PAYROLL/PERSONNEL ONLINE SYSTEM
USER'S GUIDE

UNIVERSITY OF CALIFORNIA, SANTA BARBARA
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I.INTRODUCTION

ABOUT THE PAYROLL/PERSONNEL SYSTEM

The Payroll/Personnel System (PPS) provides automated facilities in support of the payroll and personnel requirements of the University. It is comprised of several databases that maintain current and historical information about University employees. Further, it is comprised of several sub-systems that provide facilities for updating employee records, inquiring about employee records, calculating pay, and reporting information. The sub-systems include: EDB Entry/Update; EDB Inquiry; Payroll Audit Record Inquiry; Employment Verification, Time Reporting; and History Inquiry.

The system was designed as a distributed system that allows users in individual units to enter and make changes directly to the Employee Database (EDB), with appropriate security and safeguards. Among these is the use of post authorization notification (PAN), which informs mandatory reviewers, unit managers, and central administrative offices of the changes made to employee records.

Access is provided through the use of menu, list, entry, and message screens. In addition, help screens are available to provide information on screen content and on specific data elements. By using function keys and entering selection criteria, the user can navigate to the desired screen, enter or change data on the screen, and submit the entered data to the edit and update process.

THE PAYROLL/PERSONNEL SYSTEM USER

Users of the PPS are employees of the University who have been authorized to have access to the information contained in the system. Access is granted for the performance of payroll/personnel related job duties. Users of the system can have one of several roles. These include: primary preparer; mandatory reviewer; back-up preparer; back-up reviewer; manager; inquiry user; central office user.

ABOUT THE USER'S GUIDE

The User's Guide is designed to help you be a productive user of the system: to access appropriate screens and information, to navigate through the system, to successfully enter and update data, and to review updates via post authorization notifications. These primary system functions are discussed in separate chapters. A glossary is included to provide you with definitions of the important system terms.

This guide is not intended to be a substitute for training or experience; instead you will find that it is most useful as a reference tool for the various system features and functions.

HOW TO GET HELP

OTHER MANUALS

For information regarding procedures for online entry and update of payroll/personnel actions, such as hires, promotions and separations, refer to: Payroll/Personnel Online System Procedures; this manual replaces the Payroll Procedures Manual that was written for the paper forms-based process.

New PPS Designated Managers should review the "Advice to Managers" document, http://hr.ucsb.edu/hris/advice-to-managers.pdf .

ACCESS AND GENERAL APPLICATION QUESTIONS

◊ When you can get to the Logon screen but can't get to the PPS main menu your primary assistance is in the Accounting Office Computer Support Unit. Hours: Monday - Friday, 8:00A.M. to 5:00 P.M., 893-2880.
  - For status of system application forms, call Accounting, Computer Support.
  - For password problems, call Accounting, Computer Support.
  - For system availability, check your e-mail first, as reports of problems will be posted there.
  - For navigation, screen issues, and data questions call the appropriate functional office: Payroll Office, Human Resources, Academic Personnel.

POLICY AND PROCEDURE QUESTIONS

◊ For policy and procedure issues and policy consultation, contact:
  - Payroll Office
  - Human Resources
  - Academic Personnel

DATA DEFINITION QUESTIONS

◊ For data definition questions, such as data entry codes and valid data ranges:
  - Online Help - Accessed by positioning your cursor to the appropriate field on any Payroll/Personnel System screen and pressing the <F1 Help> key.
  - Payroll, Human Resources or Academic Personnel - Contact the office appropriate to your question.

II. ACCOUNTABILITY, ORGANIZATION & PLANNING

This section introduces you to key concepts of accountability, as well as to issues such as organizational roles and emergency planning necessary for successful implementation.

ACCOUNTABILITY

The accountability for the management of payroll and personnel transactions is delegated to the departments on campus. Each department decides who in the organization is responsible for processing data in the Payroll/Personnel System (PPS). The responsibility is delegated to qualified individuals in the organization who have the necessary knowledge and sufficient authority to process transactions in PPS. **This authority means that a qualified individual can refuse to process a transaction that is in violation of policy, without being subject to disciplinary action.**

Accountability is fundamental to the internal controls that underlie PPS. PPS depends on departmental accountability because it relies on individuals to understand their responsibilities and be fully accountable for carrying them out.

Several topics are included in this section. The general principles of accountability provide a framework that may help guide your organizational decisions; unit reorganizations, personnel assignments, and delegations. Also included is the principle of separation of duties, which is fundamental to maintaining good internal controls and an effective accountability structure. The Individual Accountability section sets forth responsibilities that should guide individual behavior. The section on Policy Compliance delineates one mechanism to insure that accountability is maintained.

GENERAL PRINCIPLES OF ACCOUNTABILITY

Following are several general principles of accountability:

- Individuals who delegate authority may only do so to the extent that this same authority has been delegated to them.
- Individuals who delegate authority are responsible for ensuring the employees to whom they delegate are qualified and are properly fulfilling their responsibilities. Qualified individuals are those who:
  1) Are actively involved with the processing of PPS transactions.
  2) Possess an adequate level of technical skills required to use the PPS.
  3) Understand policies, rules, laws, and regulations sufficiently to either ascertain compliance or seek additional assistance.

4) Have been provided sufficient authority to fulfill their responsibilities without being countermanded or being subject to disciplinary action.

- Each PPS transaction must be reviewed on a timely basis by an accountable individual.
- Each organizational manager must officially record all delegations of accountability as well as any cancellations or changes in delegations or obtain the services of a Department Security Administrator (DSA), to maintain official record of delegations of accountability. The delegations need to be kept secure, accurate and current.
- Accountability structure and delegations must be reviewed to insure accuracy and currency.
- Accountability structure/delegations must maintain appropriate internal financial controls. This includes the maintenance of separation of duties.

SEPARATION OF DUTIES

The design of the PPS includes features that help to insure that appropriate internal financial controls are maintained. First, it is not possible for an employee to update his/her own record. Second, the post authorization notification (PAN) review process provides a review of transactions. Additionally, separation of duties is achieved by the requirement for a department to assign separate individuals to the roles of primary preparer and mandatory reviewer. An additional safeguard is the assignment of a back-up preparer/reviewer. As a consequence, departments will need to have:

- **Primary Preparer:** The primary preparer is the individual responsible for updating PPS in a manner consistent with UC and campus policy.
- **Mandatory Reviewer**: A mandatory reviewer provides the following functions: (1) a secondary check for correctness and appropriateness; (2) a check for prior approvals and completion of other required documents.
- **Backup Preparer/Reviewer:** The backup preparer/reviewer is the trained substitute. This is important not only to cover absences of the primary preparer or mandatory reviewer, but also because it is not possible for someone to change or update his/her own record.

In order to maintain required financial controls and separation of duties it may be necessary for a small department to form a liaison relationship with other departments or units.

INDIVIDUAL ACCOUNTABILITY

Access to the PPS is granted to employees for the performance of payroll/personnel related job duties. Employees who have been granted access will be accountable to use the system consistently with University policies and procedures.

Individual accountability means:

- A logon ID is considered equivalent to a signature and an employee is responsible for all entries made under his/her logon ID.
- Updates to the system are to be in compliance with policies and procedures that govern the particular transaction to be performed.
- Computing resources are to be used only for the legitimate University business that an employee has been explicitly authorized to perform as stated in his/her job description.
- It is against University policy to peruse or use University records including, but not limited to, confidential information for personal interest or advantage.
- Proper password security is to be maintained.
- Proper physical security is to be maintained by not leaving a workstation/terminal unattended while logged into University systems.
- Privacy and confidentiality of all accessible data is to be maintained.

Before access is granted, employees will be expected to sign that they acknowledge an understanding of and agreement to abide by the above policies (see Application for Access).

POLICY COMPLIANCE

Departments are accountable for policy compliance and full understanding of all relevant policies. Failure to comply with UCSB policies, rules, and applicable regulations is a serious breach of responsibility and may result in disciplinary action up to and including dismissal. Further, any violation of local state or federal laws may carry the additional consequence of prosecution under the law, where judicial action may result in specific fines or imprisonment, or both; plus the costs of litigation or the payment of damages or both; or all.

ORGANIZATIONAL ROLES AND RESPONSIBILITIES

Accountability for use of the Payroll/Personnel System (PPS) is best viewed as a team effort. Individuals may be assigned to one of several roles, each one of which carries a set of responsibilities.

DEPARTMENT HEAD/CHAIR

- Review and approve the accountability structure to ensure that it follows accepted accountability principles including separation of duties.
- Review and approve back-up plans including the assignment of back-up personnel and review official record of authority delegations on a regular basis, or whenever major changes in the accountability structure occur.

- Assign or obtain the services of a Department Security Administrator (DSA).

DEPARTMENT HEAD/CHAIR OR DESIGNATED MANGER

- Responsible for recording all accountability delegations, cancellations, and modifications to the accountability structure.
- Monitor the effectiveness of the accountability delegations to ensure that any significant instances of noncompliance with policies and guidelines are uncovered.
- Monitor delegations and procedures to ensure they remain secure, accurate, and current.
- Ensure that appropriately skilled and knowledgeable personnel are assigned to be responsible for PPS transactions.
- Ensure that the staff member preparing payroll/personnel transactions has an appropriate working environment and proper equipment.
- Ensure that all departmental personnel under their authority have participated in the required training and are performing their functions in accordance with all policies, guidelines, laws, and regulations.
- Accept accountability for all PPS transactions.

PRIMARY PREPARER

- Understand the purpose of the transaction.
- Ensure that he/she has prior authorization before implementing a change to the system.
- Ensure that valid account/fund numbers are entered.
- Ensure that appropriate and accurate data are entered into PPS.
- Understand basic policy and other regulatory requirements.
- Resolve any questions that come to mind during the completion of the transaction or that are automatically raised via on-line edits and related error messages.
- Record an appropriate explanation of the transaction when required.
- Use the system in a manner consistent with UCSB policies and procedures.
- Make arrangements with assigned back-up preparer for absences.
- Accept accountability for all entered PPS transactions.

MANDATORY REVIEWER

- Review transactions within two business days of receipt. It is strongly recommended that reviewers audit transactions daily, especially before a check write, in order to ensure that employees receive accurate paychecks.
- Inspect notifications and/or transactions to ensure that the Preparer properly fulfilled his/her responsibility.
- Review each transaction for compliance with policy and other regulatory requirements.
- Ensure that any questions about the transaction are resolved within two business days or that the transaction is reversed until it is resolved.
- Make arrangements with assigned backup reviewer for absences.
- Notify the DSA if the reviewer will be absent or is absent for two or more business days so that notifications can be activated for another qualified individual. Upon return, notify the DSA so the interim action can be reversed.
- Accept accountability for all reviewed PPS transactions.

BACK-UP PREPARER AND BACK-UP REVIEWER

- Receive training at a level equivalent to the primary preparer or mandatory reviewer.
- Fulfill the same responsibilities as the primary preparer or mandatory reviewer.
- Maintain currency of knowledge.

Note: The use of preparers or reviewers that serve more than one department may be a good idea. The advantage of economies of scale can be gained while minimizing the physical and/or organizational "distance" between the preparer or reviewer and the originating department.

DEPARTMENT SECURITY ADMINISTRATOR (DSA)

- Record all accountability delegations identified by the organizational head or designee.
- Provide appropriate access for all on-line preparers and the prescribed PAN reviewers of a department's on-line transaction activity.
- Update the official record of accountability delegations each time a change is required such as when an individual leaves, is hired, or their responsibilities change.
- Ensure that the official record of accountability delegations is secure from unauthorized changes.
- Maintain a current back-up copy of the official record of accountability.

COMPUTER SUPPORT COORDINATOR (CSC)

- Perform individual workstation set-up and local area network configuration and support.
- Provide first-line help in the event that workstation/network hardware, software, or printing problems exist.
- Contact Information Systems and Computing when help is needed during troubleshooting and for advice on current computing standards.

EMERGENCY PLANNING/BACK-UP

It is important to have plans in place to cover emergencies and other unexpected occurrences. There is a range of situations where back-up is necessary.

In anticipation of the above situations, we provide the following responses and planning considerations.

1) *The preparer or reviewer is on vacation, unexpectedly ill, or unavailable.*

   Assign or train a back-up in advance. If you are in a small department, it may be necessary to form a liaison with another unit to ensure continuity. It is important to form these relationships before problems occur.

2) *The preparer's primary workstation fails.*

   Insure that more than one workstation in the preparer's work environment is configured correctly to access the PPS.

3) *The departmental network is unavailable or fails.*

   Depending on the estimated down time and the processing cycle deadlines, this may be a situation where it is necessary to seek help from another department.

It is recommended that preparers maintain sufficient documentation (on paper or otherwise) to enable them to re-create possible lost transactions. Although this event is unlikely, back-up information should be maintained for two days.

In the event of a major disaster, campus contingency plans will be put into operation. They include the ability to process payroll at an off-site location.

III. SYSTEM ACCESS

DATA PRIVACY

It is your responsibility to access and use data in accordance with the University's policy and the State of California Information Practices Act of 1977. For more specific information, refer to Business and Finance Bulletin RMP 8, Legal Requirements on Privacy of and Access to Information, July 1, 1992 <http://www.ucop.edu/ucophome/policies/bfb/rmp8toc.html>

OBTAINING SYSTEM ACCESS

To request access to the Payroll/Personnel System, complete a "Request for Access to Payroll/Personnel System (PPS)" form and send to the payroll office. The form can be found at http://www.accounting.ucsb.edu/pdf/PPSForm.pdf. . You will be notified when your account is available.

ACCESSING THE PPS LOG ON SCREEN/PAGE

PPS provides 2 methods to access the data; 1) A secure Web interface for Inquiry, Post Authorization Notification (PAN) review & Web Merit processing and 2) A secure TN3270 character based interface for personnel record update, time reporting and the functions available via the Web interface. The Web interface is discussed in section X. WEB INTERFACE of this document.

Your department Computer Support Coordinator (CSC) will need to provide secure TN3270 terminal emulation software for your use. One source is the Host on Depand (HOD) service provided by the Information Systems and Computing (IS&C) department. See <http://www.isc.ucsb.edu/osg/tn3270/tn3270.html>. Software installation and maintenance is the responsibility of your CSC. They should refer to the help section of this document if they need assistance.

PASSWORD SELECTION AND SECURITY

Passwords must be 6-8 alphanumeric characters and must include at least 1 alpha and 1 numeric character. You are encouraged to create a password that is a combination of alphabetic and numeric characters; try to choose a password that is easy to remember, difficult for someone to readily guess and does not form an English language word.

Maintaining the confidentiality of passwords is an essential safeguard against misuse, intrusion, and theft. You are personally responsible for the use of your logon ID and password. If there is a reason to suspect that password confidentiality has been compromised, you are responsible for changing the password immediately and reporting the suspicion to the Department Security Administrator (DSA).

PASSWORD EXPIRATION

All passwords automatically expire every 34 days. When a password expires, you are prompted to enter a new password. The security system "remembers" the last 6 passwords and rejects an attempt to reuse them. Type your new password, press the <Tab> key and reenter/verify the password by typing it again before pressing the <Enter> key.

INVALID LOGON ATTEMPTS

If you attempt to logon with a valid logon ID and an incorrect password, the message **Password Invalid** is displayed. After 3 invalid password attempts, the logon ID is automatically canceled and you will need to contact your Accounting, Computer Support, to reactivate your logon ID.

CLOSED ACCOUNT

If a Logon ID is not used for 60 days, the account is closed as a result of inactivity. You will need to contact Accounting, Computer Support in order to re-activate you Logon ID.

TIMEOUTS

At this time, the PPS does not utilize an automated timeout practice. However, you are responsible for terminating your session by logging off the system. You should log off the PPS whenever you are not actively using it.

IV. SYSTEM STRUCTURE

This section introduces you to the structural elements of the Payroll/Personnel System used in the TN3270 terminal environment: screens and function keys. Six types of screens are used, and are accessible individually or as part of a bundle of related screens. Screens display information contained in an employee record. The employee record is the set of data relating to an individual that is collected on the Employee Database (EDB).

Function keys are provided to allow you to perform system actions such as accessing Help, and canceling or updating transactions. In addition, function keys provide a means to help you navigate quickly through the system. Detailed use of function keys for navigation is discussed in Section V., *Navigation*.

SCREENS

The six types of screens in the Payroll/Personnel System are:

- Menu Screens
- List Screens
- Data Entry Screens
- Message Screens
- Inquiry Screens
- Help Screens

NOTE: PPS web based access use the same screen structure, but function keys & navigation are preformed with standard browser features.

MENU SCREEN SAMPLE

Menu screens display options available to you. They typically contain a list of available function codes. Each function code represents either a single screen or a bundled action that may be selected. The EDB Entry/ Update Function Code Menu, displayed below, is an example of a menu screen. It contains a list of function codes and a short description.

```
UCFMNU0-M0795                 SBT EDB Entry/Update          07/24/95  08:36:36
                               Function Code Menu           Userid:       SBXYZ01

_ BUND Bundle Menu                        _ HIRE New Hire Bundle #1
_ EEID Employee Identification            _ EAPC Appts./Distributions-Condensed
_ EPD1 Employee Personal Data 1           _ EAPP Appointments/Distributions
_ EPD2 Employee Personal Data 2           _ EPER Personnel-Miscellaneous
_ EALN Alien Information                  _ ELVE Leave of Absence Data
_ ETAX Tax Information                    _ EBCC Background Check Data
_ ECHK Check/Surepay Disposition          _ ESEP Separation
_ EDED Miscellaneous Deductions           _ ELOF Layoff Data
_ EACD Academic Service                   _ ERET Retirement Information
_ ELIC License/Certificate Data           _ EINS Insurance Enrollment
_ EHON Honors Data                        _ EELI Executive Life Insurance
_ EAWD Awards Data                        _ EDEP Dependent Data
_ EBND US Savings Bonds                   _ EGTN Misc. Deductions - Central
_ EWSP Work Study Program Limit           _ EDEM Misc. Deductions - Mass Entry
_ EMIS Miscellaneous Information          _ EDES Data Element Selection
_ WHO  Employee Browse                    _ EUCI University Contribution Ind.



Next Func: _____     ID: ______     Name: __________________________     SSN: _________
===> _________________________________________________________

  F: 1-Help                   3-PrevMenu
  F:                          9-Jump                                   12-Exit
```

Sample Menu Screen

Note: Not all of the functions displayed on a menu are available to all users. You will receive a "Not authorized..." error message if you select a function which you are not authorized to use.

LIST SCREEN SAMPLE

List screens display information that you may select. The Employee Browse (WHO) screen, displayed below, is an example of a list screen. It contains a list of employees who have records on the database.

```
PPWHO1-0951                         SBT EDB Inquiry              07/24/95   13:33:37
                                    Employee Browse              Userid:     SBXYZ01

ENTERED:  ID:              Name:  GAU              SSN:

   ID         Name                                 Dept              SSN
_  090456214  GAUCHO, ACADEMIC1                    ADCOM SERVICES    123-45-6789
_  090462899  GAUCHO, ACADEMIC2                    ADCOM SERVICES    234-56-7890
_  090729143  GAUCHO, EMPLOYEE                     HUMAN RESOURCES   345-67-8901
_  090423580  GAUCHO, STAFF1                       ADCOM SERVICES    456-78-9012
_  090302105  GAUCHO, STAFF2                       ADCOM SERVICES    567-89-0123
_  090422477  GAUCHO, STUDENT1                     ADCOM SERVICES    678-90-1234
_  090445837  GAUCHO, STUDENT2                     ADCOM SERVICES    789-01-2345










Next Func: _____  ID: ______  Name: _________________________  SSN: _________

===> _______________________________________________________

  F:  1-Help               3-PrevMenu
  F:  7-Backward 8-Forward 9-Jump                                      12-Exit
```

Sample List Screen

DATA ENTRY SCREEN SAMPLE

Data entry screens are used to add, change, or delete information from an existing employee record in the system. They are also used to enter a new employee record. The Appointments/Distributions (EAPP) screen is an example of a data entry screen. It allows appointment and distribution information to be added, changed, or deleted.

```
PPEAPP0-E0943                SBT EDB Entry/Update            07/24/95   08:12:46
                             Appointments/Distributions      Userid:    SBXYZ01

ID: 555555555   Name: GAUCHO, EMPLOYEE        SSN: 555-55-5555     Pri Pay:
      PAF Gen No: _1_                                               Pg 01 of 01
Appt    Actions  Pgm  Typ  Bas  Pd Ovr   Appt Begin  Appt End   Dur   Dept
10      _______  _P_  _2_  ___  ___       021495      999999    _E_   490000

Title                          Grade  %Full  F/V  Ann/Hr Rate  Rt  Sch  Time  Lv
7277  PROGRAMMER/ANALYST II     3_    1.00_  F_   _36000.00_   A_  MO_  E_    A_

Dist    Actions  L Acct    CC  Fund    PC      S                    FTE   Dis %
11      _______  11662070____19900_________1________                1.00  1.0000
        Pay Begin Pay End  Step   O/A Rate/Amount  DOS PRQ DUC  WSP
        021495___ 999999_  ____   ___ _3000.00___  REG ___ ___  ___

Dist    Actions  L Acct    CC  Fund    PC      S                    FTE   Dis %
        _______  ___________________________________                ____  ______
        Pay Begin Pay End  Step   O/A Rate/Amount  DOS PRQ DUC  WSP
        _________ _______  ____   ___ ___________  ___ ___ ___  ___




Next Func: _____  ID: ______  Name: _________________________  SSN: _________
===> ______________________________________________________

  F: 1-Help                  3-PrevMenu    4-Print      5-Update
  F:                         9-Jump        10-PrevFunc  11-Next Func   12-Exit
```

Sample Data Entry Screen

Note: The same field may appear on more than one data entry screen.

INQUIRY SCREEN SAMPLE

Inquiry screens display accurate employee information contained in the Payroll/ Personnel System.

```
PPIAPT0-I0911                 SBT EDB Inquiry              07/24/95  11:26:56
                        Appointment/Distribution Cmpc      Userid:     SBXYZ01

ID: 555555555    Name: GAUCHO,EMPLOYEE        SSN: 555-55-5555      Pri Pay:

Hm Dept: WOMS WOMEN'S CENTER Emplmt Status: A   Pri Pay: MO      PG 01 OF 02
Gen No : 0022                 Total Appt/Dis: 02/04 Remaining Appt/Dis: 01/03

LOA Beg:          LOA Return:           LOA Type:       TRIP:     %      Mths

Appt: 10 TC: 4404 PSYCHOLOGIST, COUNSELING I  Grade: 4        Pgm/Typ: P/3
       Begin Dt: 01/12/95  Ann/Hr Rt : 18.6300   % 0.20    F/V: V   Rt    : H
       End Dt  : 06/09/95  Bas/Pd Ovr: 00/00               Lv : F   Sched: MA
       Dur     :           Dept Cd   : COUN   TUC/AREP/ASHC: 99/C/  Time : A

Dis. No.  L/A/C/F/P/S

FTE   Dis %   Pay Beg   Pay End   Rate/Amt  DOS  St/OA  PRQ  D  W
11        8   680104    20000         2
0.00  0.0000  01/12/95  06/09/95  8.6300    REG




Next Func: _____  ID: ______  Name: _________________________  SSN: _________

===> _______________________________________________________

  F: 1-Help      2-Browse     3-PrevMenu     4-Print
  F:             8-Forward    9-MainMenu                          12-Exit
```

Sample Inquiry Screen

MESSAGE SCREEN SAMPLE

Message screens display messages that result from the edit/update process. These messages are displayed when there are errors in the entered information or to alert you that an implied action is to be taken by the system.

There are two types of message screens:

1) Consistency Edit Screen

This screen is displayed when an update activity is attempted and inconsistencies are detected. The screen will display the data that caused errors in the update and related information. You can correct errors on this screen or return to the appropriate data entry screen to enter the correction.

```
PPECON0-E0943                 SBT EDB Entry/Update          07/24/95   17:21:03
                                Consistency Edit            Userid:    SBXYZ01

ID: 555555555    Name: GAUCHO, EMPLOYEE      SSN: 555-55-5555      Pri Pay:

                             Consistency Edit Number
                                       113

Msg#   Severity Message Text
08454  Empl Rej I-9 DATE IS LATER THAN HIRE DATE

DE Number      Key                   Value                          Description
   0109                              C__________________________    CITIZEN CODE
   0113                              021495_____________________    EMPLOYMENT DATE
   0284                              031495_____________________    I-9 DATE









U0005  Final Edit Errors found
===> ____________________________________________________________

 F: 1-Help                  3-PrevMenu                              6-Next Msg
 F:                         9-Jump                                  12-Exit
```

Sample Consistency Edit (ECON) Screen

2) Message Report Screen

The Message Report screen can be selected by you as needed. It displays messages remaining from the edit process and from the update process regarding implied maintenance actions. Not every message is an error. Some are just informational. IMSG, below, is an example of a message report screen.

```
PPIMSG0-E0943              SBT EDB Entry/Update           07/24/95   20:57:25
                                 Messages                 Userid:    SBXYZ01
ID: 555555555    Name: GAUCHO,EMPLOYEE       SSN: 555-55-5555     Pri Pay:
Update Date: 03/01/95   Time: 17:13:07  Status: COMPLETE
Msg#   Severity Message Text
08335  Data Ovr NO BELI EFF DATE PROVIDED, DATA WILL BE DERIVED
08142  Warning  DENTAL PLAN DATA IS INCONSISTENT WITH ASSIGNED BELI
08166  Warning  OPTICAL PLAN DATA IS INCONSISTENT WITH ASSIGNED BELI
08301  Warning  ASSIGNED BELI AND DERIVED BELI INCONSISTENT
12301  Warning  ASSIGNED BELI AND DERIVED BELI ARE INCONSISTENT
12335  Impld Mt NO BELI DATE PROVIDED FOR CHANGE OF BELI, DATE WAS DERIVED











Next Func: _____  ID: ______  Name: ________________________  SSN: _________
===> ____________________________________________________
  F: 1-Help                 3-PrevMenu                           6-Next Msg
  F:                        9-Jump                               12-Exit
```

Sample Message Report (IMSG) Screen

HELP SCREEN SAMPLE

```
PPEPD10-E0821                 SBT EDB Entry/Update              07/24/95  15:06:50
                            Employee Personal Data 1            Userid:      SBXYZ01

ID: 555555555        Name: GAUCHO,EMPLOYEE        SSN: 555-55-5555        Pri Pay:

Perm
      EDBHEPD1             Help EBD E U Personal Data 1
                                                                More:
Fore  Function:  EPD1 enables the user to enter and update
Cam   personal information about the employee including campus and
Cam   home address and telephone numbers, spouse name and other
      demographic information.
Date
Hom   Nature of Information:  EPD1 contains permanent and campus
      address information, campus and home telephone numbers, spouse
UC I  name, codes indicating employee-selected disclosures to the
Emp   UC directory and to employee organizations, and personal
      demographic information such as sex and ethnicity.
Sex:
Citiz There are no highly abbreviated or group field labels on EPD1.

      Command ===>
Next  F1=Help    F2=EX'help    F3=eXit    F4=copy    F6=move    F7=BKwd    F8=FWd
      F12=Cancel
===>
  F: 1-Help                3-PrevMenu      4-Print        5-Update
  F:                       9-Jump          10-PrevFunc    11-NextFunc    12-Exit
```

Sample Help Screen

BUNDLES

A bundle is a logical grouping of data entry screens that may be needed to complete a payroll/personnel action. Screens are bundled to help facilitate the process of making the appropriate additions or changes to update the Employee Data Base. Data entry fields are **highlighted** in bundles to help you identify fields on a screen that need to be updated for a particular change. This reduces the possibility of forgetting to enter required information.

Bundles have the following key features:

- Within each bundle, the screens are presented in a particular order that is intended to facilitate the completion of a designated action.
- Each bundle has a four-character function code associated with it. For example, SHIR is used for a new hire Staff Employee.
- When you select a function code representing a bundle, navigation is limited to the screen(s) within the bundle.
- You cannot exit a bundle without successfully updating the system or canceling the transaction.

SCREEN LAYOUT

The screens in PPS have the same basic layout. In general, they contain three sections of information: Header, Body, and Footer sections.

```
        UCFMNU0-M0795               SBT EDB Entry/Update          07/24/95   11:16:25
HEADER                                   Bundle Menu              Userid:    SBXYZ01
        ID: 555555555   Name: GAUCHO,EMPLOYEE       SSN: 555-55-5555    Pri Pay:

        _ SHIR Staff New Hire                   _ AHIR Academic Hire
        _ SREH Staff Rehire                     _ AREH Academic Rehire
        _ SAPT Staff Appointment Change         _ AAPT Academic Appointment Changes
BODY    _ SINC Staff Pay Increase               _ AINC Academic Pay Increase


        _ LEAV Leave, Other                     _ SEPR Separation
        _ SABB Sabbatical Leave                 _ BENS Benefits









        Next Func: _____  ID: ______  Name: _________________________ SSN: _________
FOOTER  ===> ______________________________________________________
          F: 1-Help                 3-PrevMenu    4-Print
          F:                        9-Jump                                 12-Exit
```

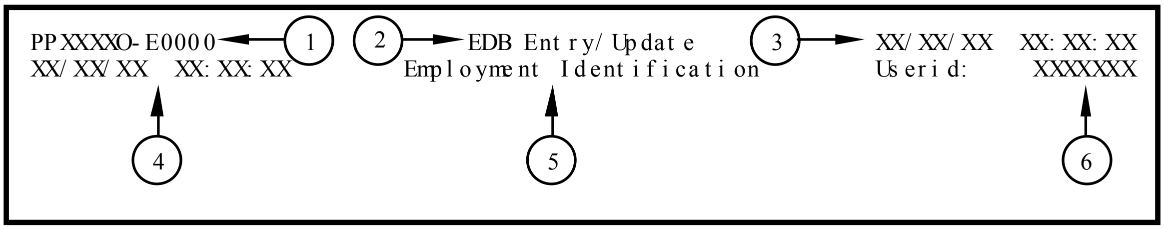
Sample Screen Layout

HEADER SCREEN

The Header section of each screen contains two types of information: Fixed and Variable.

Fixed Information: (Lines 1 and 2)

Fixed Information identifies the screen.



Example of fixed information in the header

1) *Screen Identifier* - This thirteen character code uniquely identifies each EDB Entry/Update Screen. The screen identifier is composed of the characters:

   PPXXXXO-E0000

   PP - Indicates the Payroll/Personnel System

   XXXX - Indicates an abbreviation or acronym that uniquely identifies each screen, also called function.

2) *System Title* - The System Title appears on each screen and indicates what system is being accessed.

3) *Current System Date and Time* - The current date and time are indicated in this portion of the screen.

4) *Record Update Date and Time* - This reflects the last time the employee record was updated. This field appears only on data entry and inquiry screens.

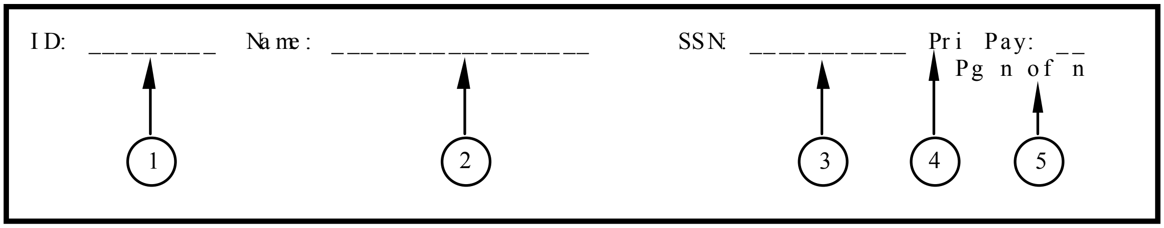
Note: The date reflects the last time there was an update in the employee's record. It does not imply that the data elements appearing on the selected data entry screen were updated at that time. Any update, whether online or system-derived, will increment the date.

5) *Screen Title* - The title is unique to each screen, such as, Employee Identification.

6) *User ID* - This is your logon identification.

Variable Information: (Lines 3 and 4)

The variable header information contains data elements that uniquely identify the employee record that is being accessed. This information is consistent on all screens.



Example of variable information in the header

1) *ID : Employee Identification Number* - This is the number associated with the employee record that has been selected.

2) *Name : Employee Name* - This is the name associated with the selected employee record.

3) *SSN: Social Security Number* - This is the Social Security Number of the employee record selected. The display of the SSN may be suppressed.

4) *Pri Pay: Primary Pay* - This code indicates the normal pay schedule for the selected employee, usually MO.

5) *Pg n of n* - When the information available fills more than one screen, the number of pages will be displayed and the page number being viewed will display, such as PG 01 of 03.

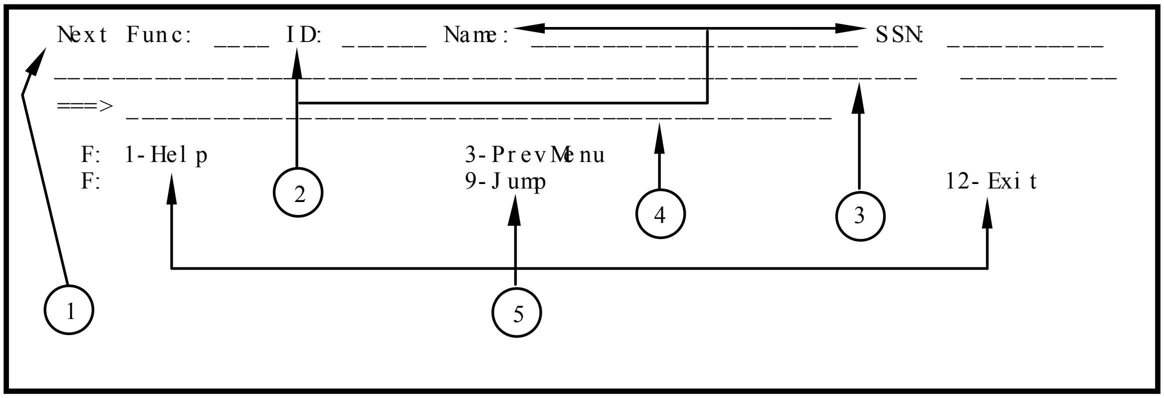
The functions keys to scroll forward or backward will appear in the Footer Section.

BODY SECTION (LINES 5-19)

The Body section of the screen displays the content of the particular screen. Depending on the type of screen, it will display data entry fields, messages, inquiry fields, a menu, or a list.

FOOTER SECTION (LINES 20-24)

The Footer section appears on every screen. It contains information which will assist you in navigating from one screen to another.



Example of information in the footer

1) *Next Function (Next Func)* - You may enter a function code in this field.

2) *Employee Record Keys* **-** You may enter a value in one of these fields to select an employee record:
   - *ID: Employee Identification Number* - This is the unique number associated with an employee's record.
   - *Name***:** This is the employee's name as recorded on the database in the format of Last Name, First Name Middle Initial (e.g., Doe, John A).
   - *SSN: (Social Security Number)* - This is the employee's Social Security Number as recorded on the database. Although the SSN can be used for selection it may not be displayed in the header section when the record is displayed in the body section.

NOTE: Enter data in only one of the three fields. The other two fields must be empty or an error message will be issued.

3) *System Message Line* **-** System messages will appear on this line (e.g., U0007 Update Process Complete).

4) *Command Line* (===>) - The Command Line may be used to enter F key numbers if a keyboard does not have function keys. This area is also used to enter special commands. (See Section V. *Navigation*, for discussion of Special Commands.)

5) *F Key (function keys)* - Only the function keys that are active for a particular screen appear. These keys are described in the following section.

FUNCTION KEY LAYOUT

Function keys (F keys) are provided to allow you to perform system actions such as accessing the Help sub-system, canceling a transaction, or updating an employee record. In addition, F keys provide a means to help you navigate quickly through the system. Only those F key functions currently available are displayed on the bottom two lines of the screen.

For workstations without the appropriate F keys, an F key can be emulated by typing the F key number on the Command Line and pressing <Enter>. For example, typing 8 on the Command Line and pressing <Enter> is the same as pressing the <F8 Forward> key. Contact your Computer Support Coordinator (CSC) if there are any questions about using the function keys.

Following are the F key definitions:

F1 - HELP

Fl is used to invoke either field-level Help or screen-level Help, depending on the position of the cursor on the screen.

- If the cursor is on the label field or on the entry field, field level Help for that data element will be displayed.
- If the cursor is anywhere else on the screen, screen-level Help will be displayed.

F2 - CANCEL

F2 is used to cancel all changes that have been entered on a screen or in a bundle since the last time the Update function was completed. Pressing F2 causes the data entry screen to be re-displayed with original values restored.

F3 - PREVIOUS MENU/RETURN

F3, when pressed on a detail or menu screen, is used to navigate back to the last menu that was displayed.

On the ECON screen, F3 is used to return to the detail screen from which update was invoked.

F4 - PRINT

F4 sends a screen print to your printer. Use the print function (PRNT) to select or change your printer.

F5 - UPDATE

F5 is used to submit the entered data to the EDB edit and update process. It will also take you to the PAN distribution screens, if notification is required.

F6 - NEXT MESSAGE/FORWARD NOTIFICATION

On the ECON screen, F6 is used to display the next error message and associated information. It also causes the cursor to be positioned at a field associated with the message if the field is available for update. In the Post Authorization Notification (PAN) sub-system, F6 is used to access the Notification Forwarding screen.

F7 - BACKWARD SCROLL

F7 is used to display the previous page of information when there are multiple pages.

F8 - FORWARD SCROLL

F8 is used to display the next page of information when there are multiple pages.

F9 - JUMP

F9 is used to move the cursor between the data entry area of the screen and the Next Func field or the Command Line. If you press F9 when the cursor is positioned in the body of the screen (line 5 through line 19), the cursor "jumps" to the Next Func field (or the Command Line for selected screens). If you press F9 when the cursor is positioned in the footer (line 20 through line 22), the cursor "jumps" to its previous position in the body, or to the initial cursor position defined for that screen.

F10 - PREVIOUS FUNCTION

F10 is used to return to the previous sequential screen in a bundle of screens.

F11 - NEXT FUNCTION

F11 is used to advance to the next sequential screen in a bundle of screens.

F12 - EXIT

F12 has two functions depending on the activity in progress.

- If entry/update data has not been entered, F12 is used to exit the Payroll/Personnel System.
- If entry/update data has been entered, and you have "nested" to an inquiry screen, F12 is used to exit the nested function and return to the entry/update screen.

V. NAVIGATION

Navigation consists of cursor movement within a screen, scrolling through multiple pages of a screen, and moving from one screen to another. You can navigate from screen to screen by using a variety of techniques including function keys, command line entries, and Next Func field entries.

CURSOR MOVEMENT

The cursor is usually positioned at the first modifiable data field when the screen is first displayed. The cursor always moves between entry fields first from left to right, then from top to bottom. There are several methods of moving the cursor from one field to another.

TAB/BACKTAB KEYS

Pressing the <Tab> and <Backtab> keys positions the cursor in the next or previous data entry field.

- The <Tab> key moves the cursor to the next modifiable data field. If the cursor is currently at the last modifiable field, it will move to the first modifiable field.
- The <Backtab> key moves the cursor to the previous modifiable data field. If the cursor is currently at the first modifiable field, it will move to the last modifiable field.

NEW LINE KEY

Pressing this key positions the cursor in the first data entry field below the current line. If a data entry field has not been found below the current line, the cursor will move to the first data entry field starting at the top of the screen.

F9 - JUMP KEY

Pressing the <F9 Jump> key moves the cursor from the current position to the Next Func field or from the Next Func field to the previous cursor position on the screen.

EAPP JUMP KEY

Pressing the <F9 Jump> key while in the EAPP screen moves the cursor from the body of the screen to the command line in preparation for an add or copy command. If the employee record has not been modified, the Jump function moves the cursor from the body of the screen to the Next Func field.

ARROW KEYS

The arrow keys move the cursor one space or line at a time to any position on a screen. Use of these keys for navigation is not recommended as it can be difficult to locate the first position in the data entry field (Other cursor movement options, e.g. <Tab>, <Backtab>, <Newline>, automatically position the cursor to the appropriate place for data entry).

AUTOMATIC MOVEMENT (AUTOSKIP)

If the data entered fills the field, the cursor moves to the next data entry position automatically. If you do not complete the field, you must use the <Tab/Backtab> keys or the <Newline> key to move to the next desired field.

RESET KEY

When the cursor is "stuck" in a position on the screen, use <Reset> to release it. Then use <Tab> or <Newline> to move to a modifiable field.

CLEAR KEY

The <Clear> key is for use when there is an abnormal termination of the PPS application. The <Clear> key will return you to the top level menu on the system.

SCROLLING

Scrolling is the method used to display additional data when there is more data than can fit on a single screen. Use <F7 Backward> and <F8 Forward> to scroll among pages of the screen to display the full range of data. <F7 Backward> and/or <F8 Forward> will appear in the footer if they are available for use.

- Press <F7 Backward> to display the previous page of available data.
- Press <F8 Forward> to display the next page of available data.

For example, Pg 01 of 02 is displayed on the right of the fourth line indicating that there is additional appointment/distribution information. To access it, use <F8 Forward>, which appears in the footer.

```
PPEAPP0-E0943               SBT EDB Entry/Update              07/24/95   10:06:03
                          Appointments/Distributions          Userid:    SBXYZ01

ID: 555555555    Name: GAUCHO, EMPLOYEE        SSN: 555-55-5555     Pri Pay:
       PAF Gen No: _1_                                               Pg 01 of 02
Appt    Actions  Pgm  Typ  Bas  Pd Ovr   Appt Begin  Appt End  Dur  Dept
10      _______  _P_  _2_  ___  ___       021495      999999   _E_  490000

Title                            Grade  %Full  F/V  Ann/Hr Rate  Rt  Sch  Time  Lv
7277 PROGRAMMER/ANALYST II       3_     1.00_  F_   _36000.00_   A_  MO_  E_    A_

Dist    Actions  L Acct   CC Fund    PC     S                      FTE  Dis %
11      _______  11662070____19900_______1________                 1.00 1.0000
        Pay Begin Pay End  Step  O/A Rate/Amount  DOS PRQ DUC  WSP
        021495___ 999999_  ____  ___ _3000.00___  REG ___ ___  ___

Dist    Actions  L Acct   CC Fund    PC     S                      FTE  Dis %
        _______  __________________________________                ____ ______
        Pay Begin Pay End  Step  O/A Rate/Amount  DOS PRQ DUC  WSP
        _________ _______  ____  ___ ___________  ___ ___ ___  ___



U0001  Input Accepted
Next Func: _____  ID: ______  Name: __________________________  SSN: _________
===> ________________________________________________________

  F: 1-Help              3-PrevMenu   4-Print       5-Update
  F:           8-Forward  9-Jump       10-PrevFunc   11-Next Func   12-Exit
```

Sample page scrolling screen

SCREEN SELECTION

You may select an individual screen by entering the screen's function code in the Next Func field. You should also specify a record key before pressing <Enter>, or the Employee Browse screen will automatically appear (refer to sub-section *Accessing Employee Records*).

For example, to access the EPD1 Screen for an employee whose ID number is 555555555:

1) In the Next Func field, type *EPD1*.
2) In the ID field, type *555555555*.
3) Press <Enter>.

```
UCFMNU0-M0795                    SBT EDB Entry/Update            07/24/95   20:58:14
                                  Function Code Menu             Userid:     SBXYZ01

_ BUND Bundle Menu                          _ HIRE New Hire Bundle #1
_ EEID Employee Identification              _ EAPC Appts./Distributions-Condensed
_ EPD1 Employee Personal Data 1             _ EAPP Appointments/Distributions
_ EPD2 Employee Personal Data 2             _ EPER Personnel-Miscellaneous
_ EALN Alien Information                    _ ELVE Leave of Absence Data
_ ETAX Tax Information                      _ EBCC Background Check Data
_ ECHK Check/Surepay Disposition            _ ESEP Separation
_ EDED Miscellaneous Deductions             _ ELOF Layoff Data
_ EACD Academic Service                     _ ERET Retirement Information
_ ELIC License/Certificate Data             _ EINS Insurance Enrollment
_ EHON Honors Data                          _ EELI Executive Life Insurance
_ EAWD Awards Data                          _ EDEP Dependent Data
_ EBND US Savings Bonds                     _ EGTN Misc. Deductions - Central
_ EWSP Work Study Program Limit             _ EDEM Misc. Deductions - Mass Entry
_ EMIS Miscellaneous Information            _ EDES Data Element Selection
_ WHO  Employee Browse                      _ EUCI University Contribution Ind.




Next Func: EPD1_ ID: 555555555 Name: _________________________ SSN: _______
===> ______________________________________________________

  F: 1-Help                  3-PrevMenu
  F:                         9-Jump                              12-Exit
```

Screen selection

NOTE: You are also able to enter a record key to identify the employee's record and position your cursor next to the Function Code/Description you want to select. However, use of the next function field is the more popular way to select a screen.

BUNDLE SELECTION

You may select a bundle (a set of related screens) by entering the bundle's function code in the Next Func field. For all bundles, except hire and rehire bundles, you should also specify a record key before pressing <Enter>. To select:

- *Hire/Rehire bundles* - Type the function code in the Next Func field and press <Enter>.
- *Other bundles* - Type the bundle function code in the Next Func field, then type the employee record key, and press <Enter>. If the employee record key is not specified, the Employee Browse screen will automatically appear.

For example, to select a Hire bundle:

1) In the Next Func field, type *SHIR*.
2) Press <Enter>.

```
UCFMNU0-M0795                  SBT EDB Entry/Update           07/24/95   11:16:25
                                  Bundle Menu                 Userid:     SBXYZ01

ID: 555555555    Name: GAUCHO,EMPLOYEE       SSN: 555-55-5555      Pri Pay:

_ SHIR Staff New Hire                        _ AHIR Academic Hire
_ SREH Staff Rehire                          _ AREH Academic Rehire
_ SAPT Staff Appointment Change              _ AAPT Academic Appointment Changes
_ SINC Staff Pay Increase                    _ AINC Academic Pay Increase


_ LEAV Leave, Other                          _ SEPR Separation
_ SABB Sabbatical Leave                      _ BENS Benefits










Next Func: SHIR_  ID: ______  Name: _________________________  SSN: _________

===> ______________________________________________________

  F: 1-Help                3-PrevMenu
  F:                       9-Jump                                    12-Exit
```

Bundle selection

To access the menu of bundle function codes, type BUND in the Next Func field. Press <Enter>.

NAVIGATING WITHIN A BUNDLE

If a bundle has more than one screen, you may use the <F10 PrevFunc> and <F11 NextFunc> keys to move from screen to screen in the bundle order. <F10 PrevFunc> and/or <F11 NextFunc> will appear in the footer if they are available for use.

- Press <F10 PrevFunc> to move to the previous screen within the bundle.
- Press <F11 NextFunc> to move to the next screen within the bundle.

You may access any screen within the bundle by typing the screen's function code, e.g., EAPP, in the Next Func field, regardless of the bundle order. However, you cannot select a screen that is not included in the bundle.

Note: You can exit a bundle only by successfully updating the system or canceling the transaction. If the transaction is canceled, you must initiate the entire bundle again; there is no mechanism to store "work-in-progress".

ACCESSING EMPLOYEE RECORDS

The system provides two methods to access employee information:

- Record keys
- Employee Browse screen (WHO)

Using the record keys is the quickest way to access employee information. However, you can also use the WHO function to locate employee information if you are not sure of the employee ID, name, or Social Security number for the employee record you want. Both record selection methods are described below.

USING RECORD KEYS

You can easily select an employee record by entering a unique key. There are three record keys for each employee:

- Employee ID
- Employee Name
- Social Security Number

To select an employee record, enter one of the above record keys in the appropriate field, using the following formats:

- Employee ID - Enter the nine-digit ID.

- Name - The Name is entered Last Name,First Name Middle Initial (e.g., Doe,John A). There must be a comma after the last name, no space after the comma, then the first name. The WHO screen will automatically appear if there is no employee with that name, or if there is more than one employee with the specified name. In the EDB, you need to enter only a portion of the full name that provides a unique match to retrieve the employee's record. The full name is not required. If the portion of the name you enter is not unique, the "who" screen will appear and you can select the desired record from the list.
- SSN - The nine-digit Social Security Number is entered **without** hyphens or slashes (e.g., 987654321).

The WHO screen will appear if the entered record key does not match an existing EDB record.

Note: In order to display employee information on the desired data entry screen, it is necessary to enter a unique employee record key and screen function.

USING THE EMPLOYEE BROWSE SCREEN (WHO)

The Employee Browse screen (WHO) is provided to assist you in locating employee record key data. The Employee Browse screen may be accessed in several ways:

- By entering the function code WHO in the Next Func field on any screen.
- By entering a non-unique or incomplete employee record key.
- By selecting a function without entering an employee record key.

```
PPWHO1-0951                        SBT EDB Inquiry          07/24/95   13:33:37
                                   Employee Browse          User id:    SBXYZ01

ENTERED:  ID:            Name:  GAU               SSN:

  ID         Name                                 Dept              SSN
_ 090456214  GAUCHO, ACADEMIC1                    ADCOM SERVICES    123-45-6789
_ 090462899  GAUCHO, ACADEMIC2                    ADCOM SERVICES    234-56-7890
_ 090729143  GAUCHO, EMPLOYEE                     HUMAN RESOURCES   345-67-8901
_ 090423580  GAUCHO, STAFF1                       ADCOM SERVICES    456-78-9012
_ 090302105  GAUCHO, STAFF2                       ADCOM SERVICES    567-89-0123
_ 090422477  GAUCHO, STUDENT1                     ADCOM SERVICES    678-90-1234
_ 090445837  GAUCHO, STUDENT2                     ADCOM SERVICES    789-01-2345









Next Func: _____  ID: ______  Name: __________________________  SSN: _________
===> ________________________________________________________
  F: 1-Help                  3-PrevMenu
  F: 7-Backward  8-Forward   9-Jump                                    12-Exit
```

Employee Browse (WHO) Screen

When the Employee Browse screen is displayed, there are two methods to select the employee record to be viewed:

1) Ensure that the desired function has been entered in the Next Func field. Position the cursor to the left of the employee information on the list. Press <Enter>.
2) Ensure that the desired function has been entered in the Next Func field. Enter the employee record key in the corresponding key field. Press <Enter>.

HINTS FOR ACCESSING EMPLOYEE RECORDS

- To bypass the WHO screen, enter a unique employee record key.
- The Employee ID is the fastest way to access the employee record.
- To display the same screen for a different employee, enter a new employee record key.
- To display a different screen for the same employee, enter a new screen function.
- To display a different screen for a different employee, enter both a new function code and a new employee record key.

FAST PATH NAVIGATION

Fast path navigation allows you to move from a screen directly to any other screen, bypassing all other menus. You can move directly from one inquiry or update sub-system to another sub-system without going back to menus, once you know the function codes.

For example, from the Applications Main Menu, MMNU, specify the desired screen by typing the function code in the Next Func field and specifying the employee record by typing either the ID, Name, or SSN in the appropriate entry field. Press <Enter>.

NESTING

Nesting is the process of temporarily leaving the EDB Update sub-system to access another online sub-system.

When using the EDB Entry/ Update sub-system, you may view an EDB inquiry screen by typing the Function code of an inquiry screen in the Next Func field. The message
<Upd in Prog>, update in progress, is displayed in the lower right corner of the inquiry screen. This serves as a reminder that you need to return to the EDB Entry/Update sub-system and complete the update function. To return to update, press <F12 Exit>.

For example, when entering leave of absence data for an employee record on the ELVE screen, you may wish to check the employee's appointment data before requesting the update. You would enter IAPT in the Next Func field to view that information.

```
PPELVE0-E0875                 SBT EDB Entry/Update          07/24/95  08:31:86
                              Leave of Absence Data         Userid:     SBSPS01

ID: 555555555    Name: GAUCHO,EMPLOYEE        SSN: 555-55-5555     Pri Pay:


Leave of Absence Action Code          : ___
Leave of Absence Begin Date           : 031595   Return: 063095    Type: 05_

Last Sabbatical Credit Balance        : ___
Sabbatical Credit Date                : ____
Sabbatical Credit Accrued             : ___
Sabbatical Credit Accrued Thru Date   : ____
Sabbatical Credit Used                : ___
Total Sabbatical Credit Balance       : ___

TRIP Reduction Percentage             : ___
TRIP Duration                         : ___
TRIP Begin Date                       : ____






Next Func: IAPT_ ID: ______ Name: __________________________ SSN: _________
U0001 Input Accepted
===> ____________________________________________________________

  F: 1-Help              3-PrevMenu    4-Print       5-Update
  F:                     9-Jump                      11-Next Func   12-Exit
```

ELVE Screen with IAPT in Next Func field

```
PPIAPT0-I0911                 SBT EDB Inquiry             07/24/95  15:03:28
                        Appointments/Distributions Cmpc     Userid:    SBXYZ01
ID: 555555555    Name: GAUCHO,EMPLOYEE        SSN: 555-55-5555     Pri Pay:
Hm Dept: 490000 HUMAN RESOURCES  Emplmt Status: I  Pri Pay: MO
Gen No : 0011                 Total Appt/Dis: 01/01  Remaining Appt/Dis: 01/03
LOA Beg:          LOA Return:           LOA Type:      TRIP:     %     Mths
Appt: 10 TC: 7277 PROGRAMMER/ANALYST II          Grade: 3        Pgm/Typ: P/2
      Begin Dt: 02/14/95  Ann/Hr Rt : 36000.00  % 1.00    F/V: F   Rt   : A
      End Dt  : 99/99/99  Bas/Pd Ovr: 00/00               Lv : A   Sched: MO
      Dur     : I INDEF   Dept Cd   : 490000 TUC/AREP/ASHC: 99/C/  Time : A
Dis. No.  L/A/C/F/P/S
FTE   Dis %   Pay Beg   Pay End   Rate/Amt  DOS  St/OA PRQ  D  W
11       9    662070    19900        1
1.00  1.0000  02/14/95  99/99/99  3000.00   REG




Next Func: _____ ID: ______ Name: __________________________ SSN: _________
U0035  NEXT FUNCTION:   IAPP                          < UPD in progress >
===> ____________________________________________________

  F: 1-Help   2-Browse
  F:                                   10-PrevFunc   11-NextFunc   12-Exit
```

IAPT Screen

VI. DATA ENTRY

ENTERING DATA

On each data entry screen, you may add new data, change existing data, or delete existing data for an employee. You may enter data in all the modifiable fields on the screen, or only in selected fields. To begin entry of data, first select the appropriate function or bundle.

NORMAL SEQUENCE

1) When an entry screen is displayed, the cursor will be positioned on the first modifiable field. If no change is desired for that particular field, move the cursor to the desired field by using the <Tab> key or <Newline> key.
2) Enter data in the field, keying over any data that is currently displayed. Each entry field allows space for the maximum number of characters which may be entered.
3) If the data entered fills the field, the cursor will automatically move to the next field. If the data entered does not fill the field, press <Tab> to move to the next field to be entered. If necessary, clear out any old data remaining in the field by using the <Erase EOF> key or by spacing over the data.

Note: If you enter data or a space in the last position of the entry field, the cursor will automatically "jump" to the next data entry field on the screen.

4) Press <Enter> after all desired changes have been made. This causes preliminary edits to be performed on the entered data. If there are range/value errors on one or more entered values, the fields in error will be highlighted and the cursor will be positioned on the first field with an error.
5) Correct any data which has caused an error.
6) If in a bundle, press <F11 NextFunc> to move to the next screen, if desired.
7) When you have finished entering data, press <F5 Update> to proceed with the update, or <F2 Cancel> to cancel the entry.

DATA ENTRY HINTS

- Data may be entered in upper or lower case. It will be converted to upper case.
- If you key over existing data in a field, and the new data does not completely overlay the old data, you must use the <Erase EOF> key or space over the unrelated data in the field. Pressing <Tab> after the new data is entered will not erase the remaining unrelated data in the field.

- If you key over existing data in a field by error, the original data can be restored by positioning the cursor on the first position of the field, pressing the <Erase EOF> key and then pressing <Enter>.
- If you are entering data in a screen bundle, one or more fields on each screen may be highlighted. Highlighting indicates that the field has been identified as critical to the functional process associated with the bundle. Pay particular attention to these fields and make sure that correct values have been entered. If appropriate, complete the other data fields on the screen, even though they are not highlighted.
- Range/value edits are also performed and any errors are highlighted when <Enter>, <F5 Update>, <F10 PrevFunc>, or <F11 NextFunc> is pressed. All range/value errors must be corrected before continuing with the update or proceeding to another screen in a bundle.
- At any time after entering data in one or more fields, you may press <Enter> to perform range/value edits of the data entered on that screen.
- Press <F1 Help> while the cursor is positioned on a data entry field to get Field Level Help for the data element. If the Field Level Help text contains a list of values for the field, you may copy the desired value back from the Help window to the data entry screen by positioning the cursor on the first character of the desired value and pressing <F4 Copy>.
- You can delete data by spacing over all the data in the field, or by entering an asterisk (*) in the first position of the field. When <Enter> is pressed, the asterisk remains and the rest of the field is blank. The data will be deleted by the update process.

Note: Data should be deleted only in a few special circumstances.

DATA ENTRY COMMANDS

Data entry commands are available on the following screens to facilitate the data entry process:

- EAPP Appointments/Distributions
- EAPC Appointments/Distributions-Condensed
- EDEP Dependent Data (Central Office use only)
- EBND US Savings Bonds (Central Office use only)
- ELOF Layoff Data (Central Office use only)

Special commands are typed on the Command Line.

EAPP AND EAPC SCREENS: SPECIAL COMMANDS

Add Commands

The appointment and distribution Add Commands are used to create a new appointment or distribution line. You may specify the number of the appointment or distribution or you may indicate that the system should assign the next available number. The appointment or distribution number will be filled in on the screen and the remainder of the appointment or distribution line information will be blank. The cursor will be positioned at the first modifiable field for the new appointment or distribution, enabling you to enter the rest of the information.

- *ADD nn*, where *nn* is a specific appointment or distribution number.
- *ADD A*, where *A* indicates that the next available appointment number should be used.
- *ADD D*, where *D* indicates that the next available distribution number for the displayed appointment should be used.

An error message is issued if the entered appointment or distribution number already exists for the employee or is an invalid number.

Copy Commands

These commands are used to copy information from an existing appointment or distribution to a specified new appointment or distribution line. The new line will be displayed with the specified appointment or distribution number filled in; all other information will be identical to the copied line. You may then change information on the new line as desired.

Note: The COPY command can be abbreviated C, as in C aa TO bb.

- *COPY xx TO yy*, where xx is an existing appointment or distribution number and yy is the number of the appointment or distribution to be added.
- *COPY xx TO **, where xx is an existing appointment or distribution number and * indicates that the next available appointment or distribution number should be used for the new entry.
- *COPY aa TO bb, cc TO dd, ee TO ff,. . .*, where aa to bb is one copy command, cc to dd is a second copy command, and ee to ff is a third command, and so on.

An error message is issued if any of the following errors occur:

- The appointment or distribution number to be copied FROM does not exist for the employee or is an invalid number.
- The appointment or distribution number to be copied TO already exists for the employee or is an invalid number.
- An appointment number is specified to be copied to a distribution number.
- A distribution number is specified to be copied to an appointment number.

GOTO COMMANDS

This command is used to move the cursor to the screen which contains information associated with the entered appointment or distribution number.

- *GOTO nn*, where *nn* is an appointment or distribution number.
- *Ann*, where *nn* is an appointment number.
- *Dnn*, where *nn* is a distribution number.

An error message is issued if there is no matching appointment and/or distribution number or if the entered number is not valid.

Note: Do not confuse GOTO command with the ADD nn command.

EBND SCREEN: SPECIAL COMMANDS (CENTRAL OFFICE USE ONLY)

EDEP SCREEN: SPECIAL COMMANDS (CENTRAL OFFICE USE ONLY)

ELOF SCREEN: SPECIAL COMMANDS (CENTRAL OFFICE USE ONLY)

VII. ONLINE HELP

OVERVIEW

Help will provide you with general information about each screen and detailed information about each field on a screen.

Note: Since the online Help function is an application independent of EDB Entry/Update, the screen appearance and the function key assignments are different in Help from those in EDB Entry/Update.

There are two types of Help:

1) *Screen-Level Help* provides three types of information about the screen:
   - *Function* of the screen, including any special commands available.
   - *Nature of the information* on the screen.
   - *Translations* of any highly abbreviated screen labels used on the screen.

```
PPEPD10-E0821                 SBT EDB Entry/Update          07/24/95   15:06:50
                            Employee Personal Data 1        Userid:    SBXYZ01

ID:  555555555    Name: GAUCHO,EMPLOYEE        SSN: 555-55-5555      Pri Pay:

Per+-----------------------------------------------------------------+
   |  EDBHEPD1          Help EBD E U Personal Data 1                 |
For|                                                      More:      |
Cam| Function:  EPD1 enables the user to enter and update            |
Cam| personal information about the employee including campus and    |
   | home address and telephone numbers, spouse name and other       |
Dat| demographic information.                                        |
Hom|                                                                 |
   | Nature of Information:  EPD1 contains permanent and campus      |
UC | address information, campus and home telephone numbers, spouse  |
Emp| name, codes indicating employee-selected disclosures to the     |
   | UC directory and to employee organizations, and personal        |
Sex| demographic information such as sex and ethnicity.              |
Cit|                                                                 |
   | There are no highly abbreviated or group field labels on EPD1.  |
   |                                                                 |
   |                                                                 |
   |                                                                 |
   | Command ===>                                                    |
Nex| F1=Help   F2=EX'help  F3=eXit  F4=copy  F6=move   F7=BKwd   F8=FWd |____
===| F12=Cancel                                                      |
   +-----------------------------------------------------------------+
 F:  1-Help                   3-PrevMenu      4-Print        5-Update
 F:                           9-Jump         10-PrevFunc    11-Next Func    12-Exit
```

Screen-Level Help Window

2) *Field-Level Help* provides one or more of the following types of information about the field being displayed:
   - *Data element number and name* associated with the field being viewed.
   - A brief *description* of the information.
   - The *format* for entry and display of the information.
   - The *valid values* and code interpretation for those values.

```
PPEAPP0+-------------------------------------------------------+46
       |                                                       |SBXYZ01
ID: 5555| EDB2017          TIME REPORTING CODE-EDB              |y:
       |                                          More:  +     |
       | Publ.: 01/10/85 "TIME-REPORTING CODE-EDB"             |f 01
Appt   |                                                       |
10     | Decription:    Code indicating the method for reporting|
       |                time worked in an appointment.          |
Title  |                                                       | Lv
7277 PR| Format:        N/A                                    | A_
Dist   |                                                       |%
11     | Code Interpr.:  A  - Positive by account/fund          |000
       |                 B  - Positive by home department       |
       |                 S  - Positive - special treatment      |
       |                 C  - Positive by home department -     |
Dist   |                                                       |%
       |                                                       |
       |  Command ===>                                         |
       |  F1=Help   F2=EX'help   F3=eXit   F4=copy   F6=move   F7=BKwd
       |  F8=FWd    F12=Cancel                                 |
       +-------------------------------------------------------+
Next Func: _____     ID: ______    Name: __________________________     SSN: _________
===> ________________________________________________________
  F: 1-Help                       3-PrevMenu    4-Print      5-Update
  F:                              9-Jump        10-PrevFunc  11-NextFunc   12-Exit
```

Field-Level Help Window

HELP WINDOW LAYOUT

Help appears in *pop-up windows* and overlays a portion of the screen being viewed before Help was invoked. Each window has three sections:

- Header
- Body
- Footer

HEADER SECTION

The first two lines comprise the header section. This information is used to help identify the window and includes the following:

1) Window Identifier.
2) Window Title - The title is a brief descriptive name assigned to the Help window.
3) More: (+/-) - "More" indicates if there are additional or previous pages of Help text available.
   - *More:* + Additional pages of information are available.
   - *More:* - + Previous and additional pages of information are available.
   - *More:* - Previous pages of information are available.

BODY SECTION

The body of the Help window is where the variable Help text appears. Help text includes descriptive information about the screen or the field.

FOOTER SECTION

1) Command Line - This is a line which may be used to key in a function key number or to enter Help commands.
2) Function key lines - These lines display an abbreviated description of the use of some of the F keys.

USING ONLINE HELP

You may select Help by pressing the <Fl Help> key from any screen. Either field-level Help or screen-level Help will be displayed, depending on the position of the cursor on the screen at the time <Fl Help> is pressed.

- *Field-level Help* is presented when the cursor is positioned on a screen label or on a data entry field.
- *Screen-level Help* is presented when the cursor is positioned anywhere on a screen that is not a field label or data entry field.

Help text will appear in a window on the screen. When a Help window is displayed, information cannot be entered on the underlying screen and the F keys on the bottom of the entry/update screen are not active. Only the F keys associated with the Help function may be used. Online Help F key functions are different from the EDB Entry/Update F key functions.

Help function keys and their corresponding commands are listed in Table 3. To issue a command, use the appropriate Help F key or tab to the Help window Command line and enter the bold character(s) shown.

Table 3. Help Function Keys/Commands

F KEY	COMMAND	DESCRIPTION
<F1>	**H**elp	Display Help for Help.
<F2>	**EX** help	Display screen-level help
<F3>	e**X**it	Return to the Payroll/Personnel screen.
<F4>		Copy the value selected to the entry/update field.
	Find ***string***	Find the first occurrence of the specified character string.
<F5>	**FN**	Find the next occurrence of the specified character string.
<F7>	**BK**wd	Display the previous page of help text.
<F8>	**FW**d	Display the next page of help text.
<F9>	**level1**	Return to the first help window.
<F12>	**C**ancel	Return to the underlying help window.

<u>HINTS:</u>

- All the F keys displayed on the Help windows are not necessarily available for a given function.
- Because of the limited space on the Help windows, some F keys are not displayed even though the associated function is available.

F1 - HELP FOR HELP

You may obtain help on Help at any stage of the Help process by pressing <F1> while in any Help window.

F2 - EXTENDED HELP

Pressing <F2> on any Help window causes screen-level Help for the current application screen to be displayed. The screen-level Help will overlay any other Help windows currently displayed. If you are already viewing Screen-level Help, pressing <F2> will have no effect.

F3 - EXIT

Pressing <F3> on any Help window causes a return to the Payroll/Personnel System screen. It clears all the Help windows off your screen, regardless of how many Help windows are displayed.

F4 - COPY

Pressing <F4> while the cursor is positioned on a highlighted value on a field-level Help window causes the value to be copied back to the data entry field and clears all the Help windows off your screen.

F STRING - FIND (NO F KEY)

The Find command (there is no F key) causes Help to position the list at the first occurrence in the Help text of the specified character string. Enter **F *string*** (where *string is* the character string to be found) on the Command Line of the Help screen. If there is no match to the entered character string, the message ** NOT FOUND ** is displayed at the top of the list.

F5 - FIND NEXT

Pressing <F5> finds the next occurrence of the character string specified in the previous Find command. A Find command must be entered before <F5> will be enabled.

Note: The Find and Find Next commands will invoke a search from the point of the cursor to the end of the data. It will not "wrap" around to the top of the data

F7 - BACKWARD

Pressing <F7> displays the previous page of help text. More: - displayed in the upper right of the help window indicates that previous page(s) of information are available.

F8 - FORWARD

Pressing <F8> displays the next page of help text. More: + displayed in the upper right of the help window indicates that additional page(s) of information are available.

F9 - LEVEL 1

Pressing <F9> returns you to the first help window when more than one help window is displayed.

F12 - CANCEL

Pressing <F12> on any help window causes a return to the underlying help window; if there is no underlying help window, it causes a return to the Payroll/ Personnel Online System screen.

VIII. SYSTEM MESSAGES

In the EDB Entry/Update environment, various messages are displayed by the system in response to data entry actions you have taken on a screen. Messages may also appear in response to conditions detected while performing edits on entered data.

There are three types of error messages:

- *Navigation messages:* If you make a navigation error, a system message will alert you that the action you requested is not valid and may provide guidelines on how to proceed.
- *Data Entry messages:* The system performs range/value edits to catch invalid data values. A message regarding the range/value error is displayed immediately on the data entry screen. You may correct the invalid data and continue with additional changes. Data entry error messages are described in detail in the sub-section *Data Entry Messages.*
- *Consistency Edit messages:* When you attempt to update the database, the system edit process checks all the data for that employee. Error messages from this process are displayed on the Consistency Edit (ECON) screen. You can correct this data directly on the ECON screen or return to the data entry screen and make the required corrections. After correcting errors, request update again and the data will be re-edited.

NAVIGATION MESSAGES

If you make a navigation error, a navigation message is displayed to alert you. For example, if you press <F12 Exit> on a data entry screen before canceling or completing the update, the following message is displayed: **U0004 Exit not permitted while update in progress**.

```
PPEEID0-E0943              SBT EDB Entry/Update             07/24/95  08:10:44
                           Employee Identification          Userid:   SBXYZ01


Employee ID              :  555555555

SSN                      :  555555555

First Name               : ____________________________
Middle Name              : ____________________________
Last Name                : ____________________________
Suffix                   : _____
Result                   :  GAUCHO,EMPLOYEE________________
                            GAUCHO,EMPLOYEE________________

Date of Birth            :  072467
Intercampus Transfer     : ___



Next Func: _____    ID: ______    Name: ____________________________    SSN: _________
►U0004  Exit not permitted while update in progress
===> ____________________________________________________________

  F: 1-Help      2-Cancel                                  5-Update
  F:                           9-Jump
```

Example of a Navigation Message

DATA ENTRY MESSAGES

Data entry messages fall into three categories:

- Informational messages
- Instructional messages
- Error messages

INFORMATIONAL MESSAGES

Informational messages inform you that an action has been completed. No response is required for an informational message. For example, if you press <F2 Cancel>, the message **U0008 Process Canceled** is displayed.

```
PPEPD10-E0964                    SBT EDB Entry/Update          07/24/95   08:11:47
                                Employee Personal Data 1        Userid:     SBXYZ01

ID: 555555555     Name: GAUCHO,EMPLOYEE         SSN: 555-55-5555      Pri Pay:

Permanent Address Line 1: 13271 ADDEN CIRCLE____________
                  Line 2: ______________________________
                  City  : SANTA BARBARA_________________ State:CA Zip:93101
Foreign Addr Ind: _ Prov: _______________ Cntry: __ Postal Code: ______
Campus Address - Room: 3472_____ Building: BROIDA___
Campus Phone 1: ____________ Phone 2: ____________

Date of Birth: 062467
Home Phone    : ____________  Spouse Name: _______________________

UC Directory Disclosures - Perm Addr: __ Home Phone: __ Spouse Name: __
Employee Organization Home Address Disclosure: 1

Sex: M Ethnic: E Disability: N_ Veteran: N Veteran Disability: N_
Citizenship: C_ Student Status: 1_ No. of Reg. Units: ____




Next Func: _____  ID: ______  Name: _________________________ SSN: _________
U0008  Process Canceled
===> ______________________________________________________

  F: 1-Help   2-Cancel                                  5-Update
  F:                        9-Jump
```

Example of an Informational Message

INSTRUCTIONAL MESSAGES

Instructional messages alert the user to an action that must be taken. The user must complete the specified action before processing can continue.

For example, when two users simultaneously enter data for the same employee, the following message is displayed on the screen of the second user to press the <F5 Update> key: **P0603 Intervening Update Has Occurred. Re-enter Changes.**

```
PPEEID0-E0943                SBT EDB Entry/Update             07/24/95   08:10:44
                            Employee Identification           Userid:     SBXYZ01



Employee ID            :  555555555

SSN                    :  555555555

First Name             :  _________________________
Middle Name            :  _________________________
Last Name              :  _________________________
Suffix                 :  _____
Result                 :  GAUCHO, EMPLOYEE_______________
                          GAUCHO, EMPLOYEE_______________

Date of Birth          :  072467
Intercampus Transfer   :  ___





Next Func: _____  ID: ______  Name: _________________________  SSN: _________
P0603  Intervening Update Has Occurred.  Re-Enter Changes.
===> _______________________________________________________

  F:  1-Help   2-Cancel                                     5-Update
  F:                         9-Jump
```

Example of an Instructional Message

ERROR MESSAGES

Error messages inform you that a data error has occurred and that processing cannot continue unless it is corrected. You must correct the invalid data or supply the missing data before processing can continue, OR press <F2 Cancel> to cancel the transaction.

After you enter data on the entry screen and press either <Enter>, <F5 Update>, <F9 Jump>, <F10 PrevFunc>, or <F11 NextFunc>, range/value edits are performed on the entered data. A message is issued if one or more fields contain an invalid value, and the cursor is positioned on the first field in error. You must supply valid value(s) before the update can proceed.

For example, you have entered a value of "0" in the Assigned BELI field on the EPER screen. Message **P0601 Field out of range or illegal value** is displayed. You may access <F1 Help> to see that the only valid values for Assigned BELI are "1" through "5".

```
PPEPER0-E0943                SBT EDB Entry/Update            07/24/95   15:44:02
                          Personnel-Miscellaneous            Userid:     SBXYZ01

ID: 555555555    Name: GAUCHO,EMPLOYEE         SSN: 555-55-5555       Pri Pay: MO

Assigned BELI: 1_   Derived BELI: 1_  Effective Date: 013195__
BELI Status Qualifiers: Primary: __ Date: ______  Secondary: __ Date: ______
Date of Hire                   : 021495__        Original Hire Date: ________
Employee Relations Code        : E_         Employee Relations Unit: 99_
Probationary Period End Date   : 090195__
Next Salary Review Date        : 0795____  Next Salary Review Type: 2_
Merit Rate Increase Percent    : ________
Home Department                : PERS PERSONNEL SERVICES
Primary Title Code             : ______
Employee Unit Code             : 98__  Employee Representation Code    : *_
Employee Special Handling Code : __    Employee Distribution Unit Code : *_
Job Group ID                   : ___
Alternate Department Code      : ______
Academic Programmatic Unit Cd  : ______




Next Func: _____  ID: ______  Name: __________________________  SSN: _________
P0601 Field out of range or illeagal value
===> _________________________________________________________

  F: 1-Help                  3-PrevMenu    4-Print      5-Update
  F:                         9-Jump        10-PrevFunc  11-NextFunc   12-Exit
```

Example of an Error Message

When all of the data passes range/value edits, press <F5 Update> to perform consistency edits on the entered data.

CONSISTENCY EDIT MESSAGES (ECON)

The Consistency Edit screen is displayed when you submit changes for update by pressing <F5 Update> and the edit process detects inconsistencies in the data. If no inconsistencies are detected, the ECON screen will not be displayed. The ECON screen cannot be requested by system users.

From the ECON screen you can:

- Review data errors (sub-section *Reviewing Data Errors on ECON*).
- Correct data errors (sub-section *Correcting Data Errors on ECON*).
- Return to a data entry screen (sub-section Returning to a *Data Entry Screen from ECON*).
- Complete the update (sub-section *Completing the Update from ECON*).
- Cancel the update (sub-section *Canceling the Update from ECON*).

MESSAGE SEVERITY

Each message displayed on the ECON screen has an associated severity level. Table 4. shows the message severity's that are used in the EDB Entry/Update process.

Table 4. Message Severity

NAME	ABBREVIATION	DESCRIPTION
Employee Activity Reject	EMPL REJ	The employee record will not be updated with the entered changes. The identified error must be corrected or the update must be canceled.
Warning	WARNING	There is a possible error or inconsistency in the entered data. The change will be accepted as entered.
Data Override	DATA OVR	Entered data will be replaced with a derived value, or a missing required field will be derived by the system.
Implied Maintenance	IMPLD MT	The system will derive or re-derive one or more data element values based on other changes made.
Informational	INFORMTL	The system has detected a condition that is not an error but which may be helpful for the user to note.

The ECON screen is displayed automatically for all instances of Employee Activity Reject (EMPL REJ) and Warning, Data Override (DATA OVR) messages. Other error messages are accessed by typing IMSG in the Next Func field.

MESSAGE ORDER

Messages are displayed on the ECON screen sequentially, one message on the screen at a time. The message with the highest (most serious) severity is presented first. If there are additional messages to review, <F6 NextMsg> will be displayed in the footer. To review additional messages, press <F6 NextMsg>. You will be able to:

- Review any additional messages.
- Cause the first message to be displayed again after viewing all available messages.
- Re-display the same message which is associated with more than one data element.

Each time a message is displayed, the cursor is positioned at a data element associated with the message so that it can be corrected.

REVIEWING DATA ERRORS ON ECON

All of the data elements associated with a consistency edit are displayed on the ECON screen, along with the value of each data element. The data elements are presented in data element number order. If there are more data elements associated with a single message than can fit on one screen, use <F7 Backward> and <F8 Forward> to scroll back and forth among additional screens. The cursor is initially positioned on the first data element directly involved with the message.

For example, if you enter an F in the Foreign Address Indicator field, but do not enter foreign address data, the input is accepted because there are no range/value errors detected.

EADD Screen with foreign address data elements omitted

However, when you press <F5 Update>, the edit process detects the missing information and displays message **08215 'F' INDICATOR REQUIRES FOREIGN ADDRESS INFO** on the ECON screen. If there are more messages, <F6 NextMsg> is displayed.

CORRECTING DATA ERRORS ON ECON

You may change data values directly on the ECON screen for most data elements that are displayed. This may be done even if it is not a data element that you changed on a data entry screen.

To correct data directly on the ECON screen:

- Position your cursor on the field to be corrected.
- Type the correct value.

After you have corrected one or more data elements, you can:

- Press <F6 NextMsg> to view the next message.
- Press <F5 Update> to invoke the update process again.

If <F5 Update> is selected, all the changes will be re-edited. If there are any messages remaining after the re-edit process, those messages will be displayed and messages can again be reviewed and data corrected. If there are no messages with a severity level of Employee Reject and you do not wish to make any more changes to data on the ECON screen, you may press <F5 Update> to proceed with the update. The ECON screen will not be re-displayed.

CORRECTING DATA THAT IS NOT DISPLAYED

You might need to correct data that is not displayed on the ECON screen. For example, a consistency error on the distribution line may be displayed, but you need to correct an appointment line. You can make the correction by returning to the update bundle (press <F3 Return>) and accessing the EAPP screen to correct the appointment line (See sub-section *Returning to a Data Entry Screen from ECON).*

DISPLAYED DATA THAT CANNOT BE CHANGED

There are two instances where it is not possible to change data that is displayed on the ECON screen:

- The field is a Key Field (e.g. Employee ID) and/or the field is restricted from update. You will not be able to enter data in those fields.
- You do not have access to the data entry screen on which the data appears although the data is part of the consistency edit process. If the data elements are associated with an Employee Activity Reject (Empl Rej) message, cancel the proposed update and contact the appropriate functional office for assistance. If the data elements are associated with a Warning or Data Override message, you may update the database and then contact the appropriate functional office to correct the information inconsistency.

RETURNING TO A DATA ENTRY SCREEN FROM ECON

Although the "nesting" feature as provided during updates to data entry screens is not available from ECON, the option to return to data entry screens from ECON is provided.

Returning to a data entry screen from ECON allows you to view data in the context of other data on a screen before determining the correct value. Or, you may decide that data that is not displayed on the ECON screen needs to be entered before the update proceeds.

To return to the data entry screen, press <F3 Return>. You are returned to the screen that was displayed at the time <F5 Update> was requested. The data entry screens will contain any changes you have made, including any changes made on the ECON screen. You can then make additional changes on that screen, or, if in a bundle, on other screens in the bundle. Update must be requested again (<F5 Update>) when additional changes, if any, have been made, and the data will again be edited.

For example, if an error in the address data is detected, a consistency edit message is issued.

```
PPECON0-E0943              SBT EDB Entry/Update          07/24/95   17:21:03
                            Consistency Edit             User id:    SBXYZ01

ID: 555555555    Name: GAUCHO,EMPLOYEE      SSN: 555-55-5555     Pri Pay: MO

                          Consistency Edit Number
                                    113

Msg#    Severity Message Text
08215   Warning 'F' INDICATOR REQUIRES FOREIGN ADDRESS INFO

DE Number      Key                Value                        Description
    0119                          1__________________________  UC STUD STAT
    0204                          13271 ADDEN________________  PERM STAT 1
    0205                          ___________________________  PERM STAT 2
    0207                          CA_________________________  PERM STATE
    0208                          93101______________________  PERM ZIP
    0291                          F__________________________  FOREIGN ADDRESS
    1118                          ___________________________  FRGN ADDR CNTRY
    1119                          ___________________________  FRGN ADDR PSTL
    1120                          ___________________________  FRGN ADDR PROV




U0005  Final Edit Errors found
===> _______________________________________________________

  F: 1-Help   2-Cancel     3-Return              5-Update      6-Next Msg
  F:
```

ECON Screen indicating address data error

When you press <F3 Return>, you are returned to the screen from which you pressed <F5 Update>. The changes that you have entered are still on the screen.

```
PPEADD0-E1302               SBT EDB Entry/Update              12/11/03 14:25:28
 10/22/03 23:11:03          Employee Address Data              Userid:  SBXYZ01
 ID: 555555555 Name: GAUCHO,EMPLOYEE            SSN: 555-55-5555 Pri Pay: MO

 Permanent Address Line 1: 330 NORTH STREET
                   Line 2:
                   City: SANTA BARBARA          State: CA Zip: 93103
 Foreign Addr Ind: F Prov:                    Country:
      Postal Code:
 Home Phone:                   Spouse Name:
 Campus Release Codes - Perm Address:    Home Phone:    Spouse Name:
 Employee Organization Disclosures - Perm Address:     Home Phone:

 Campus Address Line 1: ACCOUNTING & FINANCIAL SRVICES
                Line 2: - ACTG
                City: SANTA BARBARA         State: CA Zip: 93106
 Campus Phone 1:                    Phone 2:
 Campus Room:       Building:

 Next Func:      ID:          Name:                           SSN:
 U0001  Input accepted
 ===>
  F:  1-Help                 3-PrevMenu  4-Print     5-Update
  F:                         9-Jump                            12-Exit
```

```
PPEPDI0-E0964               SBT EDB Entry/Update          07/24/95  08:11:47
                            Employee Personal Data 1      Userid:    SBXYZ01

ID: 555555555    Name: GAUCHO,EMPLOYEE        SSN: 555-55-5555     Pri Pay:

Permanent Address Line 1: 13271 ADDEN CIRCLE____________
                  Line 2: ______________________________
                  City  : SANTA BARBARA_________________ State:CA Zip:93101
Foreign Addr Ind: F Prov: _______________ Cntry: __ Postal Code: ______
Campus Address - Room: 3472_____ Building: BROIDA___
Campus Phone 1: ___________ Phone 2: ___________

Date of Birth: 062467
Home Phone   : ____________  Spouse Name: ______________________

UC Directory Disclosures - Perm Addr: __ Home Phone: __ Spouse Name: __
Employee Organization Home Address Disclosure: 1

Sex: M Ethnic: E Disability: N_ Veteran: N Veteran Disability: N_
Citizenship: C_ Student Status: 1_ No. of Reg. Units: ____




Next Func: _____ ID: ______ Name: _________________________ SSN: _________

===> ____________________________________________________

  F: 1-Help   2-Cancel                                 5-Update
  F:                          9-Jump
```

Related Data Entry Screen showing the data entry error

You determine that the F in the Foreign Address Indicator field is a mistake and change it to an A on the EADD screen.

```
PPEADD0-E1302              SBT EDB Entry/Update             12/11/03 14:25:28
 10/22/03 23:11:03          Employee Address Data             Userid:  SBXYZ01
 ID: 555555555 Name: GAUCHO,EMPLOYEE           SSN: 555-55-5555 Pri Pay: MO

 Permanent Address Line 1: 330 NORTH STREET
                   Line 2:
                   City: SANTA BARBARA         State: CA Zip: 93103
 Foreign Addr Ind: A Prov:                 Country:
      Postal Code:
 Home Phone:                  Spouse Name:
 Campus Release Codes - Perm Address:    Home Phone:    Spouse Name:
 Employee Organization Disclosures - Perm Address:     Home Phone:

 Campus Address Line 1: ACCOUNTING & FINANCIAL SRVICES
                Line 2: - ACTG
                City: SANTA BARBARA         State: CA Zip: 93106
 Campus Phone 1:                      Phone 2:
 Campus Room:       Building:

 Next Func:      ID:          Name:                            SSN:
 U0001  Input accepted
 ===>
  F:  1-Help                 3-PrevMenu  4-Print     5-Update
  F:                         9-Jump                           12-Exit
```

```
PPEPD10-E0964                 SBT EDB Entry/Update         07/24/95  08:11:47
                              Employee Personal Data 1     Userid:    SBXYZ01

ID: 555555555    Name: GAUCHO,EMPLOYEE        SSN: 555-55-5555     Pri Pay:

Permanent Address Line 1: 13271 ADDEN CIRCLE____________
                  Line 2: ______________________________
                  City  : SANTA BARBARA_________________ State:CA Zip:93101
Foreign Addr Ind: A Prov: _______________ Cntry: __ Postal Code: ______
Campus Address - Room: 3472_____ Building: BROIDA__
Campus Phone 1: ___________ Phone 2: ___________

Date of Birth: 062467
Home Phone   : ____________  Spouse Name: _______________________

UC Directory Disclosures - Perm Addr: __ Home Phone: __ Spouse Name: __
Employee Organization Home Address Disclosure: 1

Sex: M Ethnic: E Disability: N_ Veteran: N Veteran Disability: N_
Citizenship: C_ Student Status: 1_ No. of Reg. Units: ____




Next Func: _____ ID: ______ Name: _________________________ SSN: _________

===> ______________________________________________________

  F: 1-Help   2-Cancel                                   5-Update
  F:                         9-Jump
```

EPD1 Screen with data entry error corrected

Press <F5 Update> to re-edit the information. The edit process does not detect any errors this time, so the ECON screen is not displayed again.

COMPLETING THE UPDATE FROM ECON

To complete an update, examine the message(s), make corrections if necessary, and press <F5 Update>.

The ECON screen is displayed if the system detects inconsistencies in the data at the Employee Reject Warning, Data Override, and/or severity level. Messages at the Employee Reject severity level must be corrected or the update must be canceled. See sub-section *Canceling the Update from ECON.*

The system will allow you to complete an update past a Warning or Data Override message as shown in the following example. However, to maintain the integrity of the information in the EDB, you should respond to Warning messages by correcting the relevant data whenever possible.

Following is an example of the normal sequence of steps to update past a Warning or Data Override message. After pressing <F5 Update>, the only message issued is a warning. You determine the update can proceed without a change to the BELI indicator and press <F5 Update> again.

```
PPECON0-E0943              SBT EDB Entry/Update          07/24/95   17:12:17
                              Consistency Edit           Userid:     SBXYZ01

ID: 555555555    Name: GAUCHO,EMPLOYEE       SSN: 555-55-5555     Pri Pay: MO

                           Consistency Edit Number
                                     111

Msg#   Severity Message Text
08301  Warning  ASSIGNED BELI AND DERIVED BELI INCONSISTENT

DE Number     Key                Value                        Description














U0001  Input accepted
===> ______________________________________________________

  F: 1-Help   2-Cancel     3-Return              5-Update      6-Next Msg
  F:
```

ECON Screen before completing the update

After correcting the ECON screen, the Post Authorization Notification (PAN) sub-system may be invoked (see Section X., *Post Authorization Notification (PAN)* for additional information). Add comments and additional reviewers to the PAN notification as necessary, then press <F5 Update> again to update the EDB.

You are returned to the data entry screen or, if you were in a bundle, you are returned to the first screen in the bundle. Message **U0007 Update process complete** indicates the update process is complete.

```
PPEPER0-E0943                  SBT EDB Entry/Update            07/24/95   15:44:02
                             Personnel-Miscellaneous          Userid:     SBXYZ01

ID: 555555555    Name: GAUCHO, EMPLOYEE        SSN: 555-55-5555      Pri Pay: MO

Assigned BELI: 1_   Derived BELI: 1_   Effective Date: 013195__
BELI Status Qualifiers: Primary: __ Date: ______  Secondary: __ Date: ______
Date of Hire                    : 021495__        Original Hire Date: ________
Employee Relations Code         : E_       Employee Relations Unit: 99_
Probationary Period End Date    : 090195__
Next Salary Review Date         : 0795____  Next Salary Review Type: 2_
Merit Rate Increase Percent     : _________
Home Department                 : PERS PERSONNEL SERVICES
Primary Title Code              : _______
Employee Unit Code              : 98__ Employee Representation Code    : *_
Employee Special Handling Code  : __   Employee Distribution Unit Code : *_
Job Group ID                    : ____
Alternate Department Code       : ______
Academic Programmatic Unit Cd   : ______




Next Func: _____  ID: ______  Name: __________________________  SSN: _________
U0007  Update process complete
===> ________________________________________________________

  F: 1-Help                    3-PrevMenu    4-Print      5-Update
  F:                           9-Jump        10-PrevFunc  11-Next Func  12-Exit
```

Related Data Entry Screen indicating the update process is complete

CANCELING THE UPDATE FROM ECON

When <F2 Cancel> is pressed on the ECON screen, you are returned to the screen that was displayed at the time <F5 Update> was requested, or, if you are in a bundle, you are returned to the first screen in the bundle. The employee record remains unchanged. For example, during the update the system detects that you did not enter a Citizenship Code. The message **08126 CITIZENSHIP CODE IS REQUIRED** is displayed on the ECON screen. You do not know the employee's correct citizenship status and therefore decide to cancel the update by pressing <F2 Cancel>.

```
PPECON0-E0943                    SBT EDB Entry/Update           07/24/95   17:32:29
                                   Consistency Edit             Userid:     SBXYZ01

ID: 555555555    Name: GAUCHO,EMPLOYEE        SSN: 555-55-5555      Pri Pay: MO

                                Consistency Edit Number
                                          799

Msg#    Severity Message Text
08126   Empl Rej CITIZENSHIP CODE IS REQUIRED

DE Number       Key                  Value                          Description
    0109                             __________________________     CITIZEN CODE











U0005  Final Edit Errors found
===> _______________________________________________________

  F:  1-Help   2-Cancel      3-Return                   5-Update      6-Next Msg
  F:
```

ECON Screen before canceling

You are returned to the data entry screen. The previous values of all the data are retained.

```
PPEPD10-E0964               SBT EDB Entry/Update          07/24/95  16:57:03
                          Employee Personal Data 1        Userid:    SBXYZ01

ID: 555555555    Name: GAUCHO, EMPLOYEE        SSN: 555-55-5555     Pri Pay:

Permanent Address Line 1: 13271 ADDEN CIRCLE____________
                  Line 2: ______________________________
                  City  : SANTA BARBARA_________________ State:CA Zip:93101
Foreign Addr Ind: F Prov: _______________ Cntry: __ Postal Code: ______
Campus Address - Room: 3472_____ Building: BROIDA___
Campus Phone 1: ____________ Phone 2: ____________

Date of Birth: 062467
Home Phone    : _____________  Spouse Name: _______________________

UC Directory Disclosures - Perm Addr: __ Home Phone: __ Spouse Name: __
Employee Organization Home Address Disclosure: 1

Sex: M Ethnic: E Disability: N_ Veteran: N Veteran Disability: N_
Citizenship: C_ Student Status: 1_ No. of Reg. Units: ____




Next Func: _____ ID: ______ Name: _________________________ SSN: _________
U0008 Process canceled
===> ___________________________________________________________

 F: 1-Help  2-Cancel                                5-Update
 F:                          9-Jump
```

Related Data Entry Screen after canceling the update

IX. PRINTING EMPLOYEE DOCUMENTS

OVERVIEW

The Employee Documents feature of the Payroll/Personnel System provides for printing of employee record information. You can print the employee document for all employees whose records you can access. The figures at the end of this section illustrate the types of employee documents that are available. In order to print documents, you must:

1) Have access to a printer that is connected to the campus Computer Center, or have a Local Area Network (LAN) printer that has been configured to accept files from PPS. You must have the same printer capability in order to use the F4 - Print feature on all screens (if you are unsure whether you have such a printer, consult your departmental Computer Support Coordinator) or reference http: www.accounting.ucsb.edu/PDF/PPSprint.PDFFunction.
2) Use the IDOC function to print employee documents. The IDOC menus provide you with a full list of available choices.

SELECTING AN EMPLOYEE DOCUMENT TO PRINT

Type **IDOC** in the Next Func field to select the Employee Documents option. To access an employee record, type the employee ID, name, or social security number in the appropriate field, and then press <Enter>. The Document Selection Menu will be displayed.

Note: Refer to the Payroll/Personnel Online System Procedures manual for guidelines on the appropriate use of Employee Documents.

```
PPIDOC0-I0933                 SBT Employee Documents        07/24/95  17:34:57
                              Document Selection Menu       Userid:    SBXYZ01
ID: 555555555    Name: GAUCHO,EMPLOYEE      SSN: 555-55-5555     Pri Pay: MO
                                                                 Pg 01 of 02

New Hire or Re-Hire Documents: _ Staff
                               _ Academic
                               _ Student

Change-in-Status Documents    : _ Staff
                               _ Academic
                               _ Student

Leave/Sabbatical Documents    : _ Staff-Leave
                               _ Academic-Leave/Sabbatical






Next Func: _____  ID: ______  Name: _________________________ SSN: _________
===> ______________________________________________________

 F: 1-Help   2-Cancel    3-PrevMenu              5-GenDoc
 F:          8-Forward   9-Jump                                  12-Exit
```

Document Selection Menu - first page

The Document Selection Menu is a multi-page screen. Press <F8 Forward> to access the next page.

```
PPIDOC0-I0933              SBT Employee Documents         07/24/95   17:36:59
                           Document Selection Menu        Userid:     SBXYZ01

ID: 555555555    Name: GAUCHO, EMPLOYEE       SSN: 555-55-5555     Pri Pay: MO
                                                                   Pg 02 of 02

Separation Documents          : _ Staff
                                _ Academic
                                _ Student
                                _ Layoff

Personnel Summary Documents   : S All

Benefits Summary Documents    : _ Benefits Enrollment
                                _ Retirement and Savings

                                _
                                _
                                _

Next Func: _____  ID: ______  Name: GAUCHO, EMPLOYEE__________  SSN: _________
===> ______________________________________________________

  F: 1-Help   2-Cancel      3-PrevMenu                5-GenDoc
  F: 7-Backward             9-Jump                                  12-Exit
```

Document Selection Menu - second page

To select a document, move the cursor to the desired document and type S. Press <F5 GenDoc> to generate a document that contains data from the employee's current record.

When the document has printed, the cursor will be on the Document Selection Menu and the message **P0649 Document(s) printed** will be displayed. Once you have finished printing the document(s), you can press <F3 PrevMenu> to return to the main menu.

Note: If you receive the error message P0650 after pressing <F5 GenDoc>, your printer has not been defined in the system. Please contact your departmental Computer Support Coordinator for technical assistance.

SECONDARY MENUS

Change-in-Status and Leave of Absence document selection will generate additional menus.

CHANGE-IN-STATUS ADDITIONAL MENU

From the Document Selection Menu, select a Change-in-Status document. Another selection menu will appear with the following choices:

Special Request	Request for Status
Changes in Appt Info	Promotion
	Demotion
	Reclassification Upward
	Reclassification Lateral
	Reclassification Downward
	Renewal of Appointment
	Additional Employment
	Lateral Transfer
	Employment in Different Academic Series
	Change from Casual to Career Status
	Change from Casual Restrict to Casual Status
Changes to Salary Info	Merit Increase
	Change in Funding
	Change in Percent of Full Time
	Six Month Increase
	Casual Increase
	Exceptional Equity Increase
	Change in HSCP Negotiated Salary
	Adding a Stipend
Changes in Personal Info	Change in Personal Information
	Change in Visa Type
	Extension of Visa End Date

You can select up to two action descriptions to be included in the text of the Change-in-Status Document. To select an action, move the cursor to the desired action and type S. Press <F5 GenDoc> to generate the document.

Note: As with the Main Document Selection Menu, the entire Status Change Personnel Actions Menu cannot be displayed on one page. Use <F8 Forward> to access the additional pages.

When the document has printed, the cursor will be on the Document Selection Menu and the message **P0649 Document(s) printed** will be displayed. Once you have finished printing the document(s), press <F3 PrevMenu> to return to the main menu.

LEAVE OF ABSENCE ADDITIONAL MENU

From the Document Selection Menu, select a Leave/Sabbatical document. Another selection menu will appear that contains the following document choices:

Leave of Absence Info	Leave of Absence with Full Pay
	Leave of Absence with Partial Pay
	Leave without Pay
Sabbatical Leave Info	Sabbatical Leave at Full Salary
	Sabbatical Leave with Partial Pay
	Sabbatical Leave in Residence

To select an action, move to the desired action and type S. Press <F5 GenDoc> to generate the document.

When the document has printed, the cursor will be on the Document Selection Menu and the message **P0649 Document(s) printed** will be displayed. Once you have finished printing the document(s), press <F3 PrevMenu> to return to the main menu.

SAMPLE EMPLOYEE DOCUMENTS

Sample Employee Documents are provided on the following pages. The documents illustrated do not represent all documents that can be printed, but are intended to provide you with a representative example of what is available.

```
                              UNIVERSITY OF CALIFORNIA         Print Date: 02/14/95
                              PAYROLL/PERSONNEL SYSTEM                  Page 1 of 2
                         Summary of Initial Hire or Rehire


TO: EMPLOYEE GAUCHO             FROM: HUMAN RESOURCES
                                      3515 SOUTH HALL

Welcome to the University of California, Santa Barbara.
This summary will provide you with an overview of your appointments and
related information.  This summary is not intended to be a contract or
binding document.  It is for informational use only.  If you have any
questions, corrections, or need to update any personal information, please
contact your department personnel coordinator.

PERSONAL INFORMATION
You have been issued Employee Identification Number 555555555.
Your Date of Birth has been recorded as 01/01/60.
Your Social Security Number is 555-55-5555.

Your citizenship status is:   U.S. Citizen
Your Visa Type is:           Your Visa End Date is:

You have chosen the following Withholding Allowances:
Federal Tax Status:                                      Single          0
State Tax Status:                                        Single          0
Additional State Allowances:                                             0

Your most recent date of hire is:     02/14/95
We have as your Permanent Address:
1211 GROVE
SANTA BARBARA           CA, 93101

You have chosen to disclose to Employee Organizations: Home Address


APPOINTMENT INFORMATION
You have been appointed as:

(1) PROGRAMMER ANALYST II Title Code: 7277
Grade: 3
    Department: PERSONNEL OFFICE
    Term of Service: 02/14/95 to Indefinite
    Percent of Time: 100
    Personnel Program:   Admin & Prof   Appointment Type:  Regular/Career

Your position is covered by the following union contract (s):
(1) none

Your appointment has qualified you for:
               University of California Retirement Plan
               OASDI & Medicare
               Career benefits

Your appointment(s) allows you to accrue the following:
```

Figure 1. Summary of Initial Hire or Rehire - first page

```
                              UNIVERSITY OF CALIFORNIA       Print  Date:  02/14/95
                              PAYROLL/PERSONNEL SYSTEM                Page  2 of 2
                         Summary of Initial Hire or Rehire

                          (1)   Vacation:   Yes  Rate:  10.00 hrs/month
                                Sick Leave: Yes  Rate:   8.00 hrs/month

*Note: Accrual rate shown is the approximate maximum that may be earned for
100 percent time per month or quadriweekly cycle.  Your accrual will vary
according to your hours worked.  You must be on pay status at least one-half
of the working hours in the month or quadriweekly cycle to be eligible to
earn vacation or sick leave for that period.

Your Probationary Period End Date is:  08/01/95

At this time, you are scheduled to receive a Salary Review on 07/95
for Merit Increase

SALARY INFORMATION
You will be receiving your paycheck on a Monthly basis.
You have selected that it be distributed by Departmental Pick-up
to:     Your Department

The following indicates your salary, type of payment and source of funding:

(1)REGULAR PAY             3,000.00 Monthly        36,000.00 Annually
   Step    at 100% Fixed   Time, from account 9-662070-     -19900-    -1
   effective 02/14/95 with end date of Indefinite
```

Figure 2. Summary of Initial Hire or Rehire - second page

```
                              UNIVERSITY OF CALIFORNIA         Print Date: 03/01/95
                              PAYROLL/PERSONNEL SYSTEM                  Page 1 of 2
                         Summary of Change in Status Action

TO: EMPLOYEE GAUCHO                     FROM: HUMAN RESOURCES
                                              3515 SOUTH HALL

The following information reflects your employment status with the
University as of 04/03/83, due to Request for Status.
This summary is not intended to be a contract or binding document.  It is
for informational use only.  Please review all the information to be sure it
is correct, and contact your department personnel office if you have any
questions or you think there may be an error.
PERSONAL INFORMATION
Your Employee Identification Number is: 555555555.
We have as your Permanent Address:
                      13271 ADDEN CIRCLE
                      SANTA BARBARA CA, 93101
Your citizenship status is: U.S. Citizen
Your Visa Type is:                     Your Visa End Date is:

You have chosen the following withholding Allowances:
Federal Tax Status:                    Single 0
State Tax Status:                      Single 0
Additional State Allowances.                  0

APPOINTMENT INFORMATION
You have been appointed as

(1) PROGRAMMER/ANALYST II     Title Code: 7277        Grade: 3
   Department:                PERSONNEL OFFICE
   Term of service:           02/14/95 to Indefinite
   Percent of Time:           100
   Personnel Program:  Admin & Prof  Appointment Type: Regular/Career

Your position is covered by the following union contract(s):
      (1) none

Your appointment has qualified you for:
       University of California Retirement Plan
       OASDI L Medicare
       Limited Career Benefits

Your appointments allows you to accrue the following:
       (1) Vacation:         Yes    *Rate: 10.00 hrs/month
           Sick Leave:       Yes    *Rate: 8.00 hrs/month
*Note: Accrual rate shown is the approximate maximum that may be earned for
100 percent time per month or quadriweekly cycle.  Your accrual will vary
according to your hours worked.  You must be on pay status at least one-half
of the working hours in the month or quadriweekly cycle to be eligible to
```

Figure 3. Summary of Change in Status Action -first page

```
                              UNIVERSITY OF CALIFORNIA         Print Date: 04/03/83
                              PAYROLL/PERSONNEL SYSTEM                  Page 2 of 2
                         Summary of Change in Status Action
earn vacation or sick leave for that period.

Your Probationary Period End Date is: 09/01/95

At this time, you are scheduled to receive a Salary Review on 07/95 for
Merit Increase


SALARY INFORMATION
You will be receiving your paycheck on a Monthly basis.
You have selected that it be distributed by Departmental Pick-up to
       Your Department
The following indicates your salary, type of payment and source of funding:

(l)REGULAR PAY                3,000.00 Monthly        36,000.00 Annually
   Step     at 100% Fixed Time, from account 9-662070-     -19900-     -1
   effective 02/14/95 with end date of Indefinite
```

Figure 4. Summary of Change in Status Action - second page

```
                              UNIVERSITY OF CALIFORNIA          Print Date: 03/01/95
                              PAYROLL/PERSONNEL SYSTEM                   Page 1 of 2
                            Summary of Leave of Absence

TO: EMPLOYEE GAUCHO                FROM: HUMAN RESOURCES
                                         3515 SOUTH HALL
The following information reflects your employment status with the
University as of 03/01/95, due to Leave of Absence without Pay.
This summary is not intended to be a contract or binding document.  It is
for informational use only.  Please review all the information to be sure it
is correct, and contact your department personnel office if you have any
questions or you think there may be an error.
PERSONAL INFORMATION
Your Employee Identification Number is:  555555555.
We have as your Permanent Address:
                     13271 ADDEN CIRCLE
                     SANTA BARBARA CA, 93101
Your citizenship status is:   U.S. Citizen
Your Visa Type is:            Your Visa End Date is:
You have chosen the following Withholding Allowances:
               Federal Tax Status:           Single 0
               State Tax Status:             Single 0
               Additional State Allowances:         0

APPOINTMENT INFORMATION
You have been appointed as

(1) PROGRAMMER/ANALYST II    Title Code: 7277        Grade: 3
   Department:                PERSONNEL OFFICE
   Term of service:           02/14/95 to Indefinite
   Percent of Time:           100
   Personnel Program:   Admin & Prof        Appointment Type: Regular/Career

Your position is covered by the following union contract(s):
       (1) none

Your appointment has qualified you for:
        University of California Retirement Plan
        OASDI & Medicare
        Career Benefits

Your appointments allows you to accrue the following:
       (1) Vacation:    Yes    *Rate: 10.00 hrs/month
           Sick Leave:  Yes    *Rate: 8.00 hrs/month
*Note: Accrual rate shown is the approximate maximum that may be earned for
100 percent time per month or quadriweekly cycle.  Your accrual will vary
according to your hours worked.  You must be on pay status at least one-half
of the working hours in the month or quadriweekly cycle to be eligible to
```

Figure 5. Summary of Leave of Absence -first page

```
                              UNIVERSITY OF CALIFORNIA         Print Date: 04/09/83
                              PAYROLL/PERSONNEL SYSTEM                 Page 2 of 2
                            Summary of Leave of Absence
earn vacation or sick leave for that period.
Your Probationary Period End Date is: 08/01/95
At this time, you are scheduled to receive a Salary Review on 07/95 for
Merit Increase

LEAVE OF ABSENCE INFORMATION
Your Leave of Absence without Pay from the University begins 03/01/95
You are scheduled to return from Leave on:  06/30/95
The reason for your Leave is:  Personal

SALARY INFORMATION
You will be receiving your paycheck on a Monthly basis
You have selected that it be distributed by Departmental Pick-up to:
       Your Department
The following indicates your salary, type of payment and source of funding:
(l)REGULAR PAY - 3,000.00 Monthly    36,000.00 Annually
   Step    at 100% Fixed   Time, from account 9-662070-      -19900-    -1
   effective 02/14/95 with end date of Indefinite
```

Figure 6. Summary of Leave of Absence - second page

```
                              UNIVERSITY OF CALIFORNIA         Print Date: 12/15/95
                              PAYROLL/PERSONNEL SYSTEM                  Page 1 of 1
                            Summary of Separation Action

TO:  EMPLOYEE GAUCHO           FROM: HUMAN RESOURCES
                                     3515 SOUTH HALL

The following information reflects our employment record at the time of
your separation from the University.  This summary is not intended to be a
contract or binding document.  It is for informational use only.  Please
review all of the information to be sure it is correct, and contact your
department personnel office if you have questions or you think there may be
an error.
PERSONAL INFORMATION
Your Employee Identification Number is:     555555555
We have as your Permanent Address:
                      13271 ADDEN CIRCLE
                      SANTA BARBARA CA, 93101

For your records, your Most Recent Hire Date was:   02/14/95

Your date of separation is 12/31/95         Your Last Day on Pay Status is 12/31/95

The reason for your separation is:  To accept another job.

Your Separation Destination is:  Industry
APPOINTMENT INFORMATION
You have been appointed as
(1) PROGRAMMER/ANALYST II    Title Code: 7277       Grade: 3
   Department:                PERSONNEL OFFICE
   Term of service:           02/14/95 to Indefinite
   Percent of Time:           100
   Personnel Program:   Admin & Prof        Appointment Type: Regular/Career

Your position is covered by the following union contract(s):
       (1) none
Please contact the Benefits Office if you have questions about your
benefits.
SALARY INFORMATION
For your records, the following indicates your salary, type of payment, and
source of funding immediately prior to your separation:
(1)REGULAR PAY - 3,000.00 Monthly    36,000.00 Annually
   Step    at 100% Fixed   Time, from account 9-662070-      -19900-    -1
   effective 02/14/95 with end date of Indefinite
```

Figure 7. Summary of Separation Action

```
                              University of California          Print Date 03/01/95
                                   SANTA BARBARA                        Page 1 of 1
                                  Personnel Report

NAME:  EMPLOYEE GAUCHO             ID: 555555555SOCIAL SECURITY NUMBER: 555-55-5555

PERSONNEL/EMPLOYEE INFORMATION:

Original Hire Date:           Retirement:U FICA:E   Home Department: PERSONNEL
OFFICE
Most Recent Hire Date: 02/14/95                     BELI: 01/31/95   Campus
Address:3515 SOUTH HALL
UC Student Status:     1      Prior UC Service Credit:
                                                    Campus Phone:
Date of Birth:         01/01/60                     Leave Of Absence Begin:
                                                    Next Salary Review: 2/07/95
Citizen: C Visa:              Leave Of Absence Return:06/30/95
                                                    Probationary End Date:09/01/95
Visa/Work Permit End:         Leave Type:           Last Day on Pay Status:
Check Disposition:     4      Separation Date:
                                                    Rsn:
APPOINTMENT/DISTRIBUTION INFORMATION:

Appt:10 Pers.Pgm:P Appt.Type:2  Bas/Pd Over:00/00  Title:7277 PROGRAMMER/ANALYST II
Appt Dept:ENGL

Begin:02/0l/95  End:99/99/99 Grade: 3 PCT:l.OO Ann/Hrly Rate:36,000.00 Rate:A Pay
Sch: M0 Time:E Lv:A  F/V: F

DIST:Loc/Acct/CC/Fund/Proj/Sub  FTE  PCT  Begin      End    Step  O/A  Pay
Per.Rate/Amt.  DOS PERQ WSP

11-662070- -19900- -1 1.00 1.000 02/14/95 99/99/99  3,000.00 REG
```

Figure 8. Personnel Report

X. POST AUTHORIZATION NOTIFICATION (PAN)

THE POST AUTHORIZATION NOTIFICATION SUB-SYSTEM

The Post Authorization Notification (PAN) Sub-system is the feature of the Payroll/Personnel System that electronically sends notifications to those with a need to review updates to the Employee Database (EDB) and time reporting transactions. Notifications are generated and sent immediately after an update Is completed. The notification includes information about the change along with related information to aid the reader's understanding and interpretation of the message.

PURPOSE OF THE PAN SUB-SYSTEM

PAN's primary function is to provide notification to a mandatory reviewer as part of appropriate organizational internal controls. Changes to the transaction must be reviewed in a timely manner. This after-the-fact review provides the necessary internal control mechanism to ensure that entries are correct and appropriate. The individual whose specific responsibility it is to review transactions for correctness and appropriateness is called the mandatory reviewer. The system also has the facility to provide notifications to other users, if desired.

PAN SUB-SYSTEM USERS

Users of the PAN sub-system include individuals with the following roles: preparers and reviewers. Each uses the system in differing ways. Preparers are the users who initiate the transaction. They can choose to add comments about the update, a description of content or send the notification to other users for optional review.

Reviewers are users who review the transactions for correctness and appropriateness, or receive notifications for informational purposes. There are two types of reviewers:

- Mandatory Reviewer - designated to the system in advance. Checks transaction for correctness and appropriateness. Accesses PAN via the Payroll/Personnel System functions.
- Informational Reviewer - designated to the system in advance. The review may also be designated by the preparer at the time of the original update. Receives an informational copy via PPS or E-Mail.

As a user, you should have an understanding of whether your role is that of preparer or reviewer. Each role carries a different set of responsibilities. If you are unclear about your role, please consult your designated manager. More detail on the responsibilities of preparers and reviewers is contained in Section II., *Implementation, Individual Accountability.*

NOTIFICATION DELIVERY/ADDRESSING

Immediately after an update, the system generates and sends notifications to the users who are designated to the system as reviewers. These reviewers must be established in advance. To designate reviewers to the system, complete the appropriate section of your department's organizational plan, that is maintained by your DSA.

The following sub-section covers general information that is needed by both preparers and reviewers. Detailed instructions for the use of PAN by preparers is covered in the sub-section, *The Use of PAN by Preparers.* Detailed instructions for the use of PAN by reviewers is covered in the sub-section, *The Use of PAN by Reviewers.*

PAN NOTIFICATIONS (GENERAL INFORMATION)

A PAN notification is a report that summarizes the transaction activity. It is generated for employee record changes and transactions that require review for internal control purposes. When you complete an update in EDB Entry/ Update, time reports and the data changes require a review for appropriateness, a PAN notification is automatically generated and sent to the reviewers specified in the system. For example, changes to title and pay require review, and will generate PAN notices; changes to an employee's home address do not require review, and will not generate a PAN notice.

Notifications can be viewed in the Payroll/Personnel System or in electronic mail (E-Mail) depending on the address specified for the reviewer. If an E-Mail address is specified, the notice will be delivered via E-Mail to the reviewer. Mandatory notices require review in PPS.

PAN notifications may be several pages. The following example shows several pages of a notification viewed online in the Payroll/Personnel PAN sub-system.

```
     UCIARV0-I0863            SBT PostAuth Notific         08/04/95   10:43:52
                                Activity Review            Userid:    SBXYZ01
[1]                                                          Page:    01 of 03

     App: PPP  Tran: RCIT  Userid: SBXYZ02  Date: 02/24/95  Time: 17:10:17
     ******************************** Top ****************************

     ---------------------------- Identification ---------------------------
     App: PPP  Tran: RCIT  Userid: SBXYZ02 Date: 02/24/95  Time: 17:10:17
     Rehire: Citizen/Perm Res                EMPLOYEE GAUCHO
     Description of Content:

     ------------------------------ Comments ------------------------------
[2]  THIS IS A SAMPLE OF EMPLOYEE GAUCHO

     ----------------------------- Notification ----------------------------
     -----------------------------------------------------------------------
     Summary of Notifications: 2 or 3 Page Notification
       Key Data Change
       Hire/Rehire




     Next Func: _____

     ===> _______________________________________________________

       F: 1-Help                  3-Return      4-Print                6-FwdNotif
       F:          8-Forward                                          12-Exit
```

Notification viewed online - page 1

Use the <F8 Forward> key to scroll to the next screen (page).

```
UCIARV0-I0863                SBT PostAuth Notific          08/04/95   10:43:52
                               Activity Review             Userid:     SBXYZ01
                                                             Page:     02 of 03

App: PPP  Tran: RCIT  Userid: SBXYZ02  Date: 02/24/95  Time: 17:10:17
The following key data change has been recorded.

                 Previous                           Current
Employee Name                                       EMPLOYEE GAUCHO
--------------------------------< HIRE >--------------------------------
Employee Name: EMPLOYEE GAUCHO          ID Number: 090729143

The following Rehire has been recorded.
Hire Date: 02/14/95      Home Department:  PERS  PERSONNEL SERVICES
Student Status: 1-Not Registered                 Citizenship: U.S. Citizen
Exclusively Represented: No Next Rvw. Dt-Typ: 07/95-2 Prob.Per.End: 09/01/95
Retirement: UCRP         FICA: OSASDI/Medicare
BELI: 1-Career Benefits  BELI Eff. Date: 02/14/95



Appointed as:
Next Func: _____

===> ________________________________________________________

  F:  1-Help                3-Return      4-Print                   6-FwdNotif
  F:  7-Backward 8-Forward                                       12-Exit
```

[2]

Notification viewed online - page 2

Use the <F8 Forward> key to scroll to the next screen (page).

```
UCIARV0-I0863                SBT PostAuth Notific         08/04/95   10:43:52
                               Activity Review            Userid:     SBXYZ01
                                                            Page:     03 of 03
[2]  App: PPP  Tran: RCIT  Userid: SBXYZ02  Date: 02/24/95  Time: 17:10:17
     10)   7277 PROGRAMMER/ANALYST II           Dept: PERSONNEL SERVICES
     Term of Service: 02/14/95 to Indefinite % Time: 1.00 Grade: 3 TUC: 99 LV:
     Personnel Program A&PS      Appt Type: Career     Basis:     Paid Over:

     11)  Pay Category: REGULAR      -   $3,000.00  Monthly       Step:
     at 100.00% Fixed Time, effective 02/14/95, with an end date of Indefinite
     from account 9-662070-      -19900-      -1

     ------------------------ Notification List ------------------------------
[3]  -Address-                 ------------ Name ----------- -Type -  -Status-
     SBXYZ02                   GAUCHO SUPERVISOR                M         N
     **************************** Bottom ***********************************

Next Func: _____

===> ______________________________________________________

  F: 1-Help             3-Return      4-Print                      6-FwdNotif
  F: 7-Backward 8-Forward                                          12-Exit
```

Notification viewed online - last page

Regardless of whether a notification is viewed online or in E-Mail, the content and structure of the notification is the same. PAN notifications are comprised of the following sections:

[1] *Identification:* This section lists the name of the screen or bundle that was updated, who updated it, the name associated with the employee record, and a brief summary of the action taken.

[2] *Notification:* This section lists the specific data elements that were changed and the new data that was entered for the employee. Related data elements are grouped together. An asterisk '*' indicates a change in value on an existing record + or - indicators.

[3] *Notification List:* This section lists all the users (in the form of a Logon ID or E-Mail address) to whom this notification was sent. The following system generated codes are used in the Type field:

F - Forwarded copy

M - Mandatory reviewer

R - Automatic distribution (review not mandatory)

U - User initiated

The following codes are used in the Status field:

Y - Reviewed

N - Not Reviewed

Note: E-Mail notifications will always indicate N since the system cannot determine that an E-Mailed notification has been reviewed.

THE USE OF PAN BY PREPARERS

PAN notifications are automatically generated and sent immediately after an update Is complete that requires review for internal control purposes. They are sent to the individuals who are designated in the system as reviewers - either mandatory or informational reviewers. This is all done automatically without your explicit action.

NORMAL SEQUENCE

Typically, as a preparer, you will use the PAN system in the following sequence:

1) After pressing <F5 Update> from a data entry or ECON screen, you are automatically positioned at the Comments Entry screen, where you can add comments to the notification (see the sub-section *Adding Comments*).
2) Press <F10 Comments> to display the Notification Preparation screen where you can add additional reviewers as desired (see the sub-section *Notification Preparation*). You may also enter a one line description in the Description of Content field.
3) Press <F11 Detail> to display the Activity Review screen, where you can review the notification before sending it (see the sub-section *Notifications Detail*).
4) Press <F5 Update> to update the EDB with the previously entered data and automatically send notifications.

NOTIFICATION PREPARATION

Immediately after pressing <F5 Update> from a data entry or ECON screen the Comments screen will automatically display.

```
UCENPR0-E0863              SBT PostAuth Notific          08/04/95   10:52:59
                          Notification Preparation       Userid:     SBXYZ01
                                                           Page:     01 of 01

App: PPP  Tran: EAPC  Userid: SBXYZ01  Date: ********  Time: ********
Appts./Distributions-Conden         EMPLOYEE GAUCHO
Description of Content:
MERIT INCREASE
                    -     -     -     -     -     -     -     -


------------------------- Notifications -------------------------------
C          Address                      Type ------------ Name -------------
  SBXYZ04                                 M
_ SBXYZ05                               _ U
_ ZZSMITH@UCSB.EDU                      _ U
_ -                                     -
_ -                                     -
_ -                                     -
_ -                                     -
_ -                                     -
_ -                                     -



Next Func: _____

===> ___________________________________________________

  F: 1-Help                  3-Return     4-Print     5-Update    6-Directory
  F:                         9-Jump      10-Comments 11-Detail   12-Exit
```

Notification Preparation Screen

This screen allows you to add a description of content, view the list of reviewers who are pre-designated to receive automatic system notifications, and add additional reviewers as desired.

To type an entry into the Description of Content field:

1) Press <Shift Tab> or <Home> to position the cursor on the Description of Content field (this action will position your cursor directly under the title of the field).
2) Type your one line entry, as desired. This will be used as the subject line on a notice sent by E-Mail.

To add reviewers to the notifications list:

1) Position the cursor at the next available line in the list titled "Address".
2) Type in the Logon ID or E-Mail address of the user that you are specifying to receive a copy of the notification. Press <Enter>. The system will automatically add a Type code of "U" for user initiated (if the additional reviewer is more likely to read E-Mail than to logon to the Payroll/Personnel System, you should use the E-Mail address).

When you have completed specifying additional users you may:

- Press <F10 Comments> to go to the notification preparation screen.
- Press <F11 Detail> to view the notification detail that will be sent (see sub-section *Notifications Detail*).
- Press <F5 Update> to complete the update and send the notification to the specified user(s). The message **U0007 Update Process Complete** will be displayed on the data entry screen.
- Press <F3 Return> to return to the data entry screen or bundle. Choose this option to make additional changes to the employee record, if desired. To re-invoke PAN, press <F5 Update> from the data entry screen.

ADDING COMMENTS

Pressing <F10 Comments> from the Notification Preparation screen will display the Comments Entry screen.

```
UCECOM0-E0863                 SBT PostAuth Notific           08/04/95   10:53:12
                                Comments Entry               Userid:     SBXYZ01
                                                               Page:     01 of 01

App: PPP  Tran: EAPC  Userid: SBXYZ01  Date: ********  Time: ********
Appts./Distributions-Conden            EMPLOYEE GAUCHO
Description of Content:
MERIT INCREASE


 ------------------------------- Comments --------------------------------
 SBXYZ01     MERIT INCREASE
_            -
_            -
_            -
_            -
_            -
_            -
_            -
_            -
_            -



Next Func: _____

===> ______________________________________________________

  F: 1-Help                  3-PrevMenu     4-Print      5-Update
  F:                         9-Jump        10-NotfPrep                  12-Exit
```

Comments Entry Screen

To add comments:

1) Type your desired message (the cursor is automatically positioned at the beginning of the Comments field). Comments can be entered in uppercase or lowercase, but will automatically be converted to uppercase.
2) To enter more than ten lines of comments, press <Enter> after filling the tenth line, then press <F8 Forward>. An additional page will be displayed.

When you have completed your entry you may:

- Press <F10 NotfPrep> to go to the Notification Preparation screen and add additional reviewers as desired (see sub-section *Notifications Preparation*).

- Press <F11 Detail> to view the notification detail that will be sent (see sub-section *Notifications Detail*).
- Press <F5 Update> to complete the update and send the notification to the specified user(s). The message **U0007 Update Process Complete** will be displayed on the data entry screen.
- Press <F3 Return> to return to the data entry screen or bundle. Choose this option to make additional changes to the employee record, if desired. To re-invoke PAN, press <F5 Update> from the data entry screen.

NOTIFICATIONS DETAIL

The detail feature allows you to view the notification as it will be seen by reviewers. When you press <F11 Detail> from the Notification Preparation screen or the Comments Entry screen, the Activity Review screen is displayed.

```
UCIARV0-I0863               SBT PostAuth Notific          08/04/95  18:22:38
                              Activity Review             Userid:    SBXYZ01
                                                            Page:    01 of 03

  App: PPP  Tran: RCIT  Userid: SBXYZ02  Date: 02/24/95  Time: 17:10:17
  ******************************** Top ****************************

  ----------------------------- Identification ---------------------------
  App: PPP  Tran: RCIT  Userid: SBXYZ01 Date: ********  Time: ********
  Appts./Distributions-Conden              EMPLOYEE GAUCHO
  Description of Content:
  MERIT INCREASE
  -------------------------------- Comments ------------------------------
  MERIT INCREASE

  ------------------------------ Notification ----------------------------
  ---------------------------------< APPT >-------------------------------
  Employee Name: EMPLOYEE GAUCHO          ID Number: 555555555

  The following change to Appointment information has been recorded.
  Hire Date:02/14/95    Home Department:PERS PERSONNEL SERVICES
  Exclusively Represented:No Next Rev. Dt-Typ:07/95-2 Prob.Per.End:09/01/95


Next Func: _____

===> ______________________________________________________

  F: 1-Help               3-Return                5-Update
  F:          8-Forward   9-Jump       10-Comments  11-NotfPrep    12-Exit
```

Activity Review Screen - first page

When you have completed viewing your entry you may:

- Press <F10 Comments> to enter text into the Comments field (see sub-section *Adding Comments*).
- Press <F11 NotfPrep> to return to the Notifications Preparations screen and add additional reviewers as desired (see sub-section *Notifications Preparation*).
- Press <F5 Update> to complete the update and send the notification to the specified user(s). The message **U0007 Update Process Complete** will be displayed on the data entry screen.
- Press <F3 Return> to return to the data entry screen or bundle. Choose this option to make additional changes to the employee record, if desired. To re-invoke PAN, press <F5 Update> from the data entry screen.

* Denotes change in data value on an existing record.

SETTING PAN OFF

In normal system operation, PAN will automatically appear for selected actions after successful completion of the Consistency Edit Process. Turning PAN off allows you to complete an update without viewing the PAN notification, adding comments, or adding reviewers. If you do not want to review a PAN notification before it is sent, do the following:

1) Move your cursor to the Command Line (===>).
2) Type *PAN OFF*. Press <Enter>.
3) You will receive the message: **U0209 PAN notification set off**.

Turning PAN off will not affect the automatic distribution of notifications to mandatory and informational reviewers. A PAN notice will always be generated and sent.

Once turned off, PAN will remain off for the remainder of your Payroll/ Personnel System session, or until you turn PAN on. If you exit the Payroll Personnel System, and then later begin a new session, PAN will once again be set to on.

SETTING PAN ON

If you have turned PAN off during your session, you may turn it on again to allow you to view and add comments and reviewers to a PAN notification before it is sent. You can do this at any time before pressing <F5 Update> for a screen or a bundle. To set PAN on do the following:

1) Move your cursor to the Command Line (===>).
2) Type *PAN ON*. Press <Enter>.
3) You will receive the message: **U0208 PAN notifications set on**.

Note: If you set PAN off, complete your update, and then realize that you need to forward a notification to an additional reviewer, you may do so by re-selecting the notification and adding a reviewer. Follow the steps detailed in the "Viewing Specific Notifications" sub-section to re-select the desired PAN notification and then the steps detailed in the "Forwarding Notifications" sub-section to send the notification to additional reviewers.

THE USE OF PAN BY REVIEWERS

PAN notifications can be viewed in the Payroll/ Personnel System or in E-Mail. However, mandatory reviewers are required to view notifications in the Payroll/Personnel System as this maintains an audit record. Viewing a PAN notification in E-Mail is done the same way that you would view any E-Mail message;

therefore, no specific instructions for E-Mail review are included. The following section discusses the selection and viewing of PAN notifications in the Payroll/Personnel System.

PAN MENU STRUCTURE

To access the PAN sub-system, type PSRV in the Next Func field on the Applications Main Menu. Press <Enter>. The PostAuth Notification Function Code Menu is displayed. It is the main PAN menu.

```
UCFMNU0-M0795                SBT PostAuth Notific         08/04/95   10:50:49
                              Function Code Menu          Userid:     SBXYZ01

_ INBX Incoming Notifications          _
_ INRS Notification Review Selection   _
_ IDIR Directory                       _
_                                      _
_                                      _
_                                      _
_                                      _
_                                      _
_                                      _
_                                      _
_                                      _
_                                      _
_                                      _
_                                      _
_                                      _
_                                      _
_                                      _
_                                      _
_                                      _
_                                      _
_                                      _
_                                      _
Next Func: _____

===> _______________________________________________________

  F: 1-Help                   3-Return      4-Print
  F:                          9-Jump                              12-Exit
```

PostAuth Notification Function Code Menu

The following functions are available from this menu:

INBX - Incoming Notifications: Displays a list of all notifications that have been sent to you. You may then select the notification you want to review online.

INRS - Notification Review Selection: Allows you to create a list of all PAN notifications that meet your selection criteria (such as a particular preparer and/or date prepared). You may then select the notification you want to review online.

IDIR - Directory: The Directory screen allows you to look up a user name and corresponding logon ID and/or E-Mail address.

To select one of the functions, type the four-letter function code in the Next Func field or position your cursor next to the function. Press <Enter>.

VIEWING PAN NOTIFICATIONS ONLINE (INBX)

In order to view an incoming notification, you must select it from your list of incoming notifications. This is a two step process: first, you must view a summary list of your incoming notifications; second, you select the notification to be viewed.

Step 1: Summary List

To view a summary list of your incoming notifications:

Type *INBX* in the Next Func field. Press <Enter>. A summary list of your incoming notifications is displayed on the Incoming Notifications screen.

```
UCINBX0-I0925                 SBT PostAuth Notific              08/04/95  10:37:04
                              Incoming Notifications            Userid:      SBXYZ01
                                                                 Page:       01 of 09

C   System    Tran       Prepared By                  Date        Comments
-   ------    ---- ------------------------ --------  --------
_   PPP       EAPP   SBXYZ01                          03/01/95    YES
     Summary: Appointments/Distributions              EMPLOYEE GAUCHO
S   PPP       EEID   SBXYZ02                          03/01/95    NO
     Summary: Employee Identification                 STUDENT X GAUCHO
_   PPP       EEID   SBXYZ03                          03/01/95    NO
     Summary: Employee Identification                 ACADEMIC X GAUCHO
_   PPP       EEID   SBXYZ04                          03/01/95    NO
     Summary: Employee Identification                 STAFF X GAUCHO
_   PPP       EEID   SBXYZ05                          03/01/95    NO
     Summary: Employee Identification                 EMPLOYEE GAUCHO




Next Func: _____
===> ____________________________________________________________

  F: 1-Help                    3-PrevMenu     4-Print
  F:            8-Forward      9-Jump                                  12-Exit
```

Incoming Notifications Screen

For each incoming notification, this screen lists the following summary information:

System: Abbreviation indicating the sub-system where the notification originated (PPS is the abbreviation for the Payroll/Personnel System).

Tran: The function code of the screen or bundle on which data was changed.

Prepared By: Logon ID of the person who updated the employee record.

Date: The date the update took place.

Comments: Indication (Yes or No) of whether the notification includes comments typed by the user.

Summary: Description of the screen or bundle on which the data was changed and the employee name.

Step 2: Notification Selection

To select the specific notification you want to review:

1) On the Incoming Notifications screen, tab to the notification you want to view. Type S to select the note. Press <Enter>. If you have more than one page of notification summaries, you may use <F7 Backward> and <F8 Forward> to scroll through the list.
2) To scroll through each page of the notification, use the <F8 Forward> key. To return to a previous page, use the <F7 Backward>key.
3) When you finish reviewing the notification, press <F3 Return> to return to the Incoming Notification Screen. The notification you just viewed will be a different color or brightness, depending on your terminal emulation.
4) You can select another notification for review, or you can return to the PostAuth Notification Function Code Menu by pressing <F3 PrevMenu>.

FORWARDING NOTIFICATIONS (F6 - FWDNOTIF)

While reviewing a notification online, you can forward it to other authorized users as desired. To forward a notification to another user:

1) While viewing the notification, press <F6 FwdNotif>. The Notification Forwarding screen is displayed. This screen lists the Logon IDs or E-Mail addresses of the reviewers who are presently designated to receive the notification.
2) Position the cursor at the next available line in the list of reviewers. Type the Logon ID or E-Mail address of the user you are specifying to receive a copy of the notification.

3) Press <F5 Update> to send the notification to the additional reviewers. The message **U0007 Update Process Complete** will be displayed. The notification will only be forwarded to the users you specifically added. It will not be re-sent to the others on the list.

DELETING NOTIFICATIONS FROM YOUR INBOX

You may want to delete notifications from your Inbox list. When you remove notifications from your Inbox, you are not deleting the notification from the system, but just removing the notification from your Inbox list. You can still access the notification by using the INRS function as described in the sub-section, *Viewing Specific Notifications.*

To delete a notification from your Inbox list:

1) On the Incoming Notifications screen, tab to the notification you want to remove.
2) Type D on the notification line next to the notification you want to remove. Press <Enter>.

VIEWING SPECIFIC NOTIFICATIONS (INRS)

The INRS function can be used to locate and view a specific notification. This feature allows you to access notifications that may have been deleted from your Inbox list or to research questions or patterns. For example, you may need to see a list of all the notifications prepared by a certain user. You will be able to select and view only the notifications generated for employees within your assigned security.

In order to view a notification, you must select it from a list of notifications. This is a two step process: first, you must create and view a summary list of notifications; second, you select the notification to be viewed.

Step 1: Summary List

To create a list of notifications that meet specific selection criteria:

1) Type INRS in the Next Func field to select Notification Review Selection. Press <Enter>.
2) The Notification Review Selection screen is displayed.

```
UCINRS0-I0863              SBT PostAuth Notific          08/04/95   10:37:04
                        Notification Review Selection    Userid:     SBXYZ01


Enter values for one or more of the following selection criteria:

Application   : PPP

Transaction   : HCIT

Originator ID: SBXYZ01

Department    : _

Date          : 020195

Time (Hour)   : _

Notification
  Addressee   : _



Next Func: _____

===> ______________________________________________________

  F: 1-Help                 3-PrevMenu
  F:                        9-Jump                          12-Exit
```

Notification Review Selection screen

3) Type the selection criteria values, as desired (Table 5. describes the selection criteria fields). You can specify more than one selection criteria on this screen, if desired. This enables you to access a more specific range of notifications.
4) Press <Enter>. A summary list of all the notifications that meet all the specified selection criteria is displayed on the

Notification Review Browse screen. This screen lists the following summary information for each notification:

System: Abbreviation indicating the sub-system where the notification originated (PPS is the abbreviation for the Payroll/Personnel System).

Tran: The function code of the screen or bundle on which data was changed.

Prepared By: Logon ID and name of the person who updated the employee record.

Date: The date the update took place.

Comments: Indication (Yes or No) of whether the notification includes comments typed by the user.

Summary: Description of the screen or bundle on which the data was changed and the employee name.

```
UCINRB0-I0863              SBT PostAuth Notific            08/04/95   10:50:17
                        Notification Review Browse          Userid:    SBXYZ01
                                                             Page:     01 of 12

C  System  Tran         Prepared By              Date       Comments
-  ------  ----  ------------------------  --------    --------
S  PPP     EAPP  SBXYZ01                          03/01/95   YES
     Summary: Appointments/Distributions          EMPLOYEE GAUCHO
_  PPP     EEID  SBXYZ02                          03/01/95   NO
     Summary: Employee Identification             STUDENT X GAUCHO
_  PPP     EEID  SBXYZ03                          03/01/95   NO
     Summary: Employee Identification             ACADEMIC X GAUCHO
_  PPP     EEID  SBXYZ04                          03/01/95   NO
     Summary: Employee Identification             STAFF X GAUCHO
_  PPP     EEID  SBXYZ05                          03/01/95   NO
     Summary: Employee Identification             EMPLOYEE GAUCHO







Next Func: _____

===> ______________________________________________________

  F: 1-Help                3-PrevMenu    4-Print
  F:          8-Forward    9-Jump                                 12-Exit
```

Notification Review Browse

To select the specific notification you want to review:

1) On the Notification Review Browse screen, tab to the notification you want to view. Type S to select a note. Press <Enter>. If you have more than one page of notification summaries, you may use <F7 Backward> and <F8 Forward> to scroll through the list.
2) To scroll through each page of the notification, use the <F8 Forward> key. To return to a previous page, use the <F7 Backward>key.
3) When you finish reviewing the notification, press <F3 Return> to return to the Notification Review Browse screen.
4) You can select another notification for review, or you can return to the PostAuth Notification Function Code Menu by pressing <F3 PrevMenu>.

Note: If the message U0204 Not authorized to view the selected notification is displayed, you do not have access to the employee record displayed in the PAN notification. Security Access to notifications is the same as is allowed in EDB Inquiry.

Table 5. Selection Criteria Fields

FIELD: VIEWING NOTIFICATIONS BY...	**DESCRIPTION**
Transaction	You can view notifications related to a specific transaction type, such as hire. Enter a screen or bundle function code to view all notifications of that type.
Originator ID	You can view notifications prepared by a specific user. Enter a Logon ID to view all notifications prepared by that user.
Department	For future use.
Date	You can view notifications that were prepared on a certain date. Enter a date in the format *mmddyy*.
Time (hour)	You can view notifications that were prepared within the time frame of one hour. Enter the time in the format *hh*.
Notification Addressee	You can view notifications that were sent to a specific user. Enter the Logon ID or E-Mail address of the person who received the notifications.

NOTE: The INRS screen will convert the address to upper case. If the original address entry is in lower or mixed case, the entered value will not match and the notices will be returned. This is an unanticipated-undocumented feature of the PAN sub system.

X. WEB INTERFACE)

WEB INTERFACE OVERVIEW

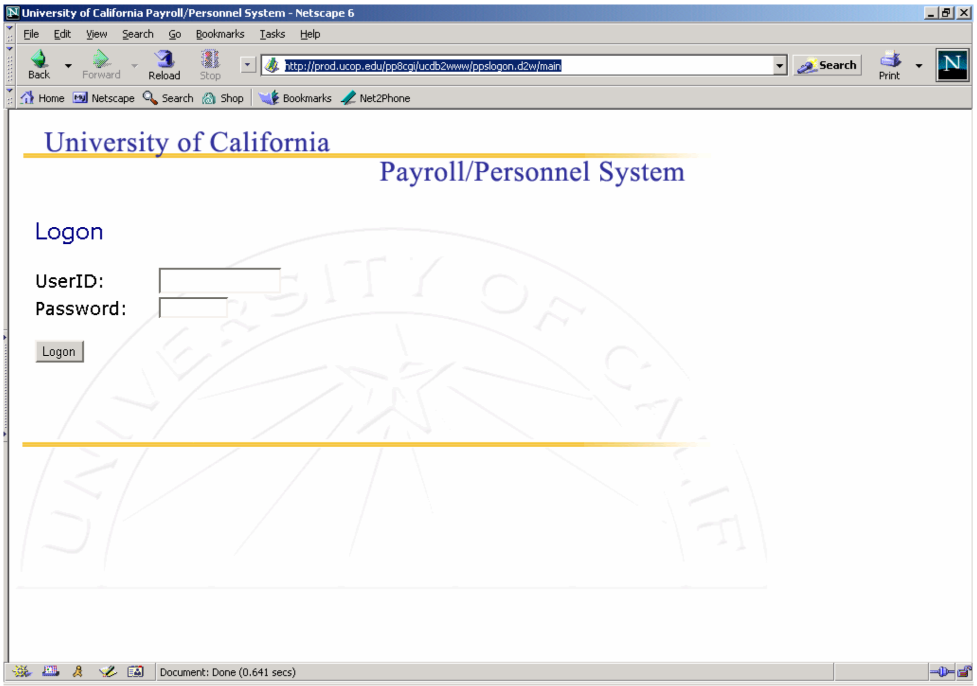
PPS can be accessed with either 1) a TN3270 terminal emulator and a character based CICS interface as discussed or 2) using a Web browser and a Graphical User Interface (GUI) developed for PPS modules. The TN3270/CICS log on and navigation are discussed in the previous sections of this Guide. This section refers to the Web browser/GUI interface.

The PPS application requires the use of frames. Minimum browser level is 1) Netscape 4.5 or higher, PC or Mac or 2) Microsoft Internet Explorer 5.0 or higher, PC or Mac. Prior versions of these browsers, or other browsers, may not format application pages precisely.

In addition, the computer's display resolution must be set to 800x600 or higher. Resolutions lower than this will not provide enough screen area to display the application pages without scrolling.

Insure your hardware and software meet the minimum specification. If they do not, discuss with your department's Computer Support Coordinator (CSC).

LOGON



Point your browser to http://prod.ucop.edu/pp8 to access the logon page.

Enter your assigned PPS UserID & Password and either press the <ENTER> key on your keyboard or click the "Logon" button with your mouse. You will either be logged on or you will need to respond to one of the following error messages –

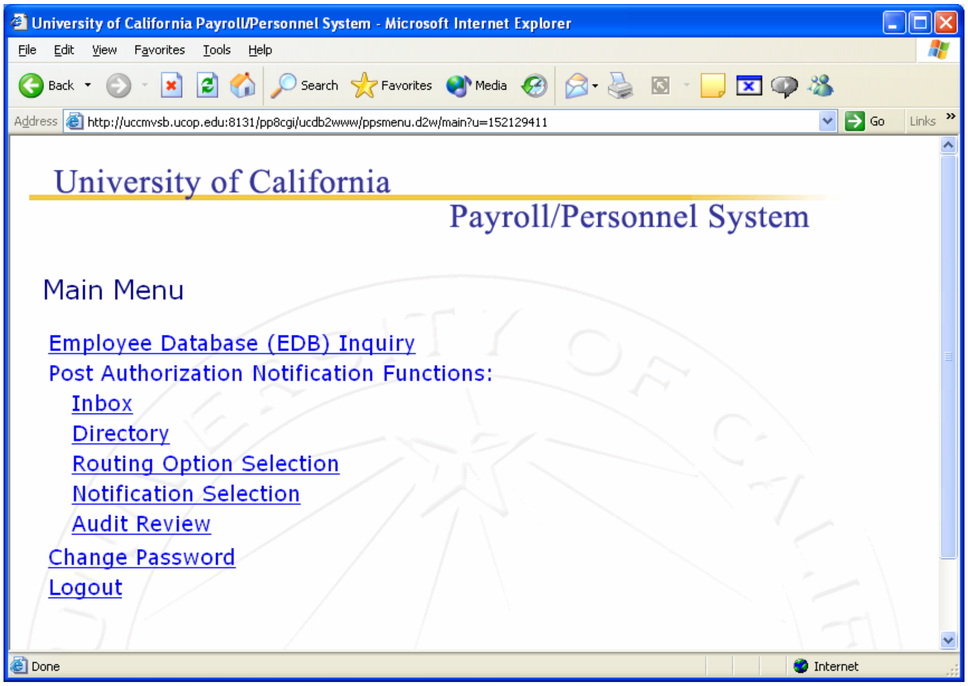
USERID not found

Password not matched to USERID

Password expired

Too few digits entered for password

MAIN MENU



At the time the example above was created, the available modules are the Employee Database (EDB) Inquiry and Post Authorization Notification Functions.. As additional Web/GUI modules are developed, they will be added to the Main Menu page. In addition to selecting the module you want to access you can also link to the Change Password page or Logout. You can select any of the items on the Main Menu by clicking on the Underlined link with your mouse. You will either be taken to the requested link or you will need to respond to the following error messages –

Not authorized for selected application

Application currently not available

WEB LOG ON AND BASIC NAVIGATION

Detail instructions are located at http://www.accounting.ucsb.edu/help/login_and_nav.shtml

SELECTION OF THE EMPLOYEE DATABASE (EDB) INQUIRY LINK

Detail instructions are located at http://www.accounting.ucsb.edu/help/edb_inquiry.shtml

SELECTION FROM THE POST AUTHORIZATION NOTIFICATION FUNCTIONS

Detail instructions are located at http://www.accounting.ucsb.edu/help/pan_functions.shtml

GLOSSARY

Bundle

A logical grouping of entry/update screens that may be needed to complete a payroll/personnel action. For example, the system contains a bundle called Staff New Hire (SHIR). This bundle will walk a user through a logical sequence of screens to complete the hiring of a staff employee. Once a user enters a bundle, it must be completed or canceled; there is no way to store or save part of the entry.

Cancel

The termination of a Create or Change function such that no change to the EDB takes place. All values on the screen are replaced with values as read from the EDB. If the values on the EDB are blank, the blank is displayed.

Change

The addition, modification or deletion of data on an existing employee record.

Consistency Edit

Consistency edits (or Con-Edits) test the values of related data elements in the context of one another. Data elements go through different consistency edits depending upon which data elements have been entered. For example, changing an employee's permanent address information will trigger one set of consistency edits related to domestic and foreign address data, but not the consistency edits related to appointments and distributions. During consistency editing, the system examines the employee record as it would look after the application of the entered data, to detect inconsistencies among groups of data elements.

Create

The establishment of a new employee record with a record key value that did not previously exist.

Employee ID Number

The nine digit number which identifies an individual's employee record. Always begins with an 8.

Employee Record

The set of data relating to an individual that is in the Employee Database (EDB).

Enter

To key new or changed employee record values on a screen.

F Key (e.g., F1, F2, etc.)

A numbered key on a terminal keyboard which is defined by the online application to perform a specified action when pressed.

Fastpath Navigation

The method of moving quickly from one screen to another. This is accomplished by entering the function code for the desired function in the Next Function field of any screen being displayed without returning to any menu.

Function Code

A four-character acronym which corresponds to an individual screen or bundle of screens.

Implied Maintenance

Implied maintenance tests data element value updates before the updates are applied to the employee record. These tests are performed through Consistency Edits, Personnel Action Code edits and maintenance functions which are performed for all employee records each time the employee updating process is executed.

Navigation

Navigation is the process of moving between screens and fields. It is accomplished through the use of function codes and standard keys, such as the <Tab> and F keys.

Nesting

The process of selecting a function outside of the entry/update sub-system, while retaining the data entered. For example, while entering data in a new hire bundle, you may select an EDB inquiry function for another employee to compare the data before proceeding with data entry for the new hire.

Payroll Personnel System Edit and Update Process

The process which receives the data entered on EDB data entry screens, evaluates it according to established criteria, and then either returns messages to the EDB Entry/Update ECON screen, or updates the EDB with entered values.

Record Key

A data element whose value serves as a unique identifier of an employee record. The three fields that can be used are Employee ID, Name and Social Security Number (SSN).

Scroll

Some of the functions may have more data than can be displayed on one screen. You can scroll backward and forward through the data by pressing the F7 and F8 keys, respectively.

Standard Navigation

The method of moving from one screen to another by selecting the desired function from a menu screen, and returning to the menu screen to select the next function.

Transaction

Data element changes submitted to the Payroll Personnel System Edit and Update process.

Update

The actual alteration of data in the Employee Database (EDB).

Value/Range Edit

Value and Range edits compare entered data with permissible values for data elements as defined on the Data Element Table. For example, date edits verify that entered data elements are acceptable as dates; that is, that the month fields fall between 01 and 12 and that the day figure is not greater than the number of days in the month specified. Value/Range edits are performed with respect to a single data element.