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INTRODUCTION

About the Payroll/Personnel Online System

The Payroll/Personnel Online System 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; both payroll and personnel information is maintained. Further, it is comprised of several subsystems that provide facilities for updating employee records, inquiring about employee records, calculating pay, and reporting information. The subsystems include: Online EDB Entry/Update; Online EDB Inquiry; Online Personnel Audit Record Inquiry; Time Reporting; and Online 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. Chief among these is the use of post-authorization notification, which informs 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.

Who is the Payroll/Personnel Online System User?

Users of the Payroll/Personnel Online System are employees of the University who have been authorized to have access to the information contained in the system. Access is granted to employees 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/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, and to successfully enter data. These primary system functions are discussed in separate chapters.

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 to 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.

For screen samples, see the procedures manual.

Access and General Application questions
For access and general application questions, e.g., password, navigation and screen issues, call:

- Human Resources

Policy and Procedure questions
For Payroll/Personnel issues and policy consultation, contact:

- Academic Personnel
- Human Resources
- Payroll Office
- Dean's Office or Vice Chancellor (if appropriate)

Data Definition questions
For data definition questions, such as data entry codes and valid ranges:

- Online Help- Accessed by positioning your cursor to the appropriate field and pressing the [F1] key when logged onto the Payroll/Personnel System.
- Payroll/Personnel Office- Contact the office appropriate to your question.
II. IMPLEMENTATION

In preparation for a successful implementation, this section introduces you to the key concepts of accountability, as well as to such issues as roles and emergency planning.

Accountability

Accountability is fundamental to the internal controls that underlie Online EDB Entry/Update. In the PAF process, review of individual transactions provided the primary internal control mechanism. Online EDB Entry/Update depends on individual accountability. It relies on individuals to understand their responsibilities and be fully accountable for carrying them out.

General Principles of Accountability

Following are several general principles of accountability:

- Units are responsible for the financial resources within their operations and for the use of them within the bounds of campus policy.
- Individuals who delegate accountability may only do so to the extent that this same accountability has been delegated to them.
- Individuals who delegate accountability are responsible for ensuring the qualifications of the individuals to whom they delegate.
- 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 is achieved by assigning separate individuals to the roles of primary preparer and mandatory reviewer.
Individual Accountability

Access to the Payroll/Personnel System 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 (see UCR Policy and Procedure Manual sections 400-35).

Individual accountability as contained in those sections is paraphrased below:

- 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 and changes in system data are to be made in a manner that is consistent with the University policies and procedures that govern the particular action to be changed.

- 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 pursue or use University records including, but not limited to, confidential information for personal interest or advantage.

- Proper password security is to be maintained by not revealing passwords.

- 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.

Policy Compliance

Control units or central administrative offices (when appropriate) monitor policy compliance using the following procedure:

1. Post transaction reviews are conducted of the entries into the Payroll/Personnel database made by preparers and inspected by mandatory reviewers. This post transaction review may be conducted by reviewing Post Authorization Notices or by reviewing other transaction reports generated from the Payroll/Personnel System.

2. Policy compliance violations will be investigated.
3. Control units and/or central administrative offices will follow up with the unit manager to resolve the issue and ensure that the appropriate action is taken. Appropriate action may include the revocation of logon rights for a user or department.

Failure to comply with UCR policies, rules, and applicable regulations is a serious breach of responsibility and may result in the revocation of logon rights for a user or department.

Organizational Roles and Responsibilities

The following roles comprise the required accountability structure: Department/Unit Head; Preparer; Mandatory Reviewer; and Back-up Preparer/Reviewer. The responsibilities associated with each role are outlined below:

**Department/Unit Head**

- Approve and review the accountability structure to ensure that it follows accepted accountability principles.
- Approve and review back-up plans including the assignment of back-up personnel.
- Monitor the effectiveness of the accountability delegations to ensure that any significant instances of noncompliance with policies and guidelines are uncovered.
- Ensure that appropriately skilled and knowledgeable personnel are assigned to be responsible for Online EDB Entry/Update transactions.
- Ensure that the staff member preparing payroll/personnel transactions has an appropriate working environment and proper equipment.
- Ensure that departmental preparer(s) and reviewer(s) under their authority have participated in the required training.

**Preparer**

The preparer is the individual responsible for entering data into the Online EDB Entry/Update System. The role of the preparer is to:

- 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 appropriate and accurate data are entered into fields on the Online EDB Entry/Update screens.

Understand basic policy and other regulatory requirements.

Resolve any questions that come into mind during the completion of the transaction or that are automatically raised via online edits and related error messages.

Record an appropriate explanation of the transaction when required.

Use the system in a manner consistent with UCR policies and procedures.

Make arrangements with back-up preparer for absences.

**Mandatory Reviewer**

The mandatory reviewer provides three functions: (1) a secondary check for correctness, (2) a check for appropriateness, and (3) a check for the possibility of entries that could result in fraudulent payments and loss of University funds. The role of the mandatory reviewer is to:

- Review all 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.

- Resolve any questions that come to mind. For example, this may be done by contacting the Preparer by telephone or email, or possibly referencing policy or other regulatory information at hand.

- 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 back-up reviewer for absences.

**Back-up Preparer/Reviewer**

The back-up preparer/ reviewer is the trained alternate. 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 his/her own record. The role of the back-up reviewer/preparer is to:
• Be trained at a level equivalent to the primary preparer or mandatory reviewer.

• Fulfill the same responsibilities of the primary preparer or mandatory reviewer as required.

• Maintain currency of knowledge.

Emergency Planning/ Backup

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

1. The primary preparer is on vacation, unexpectedly ill, or unavailable.

   Ensure that the back-up preparer is fully prepared, or assign or train a back-up as necessary. In a small department, it may be necessary to form a liaison through control unit with another department to accomplish the input. It is important to form these relationships before problems occur.

2. The preparer’s primary workstation fails.

   Ensure that more than one workstation in the preparer’s work environment is configured correctly to access the campus IBM mainframe.

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 may be necessary to seek help from the department with which a liaison was formed.

4. Damage occurs to building or office: fire, flood, earthquake, or other disaster.

   Call the appropriate Personnel Offices and Payroll Office for assistance.

5. The main system is down.

   Call the Computing and Communications at x 4741 for information on expected system availability. Full maintenance agreements are maintained with IBM to insure the most continuous service possible.

   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 Guidelines for Access to University Information Systems in the Policy and Procedures Manual, section 400.35.

Obtaining System Access

To request access to online systems, the following forms must be completed and filed with Institutional Computing:

- Signature Authorization form
- Logon ID Request/Computer Security and Use Agreement form
- Request for Access to Payroll Personnel Online System.

(Refer to Guidelines for Access to University Information Systems in the Policy and Procedures Manual for more information.)

System Passwords

Password Selection and Security

Passwords should be 5 - 8 alphanumeric characters must begin with an alphabetic character and may also include the following special characters: @, #, and $. 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, yet difficult for someone to readily guess.

Maintaining the confidentiality of passwords is essential to 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 Institutional Computing Security Administrator.
Password Expiration

All passwords automatically expire in 35 days. When a password expires, you are prompted to enter a new password. All passwords must be unique for 13 months and cannot be reused during that period.

Invalid Logon Attempts

If you attempt to logon with a valid logon ID and an incorrect password, the message ‘Invalid Password Entered’ is displayed. After 4 invalid password attempts, the logon ID is automatically canceled and you will need to call Institutional Computing to reactivate your logon ID.

Timeouts

After 60 minutes of inactivity, you are automatically logged off.

Automatic Cancellations

A login ID with no activity for 3 consecutive months will be canceled. You should make a point to logon at least once a month and change your password. This will ensure that your logon ID is not canceled.
IV. SYSTEM STRUCTURE

This system introduces the structural elements that comprise the Personnel/Payroll Online System: the screens and function keys. The system is comprised of five types of screens that are accessible individually or as part of a bundle of related functions. Function keys are provided to allow you to perform system actions such as accessing the Help subsystem, canceling a transaction, or updating an employee record. 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.

Screens

There are five types of screens in the Payroll Personnel Online system:

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

Menu Screens

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 (EEDB) is an example of a menu screen. It contains a list of Function Codes and the functions they support.

List Screens

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

Data Entry Screens

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 (EAPC) screen is an example of a data entry screen. It allows appointment and distribution information to be added, changed, or deleted.

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

Message screens display messages that result from edit and 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 displays the result of a consistency edit check. 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.

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 is an example of a message report screen.

Inquiry Screens

Inquiry screens display information that is contained on a Payroll/Personnel Online System database. After performing an update to a database, Inquiry screens can be used to view the updated information, along with other available data fields.

Bundles

A Bundle is a logical grouping of entry/update screens that may be needed to complete a payroll/personnel action. Functions 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 change required information.

Bundles have the following key features:

- Within each bundle, the functions are presented in a particular order. This order, or sequence, is intended to facilitate the completion of a designated action.
- Each bundle has a four-digit Function Code associated with it, such as ‘HIRE’ for a new hire.
- 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 Online EDB Entry/Update have the same basic layout. In general, they contain three sections of information: Header, Body, and Footer sections.

**Header Section**
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.

1. **Screen Identifier** — This thirteen character code uniquely identifies each Online EDB Entry/Update Screen. The screen identifier is composed of the characters:
   PPXXXX0-E0000
   PP—Indicates the Payroll/Personnel System
   XXXX—Indicates an abbreviation or acronym that uniquely identifies each screen.

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 screens.

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*Note: The date reflects the last time anything in the employee’s record was updated. It does not imply that the data elements appearing on the selected data entry screen were updated at that time.*

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5. **Screen Title** — The title is unique to each screen, such as, ‘Tax Information.’

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.

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.

4. **Pri Pay** — Primary Pay - This code indicates the normal pay schedule for the selected employee, such as 'MO' or 'MA'.

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 'Page 1 of 3' or 'Page 2 of 6.'

Body Section (Lines 5-19)
The Body section of the screen displays the content of the particular screen. Depending on the type of the screen, it will display information for data entry, messages, a menu, or a list. The body portion differs on each screen type.

Footer Section (Lines 20-24)
The Footer section appears on every screen. It contains information which will assist you in navigating from one function to another.

1. **Next Function** — (Next Func) You may enter a Function Code in this field.

2. **Employee Record Keys** — You may enter a value in any 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,(space)FIRST NAME(space)MIDDLE INITIAL.
   - **SSN** (Social Security Number) — This is the employee's Social Security Number as recorded on the database.

3. **System Message Line** — System messages will appear on this line.

4. **Command Line (===>)** — The Command Line may be used to enter F Key numbers if a keyboard does not have function keys. This area may also be used to enter special commands. (See Section 6.2 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 you to perform system actions such as accessing the Help subsystem, canceling a transaction, and 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. Following are the F Key definitions:

**F1: Help**

F1 invokes either screen-level Help or field-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 is used to print an image of the screen display on a designated printer.

**F5: Update**

F5 is used to submit the entered data to the EDB edit and update process.
**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) subsystem, 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 where 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. 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. If you press F9 when the cursor is positioned in the footer (line 20 through line 22), the cursor ‘jumps’ to its last 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 employee information has not been entered, F12 is used to exit the Payroll Personnel Online System.
- If information has been entered for update on one or more Online EDB Entry/Update screens, and you have ‘nested’ to another online system, such as Online EDB Inquiry, F12 is used to ‘exit’ the nested function and return to the Online EDB Entry/Update screen.
Note: If information has been entered on an Online Entry/Update screen, an attempt to use F12 before completing or canceling the update process will result in an error message.

Keyboard Reference

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<td>F1</td>
<td>Help</td>
</tr>
<tr>
<td>F2</td>
<td>Cancel</td>
</tr>
<tr>
<td>F3</td>
<td>Previous Menu/Return</td>
</tr>
<tr>
<td>F4</td>
<td>Print</td>
</tr>
<tr>
<td>F5</td>
<td>Update</td>
</tr>
<tr>
<td>F6</td>
<td>Next Message (ECON screen); Forward (PAN)</td>
</tr>
<tr>
<td>F7</td>
<td>Backward-for scrolling</td>
</tr>
<tr>
<td>F8</td>
<td>Forward-for scrolling</td>
</tr>
<tr>
<td>F9</td>
<td>Jump</td>
</tr>
<tr>
<td>F10</td>
<td>Previous Function- for use in a bundle</td>
</tr>
<tr>
<td>F11</td>
<td>Next Function- for use in a bundle</td>
</tr>
<tr>
<td>F12</td>
<td>Exit; Exit Nest</td>
</tr>
<tr>
<td>&lt;Enter&gt;</td>
<td>The &lt;Enter&gt; key is used to signal that information keyed on the screen should be submitted for preliminary range/value edits.</td>
</tr>
<tr>
<td>&lt;End&gt;</td>
<td>The &lt;End&gt; key (also known as &lt;Delete EOF&gt; key) is used to blank out the remaining information in the data entry field.</td>
</tr>
<tr>
<td>&lt;*&gt;</td>
<td>The &lt;*&gt; (asterisk) is used to delete data in an individual field.</td>
</tr>
<tr>
<td>&lt;Tab/Back Tab&gt;</td>
<td>The &lt;Tab&gt; key and &lt;Back Tab&gt; key are used to move the cursor from one modifiable field to another. Label fields or fields which are display-only will be skipped.</td>
</tr>
<tr>
<td>&lt;New Line&gt;</td>
<td>The &lt;New Line&gt; key is used to position the cursor on the first modifiable field on the next line of the screen.</td>
</tr>
</tbody>
</table>

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>.
V. NAVIGATION

Navigation is the process of moving from one screen/function to another, as well as moving the cursor within a screen. It is performed 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/Back Tab> keys

Positions the cursor in the next or previous data entry field.

- The <Tab> key will move the cursor to the next modifiable data field.
- The <Back Tab> key will move the cursor to the previous modifiable data field.

New Line key

Positions the cursor in the next 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

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.

EAPC Jump Function

Moves the cursor from the body of the screen to the command line before updating an employee record. If the employee record has not been modified, the JUMP function moves the cursor from the detail portion of the screen to the Next Func field.

Cursor arrow keys

Positions the cursor to any position on a screen. Use of these keys for navigation is not recommended.
Automatic movement (autoskip)

When you complete a data entry field, the cursor moves to the next data entry position automatically. Note that if you do not fill the field (i.e., information has not been entered in the last position of the data entry field), the cursor must be moved with the <Tab/Back Tab> key or the <New Line> key to the next data entry field.

Scrolling

Scrolling is the method used to display additional data associated within a single screen function.

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.

• Press F7 to display the previous page of available data.
• Press F8 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.

Navigating Within a Bundle

Once a bundle has been selected, you navigate using the F10 and F11 keys:

<F10 Prev Func>
Select <F10 PrevFunc> key to move to a previous screen within the bundle.

<F11 Next Func>
Select <F11 NextFunc> key to move to the next screen within a bundle.

Once a bundle function has been selected, and the update process has begun, you cannot select a function that is not included in the bundle.

It is not necessary to enter data on every screen in a bundle before attempting to update. However, incomplete or incorrect data entry in a bundle will invoke the consistency edit process. Consistency edits must be satisfied before an update will be successfully completed.
Function Selection (Screen)

You may select an individual screen by entering the screen's Function Code in the Next Func field. You must also specify a record key before pressing <Enter>, or the Employee Browse Screen will automatically appear.

For example: To access the EPD1 Screen for an employee whose ID number is 200000078:

1. Enter Function Code EPD1 in Next Func field.
2. Enter Employee ID record key.
3. Press <Enter>.

Bundle Selection

You may select groups of related functions called 'bundles' by:

Hire/Rehire Bundles
Entering the Function code in the Next Func field and pressing <Enter>.

Other Bundle Functions
Entering the Function code in the Next Func field, then the employee record key, and pressing <Enter>.

For example: To select the Hire bundle:

1. Place the cursor in the Next Func field.
2. Type: HIRE.
3. Press <Enter>.

Accessing Employee Records

The system provides two methods to access specified 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 browse functions to locate employee information if you are unfamiliar with the required keys 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 — The nine-digit ID is entered with the leading zero.
- Name — The Name is entered Last Name, (space) First Name (space) Middle Initial (e.g., Morris, John L.). There must be a comma after the last name, then a space after the comma or the Employee Browse Screen will automatically appear.
- SSN — The Social Security Number is entered without hyphens (e.g., 987654321).

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 from a menu or data entry screen.
- By entering a non-unique or incomplete employee record key from a screen.
- By selecting screen without entering an employee record key.

To select the employee record to be viewed:

1. Position the cursor to the left of the employee information on the list and press <Enter>.

2. Enter the employee record key in the corresponding key field.

Hints For Accessing Employee Records

To select an employee record and data entry screen, enter a Function Code in the Next Func field and the employee record key.

To display the same screen function for a different employee, enter a new employee record key.

To display a different screen function for the same employee, enter a new employee record key.
To display a different screen function for a different employee, enter a new Function Code and a new employee record key.

**Fast Pathing**

*Fast pathing* is a navigational technique that allows you to move from any screen directly to any of the EDB Entry/Update, EDB Inquiry bypassing all other menus.

Or

From the Online Applications Main Menu, specify the screen by typing the name in the Next Func field. Next, specify the employee record in the database by typing either the Name, SSN, or ID in the appropriate entry field.

**Nesting**

*Nesting* is a term used to describe the process of temporarily leaving the current subsystem to access another online subsystem.

When using the EDB Entry/Update subsystem, you may view an EDB inquiry screen by typing the Function code of an inquiry screen in the Next Func field. Notice 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 an update is in progress. To return to update, press F12.

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

To return to Online EDB Entry/Update, press <F12 Exit> on the IAPT screen and you will return to the ELVE screen.
VI. DATA ENTRY

Entering Data

On each data entry screen, you may add new data, change 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 a change is not desired to that particular field, position the cursor at the desired by using the <Tab> key or <New Line> 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.

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. 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 <Delete EOF> key or space over the unrelated data in the field.
Note: Pressing <Tab> after the new data is entered will not erase the remaining unrelated data in the field.

- If you overkey 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 <Delete 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.
- At any time after entering data in one or more fields, you may press <Enter> to perform preliminary edits on the entered data.
- 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 at the desired value and pressing <F4 Copy>.
- Range/value edits are also performed and any errors are highlighted when <F5 Update>, <F10 Next Func> or <F11 PrevFunc> is pressed. All range/value errors must be corrected before continuing with the update or proceeding to another screen in a bundle.
- At times you may need to delete the contents of a field 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.

Note: The ' ** ' is passed to the edit process as an indication that the data element should be deleted (blanked out). The use of the ' ** ' to delete data is only used in a few special circumstances.

Special Data Entry Commands

Special commands are available on the following screens to facilitate the data entry process. Special commands are typed on the command line. Special commands are available in the following data entry screens:

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

**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 an appointment or distribution line 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.

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**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.

**DELETE COMMAND**

*Note: The delete command is only used in exceptional circumstances. It is not to be used to end appointment and distribution lines.*

This command is used to delete existing appointment or distribution information. The associated line of information will be blanked out when this command is entered. Note that the actual delete does not take place until the update is requested; therefore the 'blanked out' information can be recovered by pressing <F2 Cancel>.

- **DELETE nn**, where nn is an appointment or distribution number.
- **DELETE aa,bb,cc,...**, where aa is one appointment or distribution number to delete, bb is a second number to delete, cc is a third number to delete, and so on. This allows you to delete several numbers with a single command.

An error message is issued if the entered appointment or distribution number does not exist for the employee or is an invalid number.

**GOTO COMMANDS**

This command is used to place the cursor on the screen which contains information associated with the entered appointment number.

- **A nn**, where nn is an appointment number.
- **D nn**, where nn is a distribution number.
- **GOTO nn**, where nn is an appointment or distribution number.

An error message is issued if there is not a matching distribution number or if the entered number is not a valid distribution number.
EBND Screen: Special Commands

- ADD n, where n is a bond number. Adds a bond.
- DELETE n, where n is a bond number. Deletes a bond. An error message is issued if the bond number entered does not exist for the employee, or if an invalid bond number is entered.
- GOTO nn, where nn is a bond number. Positions the cursor on the screen which contains information associated with the entered bond number. An error message is issued if an invalid bond number is entered.

EDEP Screen: Special Commands
(Central Office use only)

- GOTO nn, where nn is the dependent number. Moves the cursor to the information associated with the dependent number entered.
- DELETE nn, where nn is the dependent number. Deletes the information associated with the entered dependent number. An error message is issued if there is not a match for the entered dependent number for the employee.

ELOF Screen: Special Commands
(Central Office use only)

- DELETE ttttddddddmmddyy, where ttt is the Layoff Title Code, dddd.ddd is the Layoff Department code, and mmddyy is the Layoff Notice Date. Deletes the information associated with the entered layoff data key. An error message is issued if there is not a match for the entered layoff data key for the employee.
VII. ONLINE HELP

Overview

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

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

**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 screens of information are available.
   - More — — Previous and additional screens 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 certain 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 <F1 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 <F1 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 screen 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.

F Keys are used to navigate among the Help windows. Help function keys and their corresponding commands are as follows:
Note: Online Help F Key functions are different from the EDB Entry/Update F Key functions.

<table>
<thead>
<tr>
<th>F Key</th>
<th>Command</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>F1</td>
<td>Help</td>
<td>Display help for Help.</td>
</tr>
<tr>
<td>F2</td>
<td>EX help</td>
<td>Display screen-level help.</td>
</tr>
<tr>
<td>F3</td>
<td>Exit</td>
<td>Return to the underlying screen.</td>
</tr>
<tr>
<td>F4</td>
<td>Copy</td>
<td>Copy the value selected to the entry/update field.</td>
</tr>
<tr>
<td>No F Key</td>
<td>Find String</td>
<td>Find the first occurrence of the specified character string.</td>
</tr>
<tr>
<td>F5</td>
<td>FN</td>
<td>Find the next occurrence of the specified character string.</td>
</tr>
<tr>
<td>F7</td>
<td>BKwd</td>
<td>Display the previous page of help text.</td>
</tr>
<tr>
<td>F8</td>
<td>FWd</td>
<td>Display the next page of help text.</td>
</tr>
<tr>
<td>F9</td>
<td>Level1</td>
<td>Return to the first help panel.</td>
</tr>
<tr>
<td>F12</td>
<td>Cancel</td>
<td>Return to the entry/update screen or the previous level of help.</td>
</tr>
</tbody>
</table>

HINTS:

- 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 clears all the Help windows off your screen, regardless of how many 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.

**Find**
The Find command has two variations:

- **F string**: where *string* is the character string to be found. Entering the 'F string' command causes Help to display the first occurrence in the Help text of the specified character string. If there is not a match to the entered character string, the message **NOT FOUND** is displayed in the upper left of the Help window. If there is a match, the cursor is positioned on the specified character string.

- **FN**: finds the next occurrence of the character string specified in the previous Find command.

**F12 - Cancel**
Pressing <F12> on any Help window causes a return to the previous Help window, or application screen if no underlying Help window is displayed.
VIII. SYSTEM MESSAGES

In the Online 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 navigation errors, a system message will alert you that the action you requested is not valid and provide guidelines on valid data entry to proceed.

- **Data Entry messages:**
  The system performs range/value edits to catch invalid data element 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 section: Data Entry Messages.

- **Consistency Edit messages:**
  When you attempt to update the database, the system edit process checks all the data entered 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 <F5 Update> on a data entry screen before entering any data, the following message is displayed: U0025 No update data entered is displayed.

**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. There is no response required for an informational message. For example, if you press <F2 Cancel>, the message U0008 Process Canceled is displayed.

**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, or press <F2 Cancel> to cancel the action.

For example: When two users simultaneously enter data for the same employee, the following message will be displayed on the screen of the second user to press the <F5 Update> key: P0603 Intervening update has occurred.

**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 required data before processing can continue, OR press <F2 Cancel> to cancel the transaction. In general, the process is similar to the following:

- A user enters data on the entry screen.
- Range/value edits are performed on the entered data each time you press either <Enter>, <F5 Update>, <F10 PrevFunc>, or <F11 Next Func>. A message is issued if one or more fields contain an invalid value. You must supply a valid value before the update can proceed.

For example: You have entered a value of '0' in the Assigned BEL1 field on the EPER screen. Message P0601 Field out of range or illegal value is displayed because the only valid values for Assigned BEL1 are '1' through '9'.

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

**Consistency Edit Messages**

The Consistency Edit (ECON) screen is displayed when you submit changes for update by pressing <F5 Update> and the edit process detects one or more errors associated with the entered data.

Examine the message(s), make corrections if necessary, and press <F5 Update> again to proceed with the update, OR press <F2 Cancel> to cancel the update.

If the edit process does not issue any error messages, the ECON screen will not be displayed.
If there are Warning or Employee Reject errors associated with the entered data, the ECON screen appears automatically.

*Note:* The ECON screen cannot be requested by system users.

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**Message Severity**

Each message displayed on the ECON screen has an associated severity level. The following table shows the message severities that are used in the Online EDB Entry/Update process.

<table>
<thead>
<tr>
<th>Name</th>
<th>Abbreviation</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Employee Activity Reject</td>
<td>EMPL REJ</td>
<td>This severity indicates that the employee record will not be updated with the entered changes. The identified error must be corrected or the update must be canceled.</td>
</tr>
<tr>
<td>Data Override</td>
<td>DATA OVR</td>
<td>Entered data will be replaced with a derived value, or a missing required field will be derived by the system.</td>
</tr>
<tr>
<td>Warning</td>
<td>WARNING</td>
<td>There is a possible error or inconsistency in the entered data. The change will be accepted as entered.</td>
</tr>
<tr>
<td>Implied Maintenance</td>
<td>IMPLD MT</td>
<td>The system will derive or re-derive one or more data element values based on other changes made.</td>
</tr>
<tr>
<td>Informational</td>
<td>INFORMTL</td>
<td>The system has detected a condition that is not an error but which may be helpful for the user to be aware of.</td>
</tr>
</tbody>
</table>
**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. 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
- Redisplay 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 valid values for TRIP Reduction Percentage and TRIP Duration on the ELVE screen, but leave TRIP Begin Date blank, the input is accepted because there are no range/value edits detected.

When you press <F5 Update>, the edit process detects missing information and displays message **08451 ALL THREE VALID TRIP DATA ELEMENTS REQUIRED** on the ECON screen. (See screen example on the following page.) The cursor is positioned on data element 0482, TRIP PERCENT, and <F6 NextMsg> is displayed to indicate that there are more messages to be viewed.

When you press <F6 NextMsg>, message 08451 is displayed again, this time with the cursor positioned on data element 0483, TRIP DURATION.

Continue pressing <F6 NextMsg> to review all messages on the ECON screen.

**Correcting Data Errors on ECON**

You may change data element values directly on the ECON screen for any data element that is displayed. This may be done even if it is not a data element that you changed on a data entry screen.
After one or more data elements have been corrected on the ECON screen, you can:

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

If 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> and the employee record will be updated. You will be returned to the last data entry screen and the message U0007 Update process complete will be displayed on the message line of the data entry screen. The ECON screen will not be re-displayed.

However, there are two instances where correcting data on the ECON screen may not be possible. In both instances, the cursor cannot be positioned on these fields on the ECON screen.

- If a field is restricted from update and/or identified as a Key Field, it will be illegal for you to update. You will not be able to enter data in those fields.
- The second case is user specific. If you do not have access to the data entry screen on which the data element appears, update of that element will not be allowed.

If the restricted data elements are associated with a message which has a severity of Employee Activity Reject (Empl Rej) or greater, you will need to cancel the proposed update. If the severity level is less, you may update the database. In these situations, it is recommended that you contact the appropriate functional office in order to correct the information inconsistency.

Returning to a Data Entry Screen from ECON

The option to return to the data entry screens is also provided. For instance, you may want to view data in the context of other data on a screen before determining the correct value. You may also decide that data that is NOT displayed on the ECON screen needs to be entered before the update proceeds.

The F3 key returns you to the screen that was displayed at the time <F5 Update> was requested. The data entry screens will contain any changes you made before update was requested as well as 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 when additional changes, if any, have been made, and the data will again be edited.

You may press <F3 Return> and the EPD1 screen will be displayed. The changes that you have entered are still on the screen.

You determine that the 'F' in the Foreign Address Indicator field is a mistake and change it to an 'A' on the EPD1 screen, as shown below.
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.

**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 UPDATE was requested. None of the data entered before the UPDATE was requested will be retained. The data entry screens will present the data as it existed before the most recent changes were entered. For example, the system detects an inconsistency between the Citizenship Code and the number of federal exemptions and issues a message. You do not know the employee's correct citizenship status and therefore decide to cancel the update by pressing <F2 Cancel>.

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

**Completing the Update from ECON**

When you are satisfied that all necessary data changes have been made, press <F5 Update> from the ECON screen. If data changes have been made on the ECON screen, the data will be re-edited, and any messages which are issued will be displayed. If you have made any changes, these messages should be reviewed to make sure the corrected data did not cause additional errors. If additional data is not changed, again press <F5 Update> to proceed with the update.

For example: The only message issued is a warning. You determine the update can proceed without the dependent SSN and press <F5 Update>.

You are returned to the data entry screen, where the message indicates the update process is complete.

**Nesting from ECON**

Nesting directly from the ECON screen is not allowed. If desired, you can nest to the Online EDB Inquiry System by pressing <F3 Return> to return to the data entry screen, and then enter the desired inquiry function in the Next Func field.

**Note:** While you are 'nested,' the data is retained on the entry/update screens. It will not be reflected on the Inquiry screens until the update process is completed.

The message <Upd in Prog> will be displayed at the far right of the Command line to alert you that you must return to the update process.

For additional information about nesting, see Section V. NAVIGATION; Nesting.
IX. PRINTING EMPLOYEE DOCUMENTS

Overview

Employee Documents is the feature of the Payroll/Personnel Online System that provides for printing of employee record information. After you update an employee record, you can print the employee document associated with the personnel process you performed. Figures 1-5, 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 Institutional Computing mainframe. (If you are unsure whether you have a printer nearby connected to the Institutional Computing mainframe, consult your departmental PPS Contact.)

2. Use the IDOC function to print employee documents.

The IDOC menus will provide you with a full list of available choices.

Selecting an Employee Document to Print

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

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

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

When the document has printed, your cursor will be on the Document Selection Menu and the message ‘P0649 Document(s) printed’ will be displayed. Once you have finished printing the documents, press <F3 Prev Menu> 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 MSS Contact for technical assistance with Institutional Computing.*
Secondary Menus

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

Change-in-Status Additional Menu

From the Document Selection Menu, select a Change-in-Status document. Another selection menu will appear that contains the following document 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
- Other Payrate Change

Changes in Personal Info
- Change in personal Information
- Change in Visa Type
- Extension of Visa End Date

You can select up to two actions that will be included in the text of the Change-in-Status Document. To select a document, move the cursor to the next desired action and enter an 'S.' Press <F5 Gen Doc> 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, your cursor will be on the Document Selection Menu and the message ‘P0649 Document(s) printed’ will be displayed. Once you have finished printing the documents, press <F3 Prev Menu> 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 enter an ‘S.’ Press <F5 Gen Doc> to generate the document.

When the document has printed, your cursor will be on the Document Selection Menu and the message ‘P0649 Document(s) printed’ will be displayed. Once you have finished printing the documents, press <F3 Prev Menu> to return to the main menu.
X. INTRODUCTION TO POST AUTHORIZATION NOTIFICATION

What is the Post Authorization Notification Subsystem?

The Post Authorization Notification Subsystem (PAN) is the feature of the Online Payroll/Personnel System that electronically sends notifications to those with a need to review updates to the Employee Database (EDB). Notifications are generated and forwarded simultaneously with a change being registered in the EDB. The notification includes information about the change along with related information to aid the reader's understanding and interpretation of the message.

What is the PAN Subsystem Used For?

PAN’s primary function is to provide notifications to reviewers as part of appropriate organizational internal controls. Every change made to the EDB must be reviewed in a timely manner. This after-the-fact review provides the necessary internal control mechanism to insure that entries to the EDB are correct and appropriate. The individual whose specific responsibility it is to review EDB transactions for correctness and appropriateness is called the Mandatory Reviewer. The system also has the facility to provide notifications to other users, if desired.

Who Are Users of the PAN Subsystem?

Users of the PAN subsystem include individuals with the following roles: Preparers and Reviewers. Each uses the system in differing ways. The Preparer is the user that is registering a change to the EDB. They can choose to add a description of content and comments about the transaction or forward the notification to other users for optional review. Reviewers are users that review EDB transactions for correctness and appropriateness, and/or for informational purposes.

Instructions for the use of PAN by Preparers is covered in the section titled: ‘The Use Of PAN by Preparers’. Instructions for the use of PAN by Reviewers is covered in the section titled: ‘The Use Of PAN by Reviewers.’ 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 supervisor. The following section ‘PAN Notifications’ covers general information that is needed by both Preparers and Reviewers.
**PAN Notifications (General Information)**

A PAN notification is a report that summarizes employee record activity. When you complete an update in EDB Entry/Update, a PAN notification is automatically generated and forwarded to the reviewers specified to the system.

Notifications can be viewed in the Payroll/Personnel Online System in electronic mail (email). PAN notifications may be several pages.

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

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

- **Identification:** This section lists: the name of the screen that was updated, who updated it, the name associated with the employee record, and a brief summary of the action taken. (The content of this section is similar to the header section of EDB Entry/Update screens.)
- **Notification:** This section lists the specific data elements that were changed and the new data that was entered for the employee. (This section is the main body of the notification.)
- **Notification List:** This section lists all the users (in the form of a Logon ID or email address) to whom this notification was forwarded. The following codes are used in the Type Field:
  
  - **M** - Mandatory reviewer
  - **F** - Forwarded copy
  - **U** - User initiated

The following codes are used in the Status Field:

- **Y** - Reviewed
- **N** - Not Reviewed

**The Use of PAN by Preparers**

As stated above, PAN notifications are automatically generated and forwarded simultaneously with a change being registered in the EDB. They are forwarded to the individuals that are designated in the system as reviewers—either mandatory or optional reviewers. This is all done automatically without your explicit action.
Adding Comments/Description of Content

There are two fields in the notification that allow you to add additional descriptive information. They are the Description of Content Field and the Comments Field. To add descriptive information to either field do the following:

1. Position your cursor at the beginning of the field. (For the Description of Content field, the beginning of the field is directly below the field title.)

2. Type your desired message.

3. To complete the update and send the notification, press <F5 Update>. The message U0007 Update Process Complete will be displayed.

Forwarding Notifications (F6 - FwdNotif)

1. While viewing a notification, press <F6 FwdNotif>. The Notification Forwarding screen is displayed. This screen lists the Logon ID or email address of the reviewers that are presently designated to receive the notification.

2. Position the cursor at the next available line in the list of Reviewers. Type in the Logon ID or email address of the user that you are specifying to receive a copy of the notification.

3. 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. The notification will only be forwarded to the users that you specifically added. It will not be re-sent to the others on the list.

The PAN ON/OFF Feature

The PAN On/Off feature of Online EDB Entry/Update allows you to specify whether or not you want to view outgoing notifications before they are sent.

Note: PAN ON/OFF does not affect the automatic notification to the mandatory reviewer. A PAN notice will always be generated and sent to reviewers regardless of whether PAN is set to ON or OFF.

Setting PAN OFF

Turning PAN off allows you to complete an update without viewing the PAN message. To end your ability to view 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 system message: U0209 PAN notification set off.

Turning PAN off will not affect the automatic notification to the mandatory reviewer. A PAN notice will always be generated and sent to reviewers regardless of whether PAN is set to ON or OFF.

Once turned off, PAN will remain off for the remainder of your login session, or until you turn it on. Therefore you can turn PAN off for the remainder of your current login session. Or, you can turn it off and on, as needed.

Setting PAN ON
Set PAN on to view a PAN notification before it is sent. You can do this at any time before completing a screen or 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 system 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 Notification section to re-select your desired PAN notification and then the steps detailed in the Forwarding Notifications section to send the notification to additional reviewers.

The Use of PAN Notifications by Reviewers
As stated above, PAN notifications can be viewed in the Payroll/Personnel Online System or in email. However, Mandatory Reviewers are required to view notifications in the Payroll/Personnel Online System as this maintains an audit record. Viewing a PAN notification in email is done the same way that you would view any email message; therefore, no specific instructions for email review are included. The following section discusses the selection and viewing of PAN notifications in the Payroll/Personnel Online System.

PAN Menu Structure
The PostAuth Notification menu is the main PAN menu.

From this menu, you can perform the following actions:
• View a summary list of incoming notifications
• Review PAN notification detail
• Forward a notification to other authorized users
• View a summary list of notifications, based on a range of selection criteria

The following functions are available from this menu:

INBX - Incoming Notifications: Access the Incoming Notifications screen to see a list of all current notifications, then select the notification you want to review online.

INRS - Notification Review Selection: Access the Notification Review Selection screen, enter selection criteria values, and view a summary list of all notifications within the selected range.

IDIR - Directory: Access the Directory screen to look up the name and email address of an authorized user.

To select one of the functions, type the four-letter function code in the Next Func field.

**Viewing PAN Notifications Online (INBX)**

Viewing a PAN notification online is a two step process. First, it is necessary to view a summary list of incoming notifications. Second the actual notification is selected and viewed.

1. SUMMARY LIST

To view a summary list of incoming notifications:

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

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

**System:**

Abbreviation indicating the subsystem where the notification originated. (PPS is the abbreviation for the Payroll/Personnel Online 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.

2. NOTIFICATION SELECTION
To select the specific notification you want to review:

1. At the Incoming Notifications screen, tab to the notification you want to view. Type ‘S.’ Press Enter.

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. Return to the Function code menu by pressing <F3 Prev Menu>.

4. Removing Notifications from Your Inbox
You may want to remove notifications from your Inbox. 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 section title: ‘Viewing Specific Notifications.’

To remove a notification from your Inbox list:

1. At 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>.
4. **Forwarding Notifications (F6 - FwdNotif)**

After reviewing a notification online, you can forward it to other authorized users as desired. Forwarding is done while viewing a notification. 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 ID or email address of the reviewers that are presently designated to receive the notification.

2. Position the cursor at the next available line in the list of Reviewers. Type in the Logon ID or email address of the user that you are specifying to receive a copy of the notification.

3. Press <F5 Update> to complete the update and 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 that you specifically added. It will not be re-sent to the others on the list.

4. **Viewing Specific Notifications (INRS)**

The INRS function can be used to view a specific notification. The feature is intended to allow you to access notifications that may have been removed from your Inbox list or to research similarities and patterns. For example, you could request to see a list of all the notifications prepared by a certain user. Reviewers can only check notifications prepared by users within their assigned security.

To view a list of notifications using a specific selection criteria:

1. At the Function Code menu, type INRS in the Next Func field to select Notification Review Selection, and then press <Enter>.

2. The Notification Review Selection screen is displayed.

3. Type the selection criteria ranges, as desired. (Table 5. defines the selection criteria fields and related ranges.) You can specify more than one selection criteria on this screen, if desired. This enables you to access a more specific range of notifications.
Table 5. Selection Criteria Ranges

<table>
<thead>
<tr>
<th>Field: VIEWING NOTIFICATIONS BY...</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application</td>
<td>Enter a three-digit application code to specify notifications from one of the system applications. (Specify PPS for Payroll/Personnel).</td>
</tr>
<tr>
<td>Transaction</td>
<td>You can view notifications related to a specific transaction type, such as hire. Enter a function code or bundle name to view all notifications of that type.</td>
</tr>
<tr>
<td>Originator ID</td>
<td>You can view notifications prepared by a specific user. Enter a Logon ID to view all notifications prepared by that user.</td>
</tr>
<tr>
<td>Department</td>
<td>You can view notifications sent to a specific department. Enter a department code to see all notifications received by authorized users in that department.</td>
</tr>
<tr>
<td>Date</td>
<td>You can view notifications that were prepared on a certain date. Enter a date in the format mmddyy.</td>
</tr>
<tr>
<td>Time (hour)</td>
<td>You can view notifications that were prepared within the timeframe of one hour. Enter the time in the format hh:mm:ss.</td>
</tr>
<tr>
<td>Notification Addressor</td>
<td>You can view notifications that were sent to a specific user. Enter the Logon ID of the person who received the notifications.</td>
</tr>
</tbody>
</table>

4. Press <Enter>. The Notification Review Browse screen will be displayed. This screen lists all the notifications that fall within the specified selection criteria range with the following summary information:

System:
Abbreviation indicating the subsystem where the notification originated. (PPS is the abbreviation for the Payroll/Personnel Online 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.

5. Tab to the notification you want to view. Type 'S.' Press <Enter>.

If the following message is displayed: Not authorized to view the selected notification, 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 the PPS Inquiry or PPS Update system.
GLOSSARY

Bundle
A logical grouping of entry/update screens that maybe needed to complete a payroll/personnel action. For example, the system contains a bundle called Hire (HIRE). This bundle will walk a user through a logical sequence of screens to complete the hiring of an employee. Once an user enters a bundle, it must be completed or canceled; there is not a 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.

Con-edit Severity Level
A message severity level which acts as a trigger or 'threshold'. When any consistency edit message is issued which has a message severity level equal to or greater than the Con-edit Severity Level, the Consistency Edit (ECON) screen is automatically displayed. When the message is less than the Con-edit Severity Level, you can enter the 'IMSG' Function Code to view messages after the update has taken place.

Consistency Edit
Consistency edits(or Con-edits) test the values of related data elements in the context of one another. Data elements keyed on a screen or screen bundle are subjected to different consistency edits depending upon which data elements have been entered. For example, changing an employee's Medical Plan Code (EDB0292) will trigger one set of consistency edits related to health insurance 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 an employee record with a record key value that did not previously exist. Establish a new record.

Employee ID Number

The unique number which identifies an individual's employee record.

Employee Record

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

Enter

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

F Key

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

Fast path 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 F Keys.

Nesting

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

Payroll Personnel System Edit and Update Process

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

Record Key

A data element whose value serves as an unique identifier of an employee record.

Screen Set

See Bundle.

Scroll

Some of the functions may have more data than can be displayed on one screen. These are referred to as ‘screens,’ as 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.

Threshold Severity Level

See Con-edit Severity Level.
**Transaction**

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

**Update**

The actual physical alteration of data on 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.