



Office of Academic and Administrative  
Information Systems (OAAIS) -  
Administrative Computing (AdCom)

# **ONLINE PAYROLL/PERSONNEL SYSTEM USER GUIDE**

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## ADMINISTRATIVE COMPUTING CUSTOMER SUPPORT (ADCOM CUSTOMER SUPPORT)

### DOCUMENTATION

To receive any of the documents listed below, dial 502-2815 key in the document number and then your fax number. The document will be faxed to you within few minutes.

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## **1. INTRODUCTION**

### **1.1. ABOUT THE ONLINE PAYROLL/PERSONNEL SYSTEM**

The Online Payroll/Personnel System provides automated facilities in support of the payroll and personnel requirements of the University. It is comprised of several databases that maintain information about University employees. Further, it is comprised of several subsystems that provide facilities for inquiring about employee records and the pay they have received as well as information related to account and funds. The subsystems include: EDB Inquiry; Payroll Audit Record Inquiry; Departmental Account Inquiry and the Account/Fund Profile.

The system was designed as a distributed system that allows users in individual units to directly view information contained in the Employee Database (EDB), with appropriate security and safeguards. Access is authorized by designated departmental officials and is restricted to records of employees within the unit.

Access is provided through the use of menu and list screens. By using function keys and entering selection criteria, the user can navigate to the desired screen. In addition, help screens are available to provide information on screen content and on specific data elements.

### **1.2. THE PAYROLL/PERSONNEL ONLINE INQUIRY SYSTEM USER**

Users of the Online Payroll/Personnel System are employees of the University who have been authorized to have access to the information contained in the system inquiry. Access is granted for the performance of payroll/personnel related duties. About the User's Guide

### **1.3. ABOUT THE USER'S GUIDE**

The User's Guide is designed to help you productively use the Online PPS Inquiry facility to access appropriate screens and information. 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 Inquiry system features and functions.

### **1.4. HOW TO GET HELP**

#### **1.4.1. ACCESS AND GENERAL APPLICATION QUESTIONS**

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

- Your Departmental Access Administrator
- OAAIS Customer Support Hours: 8am to 5pm, Monday through Friday;  
(415) 514-4100, Option 2.

### 1.4.2. POLICY AND PROCEDURE QUESTIONS

For Payroll/Personnel issues and policy consultation, contact the Lead Functional Expert in your department. If unable to answer your question(s), the Lead will seek assistance with:

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

### 1.4.3. DATA DEFINITION QUESTIONS

For data definition questions, such as code translations and valid data ranges:

- [Online Help](#) Accessed by positioning your cursor to the appropriate field on any

Online Payroll/Personnel System screen and pressing the <F1 Help> key.

- [Payroll or Human Resources](#) Contact the office appropriate to your question.

Connectivity questions and problems:

- Advice to Managers
- Computer Support Coordinator

## 2. IMPLEMENTATION

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

### 2.1. ACCOUNTABILITY

Accountability is fundamental to the internal controls that underlie all administrative and financial systems including the On-Line Payroll/ Personnel System. This document addresses those issues related to Inquiry access only.

The Chancellor has delegated, through the Dean of each school, to the Department Chairs, administrative and financial responsibility for the operation of their departments.

This delegation from the Chancellor also goes through the Director of the Medical Center and the Vice Chancellors to equivalent management personnel. Department Chairs and equivalents can delegate some administrative and financial responsibilities, but cannot delegate accountability.

### 2.2. INDIVIDUAL ACCOUNTABILITY

Access to the OLPPS is granted to employees for the performance of payroll/personnel related job duties.

Individual accountability means:

- A logon ID is considered equivalent to a signature and an employee is responsible for all access and entries made under his/her logon ID.
- 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.
- 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.
- By logging on to the system, you acknowledge that you understand and agree to abide by the above policies.

It is against University policy for employees to seek out or use personal or confidential information relating to others for their own interest or advantage.

## 2.3. POLICY COMPLIANCE

Departments are accountable for policy compliance and full understanding of all relevant policies. Failure to comply with UCSF 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.

## 2.4. DEPARTMENTAL ROLES AND RESPONSIBILITIES

In order to implement on-line administrative systems in the departments, central administrators need to be able to identify and communicate with the people who play significant functional roles in departmental administration. Definitions of significant, departmental functional roles with respect to the OLPPS and other, anticipated distributed administrative systems are:

### DEFINITIONS

Head of Unit:	is responsible and accountable for implementing established policies and procedures and has administrative and financial responsibility for the operation of his/her unit.
Business Officer:	serves as chief business and financial officer for the department/unit and is expected to provide financial advice and assistance to the Head of Unit in fulfilling management responsibilities.
Payroll/Personnel Administrator	is responsible for accurate and timely processing: of salary, benefits and personnel actions for the unit or department.
Financial Administrator:	is responsible for accurate and timely processing and review of financial transactions for the unit or department.



Access Administrator:	Controls access to administrative applications for the unit, orders new userids, indicating the functions and the data to which the user will have access; is responsible timely for deletion of obsolete userids.
Computer Support Coordinator:	Provides computer hardware and software setup and troubleshooting, training and support in the use of general purpose and departmental computer applications, and departmental network management.
Equipment Custodian:	Provides equipment ordering services and tracking for the business unit.

The identification of the employees who fill these roles is critical in an increasingly distributed administrative environment. This record of significant role players will be used to:

- Validate the authority of individuals ordering access to systems.
- Identify the appropriate individuals to receive administrative communications.
- Replace the Campus Locator System mailing lists.
- Coordinate customer support activities.

In identifying individuals who fill these roles, keep in mind:

- Each role is unique within a given unit.
- One employee may fill several roles.

There may be more than one person performing the functions of a given role in a department or unit. However, only one individual can be assigned to fill the role. This is particularly true of the Payroll/Personnel and Financial Administrators roles defined above.

The person assigned to a role should be the person who has primary responsibility for the function and for distributing administrative communications to others.

The person filling a role must be an employee of UCSF, even though some of the duties may be carried out by non-employees (e.g., by consultants, independent contractors, etc.).

The person filling the role for a given department or unit need not be an employee of that unit.

If any role for a given department or unit is unassigned (i.e., no employee is identified as filling that role) the person filling that role in the parent department will be assumed to fill the role for the subordinate department.

## 3. SYSTEM ACCESS

### 3.1. 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 San Francisco Campus Policy and Procedures Manual, or contact the Campus Information Practices Coordinator.

### 3.2. OBTAINING SYSTEM ACCESS

To request access to the Online Payroll/Personnel System, the following forms must be completed and filed with Administrative Computing Services:

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

### 3.3. SYSTEM PASSWORDS

#### 3.3.1. PASSWORD SELECTION AND SECURITY

Passwords should be 6 - 8 alphanumeric character. Your password must contain at least one numeric character; try to choose a password that is easy to remember, yet difficult for someone to readily guess.

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 OAAIS Customer's Services (514-4100, Option 2).

#### 3.3.2. PASSWORD EXPIRATION

All passwords automatically expire in 30 days. When a password expires, you are prompted to enter a new password. All passwords must be unique for 12 months and cannot be reused during that period.

#### 3.3.3. 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 call the OAAIS Customer's Services (514-4100, Option 2) to reactivate your logon ID.

## 4. SYSTEM STRUCTURE

This section introduces you to the following structural elements of the Online Payroll/Personnel System: screens and function keys.

Three types of screens are used for OLPPS Inquiry. 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. 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.

### 4.1. SCREENS

Three types of screens are in the Inquiry Online Payroll/Personnel System:

- Menu Screens
- List Screens
- Detail Screens

### 4.2. MENU SCREENS

Menu screens display options available to you. They typically contain a list of available function codes for OLPPS INQ. Each function code represents a single screen that may be selected. The IDDB Screen, displayed below, is an example of a menu screen. It contains a list of function codes and the functions they support.

```
UCFHHU08-H0795          EDB Inquiry          06/16/95 14:07:14
                        Departmental Menu      Userid: SFSTFAP

- IALN Alien Information      - IHRS Hours on Pay Status
- IAPP Appointment/Distribution - IINS Insurance - Departmental
- IAPT Appointment/Distribution Cmpct - ILSC Layoff Seniority Credit
- IAPS Appointment Summary    - ILAH Leave Accrual History
- IBAL Dollars Information    - IMEM Membership Data
- IGEN General Information 1   - IPER Personal Data
- IGNU General Information 2   - IRET Retirement/Savings-Department
-                               - IUCI University Contribution Ind
-                               -
-                               -
-                               -
-                               -
-                               -
-                               -
-                               -
-                               -
- WHO Employee Browse

Next Func: █ ID: _____ Name: _____ SSN: _____

===>
F: 1-Help          3-PrevMenu  4-Print
F:                9-MainMenu
                                12-Exit

Fri 16 Jun 02:14
```

Example of a Menu Screen.

### 4.2.1. LIST SCREENS

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.

```

PPWH08-0951                      EDB Inquiry                      07/27/95 13:42:59
                                Employee Browse                  Userid: SFSTFAP
ENTERED: ID:                      Name: ONLINE                      SSN:
ID      Name                      SSN      Dept
- 029061165 ONLINE, OSCAR B      123-45-6789 ACCOUNTING
- 026298240 ONLY, JANE           695-42-9649 MC: CLINICAL L
- 026298281 ONLY, JOHN           713-39-0565 MC: MEDICAL ST
- 026298387 ONRIGHT, SALLY       521-17-3243 S/M ANATOMY
- 026298421 ONTERIO, CAMDEN      135-63-2988 S/M ANESTHESIA
- 026298547 OOSTEROFF, RANDALL   254-66-1844 S/M CARDIOVASCU
- 026298588 OOSTERVAN, MARK      625-34-7545 S/M SURGERY
- 026299008 OPANANA, GIDIAN C    654-65-9287 MZ: I/P NURSIH
- 026299065 OPEAL, DANIAN V      552-65-0411 CLERICAL POOL
- 026299156 OPERA, DEVIN S       473-75-0568 S/M OB/GYN & AS
- 026299701 OPERATOR, LILY T     545-74-2784 S/M FAMILY HLTH
- 027453661 OPENDOOR, JOHNNIE   363-65-6388 S/M SURGERY
- 026299404 OPPENREAL, RALPH     404-14-2336 S/P PHARMACEUTI
- 026299545 OPPENSLOFF, OLIVER   245-59-1161 S/M UROLOGY
- 026299803 ORANGE, ROWENA       003-72-6591 S/M PATHOLOGY
Next Func: WHO ID: _____ Name: _____ SSN: _____

===>
F: 1-Help          3-PrevMenu  4-Print
F: 7-Backward     8-Forward  9-Jump          12-Exit
Thu 27 Jul 01:48
  
```

Example of a List Screen.

### 4.2.2. DETAIL SCREENS

Detail screens display information that is contained in the Online Payroll/Personnel System.

```

PPIGEN0-10964                      EDB Inquiry                      06/16/95 16:09:42
06/16/95 15:56:07                  General Information 1                  Userid: SFSTFAP
ID: 029061165 Name: ONLINE, OSCAR B      SSN: 123-45-6789
Hm Dept: 127311 ACCOUNTING              Emplmt Status: A Pri Pay: MO

Gen No      : 0022      Date of Hire      : 09/25/90 Lst Day on Pay:
Date of Birth : 09/03/60 Citizen          : C      Separation      :
Sex          : M      Visa Type          :      Sep Rsn/Dest      :
Ethnic ID    : R      Visa/Work Permit    :      LOR Beg          : 11/20/95
Veteran Status: N      I-9 Date          : 09/25/90 LOR Return      : 02/01/96
Vet Disab Stat: N      Oath Signature Date: 09/25/90 LOR Type        : 15
Hdcp Status  : N      Fed Tx Marit/Allw   : M 003      Nx Sal Rev      : 07/95
Std St/Units : 1/      Fed Tax Max        : 999      Nx Sal Rev Typ: 3
UI Code      : C      Calif Tx Marit/Pers: H 002      EREL/EARL/EUC   : E/CX/CX
Retirement  : U      Calif Tx Item       : 001      EREP/ESH/EDUC   : C /
FICA Elig Cd : E      Calif Max           : 999      CAP Elig Code   : A
Asgn/Drv BELI : 1/1      Other State CA Res :      Other St Name   :
Pay Disp/Dept : 0/00499 Pr ID: _____ Pr Name:
APUC          :
Next Func: █ ID: _____ Name: _____ SSN: _____

===>
F: 1-Help          2-Browse   3-PrevMenu  4-Print
F: 9-MainMenu      12-Exit
Fri 16 Jun 04:17
  
```

Example of a Detail Screen.

### 4.2.3. SCREEN LAYOUT

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

ER →

→

R →

PP1HRS0-10930		EDB Inquiry		07/03/95 13:48:32	
06/16/95 15:56:07		Hours on Pay Status		Userid: SFSTFAP	
ID: 029061165 Name: ONLINE, OSCAR B		SSN: 123-45-6789			
Hm Dept: 127311 ACCOUNTING		Emplmt Status: A Pri Pay: M0			
Hours on Pay Status: Curr Mnth: .00					
Jan: 168.00	Jul: 168.00	YTD Tot Hrs : 1032.00			
Feb: 168.00	Aug: 184.00	YTD Reg Hrs : 1001.50			
Mar: 184.00	Sep: 176.00	YTD OT Hrs : .00			
Apr: 168.00	Oct: 168.00	YTD NonWk Hrs: 30.50			
May: 184.00	Nov: 176.00	Avg Hr/Wk : 39.85			
* Jun: 176.00	Dec: 176.00	Prior Service Mths : 0			
Lv Accr Hrs: Balance Maximum		Empl Service Credit:			
Vacation 91.750000 240.00		From Date :			
Sick Leave 68.500000					
Compensatory .00					
Paid Time Off .000000					
Next Func: ID: Name: SSN:					
F: 1-Help 2-Browse 3-PrevMenu 4-Print 12-Exit					
F: 9-MainMenu					
Mon 03 Jul 01:56					

Example of Screen Layout.

### 4.2.4. HEADER SECTION

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

### 4.2.5. 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 Online 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, 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. Screen Title — The title is unique to each screen, such as, "Employee Identification."
5. User ID — This is your logon identification.

#### 4.2.6. 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.

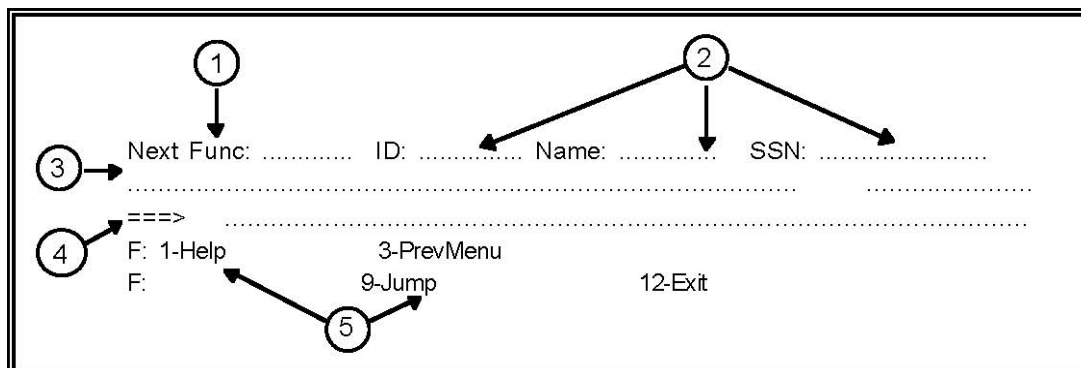
1. ID — Employee Identification Number - This is the number associated with the employee record that has been selected.
2. Name — Employee Name - This is the name associated with the selected employee record.
3. SSN — Social Security Number - This is the Social Security Number of the employee record selected.
4. Pri Pay — Primary Pay - This code indicates the normal pay schedule for the selected employee, such as MO for monthly or BW for Biweekly.
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.

#### 4.2.7. 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 inquiry fields, a menu or a list.

#### 4.2.8. 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 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, First Name(space)Middle Initial (e.g., Online,Oscar A).
  - 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 is also used to enter 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.

### **4.3.FUNCTION KEY LAYOUT**

Function keys (F keys) are provided to allow you to perform system actions such as accessing the Help. 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.

### **4.4.FOLLOWING ARE THE F KEY DEFINITIONS:**

#### **4.4.1. F1 - HELP**

F1 is used to invoke 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 Display 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.

#### **4.4.2. 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.

#### **4.4.3. F7 - BACKWARD SCROLL**

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

#### **4.4.4. F8 - FORWARD SCROLL**

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

#### 4.4.5. F9 - MAIN MENU/JUMP

F9, when pressed on a detail or menu screen, is used to navigate back to the Main Menu. On a list screen, F9 is used to move the cursor between the data display 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 previous position in the body, or to the initial cursor position defined for that screen.

#### 4.4.6. F12 - EXIT

F12 is used to exit the Online Payroll/Personnel System.

### 4.5. KEYBOARD REFERENCE

Table 1. Function Keys for IBM/IBM-compatible PCs

KEY	DESCRIPTION
<F1>	Help
<F3>	Previous Menu/Return
<F4>	Print
<F5>	Previous Record (for Payroll Audit Record Functions only)
<F6>	Next Record (for Payroll Audit Record Functions only)
<F7>	Backward - for scrolling
<F8>	Forward - for scrolling
<F9>	Main Menu/Jump
<F12>	Exit Online Payroll/Personnel System

Note: Emulation of 3270 type terminals is a requirement for Online Payroll/Personnel System. As of this publication date, the San Francisco campus uses the following emulation and connection packages:

IBM and Compatible: Macintosh:

- FTP Software On-Net • MACTCP 2.0.4 or later version
- FTP Software's PC/TCP Plus • NSCA Telnet
- Novell's LAN Workplace for DOS • TN3270



## 5. 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.

### 5.1. CURSOR MOVEMENT

When the screen is first displayed, the cursor is positioned at the Next Func. There are several methods of moving the cursor from one field to another.

#### 5.1.1. TAB/SHIFT TAB KEYS

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

- The <Tab> key moves the cursor to the next record key. If the cursor is currently at the last record key, it will move to the first record key.
- The <Shift Tab> key moves the cursor to the previous record key. If the cursor is currently at the first record key, it will move to the last record key.

#### 5.1.2. F9 - JUMP KEY

On list screens, 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.

### 5.2. 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 03" 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.

<b>PPIAPT0-10911</b>		<b>EDB Inquiry</b>		08/01/95 13:31:56																																													
08/01/95 09:42:42		<b>Appointment/Distribution Cmpc</b>		Userid: SFSTFAP																																													
ID: 024031536 Name: CISCO,SAN FRAN		SSN: 275-64-7607																																															
Hm Dept: 379469 S/M OPTHALMOLO Emplmt Status: N Pri Pay: M0		PG 01 OF 03																																															
Gen No : 0009		Total Appt/Dis: 02/06		Remaining Appt/Dis: 01/03																																													
LOR Beg: 01/01/95 LOR Return: 07/31/95 LOR Type: 15 TRIP: % Mths																																																	
Appt: 10 TC: 1721 PROFESSOR-MEDCOMP-A		Grade:		Pgm/Typ: A/5																																													
Begin Dt: 07/01/81 Ann/Hr Rt : 85700.00 %: 1.00 F/U: F Rt : A																																																	
End Dt : 99/99/99 Bas/Pd Ovr: 00/00		Lv : E		Sched: M0																																													
Dur : T TENURE Dept Cd : 379469		TUC/AREP/ASHC: A2/C/		Time : E																																													
<table border="1"> <thead> <tr> <th>Dis</th> <th>L/Acct/Fund/Sub</th> <th>FTE</th> <th>Dis %</th> <th>Pay Beg</th> <th>Pay End</th> <th>Rate/Amt</th> <th>DOS</th> <th>St/OR</th> <th>PRQ</th> <th>D W</th> </tr> </thead> <tbody> <tr> <td>12</td> <td>2 404933 19900 0 0.00</td> <td>0.3099</td> <td>07/01/95</td> <td>06/30/96</td> <td>23041.50</td> <td>REG</td> <td>5</td> <td>/</td> <td></td> <td></td> </tr> <tr> <td>13</td> <td>2 404933 60200 0 0.00</td> <td>0.0000</td> <td>07/01/95</td> <td>06/30/96</td> <td>15899.83</td> <td>MAR</td> <td></td> <td></td> <td></td> <td></td> </tr> <tr> <td>14</td> <td>2 404933 60233 0 0.00</td> <td>0.5972</td> <td>07/01/95</td> <td>06/30/96</td> <td>23041.50</td> <td>HSC</td> <td>5</td> <td>/</td> <td></td> <td></td> </tr> </tbody> </table>						Dis	L/Acct/Fund/Sub	FTE	Dis %	Pay Beg	Pay End	Rate/Amt	DOS	St/OR	PRQ	D W	12	2 404933 19900 0 0.00	0.3099	07/01/95	06/30/96	23041.50	REG	5	/			13	2 404933 60200 0 0.00	0.0000	07/01/95	06/30/96	15899.83	MAR					14	2 404933 60233 0 0.00	0.5972	07/01/95	06/30/96	23041.50	HSC	5	/		
Dis	L/Acct/Fund/Sub	FTE	Dis %	Pay Beg	Pay End	Rate/Amt	DOS	St/OR	PRQ	D W																																							
12	2 404933 19900 0 0.00	0.3099	07/01/95	06/30/96	23041.50	REG	5	/																																									
13	2 404933 60200 0 0.00	0.0000	07/01/95	06/30/96	15899.83	MAR																																											
14	2 404933 60233 0 0.00	0.5972	07/01/95	06/30/96	23041.50	HSC	5	/																																									
Next Func: <input type="text"/> ID: <input type="text"/> Name: <input type="text"/> SSN: <input type="text"/>																																																	
====>																																																	
F: 1-Help      2-Browse      3-PrevMenu      4-Print																																																	
F:              8-Forward      9-MainMenu                      12-Exit																																																	
Tue 01 Aug 01:34																																																	

Example of page scrolling.

### 5.3. 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 subsection Accessing Employee Records.)

For example, to access the IGEN Screen for an employee whose ID number is 021234567:

1. In the Next Func field, type IGEN.
2. In the ID field, type 029061165.
3. Press <Enter>.

```
UCFNNH08-M0795                                EDB Inquiry                               07/27/95 14:05:57
                                           Departmental Menu                          Userid: SFSTFRP
```

_ IALN Alien Information	_ IHRS Hours on Pay Status
- IAPP Appointment/Distribution	- IINS Insurance - Departmental
- IAPT Appointment/Distribution Cmpct	- ILSC Layoff Seniority Credit
- IAPS Appointment Summary	- ILAH Leave Accrual History
- IBAL Dollars Information	- IMEM Membership Data
- IDED Deductions - Departmental	- IPER Personal Data
- IGEN General Information 1	- IRET Retirement/Savings-Department
- IGNL General Information 2	- IUCL University Contribution Ind
-	-
-	-
-	-
-	-
-	-
-	-
-	-
-	- WHO Employee Browse

Next Func: igen ID: 029061165 Name: \_\_\_\_\_ SSN: \_\_\_\_\_  
===> \_\_\_\_\_  
F: 1-Help                      3-PrevMenu    4-Print  
F:                                 9>MainMenu                  12-Exit

Thu 27 Jul 02:08

### Example of Screen Selection.

## 5.4. 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 browse function to locate employee information if you not sure of the employee ID, name, or Social Security Number for the employee record you want. Both record selection methods are described below.

### 5.4.1. 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(space)Middle Initial (e.g., Online,Oscar A). A comma must be entered after the last name (\*Do not use a space after the last name.) The Employee Browse screen, WHO (IBRS), will automatically appear if there is no employee with that name, or if there is more than one employee with the specified name.

- SSN — The nine-digit Social Security Number is entered without hyphens or slashes (e.g., 987654321).

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

## 5.5. 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.

PPWH08-0951		EDB Inquiry		07/27/95 13:42:59	
		Employee Browse		Userid: SFSTFAP	
ENTERED: ID:		Name: ONLINE		SSN:	
ID	Name	SSN	Dept		
029061165	ONLINE, OSCAR B	123-45-6789	ACCOUNTING		
026298240	ONLY, JANE	695-42-9649	MC: CLINICAL L		
026298281	ONLY, JOHN	713-39-0565	MC: MEDICAL ST		
026298387	ONRIGHT, SALLY	521-17-3243	S/M ANATOMY		
026298471	ONTERIO, CAMDEN	135-63-2988	S/M ANESTHESIA		
026298547	OOSTEROFF, RANDALL	254-66-1844	S/M CARDIOVASCU		
026298588	OOSTERVAN, MARK	625-34-7545	S/M SURGERY		
026299008	OPANAMA, GIDIAN C	654-65-9287	NZ: I/P NURSIN		
026299065	OPERAL, DAMIAN U	552-65-0411	CLERICAL POOL		
026299156	OPERA, DEVIN S	473-75-0568	S/M OB/GYN & RS		
026299701	OPERATOR, LILY T	545-74-2784	S/M FAMILY HLTH		
027453661	OPPENDOOR, JOHNNIE	363-65-6388	S/M SURGERY		
026299404	OPPENREAL, RALPH	404-14-2336	S/P PHARMACEUTI		
026299545	OPPENLOFF, OLIVER	245-59-1161	S/M UROLOGY		
026299883	ORANGE, ROWENA	083-72-6591	S/M PATHOLOGY		

Next Func: WHO ID: \_\_\_\_\_ Name: \_\_\_\_\_ SSN: \_\_\_\_\_

===> \_\_\_\_\_

F: 1-Help                      3-PrevMenu   4-Print

F: 7-Backward   8-Forward   9-Jump                      12-Exit

Thu 27 Jul 01:48

Example of Employee Browse (WHO) Screen.

When the Employee Browse screen is displayed, two methods can be used 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>.

## 5.6. 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 a new function code and a new employee record key.

## 5.7. FAST PATH NAVIGATION

Fast path navigation allows you to move from a screen directly to any other screen, bypassing all other menus.

For example, from the Online 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>.

```

UCMMNU0-M0967      Online Applications      08/03/95 16:34:46
                    Main Menu                  Userid: SFSTFAP

---- Employee Data Base ----
- IEDB Central Inquiry
- IDDB Departmental Inquiry
- EEDB EDB Entry/Update
- IDOC Employee Documents
--- Payroll Audit Record ---
- IPAR Central Inquiry
- IPAY Departmental Inquiry
---- Absence Data Base ----
- SPCL Special Processes
---- History Data Base ----
- IHDB Inquiry/Update
- IHIS Personnel History
--- System Administration --
- UCSA Entry/Update

----- PAN Subsystem -----
- PSRU PAN Services Menu
-- Payroll Time Reporting --
- ETHF THF Entry/Update
- IDTC Dept Time Collect
- EDAT Dept Adj Trans

--- ID Number Subsystem ---
- IDMN ID Numbers Main Menu
--- Department Subsystem ---
- DPMN Dept System Main Menu
-- Account Fund Subsystem --
- AFMN Acct Fund Main Menu

Next Func: ihrs ID: 123456789 Name:                      SSN:                     

==>
F: 1-Help                      4-Print
F:                               12-Exit

Thu 03 Aug 04:37

```

Example of Fast Path Navigation.

## 6. ONLINE HELP

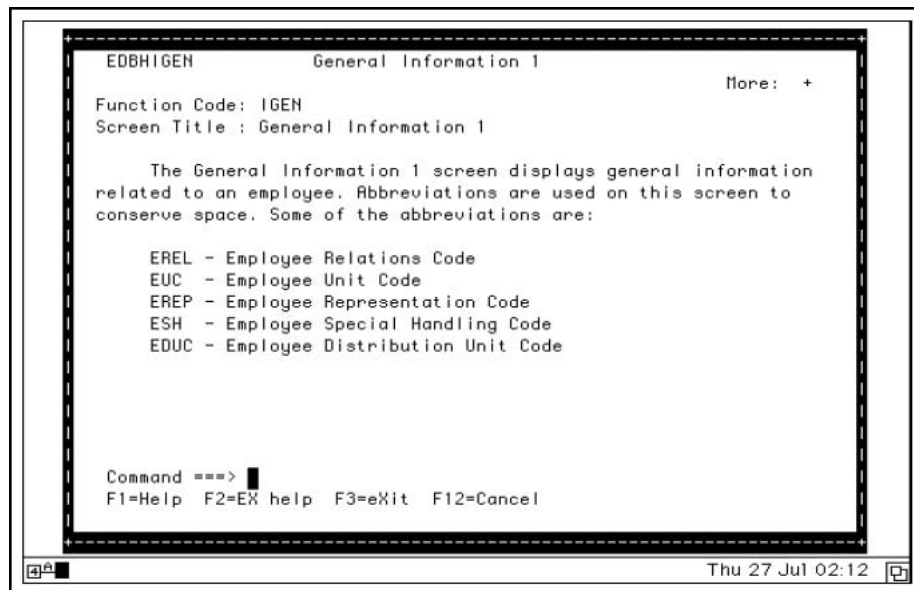
### 6.1. OVERVIEW

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 OLPPS Inquiry, the screen appearance and the function key assignments are different in Help from those in EDB Inquiry.

There are two types of Help:

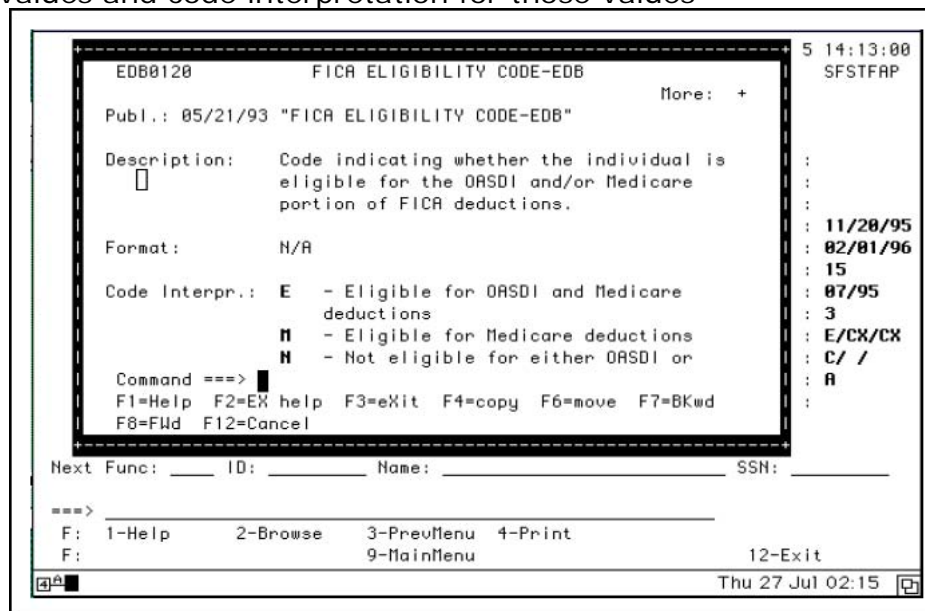
1. Screen-Level Help provides three types of information about the screen:
  - Function of the screen, including any special commands available
  - Nature of the information on the screen
  - Translations of any highly abbreviated screen labels used on the screen



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



Field-Level Help Window.

## 6.2. 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

### 6.2.1. 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.

### 6.2.2. 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.

### 6.2.3. 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.

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

Help text will appear in a window on the screen. When a Help window is displayed, the F keys on the bottom of the inquiry 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 Inquiry 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.

**6.3.1. TABLE 3. HELP FUNCTION KEYS/COMMANDS**

F Key	Command	Description
<F1>	Help	Display help for Help.
<F2>	EX help	Display screen-level help.
<F3>	eXit	Return to the Payroll/Personnel screen. Find string Find the first occurrence of the specified character string.
<F5>	FN	Find the next occurrence of the specified character string.
<F7>	BKw d	Display the previous page of help text.
<F8>	FWd	Display the next page of help text.
<F9>	level1	Return to the first help window.
<F12>	Cancel	Return to the underlying help window.

**6.4. 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.

**6.5. 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.

**6.6. 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.

**6.7. F3 - EXIT**

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

**6.8. 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.

### **6.9. 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 in its search.

### **6.10. 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.

### **6.11. 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.

### **6.12. 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 Online Payroll/Personnel System screen.

## 7. SYSTEM MESSAGES

In OLPPS, messages are displayed by the system in response to actions you have taken on a screen.

If you make an error, a system message will alert you that the action you requested is not valid and may provide guidelines on how to proceed.

### Messages

If you make an error, a message is displayed to alert you.

<b>PP1GEN0-10964</b>		<b>EDB Inquiry</b>		07/27/95 14:15:05
07/20/95 19:44:02		<b>General Information 1</b>		Userid: SFSTFAP
ID: 029061165 Name: ONLINE, OSCAR B		SSN: 123-45-6789		
Hm Dept: 127311 ACCOUNTING		Emplmt Status: A Pri Pay: M0		
Gen No	: 0022	Date of Hire	: 09/25/90	Lst Day on Pay:
Date of Birth	: 09/03/60	Citizen	: C	Separation
Sex	: M	Visa Type	:	Sep Rsn/Dest
Ethnic ID	: R	Visa/Work Permit	:	LOR Beg
Veteran Status	: N	I-9 Date	: 09/25/90	LOR Return
Vet Disab Stat	: N	Oath Signature Date	: 09/25/90	LOR Type
Hdcp Status	: N	Fed Tx Marit/Allw	: H 003	Nx Sal Rev
Stdt St/Units	: 1/	Fed Tax Max	: 999	Nx Sal Rev Typ
UI Code	: C	Calif Tx Marit/Pers	: H 002	EREL/EARL/EUC
Retirement	: U	Calif Tx Item	: 001	EREP/ESH/EDUC
FICA Elig Cd	: E	Calif Max	: 999	CAP Elig Code
Asgn/Drv BELI	: 1/1	Other State CA Res	:	Other St Name
Pay Disp/Dept	: 8/00499	Pr ID:		Pr Name:
APUC	:			
Next Func:	1-KHO	ID:		Name:
				SSN:
<b>U0011 Invalid function code</b>				
====>				
F:	1-Help	2-Browse	3-PrevMenu	4-Print
F:			9-MainMenu	12-Exit
				Thu 27 Jul 02:17

Example of an Error Message

## 8. GLOSSARY

### **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 in the Employee Database (EDB).

### **F Key**

A numbered key on a terminal, Mac or PC 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 that corresponds to a screen.

### **Navigation**

Navigation is the process of moving between screens and fields. Accomplished through the use of function codes and standard keys, such as F keys.

### **Record Key**

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

### **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.  
Example of an Error Message.

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