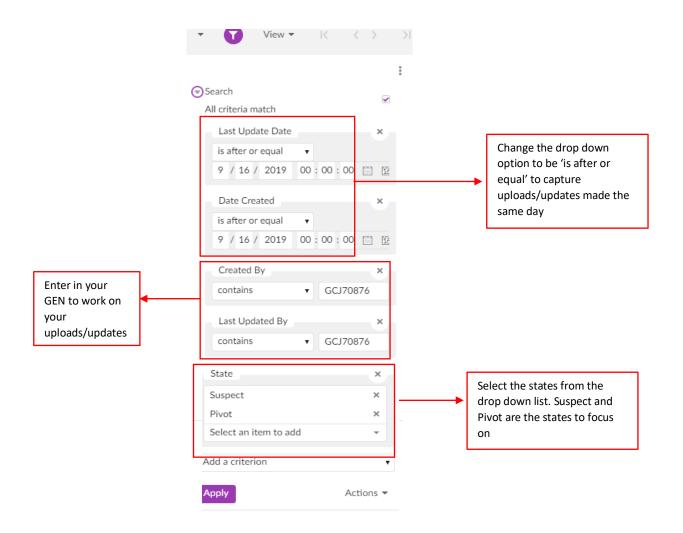
6. The exported file will now download

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)

	L	ough the Cluster	l together 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.

- 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	5 🔻						
=	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

Actions 🔻				
Compare				
Validate		Last Name	State	
View history		Albatross	Pivot	
TIBCO EBX™ Data Exchange Add-on	•	Deles	D'	
TIBCO EBX [™] Match and Cleanse Add-on	F	(Full) Data quality st	tewardship	
TIBCO EBX™ Data Model and Data Visualization Add-on	۰	(Light) Data quality	stewardship	
Import / Export	•	Display metadata		-
Email New GEN Facility	F	Earwig	Pivot	

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.

Cluster vie	ew	Merge view					Statistics
MDM ID	^	GEN ID	First Name	Last Name	State	Cluster 🔨	Score(%) 🗸
2,030,94	43	GFM92313	Andrew	Albatross	▼ Pivot	17,382	100
2,030,94	48	GFM92368	Andrew	Albatross	Suspect	17,382	100
	next 'Rem	ct the arrow dr to the State ar nove and set go te two golden (id select Iden' to	•	Display metac Manage cluste Display relatio Modify record Not suspect Switch pivot Remove and s Remove from Delete	er on records I set golden	

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.

Action	S 🔻						
	MDM ID	GEN ID	First Name	Last Name	State	Cluster	(
	2,030,943	GFM92313	Andrew	Albatross	Golden	1	
	2,030,948	GFM92368	Andrew	Albatross	Golden	1	

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'

MDM ID 🔺	GEN ID	First Name	Last Name	Date Of Birth	Known As Name	Initials	Effective End Date	Gender	External S
2,030,944	GFM92	Bonnie	Badger	1989/10/23				Female-F 🛛	
2,030,949	GFM92	Bonnie	Badger	1989/10/23				Female-F 🛛	
lew									
iew IDM ID	GEN ID	First Name	Lat Name	Date Of Birth	Konun & Name	latiste	Effective Ford Date	Gander	External
iew DM ID	GEN ID	First Name	Last Name	Date Of Birth	Known As Name	Initials	Effective End Date	Gender	External

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

Employment %	•]	Step 2/3	
Select all								 Expand/Collapse
GFM92322 : Bonnie Badger	☑ ▼ 1/1							
MDM ID Emp	oyee	Division ID	Organisation Structure Level	2	Work Email Address	Employee ID	Direct Phone	Role or Positio
✓ 4,017,7 GFM	92322 - Bonnie 🖄	297	DIVISION	C ²	bbadger@test.com	1252		Not applicabl
GFM92377 : Bonnie Badger	⊵" ▼ 0/1							
MDM ID Emp	ovee	Division ID	Organisation Structure Level	2	Work Email Address	Employee ID	Direct Phone	Role or Positi
□ 4,017,7 GFM	92377 - Bonnie 🖄	308	DIVISION	Ľ	bbadger@test.com	1352		Not applicable
ependency(ies) selected.		has m Select	instance, this em ultiple employee i the check box ne wment record.	records.				
ependency(ies) selected.	L,	has m Select	ultiple employee the check box ne	records.				
	First Name	has m Select	ultiple employee i the check box ne wment record.	records.	Initials	Effective End Date	Gender	External Status
view	First Name Bonnie	has m Select Emplo	ultiple employee i the check box ne wment record.	records. ext to the	Initials	Effective End Date	Gender Female-F 12	External S

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

ummary	•	Step 3/3	
EN ID	GFM92322		
irst Name	* Bonnie		
ast Name	* Badger		
Date Of Birth	1989/10/23		
nown As Name			
nitials			
ffective End Date			
iender	Female-F 🛛 🖄		
xternal Status		Select 'Merge' to	
late Created	2019/09/16 08:20	merge the records	
reated By	GCJ70876	together and create a	-
ast Update Date	2019/09/16 08:20	'Golden' record	
ast Updated Manually by user	ebx-systemUser		
ast Updated By DEX	GCJ70876		
ast Login Date			
organisation			
=			

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