

63 - CYMS Training Guide – CYMS RecCentral Data Transfer (Staff)

(10.3 - Updated Jan 2013)

Overview

The CYMS Global Data Transfer is designed to streamline the relocation process for military and civilian families, staff (to include coaches and volunteers) and Family Child Care providers. Now the entire Army is using CYMS, standard data in files should not have to be “recreated” and “retyped” into the computer at every new duty assignment.

If a staff member is planning to seek employment or volunteer with CYS Services at their new location, standard data elements (such as names, birthdates, medical records, background checks, training records, etc.) should be immediately available.

By exporting staff files to the Global Database, the “in-processing” is much simpler for the individual and it will definitely save admin personnel data entry time.

- The **export process** allows key staff information from the “losing” installation to be safely transferred to a secure centralized database maintained by the U.S. Army Family and Morale, Welfare, Recreation Command (FMWRC)
- The **import process** allows the “receiving” installation to safely move individual staff files from the FMWRC site to their local CYMS databases to initiate the file.

Only **limited elements of the Staff file are exported**. It is NOT an export of the complete file.

- The export **includes**:
 - Select information from the Core, History and Emergency Contact screens (names, Email address, birthdate, service computation date, previous experience, schooling level, emergency contact, etc.)
 - Almost all of the information on the button screens (background checks, medical, credentials, training, recognition.
- The export **does not include**:
 - Data that will be different at the new location (addresses, job position/title, etc)

The import/export processes **one Staff member at a time**. Data import/export for relocating staff should become part of the regular CYS in- and out-processing protocol.

With version 10.3q we are able to use the **Email** address linked to the **Staff Member** as the “unique factor” used to identify Staff data on the FMWRC site. So it will now be a required field in order to complete a **RecCentral Xfer**. However, since the **Staff Member’s Social Security Number** is the “unique factor” in versions prior to 10.3q it is also still needed to identify Staff data on the FMWRC site. So while the system will not prevent the transfer without a SSN we recommend the information be present or the receiving Garrison will be unable to locate the record if on a version prior to 10.3q.

NOTE: You should **not be able to routinely see the SSN** in the staff files. The first time you save the staff file, the SSN field is locked. The number is secured behind the scenes.

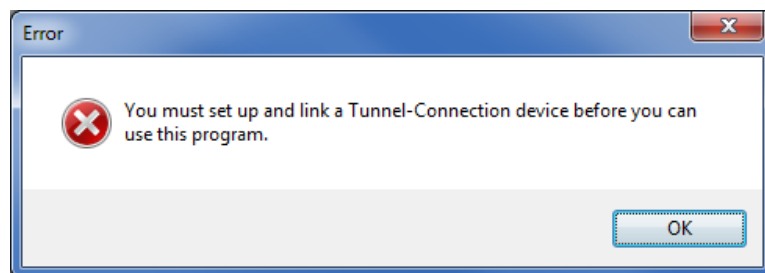
If you can see the SSN in your staff files, contact your FTS. The FTS should go into **Security Maintenance** and toggle **Hide HH ID** on your user ID. To help keep this sensitive information safe and secure, no user should **routinely** see the SSN! Access is only granted to authorized key individuals – and it is only authorized for as long as it takes to update the SSN data.

If the staff member you are exporting already exists in the Global database, the old information will be overwritten with new export.

Authority – Who Can Process Data Transfers?

The garrison should **locally identify and train** individuals responsible for processing transfers:

- The garrison is required to have sufficient staff members designated/trained to ensure records of **all** departing staff are **PROMPTLY and CONSISTENTLY exported**.
- It is wise to have staff trained to **export** files **at all key points where staff records are kept** (CER, CDC, SAS, FCC, POS, MST, Sports, etc.)
- Downloading files for incoming staff is usually done by the CYSS POS or Admin staff.
- It is no longer necessary to provide these authorized staff names to higher headquarters or to ensure they have portal access. That process has been changed and greatly simplified since the original instruction for this process was distributed.
- There is no longer an extensive process needed to make a computer ready to process transfers.
- The only requirement is that (behind the scenes) the workstation must have the **Tunnel-Connection device** linked to it.



If you get this message, please see your FTS. The FTS can quickly and easily set up the VSI News device for your workstation. They do not even have to leave their office to do this!

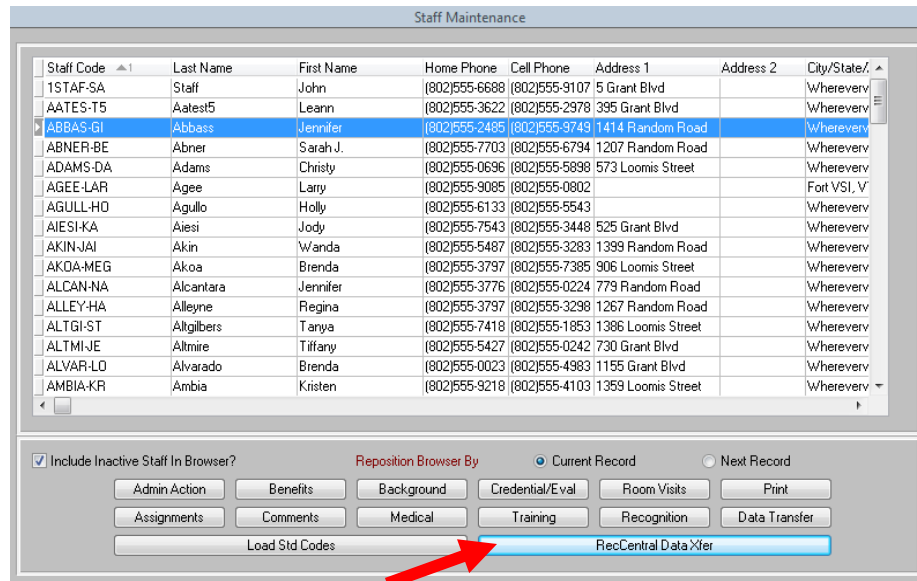
Instructions for your FTS are at the end of the CTG-36 CYMS Training Guide.

PLEASE MAKE SURE YOU HAVE SUFFICIENT INDIVIDUALS IDENTIFIED TO PERFORM THE DATA EXPORT PROCESS.

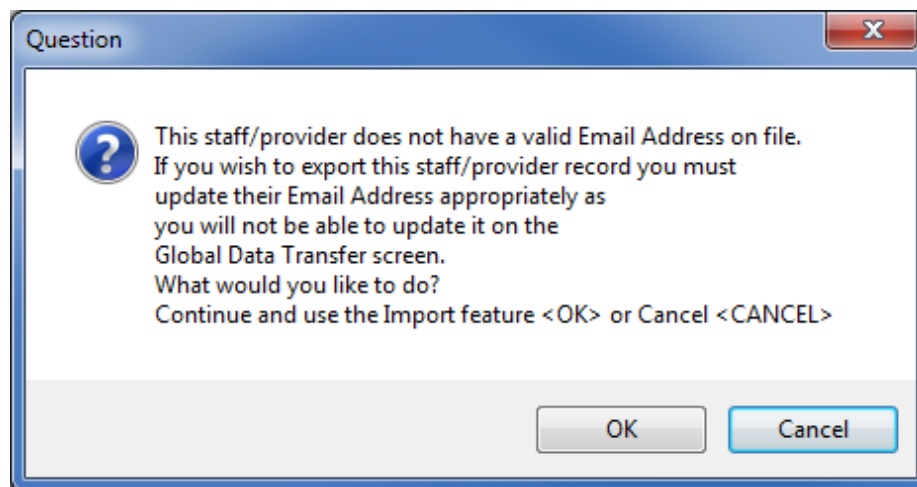
TRAINED INDIVIDUALS SHOULD BE LOCATED AT ALL POINTS WHERE STAFF RECORDS ARE MAINTAINED (AT CER, CDC, SAS, FCC, POS, MST, ETC).

To Export a Record for a Relocating Employee, Coach or Volunteer:

- 1 On your **Staff Main Menu** screen, highlight the individual you want to export.
- 2 Then, find the **large RecCentral Data Xfer** button. Click it. (Don't get confused with the old tiny Data Transfer button – it is no longer used in this process.)

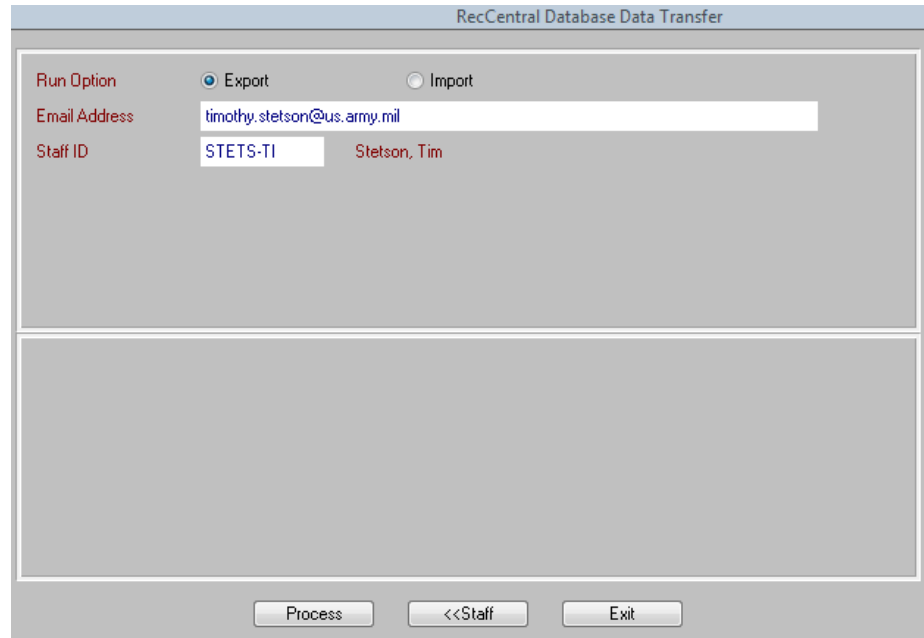


- 3 If the staff you selected **does not** have a valid Email address the following message will be displayed:



If you wish to export this staff member, you must click **Cancel** and update the staff member's Email address.

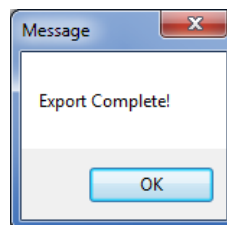
- 4 Once a valid Email address is entered in the Staff member's file and the staff member is re-selected, click the **RecCentral Data Xfer** button again. You will be taken to the following screen:



Note: If more than 1 Email address exists, the Staff record will export using the first Email in the comma separated list. However, all Email addresses will be passed during export and present after import.

Note: You cannot change/update the **Staff ID** field. If you didn't select the correct staff member you can click the **<<Staff** button and re-select accordingly.

- 5 Click **Process** to export this staff member's data.
- 6 When the process is finished, you will get a confirmation message. Click **OK**.



To Import a Record for a Relocating Employee, Coach or Volunteer:

- 1 On your **Staff Main Menu** screen, click the **RecCentral Data Xfer** button. **NOTE:** For an import, it does not matter which staff member you have highlighted.

Staff Code	Last Name	First Name	Home Phone	Cell Phone	Address 1	Address 2	City/State/
1STAF-SA	Staff	John	(802)555-6688	(802)555-9107	5 Grant Blvd		Wherever
AATES-T5	Aatest5	Leann	(802)555-3622	(802)555-2978	395 Grant Blvd		Wherever
ABBAS-GI	Abbass	Jennifer	(802)555-2495	(802)555-9749	1414 Random Road		Wherever
ABNER-BE	Abner	Sarah J.	(802)555-7703	(802)555-6794	1207 Random Road		Wherever
ADAMS-DA	Adams	Christy	(802)555-0696	(802)555-5898	573 Loomis Street		Wherever
AGEE-LAR	Agee	Larry	(802)555-9085	(802)555-0802			Fort VSI, V
AGULL-HO	Agullo	Holly	(802)555-6133	(802)555-5543			Wherever
AIESI-KA	Aiesi	Jody	(802)555-7543	(802)555-3448	525 Grant Blvd		Wherever
AKIN-JAI	Akin	Wanda	(802)555-5487	(802)555-3283	1399 Random Road		Wherever
AKQA-MEG	Akoa	Brenda	(802)555-3797	(802)555-7385	906 Loomis Street		Wherever
ALCAN-NA	Alcantara	Jennifer	(802)555-3776	(802)555-0224	779 Random Road		Wherever
ALLEY-HA	Alleyne	Regina	(802)555-3797	(802)555-3298	1267 Random Road		Wherever
ALTI-ST	Altigibers	Tanya	(802)555-7418	(802)555-1853	1386 Loomis Street		Wherever
ALMI-JE	Altmire	Tiffany	(802)555-5427	(802)555-0242	730 Grant Blvd		Wherever
ALVAR-LO	Alvarado	Brenda	(802)555-0023	(802)555-4983	1155 Grant Blvd		Wherever
AMBIA-KR	Ambia	Kristen	(802)555-9218	(802)555-4103	1359 Loomis Street		Wherever

- o If your highlight bar is resting on a Staff Member who **does not have a valid Email on file** you will get the following message:

Question

This staff/provider does not have a valid Email Address on file.
 If you wish to export this staff/provider record you must update their Email Address appropriately as you will not be able to update it on the Global Data Transfer screen.
 What would you like to do?
 Continue and use the Import feature <OK> or Cancel <CANCEL>

OK Cancel

- o Since you are not trying to export this staff member, you may click **OK** to “**Continue and use the Import feature.**”
- 2 If you selected a Staff Member that **had a valid Email address on file**, you will be taken directly to the **RecCentral Database Data Transfer** screen.
 - o For **Run Option**, select **Import**.

- Enter the staff member's **Email address** in the appropriate field.

RecCentral Database Data Transfer

Run Option: Export Import

Email Address:

Buttons: Process, <<Staff, Exit

Note: If more than 1 Email address exists, you must use the first Email on the Staff record to complete the import. However, all Email addresses were passed during export and will be present after import.

- Click **Process**
NOTE: If you received an IMPORT error message, see Step #5 below for assistance.

3 If your import was successful, you will be asked to enter a **“New” Staff Member ID**.

RecCentral Database Data Transfer

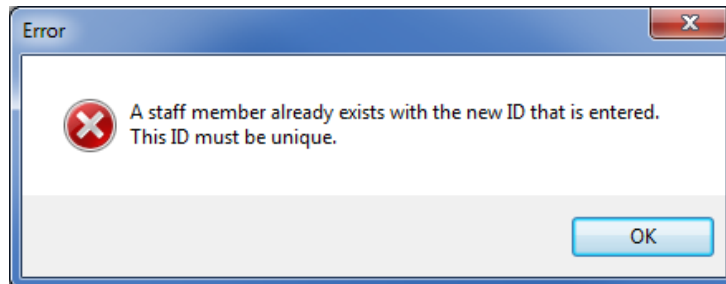
A valid staff member was located to download!
 Please verify the staff member listed below, and then click Process

New staff member ID:

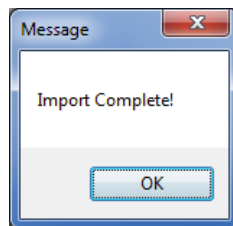
Last Name	First Name	Old Home Phone	Cell Phone	Email
Stetson	Tim			timothy.stetson@us.army.mil

Buttons: Process, Back, Exit

- Our standard format is to **enter 5 letters of the last name, a dash (with no space after it) and then two letters from the first name.**
- If the **last name is short**, fill up the rest of the space with the first name (example: LEE-MARY) – you have a total of 8 spaces for the ID.
- If your new Staff ID **matches a staff member who already exists** in your database you will receive the following message:



- You may need to get creative with your new Staff Member ID. For instance, Marie Sara Lee might be coded as LEE-MARS. Or for Smith,Mary and Smith,Martha, you will have to get creative to make one ID slightly different (SMITH-MA and SMITH-MT).
- Once you have a valid new **Staff Member ID**, click **Process** and **OK** through the **Import Complete** message.

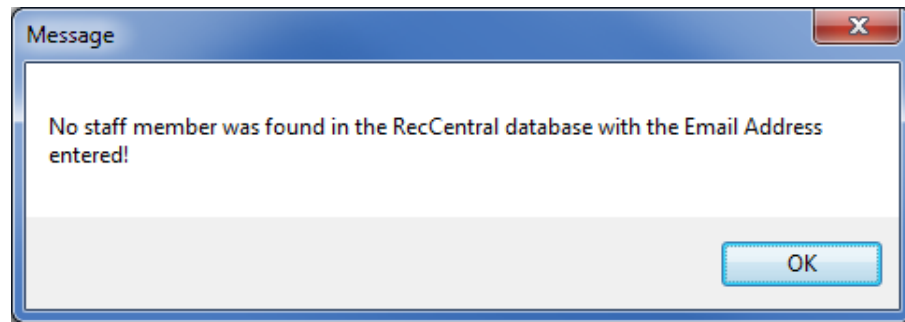


- 4** All imported data will need to be **reviewed** before you are “finished.”
- Some data may have changed since the file was exported. New “local” data must be added. Codes in your database and codes in the losing garrison database may be different and will show up as question marks (?????).
 - Items that are not needed / wanted can be easily deleted in the browser screens.
 - For example: If you did not want to keep the history of Room Visits from the previous installation, you could:
 - Highlight the first item in the browser, hold down your **Shift Key** and highlight the last item in the browser – everything between these two should be highlighted – then click the **Delete** button.
 - If you wanted to keep some items in the list, you can hold down your **Control Key** and easily select or deselect items.

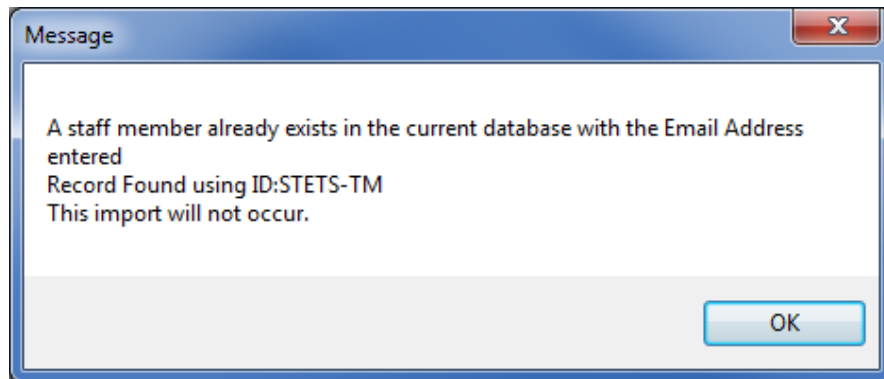
5 IMPORT ERROR MESSAGES.

- In **Step 2 above**, if you receive the following message, you either have the **wrong Email address** (on your end or on the file in the Global Database) or the **records for this individual have not been exported** to the Global Database. You may want to contact the

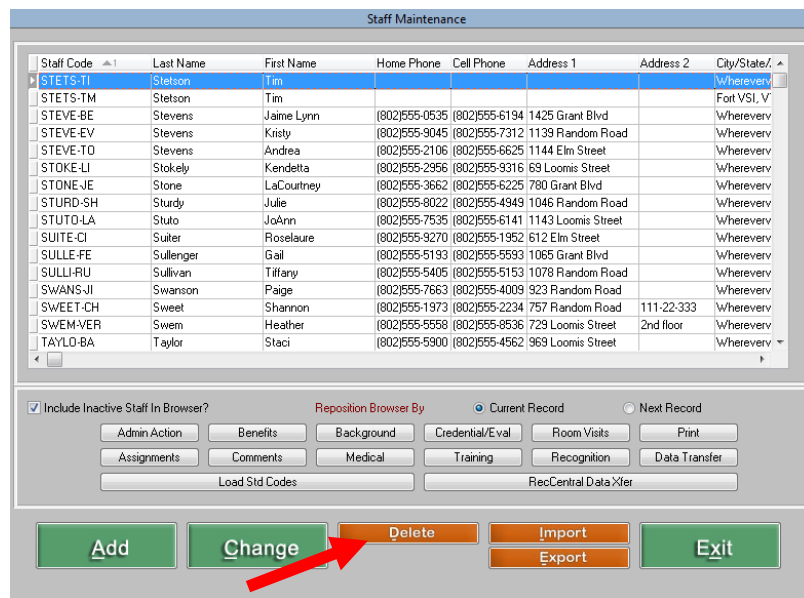
losing installation and have them export (or “re-export”) the file to the Global Database and/or validate the Email address on the export file.



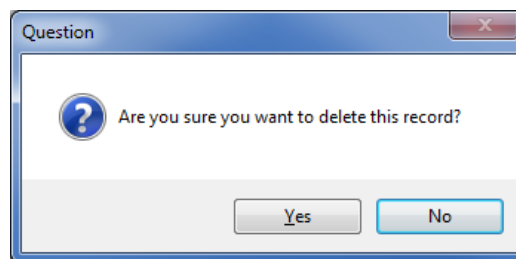
- In **Step 2**, if the **Email address you entered matches the Email address of a Staff member that already exists** in your database you will get the following message:



- We typically keep records for 3 years, so it might be possible that the Staff left, worked at another installation, and is now back. In this situation, you have to make a decision:
 - Do you want to **keep the file that is currently in your database** and use it as the starting point for your data update . . . or . . .
 - If you think the file in the Global Database is more current than your local file, you will have to **delete your local file** before you can import the new file.
 - To delete the old file from your database, go to your **Staff Main Menu** screen.



- Highlight the Staff and then click the **Delete** button.
- You will get a warning box. If you are sure you have the correct Staff Member highlighted, click **Yes**.



Reports:

- 1 There is now a report to show you **how many uploads (exports) or downloads (imports)** you have done at your garrison during any designated time period. It also shows you **exactly WHO** did the import or export.
 - Go to: **Reports → CYS → CYS Admin Reports → Global RecTrac Import/Export Report**

Global Rectrac Import/Export Report

Include HH Downloads
 Include HH Uploads
 Include Provider Downloads
 Include Provider Uploads
 Include Staff Downloads
 Include Staff Uploads

Date Rng: 01/11/2013 ↓ Thru 12/31/2099 ↓

Report Sort Option: Date/Time/Program Base/Date/Time

Print Details >> Last Settings Default Settings Templates Exit

- Select **what you want to see** and how you want it sorted. Then enter a **date range**.

2 You have 2 options for processing this report:

- **OPTION 1:** If you want a .pdf report – click **Print** and turn on the **Preview** toggle (to see the report on screen) or turn on the **Print** toggle to send it directly to the selected printer.

Output Selection

Process Option: Process Report Schedule Report

Output Option: PDF Spreadsheet

Print Win-Land of the Lost
 Preview
 Email

Finish Details Cancel



FT VSI CYSS - MGR1
Global Rectrac Import/Export Report

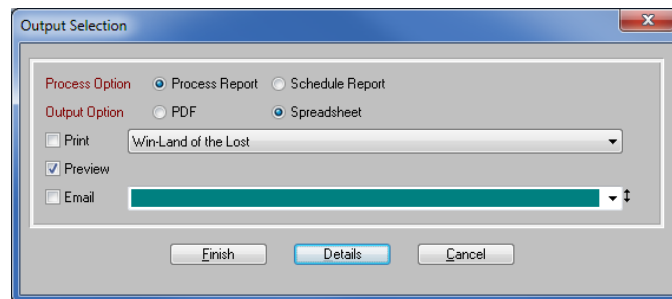
Ft VSI CDC
01/15/13 14:07 User: 100
Page: 1 of 1

Date	Time	Base	Program	Up/Down	Type	Client User	Base Code	HH/Prov/Staff Name
01/11/2013	11:27	Fort VSI	CY0657	Download	Staff	100	VS	Stetson Tim
01/11/2013	11:30	Fort VSI	CY0657	Upload	Staff	100	VS	Stetson Tim
01/11/2013	11:30	Fort VSI	CY0657	Download	Staff	100	VS	Stetson Tim
01/11/2013	12:56	Fort VSI	CY0657	Download	Staff	100	VS	Stetson Tim
01/11/2013	12:57	Fort VSI	CY0657	Download	Staff	100	VS	Stetson Tim
01/11/2013	12:58	Fort VSI	CY0657	Download	Staff	100	VS	Stetson Tim
01/11/2013	12:58	Fort VSI	CY0657	Download	Staff	100	VS	Stetson Tim
01/11/2013	12:59	Fort VSI	CY0657	Upload	Staff	100	VS	Stetson Tim
01/11/2013	12:59	Fort VSI	CY0657	Download	Staff	100	VS	Stetson Tim
01/11/2013	13:55	Fort VSI	CY0657	Download	Staff	100	VS	Stetson Tim

Total Records in Selected Range: 10

NOTE: Sample is from local test Database so there are many duplicates. Locally, you would just see your garrison's transactions on the report.

- If you see **NO NAME AVAILABLE**, contact your FTS. You may be on the wrong version of CYMS. This needs to be corrected.
- If you see the **same name twice**, that is OK. On an export, the last version sent out overwrites any previous versions in the Global Database.
- **OPTION 2:** If you want an Excel report where you have the ability to sort the data – click **Print** and then change the **Output Option to Spreadsheet**. Be sure that the **Preview** toggle is on (to see the report on screen) or the **Print** to send it to the selected printer.



	A	B	C	D	E	F	G	H	I
1	Date	Time	Base	Program	Up/Down	Type	Client User	Base Code	HH/Prov/Staff Name
2	04/21/2010	10:29	Fort Drum	CY0657	Upload	Staff	321.00 FG		No Name Available
3	04/21/2010	10:31	Fort Drum	CY0657	Upload	Staff	49.00 FG		Thomas Karen
4	04/21/2010	13:31	Fort Bliss	CY0657	Upload	Staff	801.00 TC		Goodman Stephania A.
5	04/21/2010	15:03	Ft Hood	CY0657	Upload	Staff	915.00 FH		Holcomb Sarah
6	04/22/2010	08:11	Fort Stewart	CY0657	Download	Staff	809.00 FW		Thomas Karen
7	04/22/2010	09:42	Fort Stewart	CY0657	Download	Staff	809.00 FW		Thomas Karen
8	04/22/2010	11:38	Ft Hood	CY0657	Upload	Staff	153.00 FH		Niter Marcileta
9	04/22/2010	11:39	Ft Hood	CY0657	Upload	Staff	153.00 FH		Niter Marcileta
10	04/22/2010	11:39	Ft Hood	CY0657	Upload	Staff	153.00 FH		Ryan (Cortina) Araceli

NOTE: Sample is from the Global Database (showing several garrisons in the Base column). Locally, you would just see your garrison's transactions on the report.

Troubleshooting Connectivity:

- 1 If you **cannot connect to the database** (Session Failed message or the process freezes up on any of the steps), **make sure:**
 - This machine has been **linked to the Tunnel-Connect Device**. Your FTS can check this for you. Technical setup instructions for the FTS are found at the end of CYMS Detailed Training Guide (CTG) **CTG-36 OS-CYMS Global Data Xfer (HH) 103 DONE**.
 - The FTS will also be notified if the **server is down** for maintenance or other reasons.

- 2 If this doesn't solve the problem, **your FTS** should:
- o **Contact the ASP Support Help Desk – IMMEDIATELY!** They can immediately confirm whether the server is operational or provide technical assistance with validation of your setup.
 - o **Remember** – you may be the first one to discover the server is down – so please make the call so the ASP can initiate troubleshooting and/or send out notices to other users.

**If you have any problems accessing the data transfer site
please immediately contact the MWR Portal Administrator at:**

ASPsupport@conus.army.mil

(410) 306- 4558 or (DSN) 458-4558

- 3 For additional assistance or other questions about the import/export policies and procedures, contact the **FMWRC CYS CYMS Help Line**. The cell phone number is available at all times. Suggestions for improving this process should also be forwarded here.

FMWRC CYS CYMS Help Line

CIVILIAN: (615) 553-4200

CELL: (571) 243-1502

EMAIL: linda.shiles@us.army.mil

BLANK SHEET FOR DOUBLE SIDED PRINTING