

# CHRIS User Guide: Mass Appraisals

## Introduction

This chapter describes:

- Processing Mass Performance Appraisals via Spreadsheet, and,
- Processing Mass Performance Appraisals via Screen Entry.

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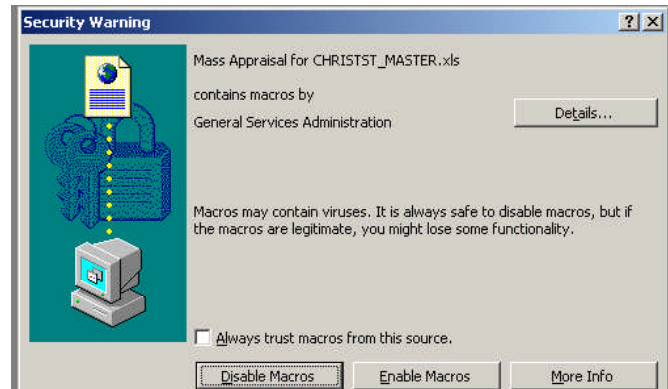
## MASS APPRAISALS — SPREADSHEET

### Setting Up Spreadsheet Macros

This section explains a one-time process used to set the security macros for the spreadsheet that will be used in the Mass Appraisal Spreadsheet process. You must open your Excel Program.

#### STEP 1

From the Excel Program → File → Open → (Name of Spreadsheet). The following Screen will appear:



Check the box that says “Always trust Macros from this source” and click on the Enable Macros Button.

**Note:** Once the above steps have been performed close and reopen the spreadsheet.

### Spreadsheet Information

This section explains the process for entering information on the spreadsheet

#### Step 1

After opening the Excel Spreadsheet, enter the Header Information.

- Appraisal Name: Required Field
- Appraisal Description: Required Field
- Appraisal Type: Do not mix PMS and SES, etc. Only one type may be entered.

View Header	View Line													
CHRIS Mass Appraisals - August 2009														
Appraisal Name														
Appraisal Description														
Appraisal Type														
			Rating Of Record	Rating Of Record	Date Effective	Rating Effective Start Date	Appraisal Period Start Date	Appraisal Period End Date	Rating Points	Org Structure Id	Pay Plan	Grade		
Upl	Employee Name	SSN	Level	Pattern										

**Note:** All Header Information will be shown on the Mass Appraisal Screen and used to identify the Mass process.

## Step 2

Enter Employee Name

Enter Employee Social Security Number (SSN): Required

Enter Rating of Record Level: Required

Enter Rating of Record Pattern: Required

Enter Effective Date: Required

Enter Rating Effective Start Date: Required. (Must use formula Appraisal End plus one day)

Enter Appraisal Period Start Date: Required

Enter Appraisal Period End Date: Required

The screenshot shows a spreadsheet with columns A through M and rows 2 through 13. The spreadsheet is titled "CHRIS Mass Appraisals - August 2009". The data entry fields are as follows:

View Header	View Line
CHRIS Mass Appraisals - August 2009	
Appraisal Name	
Appraisal Description	
Appraisal Type	
Rating Of Record Level	Rating Of Record Pattern
Date Effective	Rating Effective Start Date
Appraisal Period Start Date	Appraisal Period End Date
Rating Points	Org Structure Id
Pay Plan	Grade

**Note:** Date fields will NOT accept any future dates.

## Step 3

If necessary, enter Optional Information in the appropriate fields. Optional information fields include:

Rating Points (Must be entered in decimal format)

Org Structure Code

Pay Plan

Grade

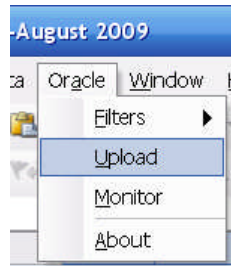
**Note:** DO NOT use the optional fields to make Assignment changes in Org Code, Pay Plan or Grade. Assignment changes to these fields must be made using the appropriate RPA.

After entering all information, SAVE the spreadsheet.

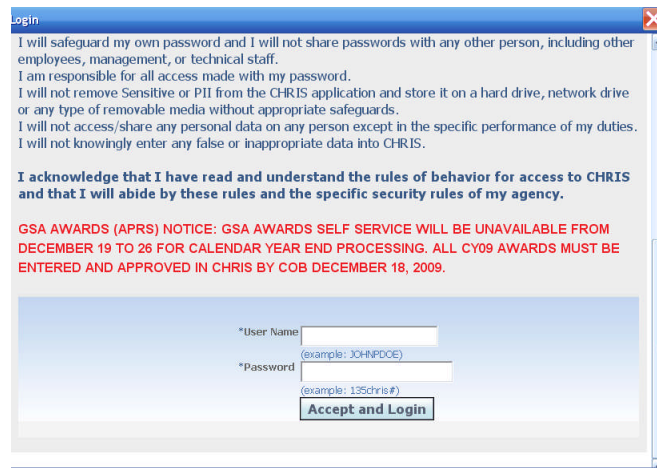
## Uploading the Spreadsheet

### Step 1

From the menu Bar click on Oracle → Upload



The following Oracle Login Window will open:

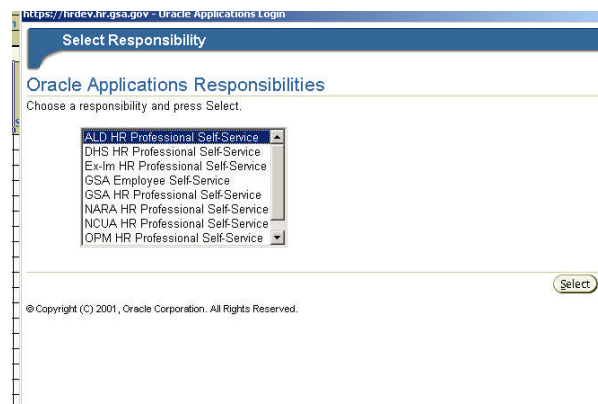


### Step 2

Enter your CHRIS User Name and Password. Click Accept and Login.

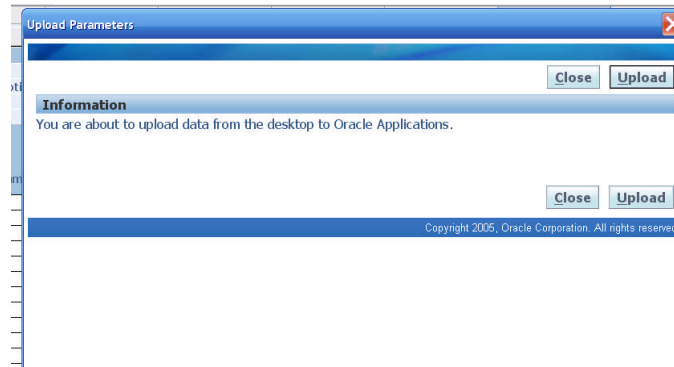
### Step 3

A Responsibility Window Opens. Choose your HR Federal Personnelist Responsibility. Click on Select.



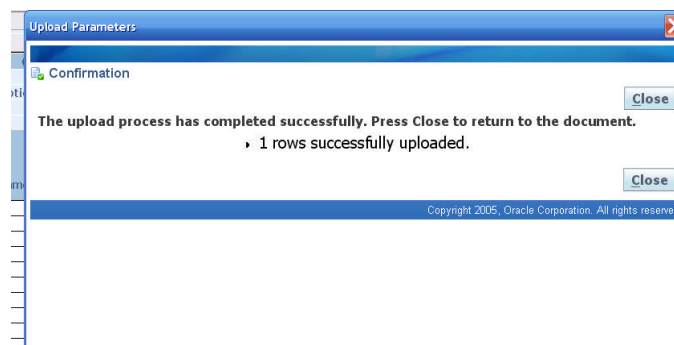
#### Step 4

The Upload Screen appears. Click the Upload button.



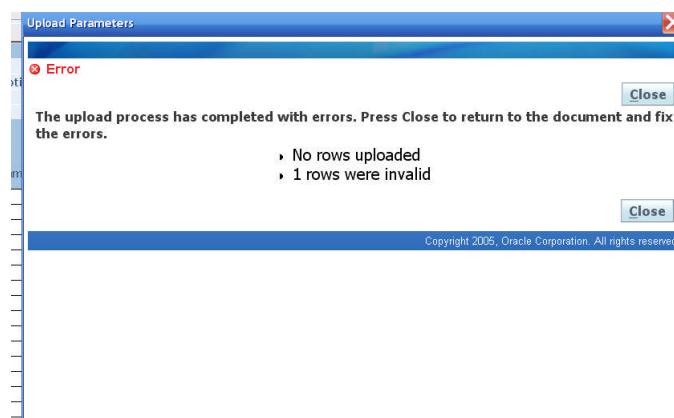
#### Step 5

The Upload Message Screens appears. If the upload was successful, you will get the screen below:



#### Step 6

If the upload was unsuccessful, you will get the screen below:



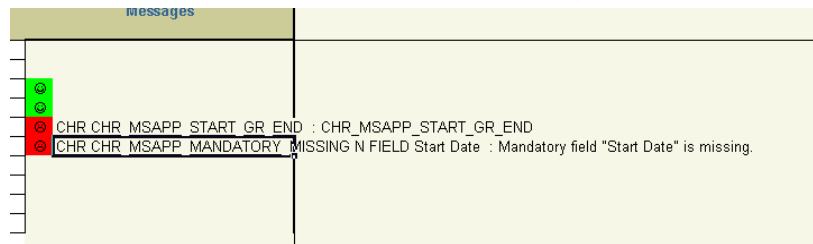
**Note:** All records must validate in order for the upload to be successful.




## Step 7


Click the Close button to close the window.


## Step 8

Records will display on the spreadsheet as the following:



messages	
	
	CHR CHR_MSAPP_START_GR_END : CHR_MSAPP_START_GR_END
	CHR CHR_MSAPP_MANDATORY_MISSING N FIELD Start Date : Mandatory field "Start Date" is missing.

Green happy faces  indicate the records have been entered correctly.

Red sad faces  indicate the records have not been entered correctly. An error message will display.

**Note:** Records with errors must be corrected to get a successful upload of data. After correcting the errors, SAVE the spreadsheet before attempting, again, to upload the data.

## Step 9

Save the spreadsheet. Close the Excel Program.

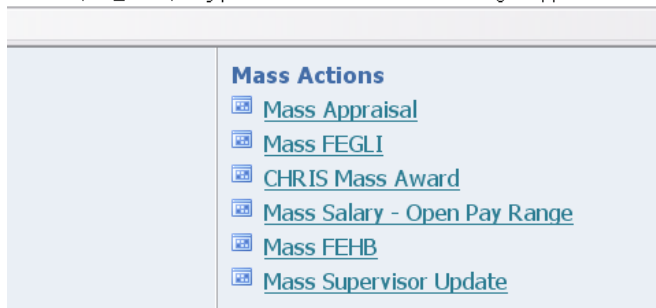
## Processing the Spreadsheet Data

### Step 1

Log into CHRIS Fed HR Personnelist Responsibility.

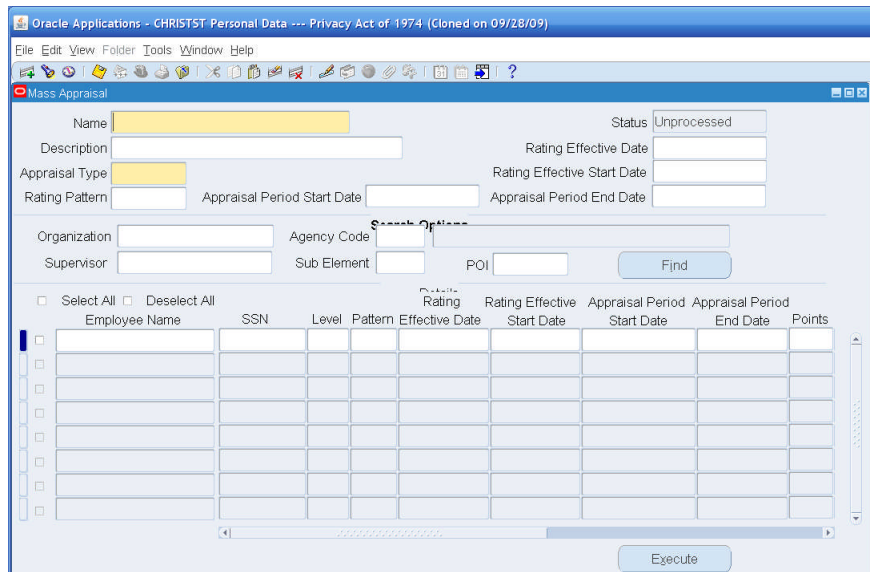
From the Navigation menu double-click on **Mass Actions** , **Mass Appraisals**.

iov:4445/OA\_HTML/OA.jsp?OAFunc=OAHOMEPAGE&akRegionApplicationId=0



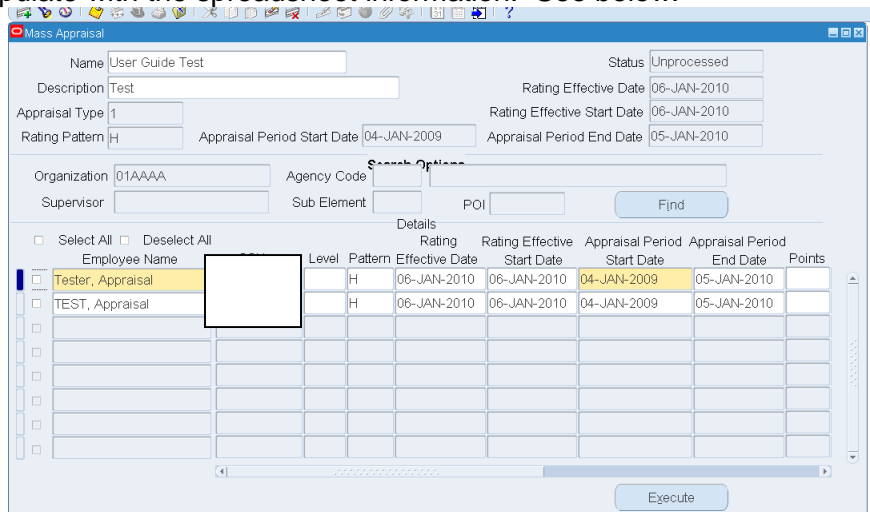
### Step 2

The mass appraisal screen opens:



### Step 3

Query the name field for the Appraisal Name from the Spreadsheet. (F11-Name-Ctrl F11) The screen will populate with the spreadsheet information. See below.



## Step 4

You can add additional records by clicking the row below the last entry.

The screenshot shows the 'Mass Appraisal' application window. At the top, there are several input fields: Name (User Guide Test), Description (Test), Appraisal Type (1), Rating Pattern (H), Organization (01AAAA), Agency Code, Supervisor, and Sub Element. There are also date fields for Rating Effective Date (06-JAN-2010), Rating Effective Start Date (06-JAN-2010), Appraisal Period Start Date (04-JAN-2009), and Appraisal Period End Date (05-JAN-2010). A 'Find' button is located to the right of the Agency Code field. Below these fields is a table with columns: Employee Name, SSN, Level, Pattern, Rating Effective Date, Rating Effective Start Date, Appraisal Period Start Date, Appraisal Period End Date, and Points. The table contains three rows of data, with the second row highlighted in yellow. A 'Find' button is also located at the bottom right of the table area.

Employee Name	SSN	Level	Pattern	Rating Effective Date	Rating Effective Start Date	Appraisal Period Start Date	Appraisal Period End Date	Points
Tester, Appraisal			H	06-JAN-2010	06-JAN-2010	04-JAN-2009	05-JAN-2010	
TEST, Appraisal			H	06-JAN-2010	06-JAN-2010	04-JAN-2009	05-JAN-2010	
			H	06-JAN-2010	06-JAN-2010		05-JAN-2010	

## Step 5

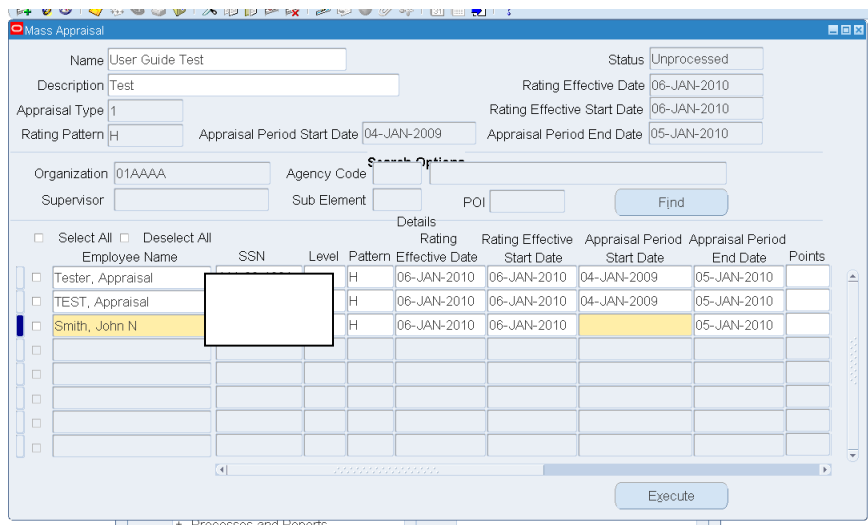
Enter the employee name and SSN, or use the LOV to find the employee. See below.

The screenshot shows the 'Mass Appraisal' application window with a search dialog box open. The dialog box is titled 'Person' and contains a search criteria field with the text 'Find:Smith'. Below the search criteria field is a 'Full Name' field. The dialog box also contains a warning message: 'Warning: Entering % to see all values may take a very long time. Entering criteria that can be used to reduce the list may be significantly faster.' The dialog box has 'Find', 'OK', and 'Cancel' buttons. The background application window is partially obscured by the dialog box.

## Step 6

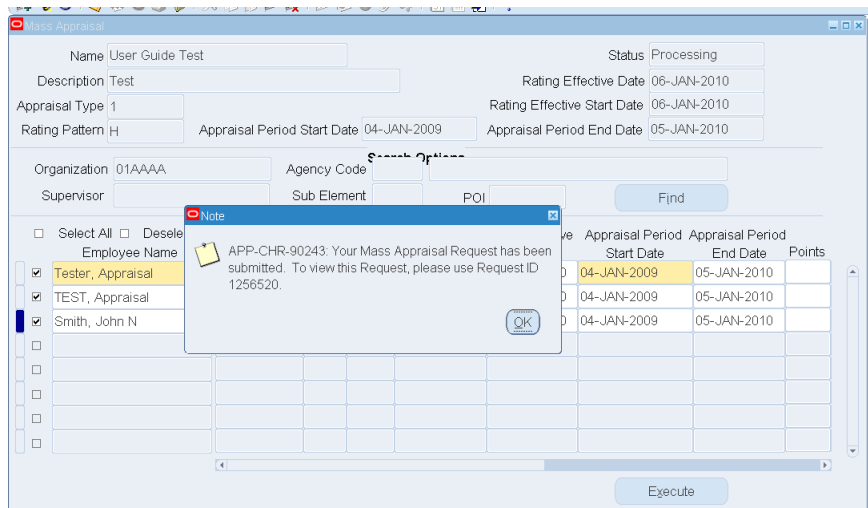
When the name populates, you must check the select box (located to the left of the name) to process the record. Enter all required information. See below.





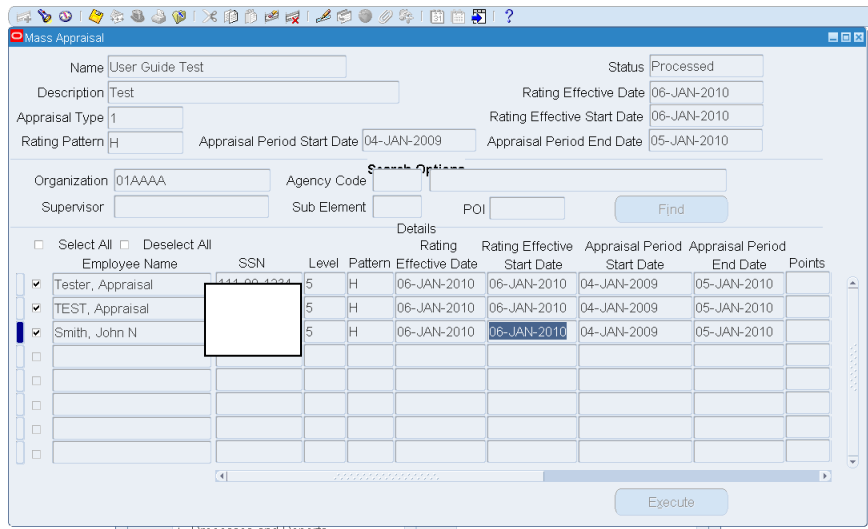
### Step 7

To process the Mass Appraisal, click the Execute Button.



### Step 8

Click the OK button and the following screen will display.



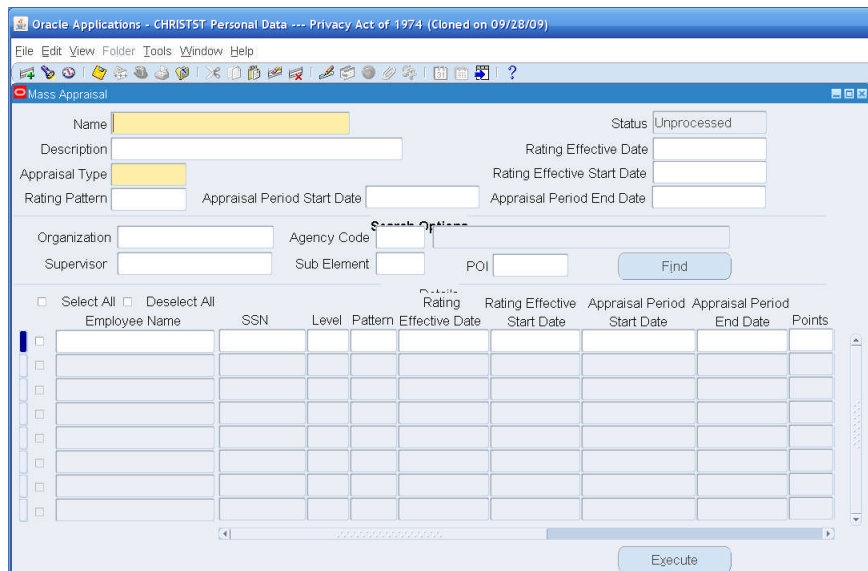
Close the Mass Appraisal Screen.

## MASS APPRAISALS — BATCH PROCESS

This section explains the Batch Process for entering and updating multiple employee performance appraisal information without using the spreadsheet.

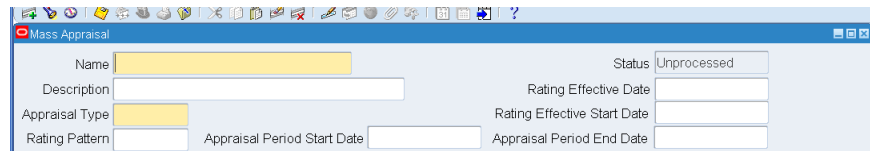
### Step 1

From the Navigation menu double-click on Mass Actions→Mass Appraisals. The Mass Appraisal Screen opens:



## Step 2

Enter the Header Information.



The screenshot shows a software window titled "Mass Appraisal". The form contains the following fields:

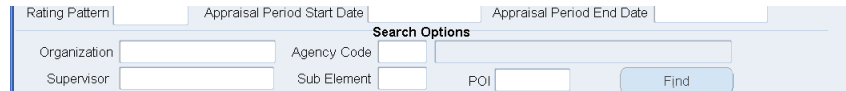
Name	<input type="text"/>	Status	Unprocessed
Description	<input type="text"/>	Rating Effective Date	<input type="text"/>
Appraisal Type	<input type="text"/>	Rating Effective Start Date	<input type="text"/>
Rating Pattern	<input type="text"/>	Appraisal Period Start Date	<input type="text"/>
		Appraisal Period End Date	<input type="text"/>

- Name: Unique Identifier Name
- Description: Enter description of the Batch.
- Rating Effective Date: No future dates allowed.
- Appraisal Type: Enter Type, or select from the LOV.
- Rating Pattern: Enter Pattern or select from the LOV.
- Rating Effective Start Date: No future dates allowed.
- Appraisal Period Start Date: No future dates allowed.
- Appraisal Period End Date: Required

## Search Options

### Step 3

Select a search option from which to pull the list of records. For each option in the search field, enter the correct data or use the LOV to find the correct value.



The screenshot shows a search interface with several input fields. At the top, there are three tabs: 'Rating Pattern', 'Appraisal Period Start Date', and 'Appraisal Period End Date'. Below these is a section titled 'Search Options' containing the following fields: 'Organization', 'Agency Code', 'Supervisor', 'Sub Element', and 'POI'. A blue 'Find' button is located to the right of the 'POI' field.

**Organization:** Searches and displays the employees within the organization selected.

**Supervisor:** Searches and displays the name of employees assigned to a specific supervisor.

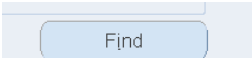
**Agency Code:** Searches and displays the name of employees belonging to a particular Agency. (The agency description will also auto-populate).

**Sub-Element:** Searches and displays the name of employees assigned to a specific sub-element unit.

**POI:** Searches and displays the name of employees assigned to a specific POI (Personnel Office Identifier) code.

**Note:** Users may search on one or more options at a time. Entering multiple search criteria significantly narrows the list of employee names that will display.

### Step 4

Click on the Find  button. Results are returned with the header information auto-populated in each record. See below.

## Processing Records

### Step 5

Populated Screen looks like this:

Mass Appraisal

Name: User Guide Test      Status: Unprocessed

Description: Test      Rating Effective Date: 06-JAN-2010

Appraisal Type: 1      Rating Effective Start Date: 06-JAN-2010

Rating Pattern: H      Appraisal Period Start Date: 04-JAN-2009      Appraisal Period End Date: 05-JAN-2010

Organization: 01AAAA      Agency Code:      Search Options

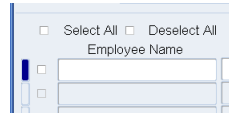
Supervisor:      Sub Element:      POI:      Find

Select All    Deselect All

Employee Name	Rating Pattern	Rating Effective Date	Rating Effective Start Date	Appraisal Period Start Date	Appraisal Period End Date	Points
Tester, Appraisal	H	06-JAN-2010	06-JAN-2010	04-JAN-2009	05-JAN-2010	
TEST, Appraisal	H	06-JAN-2010	06-JAN-2010	04-JAN-2009	05-JAN-2010	
Smith, John N	H	06-JAN-2010	06-JAN-2010	04-JAN-2009	05-JAN-2010	

Execute

Select the record for processing by checking the select box located next to each employee name:



### Step 6

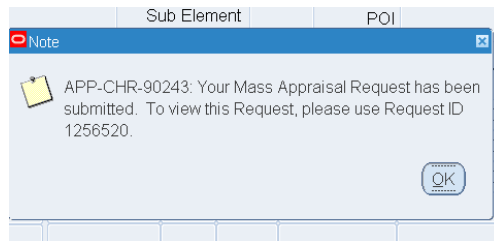
Enter the Rating Level for each record selected, as well as any other optional information, e.g., Rating Points, Org Struct ID, Pay Plan, or Grade.

### Step 7

Click the Execute  Button.

### Step 8

The following message will display.

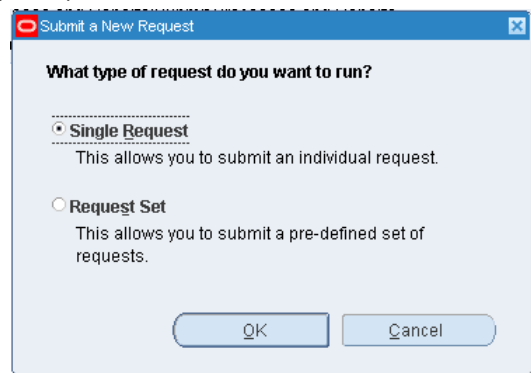


Click OK.

## Printing Batch Report

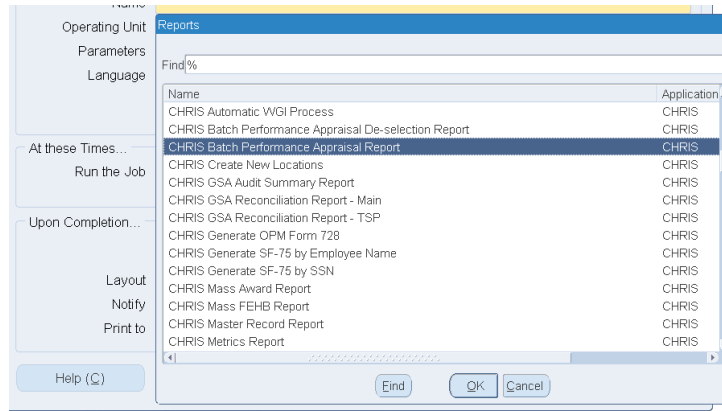
### Step 1

Navigate to Processes and Reports→Submit Processes and Reports. (The Submit a New Request Window opens)



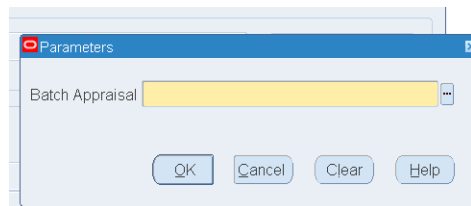
## Step 2

Select Single Request. Click OK. The Submit Request Window opens.



## Step 3

When the Parameters Window opens, click the LOV to find the name of your Mass Appraisal Process. Click OK twice.



## Step 4

Click in the Options section. Select the correct printer and click the submit button.

**Note:** The report can also be scheduled to run during normal batch processes.

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