

Navigation

Chapter Topics

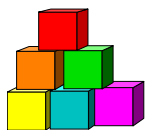
Security Protocols	2-4
Changing the Password.....	2-5
Signing On	2-7
Terminology	2-11
Terminology.....	2-11
Page Navigation	2-12
Breadcrumbs	2-12
Page Action Buttons	2-13
Hyperlinks.....	2-14
Keyboard Alternatives	2-15
Navigation Bar or Scroll Area Header.....	2-16
Folder Tabs	2-16
Searches	2-17
Advanced Search	2-17
Basic Search.....	2-17
Menu Options	2-19
Menu Option – Home	2-19
Broadcast Messages.....	2-19
NY Personnel Management:.....	2-19
Incumbent Change Request.....	2-20
Encumbent Change Request.....	2-20
Menu Option – Use.....	2-21
Incumbent Change Request.....	2-21
Encumbent Change Request.....	2-21

Search Dialog Boxes2-21
Menu Option – Process2-21
Menu Option – Inquire.....2-21

Favorites and Bookmarks.....2-21

Canceling Transactions and Signing Out.....2-21
Canceling Transactions2-21
Closing Multiple Windows/System Sign Out.....2-21

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Security Protocols

Every State agency and every individual user of the NYSTEP System is responsible for ensuring the security of the information in the NYSTEP System.

The information in NYSTEP shall not be made available or released to any third party, except as directed by a court of competent jurisdiction or as necessary to comply with applicable law such as the New York State Freedom of Information and Personal Privacy Protection Laws found in Public Officers Law Articles 6 and 6-a, respectively.

AGENCY RESPONSIBILITIES

Include, but are not limited to:

- Restricting access to the NYSTEP System to authorized employees who must use the system to perform the duties of their positions;
- Assigning authorized employees to a user operator class appropriate for the individual's need to access information;
- Reassigning authorized employees to a new user operator class when their need to access information changes;
- Notifying the Department of Civil Service immediately when a user ID is no longer being used or has been compromised because of a breach or potential breach in security; and,
- Training all employees on the security requirements of using the NYSTEP System.

USER RESPONSIBILITIES

Individual users of the NYSTEP System have a responsibility to preserve security of information in the system.

Individual users' responsibilities include but are not limited to:

- Maintaining the privacy of personally identifying information;

- Maintaining the confidentiality of their password;
- Keeping written records of passwords in a secure place (e.g. not posted on or around the workstation); and,
- Logging off the system before leaving a PC unattended, even for a brief period of time.



NOTE: INTENTIONAL AND/OR REPEATED ACCIDENTAL BREACH OF ANY SECURITY REQUIREMENTS MAY, AT THE SOLE DISCRETION OF THE DEPARTMENT OF CIVIL SERVICE, CONSTITUTE GROUNDS FOR TERMINATION OF THE USER’S ACCESS TO NYSTEP. SUCH TERMINATION WILL ALSO BE BROUGHT TO THE AGENCY’S ATTENTION.

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 using your *User ID*.

To change your password:

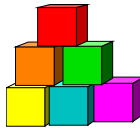


1. Click **PeopleTools, Maintain Security, Use, Change Password**.
A change password page will display.
2. Click **Change password**.



The screenshot shows a web browser window with the NYSTEP logo in the top left corner. The top navigation bar is blue and contains a Home icon and a Work icon. Below the navigation bar, a breadcrumb trail reads: Home > PeopleTools > Maintain Security > Use > Change Password. The main content area is titled "Change password" in blue text. It contains three text input fields: "*Current Password:", "*New Password:", and "*Confirm Password:". Below the input fields are two buttons: "OK" and "Cancel".


2. In the **Current Password** field, type your current password.
3. In the **New Password** field, type your new password.
4. In the **Confirm Password** field, type your new password again.
5. Press **OK**.



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 may be directed to a series of dialog boxes that will require them to change their password.

See the section on “Changing the Password” in this section.

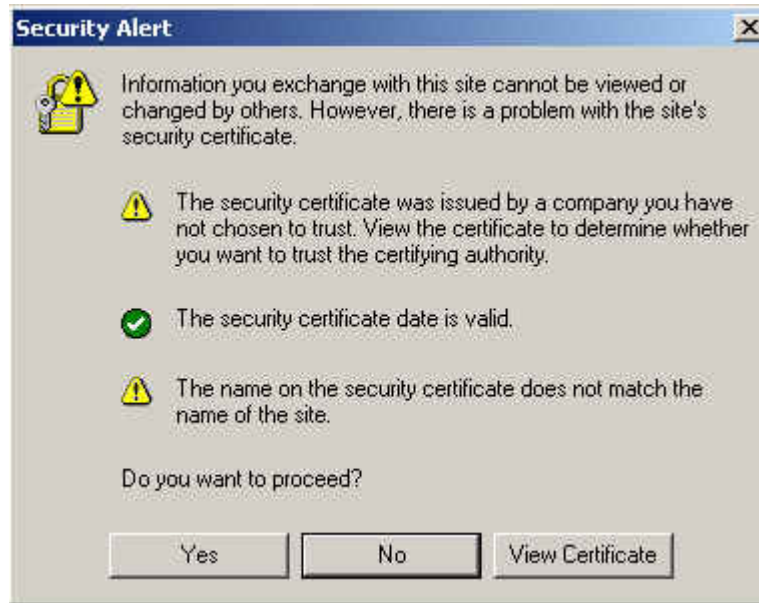
2. In the **Address** field, type the NYSTEP URL (If you do not know the URL, please contact the Civil Service Help Desk at 1-800-422-3671 for assistance)
*A Security Alert **MAY** display*





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

*Another Security Alert **MAY** display*

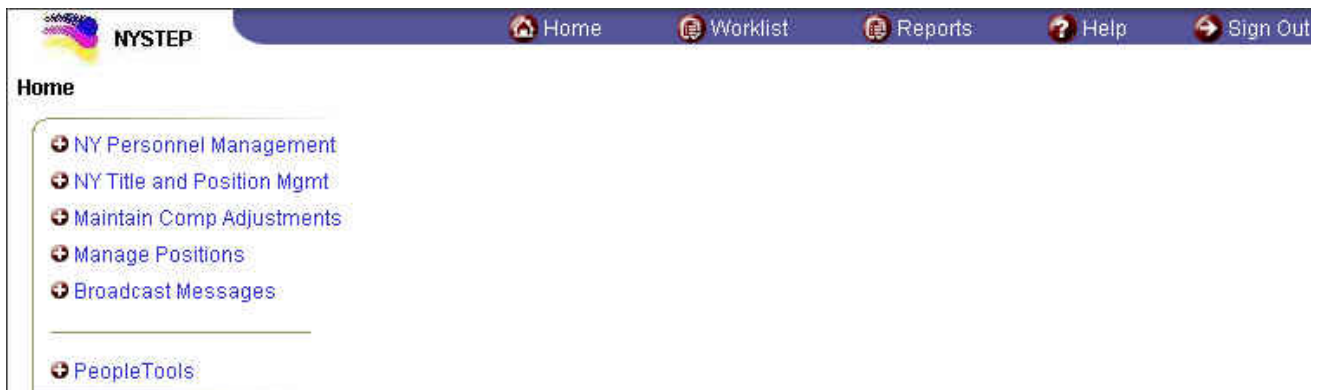


3. Press *Yes*.

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. Press 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.

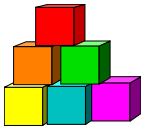
The Menu Group can expand three columns per screen. As a user progresses to an application page, the three columns that are viewed will change to the last three selected.



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.

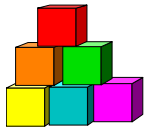


Terminology

NYSTEP has some terminology with which the user must be familiar.

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.
Components	A group of related pages that pertain to a specific task.
Home	Highest level in the menu navigation structure; this is also the default page when PeopleSoft 8.3 is accessed.
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.
Lookups	Functionality that takes the user to view tables that are associated with a field.
Page	Area where data can be viewed or updated.
Page Action Buttons	Push buttons that allow the user to save updates, access records, navigate, and access other pages.
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

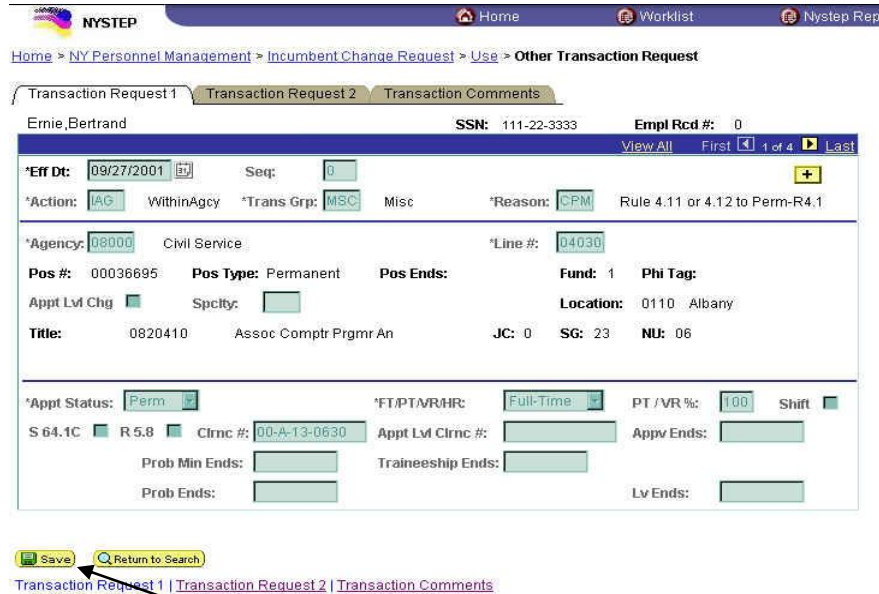
Breadcrumbs indicate the path the user has taken to reach a page. They appear as a chain of hyperlinks which allow the user to navigate between menu groups.



NOTE: If a preceding breadcrumb is clicked, a message may display that asks if the User wants to save the current data first, or continue without saving.





Page Action Buttons

Page Action Buttons are pushbuttons 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.



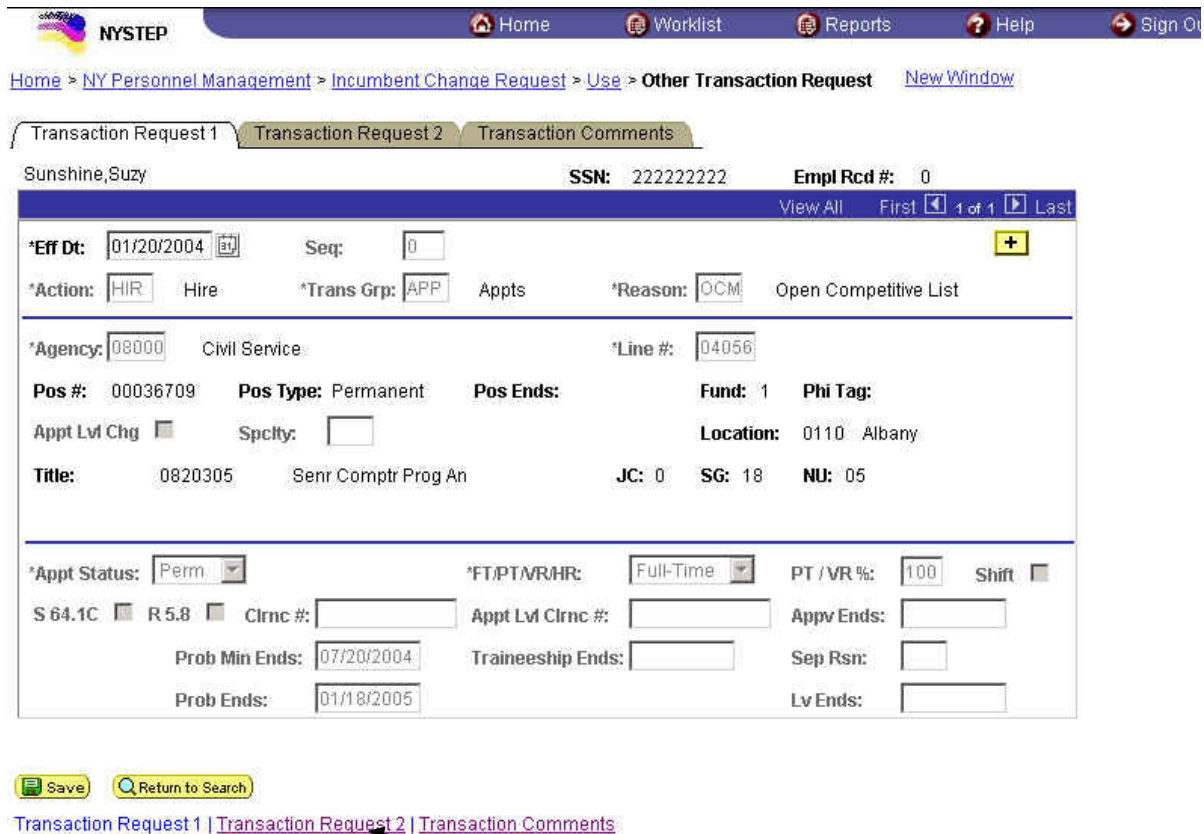
Page Action Button

Page Action Button	Description
	Saves work and assigns a Job Control Number.
	Next in List
	Previous in List
	Return to Search
	Previous Tab
	Next Tab
	Update/Display
	Include History
	Correct History
	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. Always insert top of stack regardless of the effective date.
	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 Reports Help Sign Out

Home > NY Personnel Management > Incumbent Change Request > Use > Other Transaction Request [New Window](#)

Transaction Request 1 | Transaction Request 2 | Transaction Comments

Sunshine, Suzy SSN: 222222222 Empl Rcd #: 0

View All First 1 of 1 Last

*Eff Dt: 01/20/2004  Seq: 0 

*Action: HIR Hire *Trans Grp: APP Apts *Reason: OCM Open Competitive List

*Agency: 08000 Civil Service *Line #: 04056

Pos #: 00036709 Pos Type: Permanent Pos Ends: Fund: 1 Phi Tag:

Appt Lvl Chg Spclty: Location: 0110 Albany



Title: 0820305 Senr Comptr Prog An JC: 0 SG: 18 NU: 05

*Appt Status: Perm *FT/PT/MRHR: Full-Time PT / VR %: 100 Shift

S 64.1C R 5.8 Clrc #: Appt Lvl Clrc #: Appv Ends:

Prob Min Ends: 07/20/2004 Traineeship Ends: Sep Rsn:

Prob Ends: 01/18/2005 Lv Ends:

Transaction Request 1 | Transaction Request 2 | Transaction Comments

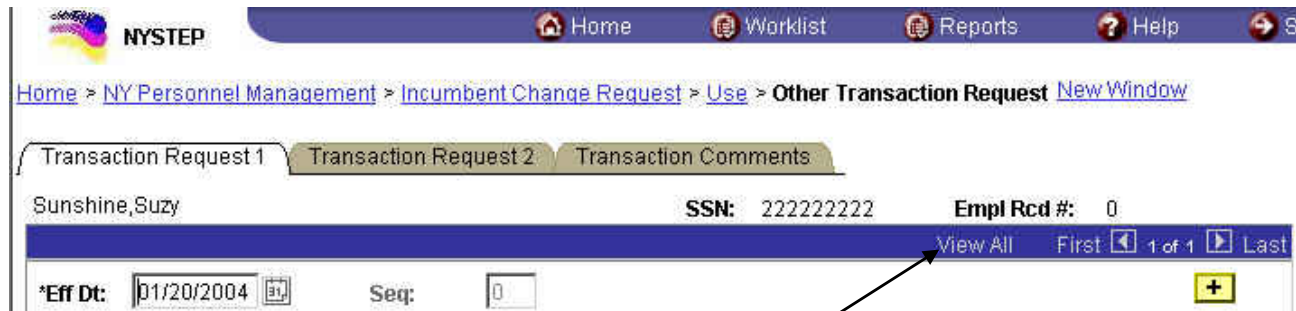
Hyperlinks

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

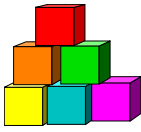
The Scroll Area Header allows the User to scroll through multiple rows of data. The **View All** hyperlink allows the User to view and scroll through all the data rows together. The **First** hyperlink brings the User to the first (the most recent) row of data. The **1 of #** shows the User how many rows of data exist. 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



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 on the **Basic Search** hyperlink.

The screenshot shows the NYSTEP web interface. At the top, there is a navigation bar with the NYSTEP logo and a 'Home' link. Below the navigation bar, there is a breadcrumb trail: [Home](#) > [NY Personnel Management](#) > [Incumbent Change Request](#) > [Use](#) > **New**. The main heading is 'New Hire/Rehire Request'. Below this, there is a section titled 'Find an Unprocessed Transaction'. The search form includes three input fields: 'SSN:', 'Name:', and 'Last Name:'. Below the input fields are three buttons: 'Search', 'Clear', and 'Basic Search'. At the bottom of the form, there is a link: [Add a New Employee](#).

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 left is the NYSTEP logo. Below it is a breadcrumb trail: [Home](#) > [NY Personnel Management](#) > [Incumbent Change Re](#). The main heading is **New Hire/Rehire Request**. Below this is a section titled **Find an Unprocessed Transaction**. There is a search form with a dropdown menu labeled "Search By:" set to "SSN". Below the dropdown is a text input field labeled "SSN:". To the right of the input field are two buttons: a yellow "Search" button and a purple "Advanced Search" link. At the bottom of the search area is a purple link labeled [Add a New Employee](#).

Whether using an Advanced or Basic Search, partial value searches can be used by entering partial values in a particular data field. The more data entered, the more precise the returned list will be.



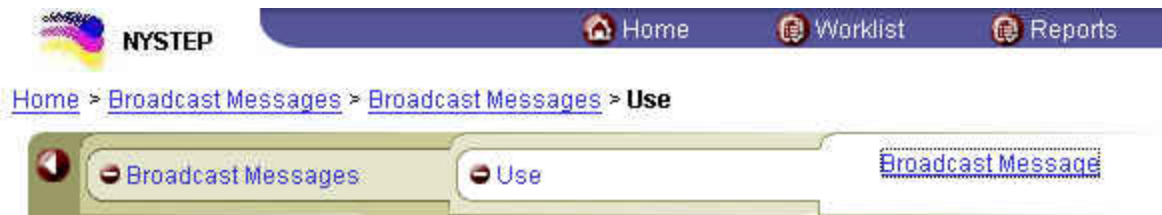
Menu Options

Menu Option – Home

The user ID (operator class) determines what **Home** menu options and components are available to each user. The menu options and components described in this section are available to users with authorization to enter personnel transactions into the system.

Broadcast Messages

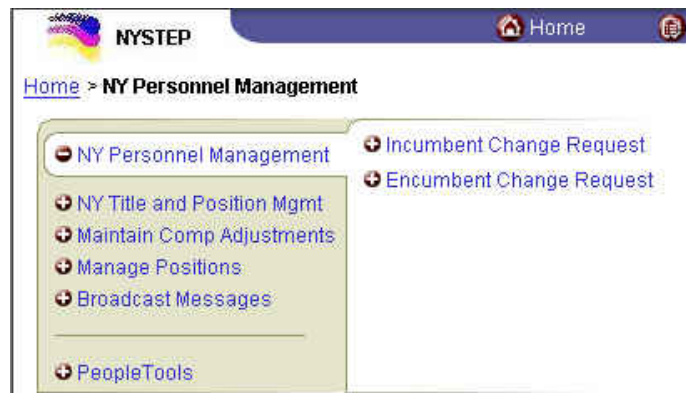
Broadcast Messages will let the user view any current messages sent by the Department of Civil Service.



To retrieve **Broadcast Messages**, click **Broadcast Messages**, **Broadcast Messages**, **Use**, **Broadcast Message**.

NY Personnel Management:

There are two options available for **NY Personnel Management: Incumbent Change Request** and **Encumbent Change Request**. Choosing one of these options directs NYSTEP to retrieve the component necessary to process against an incumbrance record or encumbrance record.



Incumbent Change Request

Use the **Incumbent Change Request** option to:

- Appoint an individual to a position when the individual will incur that position;
- Process a transaction against any position from which an employee is being paid;
- Place an employee on any type of leave from a position the employee is incumbering;
- Reinstate an employee from any type of leave;
- Process a transaction that changes an employee's type of leave without pay (i.e. change child care leave to discretionary leave out);
- Terminate an employee's employment or retire an employee from state service; or
- Extend Leave End Date for leave generated by LOA, LTO, PLA, or STO.

Encumbent Change Request

Use the **Encumbent Change Request** option to:

- Process a transaction against an encumbent's hold item (i.e. change hold item, change employee's status in the hold item, extend leave end date for leave generated by an Action of SEP or a SEP reason of LIT, LOT (Appoint Leave), MLV or PBL);
- Appoint an individual who is not incumbering or encumbering any position in NYSTEP using action code HIR or REH and place the individual on an immediate leave without pay (appoint leave); or,
- Appoint an individual using action code HLD and place the individual on an immediate probationary leave, mandatory leave or discretionary leave internal while the employee incumbers another item (appoint continue).
- Combo transactions which allow the rein leave to be done as part of the appoint leave or appoint continue.

Menu Option – Use

Page menus group the pages necessary to complete a transaction for a specific action/reason code combination, to make changes to Personal Data or Employment Data, or to work with Incoming Worklist Separations.

To select the appropriate activity click the **Use** menu option.

Incumbent Change Request



New Hire/Rehire Request: Use to appoint a person who has no record on NYSTEP, no records on APPS, or no records on Deleted APPS History.

Cross Agency Appt Request: Use to:

- Appoint an individual who is employed in another agency;
- Rehire an individual who has a record on NYSTEP from previous employment in a different agency;
- Reinstate from an appoint leave;
- Reinstate from an appoint continue when the employee has been serving in a different agency.

Concurrent Appt Request: Use to appoint a person who will be a dual employee. This person will be paid from two or more positions in one agency AND will have different status and/or titles in those positions OR will be paid from positions in two or more agencies. They will also have separate Employee Availability and Employee History pages for each job (identified by Empl Record).

Other Transaction Request: Use to submit all transactions that do not meet the criteria for **New Hire/Rehire Request**, **Cross Agency Appt Request** or **Concurrent Appt Request**.

Personal Data: Use to access personal data pages directly.

Employment Data: Use to access employment dates and salaries from OSC.

Incoming Worklist Separations: Not used by agency personnel. To process a system generated (XAG) separation click **Worklist** on the menu bar.

Encumbent Change Request



Enc New Hire/Rehire Request: Use to:

- Appoint a person who has no record on NYSTEP AND who will be placed on an immediate leave without pay (appoint leave). May have APPS/Deleted APPS History;
- Process Combo transactions which allow the rein leave to be done as part of the appoint leave.

Enc Other Transaction Request: Use to:

- Appoint an individual and place the individual on an immediate probationary leave, mandatory leave or discretionary leave internal while the employee incumbers another item (appoint continue);
- Process a transaction against an encumbent's hold item (i.e. change hold item, change employee's status in the hold item);
- Rehire an individual who was terminated after NYSTEP implementation and who will be placed on an immediate leave without pay (appoint leave);
- Process Combo transactions which allow the rein leave to be done as part of the appoint leave or appoint continue.

Search Dialog Boxes

Sample Incumbent Change Request Search Dialog Box

The following shows the search dialog boxes available under **Incumbent Change Request, Use, New Hire/Rehire Request**.

- Enter **SSN**.
- Press **Add** to begin to process a new transaction

OR

- Click **Find an Unprocessed Transaction** to retrieve a transaction that has been initiated or requested.

A Find an Unprocessed Transaction search dialog box will display.

There are three options in the search dialog box above. Select one option and press **Search**.

1. Enter the complete SSN for the desired employee;

2. If the complete name for the desired employee is known, in the **Name** field enter the last name followed by a comma and then the first name or initial. Remember to use to correct format: Lastname,Firstname – no spaces.

OR

3. If the last name or partial last name is known, **Tab** to the **Last Name** field;

- In the **Name** field, enter the employee's last name (KINGSTON) or partial last name (KING) for King, Kings, Kingsbury, Kingston, etc. Remember to enter as much of the last name as possible to target the search.
- Press **Search**.
- A list of valid values displays ALL names matching the entered criteria regardless of the agency in which the individual is employed. (Although all records will display in the list, security remains in place for accessing specific records.)
- Highlight the desired employee and double click to select.



NOTE: At this point, NYSTEP performs a security check to determine if the record for the individual requested may be displayed. If the user is not allowed access to the record, an error message will indicate "No Matching Records Found".

Sample Encumbent Change Request Search Dialog Box

The screenshot shows the NYSTEP web interface. At the top, there is a navigation bar with 'Home', 'Worklist', and 'Reports' links. Below the navigation bar, the breadcrumb trail reads: 'Home > NY Personnel Management > Encumbent Change Request > Use > Enc Other Transaction Request'. The main heading is 'Enc Other Transaction Request'. Below this, there is a section titled 'Find an Existing Employee' with several search criteria fields: 'SSN:', 'Empl Rcd Nbr:', 'Title Code:', 'Position Number:', 'Agency:', and 'Line Item Number:'. Each field has a corresponding input box, and the last three fields have a magnifying glass icon. At the bottom of the search area, there are three buttons: 'Search', 'Clear', and 'Basic Search'.



NOTE: The Encumbent Hire/Rehire search dialog box requires SSN only.

Since an employee may have more than one active hold in NYSTEP, and Incumbent Change Request actions process directly against a hold item, NYSTEP requires additional information before the record is retrieved to assure accuracy and reduce potential errors.

In the search dialog box for an Incumbent Change Request

- Enter the complete SSN for the employee and Title Code for the current hold



NOTE: For a new hold, it is the title code of the title they will hold. For an existing hold, it is the title code of their current hold.

AND

- Enter either:
 - (a) Position Number for current hold

OR

- (b) Agency AND Line Item Number for current hold



NOTE: Whenever making a change to an existing hold, it will be the current value. The new value will be entered on the Transaction Request 1 page.

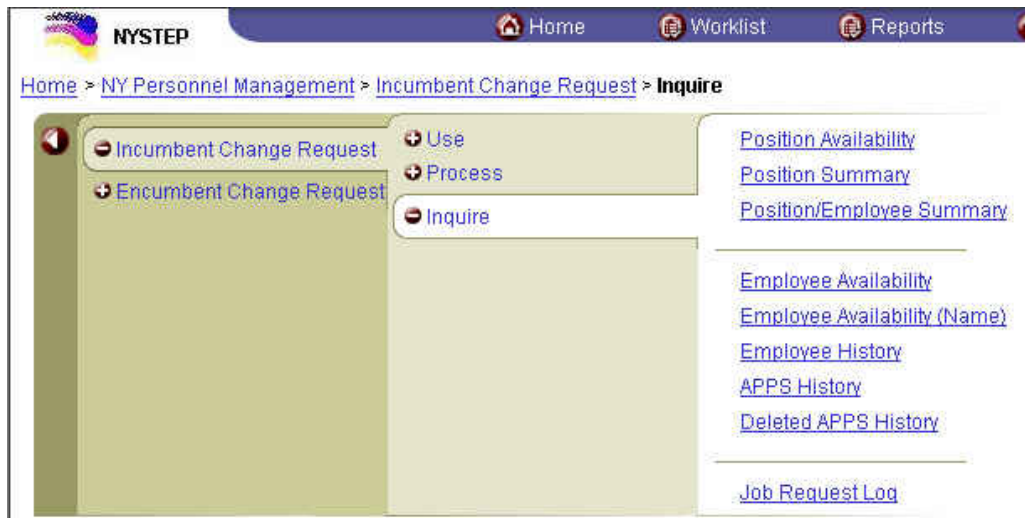
Menu Option – Process

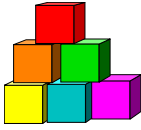
The **Process Menu** option is used to process Name and SSN changes. See the respective chapters for more details.



Menu Option – Inquire

The **Inquire Menu** option is used to view employee or position information. See the Inquire Menu Options chapter for more details.



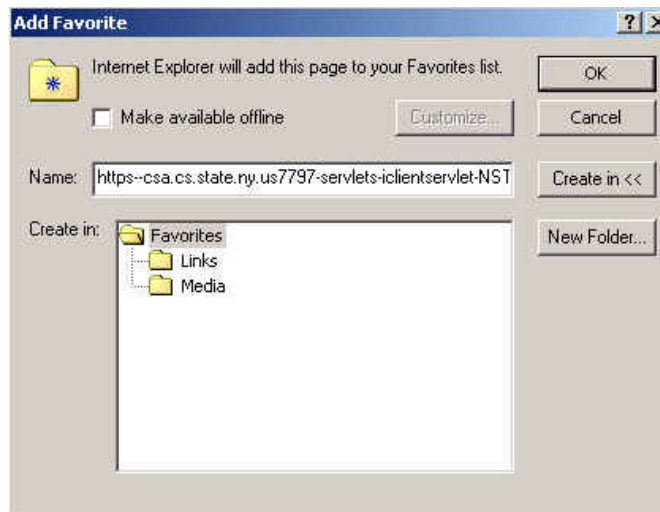


Favorites and Bookmarks

Depending on which browser you use, Internet Explorer or Netscape, you will have ‘Favorites’ or ‘Bookmarks’. Internet Explorer uses ‘Favorites’, while Netscape uses ‘Bookmarks’. These shortcuts make it easier to access for transaction types that are used often. The Favorites/Bookmarks that are marked are specific to a workstation, not a User ID.

To mark a transaction as a Favorite in Internet Explorer:

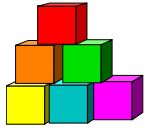
1. When a transaction type is open, click **Favorites, Add to Favorites**.
A dialog box will display



2. In the **Name** field, enter the type of transaction or other descriptive title.
3. Press **OK**.




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



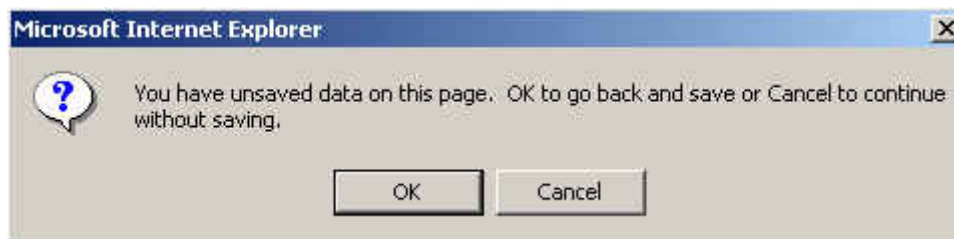
Canceling Transactions and Signing Out

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  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:




Press **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.

