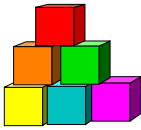


Navigation

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Signing On



Access the Page

1. Open your Web Browser by clicking the Internet  icon. (In this example Internet Explorer is being used.)

Your Internet home page will display.



NOTE: If your agency uses security software that requires a login and/or password for you to use the internet, you will need to complete that procedure before continuing. Additionally, there are security protocols that must be followed to log onto NYSTEP.

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 section.

2. 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

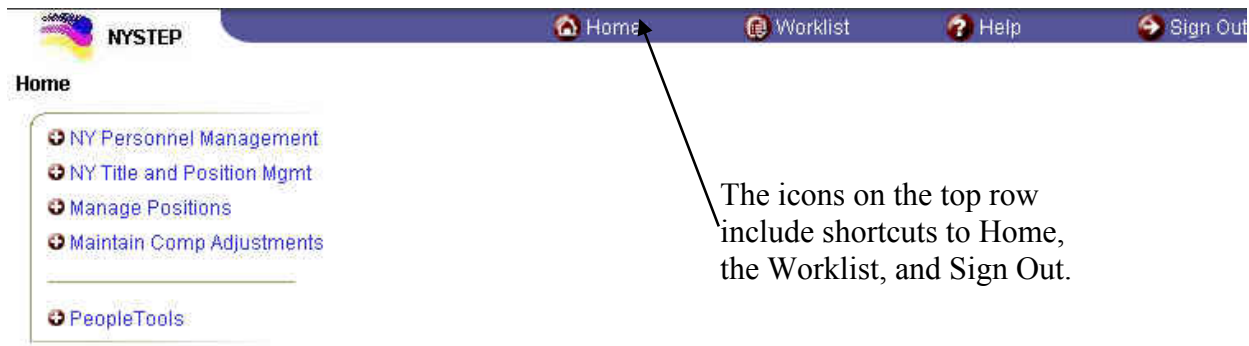


3. Click *Yes*.

The PeopleSoft sign in screen will display



4. In the **User ID** field enter your *User ID* in all capitals. This field is case sensitive.
5. In the **Password** field, enter your password (this field is case sensitive).
6. Push the **Sign In** button.
The NYSTEP Homepage will display.



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.



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:

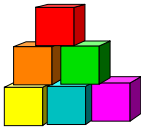
Passwords must be a minimum of 8 characters in length;

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.

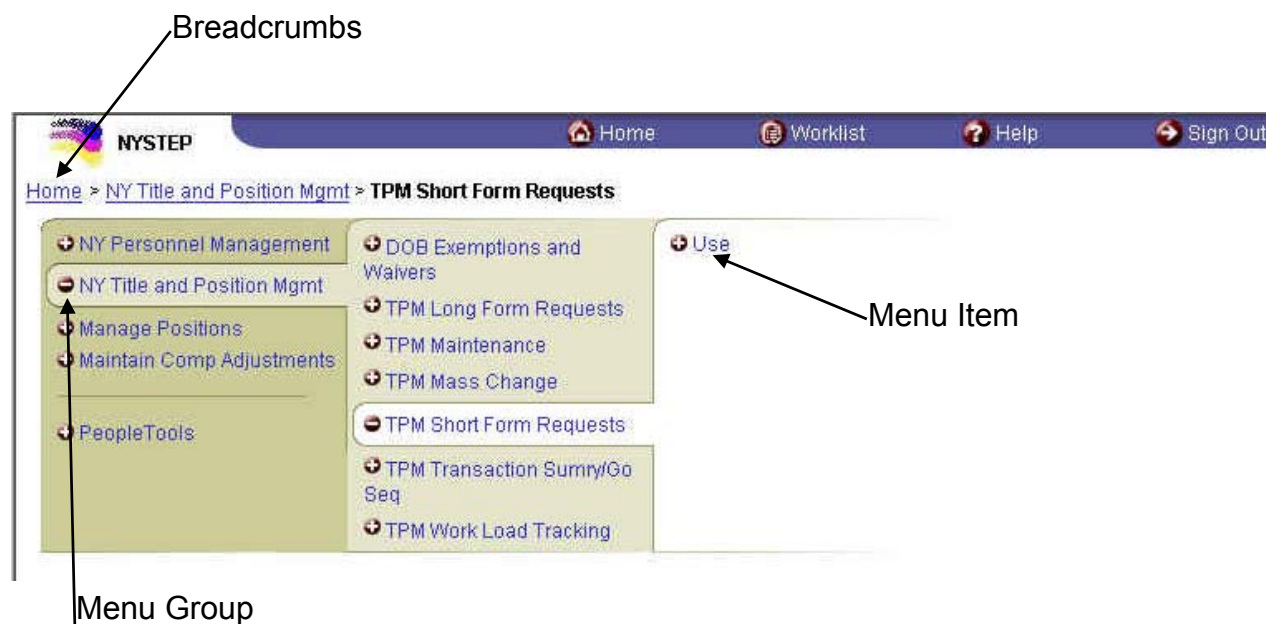
Changed Terminology

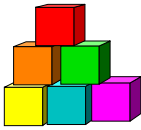
PeopleSoft 7.5	PeopleSoft 8.3
Panel Groups	Components: A group of related pages that pertain to a specific task.
Go Menu Items	Home: Highest level in the menu navigation structure; this is also the default page when PeopleSoft 8.3 is accessed.
Prompts	Lookups: Functionality that takes the user to view tables that are associated with a field.
Panel	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	<u>H</u> yper <u>T</u> ext <u>M</u> arkup <u>L</u> anguage; 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	<u>U</u> niform <u>R</u> esource <u>L</u> ocator; the address by which documents on the Internet are found.



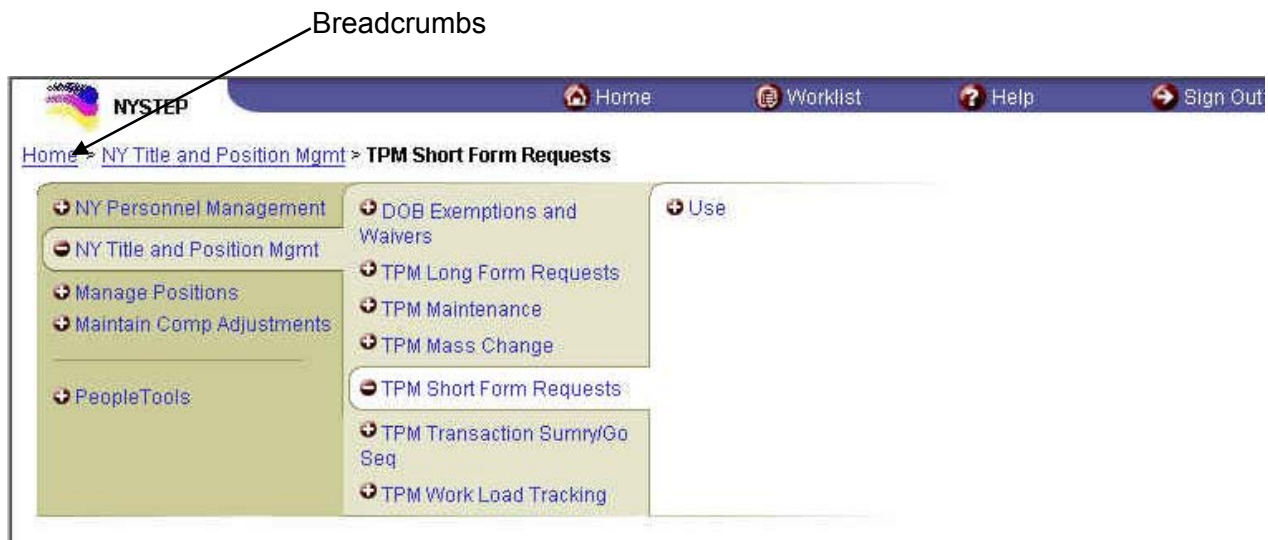


Page Navigation

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.

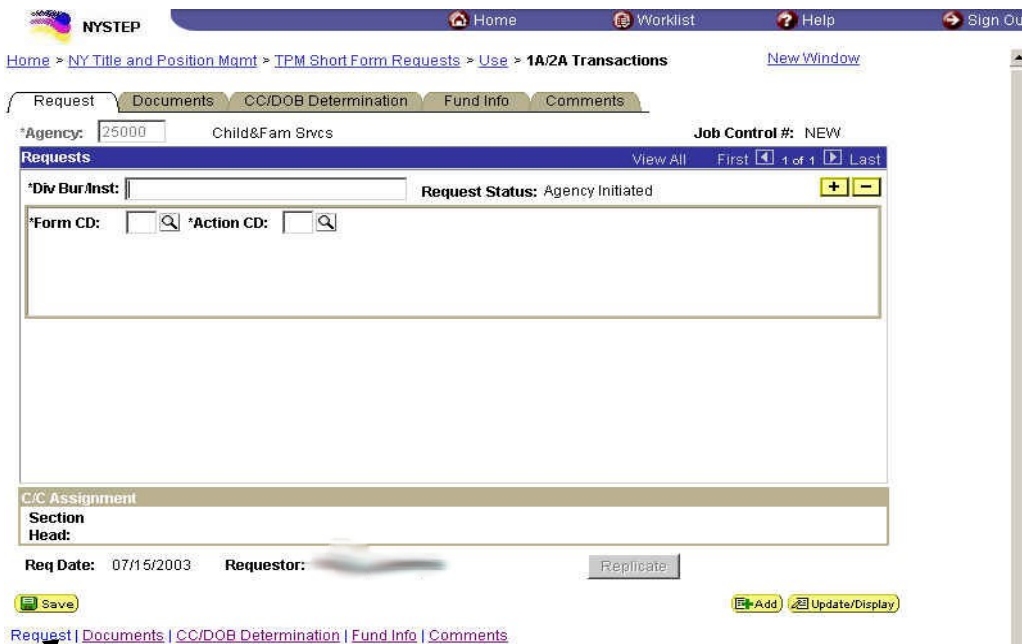
Page Action Button

Page Action Button	Description
Save	Saves work and assigns a Job Control 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
Include History	Include History
Correct History	Correct History
Add	Add another transaction of similar type.

Page Action Button	Description
	Press to display a calendar for fields that require a date.
	Delete a row
	Insert a row
	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.



NYSTEP Home Worklist Help Sign Out

Home > NY Title and Position Mgmt > TPM Short Form Requests > Use > 1A/2A Transactions New Window

Request Documents CC/DOB Determination Fund Info Comments

*Agency: 25000 Child&Fam Svcs Job Control #: NEW

Requests View All First 1 of 1 Last

*Div Bur/Inst: Request Status: Agency Initiated + -

*Form CD: *Action CD:

C/C Assignment

Section

Head:

Req Date: 07/15/2003 Requestor: Replicate

Save Add Update/Display

[Request](#) | [Documents](#) | [CC/DOB Determination](#) | [Fund Info](#) | [Comments](#)

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 TPM 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 job control number, and possibly a sequence number field, is located in the right hand corner of the page. The information at the bottom of a page includes the transaction request date and the requestor's name.


Job Control


The Job Control # is located in the upper right hand corner of all pages. It is used for tracking a transaction, the sequential numbering of multiple requests in a classification transaction, and accessing a request for review or approval.

The Job Control # consists of 9 digits. The first four denote the fiscal year, and the five numbers following the dash are a sequential number assigned by NYSTEP to the request after a "Save" or "Submit" action. The Job Control # reads "NEW" until that action.

For transactions containing multiple requests, a sequence number is used to represent the different portions of the whole transaction. The sequence number will appear as "1 of 1" until more sequences are added.



Multiple Requests Within The Same Job Control


NYSTEP can be used to process more than one request within the same Job Control # and Div Bur/Inst. For this function, **Alt + 7** key or Insert Row  icon is used.


By way of illustration, presume an agency needs to request two new positions – one Clerk 1 and one Keyboard Specialist 1. Begin by accessing the appropriate classification action page, the 1A New Positions request. Once all the information requesting the Clerk 1 has been entered, place the cursor in the highest numbered sequence and press **Alt + 7** or Insert Row  icon.

At this time, NYSTEP displays a fresh page over the first request. The sequence number changes from "1 of 1" to "2 of 2". Enter all of the data necessary for the Keyboard Specialist 1 position on the second page. When the data is entered and all edit checks have been passed, the classification action request can be saved or submitted.





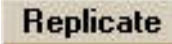
NOTE: The scroll area header allows the User to scroll through multiple rows of data. The **View All** hyperlink allows the User to view and scroll through all the data rows together. The **First** hyperlink brings the User to the first (the most recent) row of data. The **1 of #** shows the User how 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.

The Insert Row  icon can be used to overlay a fresh page up to 99 times within the same Job Control #, as long as the request has not been submitted.

If the added request is later deemed unnecessary, that portion of the transaction request can be deleted using **Alt + 8** or Delete Row  icon prior to submitting. Place the cursor in a data entry field within the sequence to be deleted. Press **Alt + 8** or the icon and a confirmation message will appear. Click OK. That page is deleted from the transaction, although the sequences are not renumbered.

Replicate

For multiple sequences within a request, the user can work with **Alt + 7** or Insert Row  icon on the toolbar, as described above. The User may also use the Replicate  button for certain transaction to duplicate data from one sequence to another.


The replicate button appears for transactions 1A 31, 2A, 4N 11, 4N 12, 4R 01, 4R 02, 4R 41 and 4R 42. When the Replicate  button is pressed for any of these transactions, the system will save the transaction, insert a new row, and roll forward all the values from the last sequence entered. The system will blank out the # **POS Req**, **Begin Line Number**, and **Location** fields. These fields must be re-entered by the user.


The button is available only on the request page and only prior to the submission of the transaction. The row being replicated must have passed any and all save edits prior to the replication taking place. Using this feature eliminates redundant data entry for multi-sequenced transactions when the only difference between them is the line numbers, location, or the number of positions required. Sequences added by Replicate can be deleted as described above.



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 a classification action request, one of two things must happen.

When the data is correct and complete and any required documents have been attached, press the Submit  button to commit the request to NYSTEP. The request is forwarded to the next approval level. Once a request has been submitted, it cannot be accessed for changes. If changes are necessary, contact the appropriate C&C Analyst.

If there are questions about the data, click 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 Request

It is possible for the wrong data to be entered into a request, pass all the edit checks, and be forwarded to the next approval level for consideration (reclassifying or moving a position and entering the wrong line item number, for instance). It is also possible that circumstances change and the agency wants to change the request.

When these or other errors occur, or when a transaction request needs to be cancelled outright, it can be withdrawn from NYSTEP, provided that the request has not received final approval.

Contact the agency's C&C Analyst, explain the situation and give the Analyst all relevant data needed to access the request.

The Analyst retrieves and then withdraws the request. The request is returned to the Worklist of the Requestor. The data can be corrected and the transaction resubmitted, or the request can be removed from the Worklist by marking it worked.

A request that has passed through C&C and been forwarded to the Division of Budget can also be withdrawn, again providing that it has not received final approval. Contact the DOB Examiner, who withdraws the request and returns it to C&C. C&C can then return the transaction to the requestor.

Return for Additional Information


There are times when C&C may request additional information. This action returns the request to the requestor and puts it on that person's Worklist. Once the additional information is attached, the request can be resubmitted.

Repeating a Classification Action


The same type of classification action request can be repeated as often as necessary without having to initiate the request through the drop down menus. This can be done using the Add



icon.

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

This function can be used as often as necessary to process classification request of the same nature. This is especially useful for those agencies within New York State that have their personnel and classification actions completed by a central office.

A central office can initiate a request for a position in one facility, press the Add  icon, and request a position for another facility.

Line Numbers and Number Ranges

In transactions that require the number of positions being requested and a beginning line number, an edit and calculation is performed by NYSTEP. When multiple positions are requested, the ending line number is calculated by NYSTEP, and an edit is initiated verifying that the attributes of the positions within that range match.

If the attributes of all of the positions are not identical, an error message indicates the “attributes of Range of Line Items are not the same.” Attributes are defined as the title, salary grade, jurisdictional class and the negotiating unit of a position. Find where the discrepancy lies and either alter the number of positions being requested, or the line item numbers.

To assist in processing the request, some pages have a **View Position** button that allows the user to access a list of the line items and their attributes. After viewing the positions, press the **Return to page** button to return to the transaction request page.

Request Components vs. Sequence Components

Comments added on the **Comments** page can be attached to a transaction request at two different levels.

Any comment attached at the higher Request level is pertinent to all of the sequences created for that transaction. Comments that apply to only one sequence can be entered at the sequence level. They are visible only at the sequence to which entered unless “View All” is selected.

Audit

The majority of agency submitted transactions are routed to C&C for approval and/or further routing. If, at any stage of the processing, a C&C Analyst makes any change to the original request, an Audit hyperlink [Audit](#) will appear on the original request page.

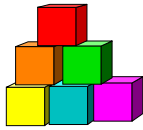
When clicked, an audit page will appear that lists the original values for the specific data elements that have been changed. The changed elements can be viewed on the request page itself.

The Audit hyperlink [Audit](#) will appear only if C&C has made a change to a 1A, 2A, 4N, or 4R transaction.

Sunset Deadlines

NYSTEP has a limit, or “sunset,” on the amount of time a transaction can sit inactive in the system.

Withdrawn transactions are returned to the Requestor and placed in the Worklist. The transaction is held in the worklist for a period of 60 days, then purged from the system. The transaction can be removed from an individual’s work list prior to the 60-day sunset by marking the item worked. Transaction requests that have been in a worklist for 180 days are withdrawn from DOB and marked “Sunsetted”.






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.

The screenshot displays the NYSTEP system interface. At the top, there is a navigation bar with the NYSTEP logo and links for 'Home' and 'Worklist'. Below the navigation bar, a breadcrumb trail reads: 'Home > NY Title and Position Mgmt > TPM Short Form Requests > Use > 1A/2A Transactions'. The main heading is '1A/2A Transactions'. Below this, the section 'Find an Existing Transaction' is highlighted. The search form includes the following fields and controls:

- Job Control Number:
- Agency: 
- Form Code: 
- Action Code: 
- Begin Line Number:
- Changed To Agency:

At the bottom of the form, there are three buttons: 'Search' (yellow), 'Clear' (yellow), and 'Basic Search' (purple). Below the buttons, there is a link 'Add a New Transaction'.

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.

The screenshot shows the NYSTEP System interface. At the top is a navigation bar with the NYSTEP logo and links for Home and Worklist. Below the navigation bar is a breadcrumb trail: Home > NY Title and Position Mgmt > TPM Short Form Requests > Use > 1A/2A Transactions. The main heading is 1A/2A Transactions. Below this is a section titled Find an Existing Transaction. The search form includes a Search By dropdown menu set to Job Control Number, a text input field for the Job Control Number, a yellow Search button, and a purple Advanced Search hyperlink. At the bottom of the form is a purple Add a New Transaction hyperlink.

NYSTEP

Home Worklist

Home > NY Title and Position Mgmt > TPM Short Form Requests > Use > 1A/2A Transactions

1A/2A Transactions

Find an Existing Transaction

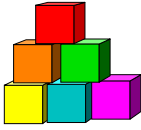
Search By: Job Control Number

Job Control Number:

Search Advanced Search

Add a New Transaction

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.

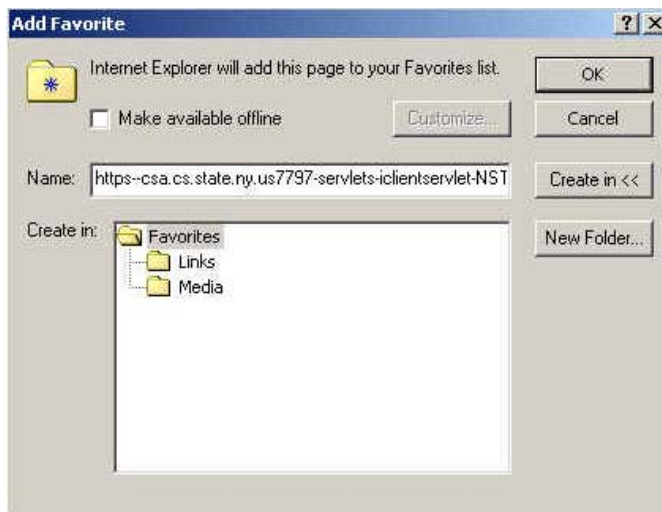


Favorites and Bookmarks

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:

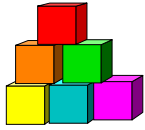
1. When a transaction type is open, click **Favorites, Add to Favorites**.
A dialog box will display



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.



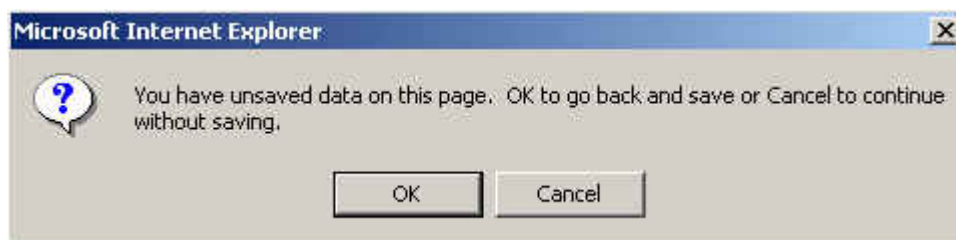
Canceling Transactions and Signing Out

Canceling Transactions

In the new NYSTEP System, there is no longer the  icon to cancel a transaction. 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  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  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.

