Chapter 1

Navigation

Chapter Topics

Signing On

Access the Page

1. Access NYSTEP by clicking the NYSTEP icon on your desktop and proceed to step # 5.

OR

2. Open your Web Browser by clicking the Internet icon. (In this example Internet Explorer is being used.)
   Your Internet home page will display.

3. In the **Address** field, type the NYSTEP URL.

   A Security Alert may display

NOTE: If you do not want this Security Alert to display each time you sign on, click in the **In the future, do not show this warning** checkbox and click **OK**.

Another Security Alert may display
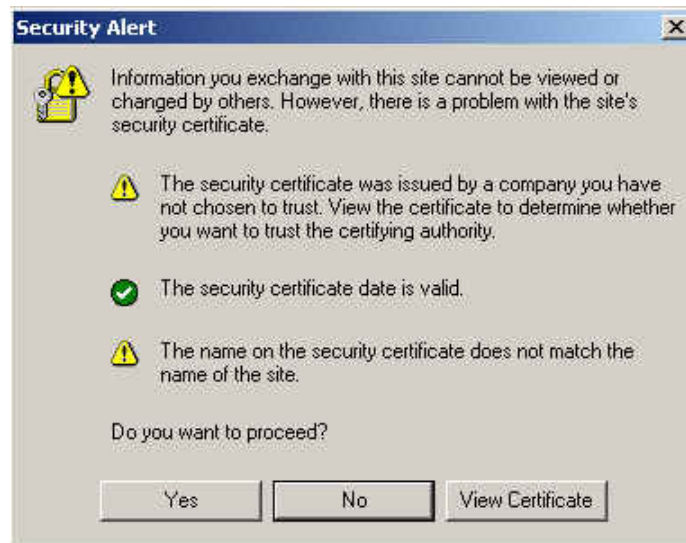
4. Click **Yes**.

    The PeopleSoft sign in screen will display

5. In the **User ID** field enter your *User ID* in all capitals.

6. In the **Password** field, enter your password (this field is case sensitive).
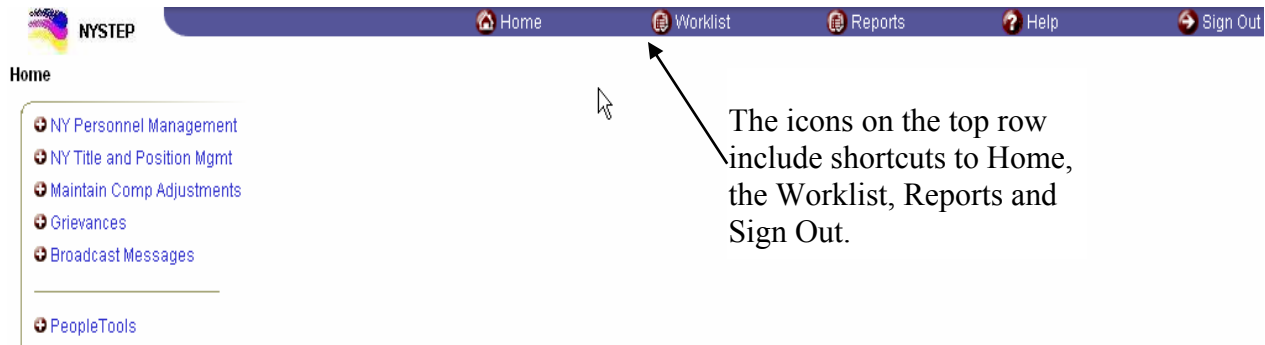
NOTE: When a user logs onto the NYSTEP system for the first time, they will be directed to a series of dialog boxes that will require them to change their password.

See the section on "Changing the Password" later in this chapter.

7. Push the **Sign In** button.

The NYSTEP Homepage will display.

The icons on the top row include shortcuts to Home, the Worklist, Reports and Sign Out.

NOTE: The Homepage is defined by the User's profile. Therefore, the Homepage may look different from User to User.

The Menu Group can expand three columns per screen. As a user progresses to an application page, the three columns that are viewed will change to the last three selected.

When clicked, brings the User back to a previous level.

A plus (+) sign in front of the menu option indicates that the menu option can be expanded. A minus (-) sign in front of a menu option indicates that the menu option is completely expanded.

NOTE: To get a full screen view of the page, press **F11**. This will hide other toolbars that may be visible on your monitor. To return the toolbars, press **F11** again.

Changing the Password

In accordance with the State Policy regarding the security of electronic data, the NYSTEP system will have the following password security:

Passwords must be a minimum of 8 characters in length;

At least one special character is required in each password. These special characters include: ! @ # $ % ^ & * ( ) - _ = + \ | [ ] { } ; : / ? . < >;

The system will require the password to be changed every 90 days;

The user will be locked out after 6 unsuccessful logon attempts, after which the Civil Service Help Desk must be called to allow the user back into the system;

The following Passwords will automatically be invalid in any form within the system: *NYSTEP*, *PASSWORD*, *PA$$WORD* and *User ID*. Any user that currently has any of these passwords will be directed to a Password Maintenance page to change their password.
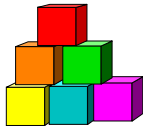
Terminology

Some of the terminology has changed between the old NYSTEP System that was created in PeopleSoft 7.5, and the new Web Version that was created in PeopleSoft 8.3. Additionally, there is new terminology with which the user must be familiar.

Changed Terminology

PeopleSoft 7.5	PeopleSoft 8.3
Page Groups	**Components**: A group of related pages that pertain to a specific task.
Go Menu Items	**Home**: Highest level in the menu navigation structure; this is also the default page when PeopleSoft 8.3 is accessed.
Prompts	**Lookups**: Functionality that takes the user to view tables that are associated with a field.
Page	**Page**: Area where data can be viewed or updated.

New Terminology

Term	Description
Breadcrumbs	Page navigation path. Appear as hyperlinks that allow the user to navigate between menu levels.
Browser	An application program that searches the Internet, interprets HTML and presents the Web page. Examples include Internet Explorer and Netscape Navigator.
HTML	Hyper Text Markup Language; the text based language used to construct Internet pages. The Web browser interprets this language to display the Web pages.
Hyperlinks	A highlighted and underlined word or phrase on a Web page that, when clicked, takes the user to another area on the same page or another Web page.
Page Action Buttons	Push buttons that allow the user to save updates, access records, navigate, and access other pages.

| Term	Description
URL	Uniform Resource Locator; the address by which documents on the Internet are found.

Breadcrumbs

Menu Item

Menu Group
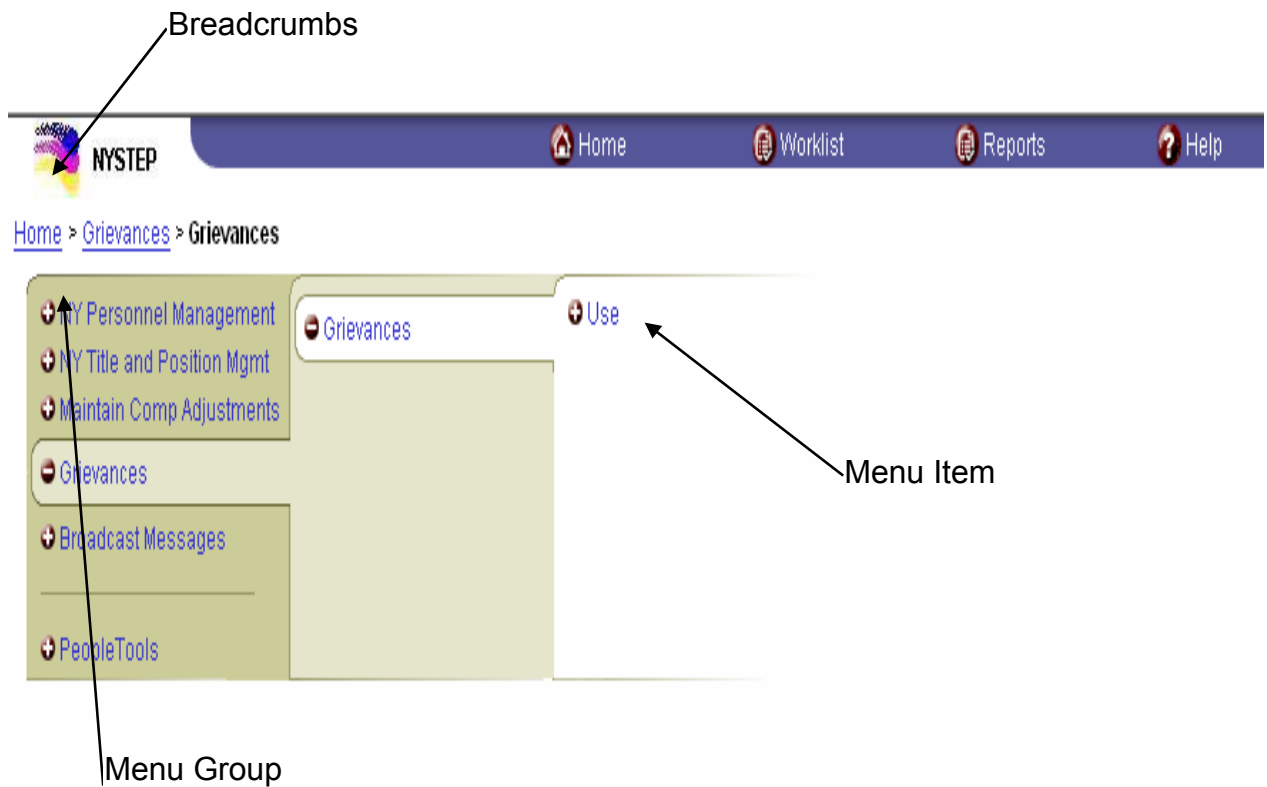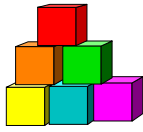
Page Navigation

There are several ways to navigate around a page. There are breadcrumbs, page action buttons, hyperlinks, keyboard alternatives, scroll areas, and folder tabs.

Breadcrumbs

Breadcrumbs indicate the path the user has taken to reach a page. They appear as a chain of hyperlinks which allow the user to navigate between menu groups.
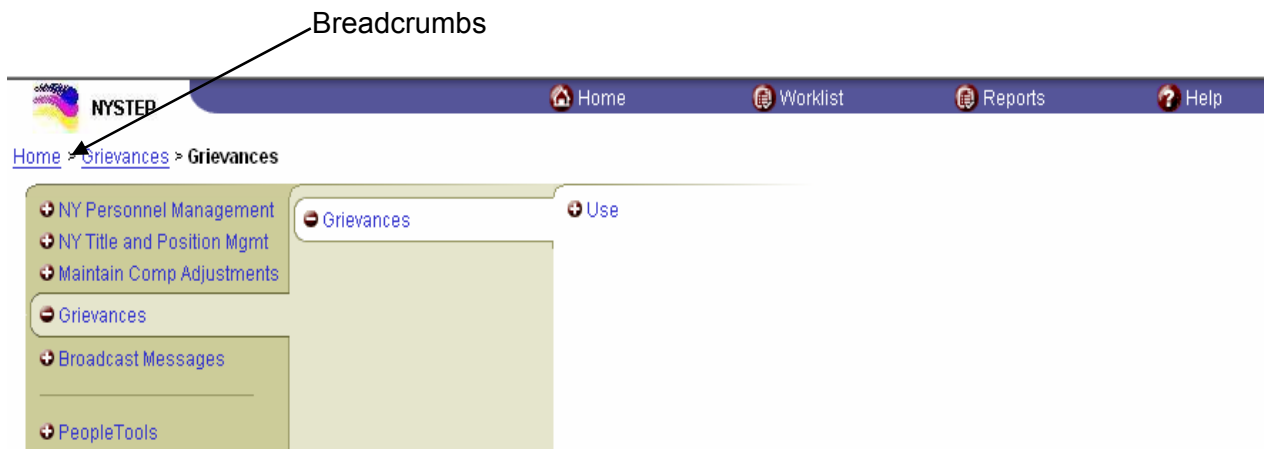
NOTE: If a preceding breadcrumb is clicked, a message will display that asks if the User wants to save the current data first, or continue without saving.

Page Action Buttons

Page Action Buttons are push buttons that allow the user to save, update, access records, navigate and access other pages. Some Page Action Buttons only appear on certain pages or when certain actions are initiated.
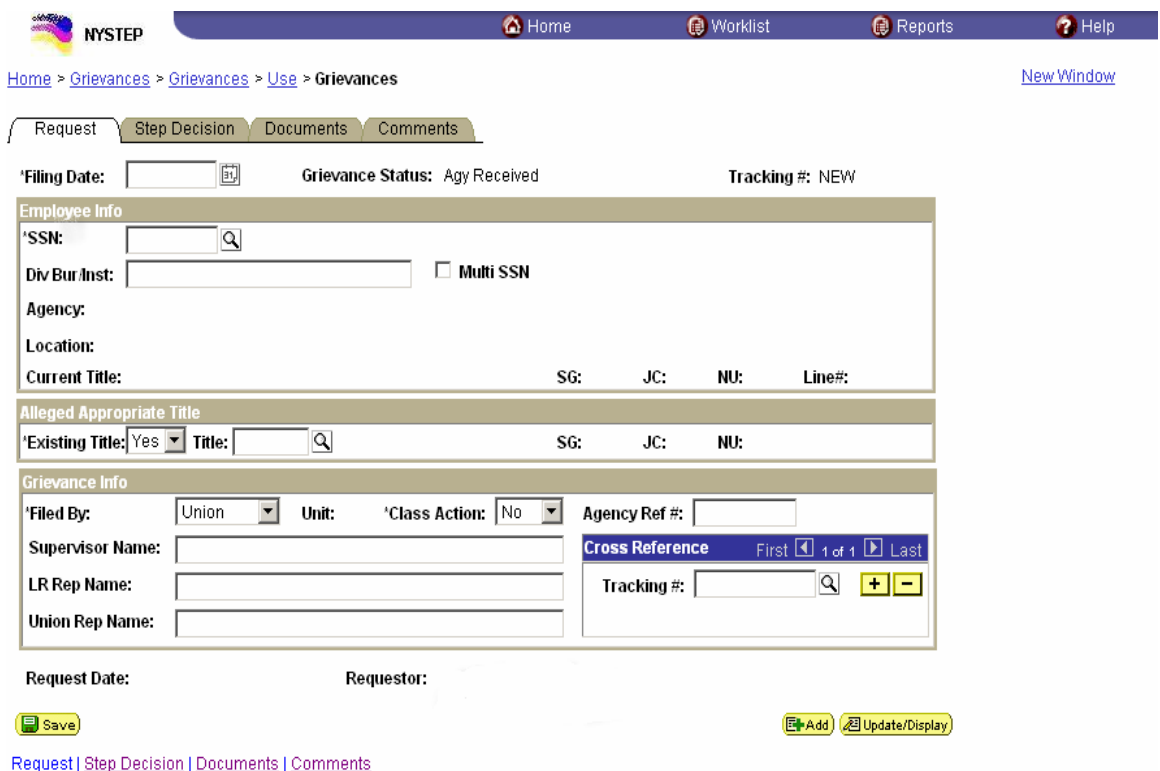
Page Action Button

Page Action Button	Description
Save	Saves work and assigns a Tracking Number.
Next in List	Next in List
Previous in List	Previous in List
Return to Search	Return to Search
Previous tab	Previous Tab
Next tab	Next Tab
Update/Display	Update/Display
Add	Add another transaction of similar type.
(calendar icon)	Press to display a calendar for fields that require a date.
—	Delete a row
+	Insert a row

Page Action Button	Description
🔍	Indicates that there is a Lookup table of valid values for a particular field.

Hyperlinks

A highlighted and underlined word or phrase on a Web page that, when clicked, brings the user to another area on the same page or to another Web page.

Hyperlinks

Keyboard Alternatives

Keyboard alternatives are another way of navigating through the pages. They assist users in quick data entry.

Keys	Functions
Alt + 1	Save
Alt + 2	Return to Search
Alt + 3	Next in List
Alt + 4	Previous in List
Alt + 5	Search or Lookup
Alt + 6	Cancel
Alt + 7	Insert Row
Alt + 8	Delete Row
Alt + 0	Exit
Alt + F	Find in List
Ctrl + Z	Undoes the last field typed.
Shift + Tab	Brings the user to the previous field.
Shift + End	Highlights the whole field when the cursor is at the beginning of the line.
Shift + Home	Highlights the whole field when the cursor is at the end of the line.
Alt + .	Next in grid, scroll, or search page results list.
Alt + ,	Previous in grid, scroll, or search page results list.
**Alt + **	Toggles between "Add a New Value" and "Find an Existing Value" in a search page.
Alt + /	Find data in grid or scroll.
Alt + '	View all rows of data in grid, scroll area, or search page results list.
Ctrl + K	When in a search or transaction page, opens a page with a list of keyboard navigation shortcuts using hot keys and access keys.

Navigation Bar or Scroll Area Header

Navigation Bar or
Scroll Area Header

The scroll area header allows the User to scroll through multiple rows of data. The **View All** hyperlink allows the User to view and scroll through all the data rows together. The **First** hyperlink brings the User to the first (the most recent) row of data. The **1 of #** shows the User how many rows of data exist for the transaction. The **Last** hyperlink brings the User to the last (the oldest) row of data. To view one row at a time, use the ◄ arrow to the right of **First** and the ► arrow to the left of **Last** to navigate back and forth between rows.
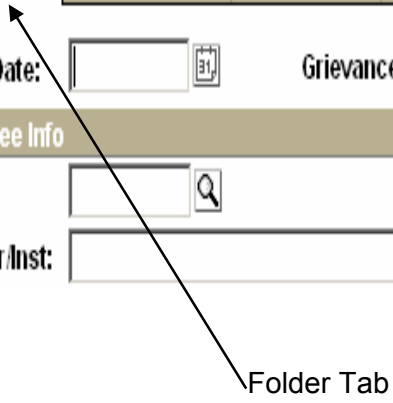
Folder Tabs

Each type of transaction is called a component. A component can be made up of one or several pages. Each page is displayed by a folder tab. When the folder tab is clicked, the page in the component will display.

Folder Tab

Page Functionality

There are some standard features on the OTW pages. The top of each page has the Agency Code and name. This is the first field entered by the user. If security grants access to only one agency, the agency will be populated by the system. If access to more than one agency is available, a drop down box lists the agency codes available to the user. A Tracking Number is located in the right hand corner of the page. The information at the bottom of a page includes the grievance request date and the requestor's name. The request date is the date the grievance is saved or submitted on NYSTEP. The requestor is the person saving or submitting the grievance on NYSTEP.

Tracking

The Tracking #, also known as the OER File #, is located in the upper right hand corner of all pages. It is used for tracking a grievance and accessing a grievance for review or processing.

The Tracking # consists of 10 digits. The first four denote the calendar year, the next two denote the negotiating unit, and the last four numbers are a sequential number assigned by NYSTEP to the request after a "Save" or "Submit" action. The Tracking # reads "NEW" until that action is either saved or submitted.

Scroll Bar & Elevator Button

Scroll bars allow the user to display more data than can be shown at any one time on the page. By clicking on the arrows, the elevator button contained in the scroll bar can be moved up and down to scroll through the applicable area. Dragging the elevator up or down the scroll bar (click, hold and drag) can also change the display. Should there be more data than can fit into a page; the elevator button will be located at the top of the scroll bar. Pages may provide more than one scroll bar for access to information specific areas of a page.

When a scroll bar is present in a work area, additional data can be entered. The **Alt + 7** function key or the Insert Row [+] icon is used to create additional entry fields.

Place the cursor in any data entry field within the area. Press **Alt + 7** or the Insert Row [+] icon. This will activate a new data entry field.

To delete a data entry field that has been added through **Alt + 7**, **Alt + 8** or the Delete Row [−] icon is used. Place the cursor in the data field to be removed, and press **Alt + 8** or Delete Row

icon. When pressed, a confirmation message will pop up asking if the data should be deleted. Confirm your action by pressing the "Yes" button on the message screen. The data will be deleted from the transaction.

Save or Submit?

After completing entry of a grievance, one of two things must happen.

When the data is correct and complete and any required documents have been attached, press the Submit [Submit] button to commit the request to NYSTEP. The request is forwarded to the next level. Once a grievance has been submitted, it cannot be accessed for changes. If changes are necessary, contact the TPM/OTW Corrections Unit in Classification & Compensation.

If there are questions about the data or the grievance is being enter without a Step 2 determination or other action, click Save [Save]. This secures the transaction data without submitting and allows the user access to the request through the worklist for later revision and/or submission.

NYSTEP will not allow an incomplete page to be saved or submitted. All required data entry fields must be completed, and all field edit checks passed.

Withdrawing a Grievance

When a grievance is withdrawn by the union or employee who filed it, it can be withdrawn from NYSTEP, provided that the request has not received final determination. If the grievance is at agency level for Step 1 or 2 Decision, attach an electronic copy of the document withdrawing the grievance and select **Withdraw** from the lookup on the Step Decision page. If the grievance has gone to OER, attach the documentation to the grievance and contact a designated person there to have it withdrawn.

Return for Additional Information

There are times when C&C may request additional information. This action returns the request to the person who submitted the grievance and puts it on that person's Worklist. Once the additional information is attached, the grievance can be resubmitted. **Note**: the agency cannot change data on the **Request** page in this status.

Adding More Grievances

More OTW grievances can be added as often as necessary without having to initiate the request through the drop down menus. This can be done using the Add [Add] icon.

After submitting (or saving) a request page, press the Add [E+Add] icon. A new request page with NEW in the Tracking # field appears. Enter the data for the new transaction, save or submit the request, and the Tracking # is assigned.
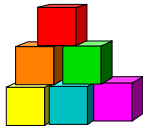
Searches

There are two types of Searches that can be used to retrieve data; an **Advanced Search** and a **Basic Search**.

Advanced Search

This is the default search. By using the **Advanced Search**, the User may search by entering data in multiple fields, and any combination of fields. To do a basic search, click the **Basic Search** hyperlink.

Basic Search

When using the **Basic Search**, the User can retrieve data by entering data in a single field. The **Search By** dropdown field allows the User to select the value used to search. The User can switch to the advanced search by clicking on the **Advanced Search** hyperlink.

Whether using an Advanced or Basic Search, partial value searches can be used by entering partial values in a particular data field. As with the old NYSTEP System, the more data entered, the more precise the returned list will be. Of course, entering the **Tracking Number** will bring up only that transaction.
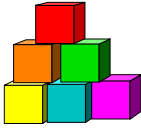
Favorites and Bookmarks

Internet Explorer allows a user to create a shortcut that goes directly to a specific web page. These shortcuts, called "Favorites" make it easier to access the transaction types that are used most often. The Favorites that are marked are specific to a workstation, not a User ID.

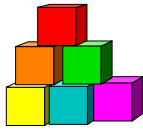To mark a transaction type as a Favorite in Internet Explorer:

1.   When a transaction type is open, click **Favorites**, **Add to Favorites**.
     A dialog box will display
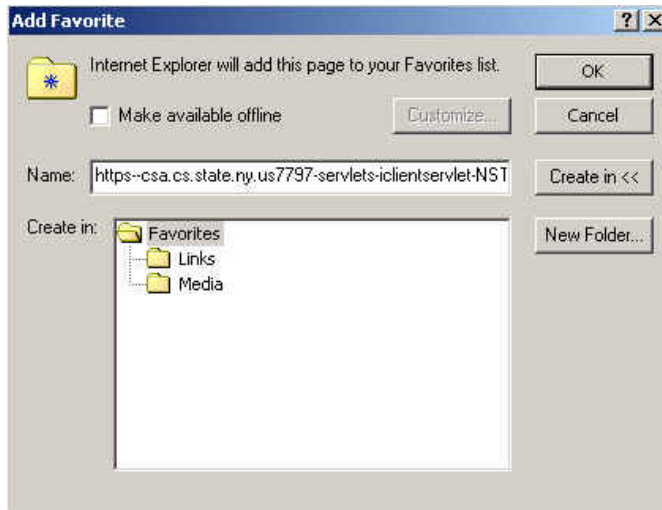
2.   In the **Name** field, enter the type of transaction or other descriptive title.
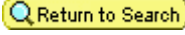
3.   Click **OK**.

NOTE: Currently, Netscape does not allow for the creation of shortcuts, or "Bookmarks" within NYSTEP.

Canceling Transactions and Signing Out

Canceling Transactions

To cancel a transaction without saving or submitting, a user has different options.

- Click on a preceding breadcrumb to bring you back to a previous point in the navigation.

- Click on a hyperlink at the bottom of the page.

- Click on [Q Return to Search] to bring you back to the list.

- Click the Home icon at the top of the page.

- Click the Sign Out icon on the top of the page to end the session.

When canceling a transaction without saving or submitting, a dialog box will display the following reminder:
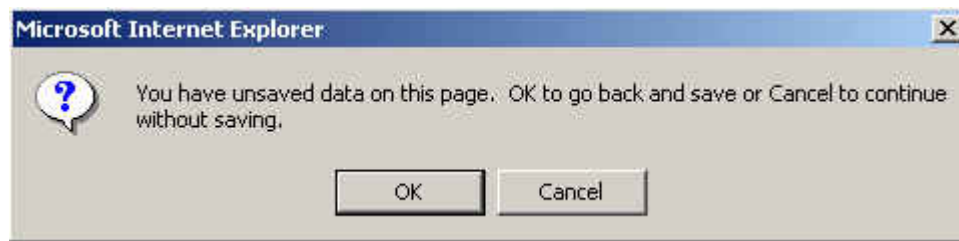
Click **Cancel** to continue without saving.

Closing Multiple Windows/System Sign Out

Certain processes within NYSTEP will result in other pages appearing on the user's monitor (Reports, Transaction Summary, Work Load Tracking).

To close an individual page, simply press the [X] button in the upper right hand corner of the page. This will close that particular page, yet leave any other pages open and the system up to process other transactions.

Using the [Sign Out] icon will close out the system and log the user out, ending the NYSTEP Session and bringing the User back to the sign in page. Use this method only when signing completely out of the system!

Once back at the Sign-in page during log out, the user can use the File drop down menu to close out the web browser entirely. Access the drop down menu and click **Close**. This will disconnect the user from the web.