This overview details the basic usage of the Payroll/Personnel System Inquiry screens used by the University of California, Davis. This system is used at all of the UC campuses for viewing employee payroll and personnel-related data. While there are over 14 menus and 100+ screens in the PPS Inquiry system when you include the historical and payroll record subsystems, this document will only cover a few basic screens to illustrate the navigation between the screens and to include some helpful hints when starting to use PPS.

BACKGROUND

Familiarity with the Inquiry screens is useful for both those who need to view the employee records as well as those who will be updating the employees’ records. The navigation between the PPS Entry/Update screens is very similar to PPS Inquiry and the Inquiry screens continue to provide excellent “look-up” capabilities.

In order to use the PPS system, you need to request access with the approval of your department or college and have the telnet software installed on your PC or MacIntosh. For more information about downloading and installing the software, see the Information and Educational Technology Desktop support web site at: http://desktop.ucdavis.edu/pps.html. (Also you can optionally install the printing control software. There is more information about printing at the end of this overview.)
Main Login Screen
The first screen that you see when you start up the telnet software is the main log-in screen. The software should already be set to link to the Office of the President system.

- Enter your userid, password and press enter.

HINT: If this is the first time that you are accessing PPS you will have a “one-time use” password. The system will immediately ask you to change your password. You will be prompted with the “change password” pop-up screen that will ask for your new password – twice. Type your new password (5-7 characters including at least 1 number) then tab to the second line and repeat the new password. In the future your password will expire monthly so you will need to change it regularly. The system also remembers your last several passwords so it will not allow you to reuse the same one.

UCOP’s Supersession Menu
Once you’ve logged on, the first menu that comes up is the “Supersession” menu. The UCD payroll/personnel system runs at Office of the President along with several other campuses so you will be presented with an extremely full list of systems.

We only use two of the entries on the menu:

- CICSPAY3 - CICS DAVIS PROD → the production system for UCD/UCDHS
- CICSSP3T - CICS DAVIS TEST → the training/test system for UCD/UCDHS
HINT: You can customize this menu by deleting all of the entries that you don’t need. Type a “D” next to the line that you don’t need and press enter. A pop-up screen will ask you to confirm the deleted entry. Press enter again to confirm. You can type the “D” next to several lines at a time and then confirm them one after another. You will only have to go through this process once.

- Select the production PPS system (CICSPAY3) by either typing an “S” or just placing your cursor in front of the line and pressing enter.

This will bring you to the main menu for PPS.

NOTE: Our example employee, Barbara May Smith from Cooperative Extension, is a fictitious employee created for this overview. The heading of the screens read “DVT”, whereas yours will read “DV.”

This overview will only cover some of the screens within the Departmental Inquiry menu (IDDB). While this overview does not cover the IPAR (Payroll Audit Record) and history subsystems (IHDB, IHIS and IHHR); most users have access to their employees’ records within these subsystems.
Main and Departmental Menus

Once you select the production PPS system, you will have access to the Main Menu for the PPS system and its various subsystems.

All of the menus and screens below this one are based on a 4-character ID, so once you have memorized the 4-character identification of the screen that you want, you can go directly to the menu or screen of your choice. The IDDB menu includes all of the screens used by departments and dean’s offices to access basic employee information.

- In order to move to the next menu, type IDDB in the Next Func: and press enter.
You can select any of the screens by entering the 4-character identifier in the NEXT FUNC line and then entering the employee’s ID, Name or SSN. Then press enter.

WHO Screen
If you do not enter a distinct enough employee name, the system will bring up the Employee Browse (WHO) screen so you can pick the correct employee. The WHO screen shows all current and recently separated employees at the campus and hospital system.

HINT: You can scroll through the list using the Function keys: F7 scrolls back and F8 scrolls forward.

To select the correct employee, use the arrow key or tab key to move the cursor (_) to the front of the line which your employee is on. Then press enter or you can type an “S” and then press enter.

While you will only have access to those employees within your school, department or group of departments that you have been granted access to, the WHO screen will show you all of the employees. Selecting someone from another department will return the message “P00015 Not Authorized to see data for selected employee id” and the screen will wait for you to select another employee.

Conversely, if an employee is split-funded between your department and another; both you and the other department will be able to view that employee’s records.
IGEN General Information

The IGEN screen is the General Information 1 screen. Each screen is identified by the 4-character name in the top left corner (PPIGEN0).

Each screen has a top section that contains basic information about the employee (first 2 lines of the screen). It shows that Barbara May Smith is actively employed in the Cooperative Extension department and is paid on the monthly (PRI PAY: MO) cycle.

For more information about the values of the different fields, put the cursor over the value of the field and press the F1 HELP key. (The pop-up window for citizenship includes translations of all the field values. The “more” message in the top right corner of the window indicates that additional pages of translations follow. When you are done with the translation, you can press F3 to exit the help window.)
HINT: The function keys will assist you in maneuvering through the different screens. Function key F2 will return you to the WHO screen to browse for a different employee and Function key F3 will return you to the previous menu. The function keys will appear and disappear as their functionality is needed.

If you wish to continue reviewing the same employee’s records, it is not necessary to retype either the name or id; simply type the 4-character screen name in the FUNC: field. Similarly, if you wish to use the same screen on many employees, you only have to retype the employee’s name or id and not the screen name.

IALN Alien Information
Move to the next screen of data on Barbara May Smith – the IALN or Alien Information.

- Type IALN in the NEXT FUNC: field and press enter.

While Barbara is not a resident alien employee, the IALN screen includes the tax and the employee’s address.

Next, there are several screens available for displaying the employee’s job appointment and pay distribution data.

IAPS – Appointment Summary screen: Shows basic job title, beginning and ending dates and salary for multiple appointments.

IAPP – Appointment/Distribution screen shows both the job appointment and its related payroll distributions (funding) in a detailed format with one appointment per page.
IAPT – Appointment/Distribution screen shows the same information as the IAPP screen but in compact form.

**IAPP Appointment/Distribution (detailed)**

If you are only interested in the basic information (job title, beginning and ending dates, salary) about an employee’s appointment(s), the IAPS – Appointment Summary is the best. Our example will look at the appointments and distributions using both the IAPP and IAPT screens.

- Enter IAPP in the Next Func: field and press enter.

The “PG 01 OF 03” message in the top right hand corner of the screen indicates that Barbara May Smith has additional pages of appointments and distributions. There is a “Total” entry that indicates that she has 2 appointments with a combined count of 4 payroll or funding distributions.

One of the advantages of the IAPP screen is that the name of the account funding the job appointment is included: account 3/REGHSTR is for UNEX: HST Enrollments.

**IAPT Appointment/Distribution (compact)**

Now look at the IAPT screen - the same Appointment and Distribution data is presented in compact form with less field descriptions. This is the preferred screen for viewing the employees job appointment and the related funding. (This screen was originally part of the Central Office menu so it doesn’t appear on the Departmental Menu but it one of the most used PPS Inquiry screens by both central offices and departments.)

The IAPT screen shows one job appointment and its related pay distributions. Barbara has multiple job appointments – this is indicated by the “page 01 of 02” message on the right side of the screen header. The Function Key F8 (forward) is also displayed on the screen.
Barbara’s appointment as a __ Assistant II is actually split between two different departments and funded from each of their separate funding sources. Her primary or administrative department (as shown in the screen header and on the IGEN screen) is 065000 – Cooperative Extension. Her appointment 10 is a 50% appointment in department 027025 – University Extension that began September 1, 2001 and runs indefinitely (Duration = “I” and an ending date of 99/99/99.) The PPS security is set so that both departments are able to see Barbara’s records.

In order to see remainder of her Appointment information,

- press Function key F8 – Forward.
Note the “PG 02 of 02” message on the right side of the header indicating that this is the last page of Barbara’s appointments. A “backward” function key appears at the bottom of the screen and the “forward” function key no longer appears.

Barbara’s other half-time ___ Assistant II position is funded by two different funding sources. Then at the beginning of the year, it changes to a single funding source with a pay increase.

**IHRS Hours on Pay Status/Leave Balances**

The Hours on Pay Status/Leave Balances screen (IHRS) has several important pieces of employee information.

- Enter IHRS in the Next Func: field and press enter.

The IHRS screen is very helpful in monitoring hours accrued (sick leave, vacation and comp time) balances. The current month’s “Hours on Pay Status” total is identified by the asterisk. These totals are reused each year without being cleared out. So, the August total is from the current year (2001) while the October total is from the prior year (2000).

The YTD totals are the calendar year-to-date which are used at year-end on the W2s. These totals are cleared each year so the YTD totals are for the current calendar year. If you need to see the data from the prior year that was used for the W2, tab down to the arrow line (===>), type EDBB and press the enter key. The “B” version of the Employee Data Base (EDB) is the year-end copy of the employees’ records used for the W2s. “EDBB” will be shown on the top left of the screen. To return to the current data, return to the arrow line, type EDBA and press the enter key. The “A” version of the data is the current copy. It is also assumed that this version is the one used regularly, so there is no “EDBA” message in the top left side of the screen header.
PRNT Printing from PPS

Prior to printing anything from PPS, you must set up PPS so that it recognizes your printer. This is done using the PRNT screen. Once you have set this up, you should only have to change the PRNT screen if your office’s network changes or you re-install PPS.

- Type PRNT in the Next Func: field and press enter.
You can set up software on your PC or Mac that will act as a print queue or send your print screens (generated by F4-Print) or IDOCs directly to the printer.

For those using a PC, you can install the RPM printer daemon software when you initially set up the telnet software.

If you will be printing regularly, you will want the RPM software to start-up automatically each morning, so you will reply “yes” to the prompt whether you want to add this to your start-up menu.

- Once the software is installed, log into PPS and go to the PRNT screen.
- On either of the two LPR lines, enter the word “printer” and (@) your PC’s IP address.
- Press F5 to update
- Press F3 to return to the other PPS screens.

The “S” indicates the line is “selected”. When you either print a screen using the F4 key or when you print an IDOC (inquiry report menu), your page will be sent to this RPM software on your PC acting like a print queue. If your printer is on the network and has its own IP address, you can send your IDOCs or print screens directly to the printer. In that case enter the word “text” instead of “printer” and (@) the networked printer’s IP address (like the LPR2 example). You then do not need to install or run RPM.

Many departments are using this second method, however there are some concerns. **If your printer goes off-line** (i.e. runs out of paper or is back-logged with print jobs), **it can cause a back-up of all PPS printing at Office of the President – for the whole campus and medical center.** This happens because the IBM system running PPS treats each print job one-at-a-time. A back-log on
Payroll/Personnel System (PPS) Inquiry Overview

your networked printer will fill your printer’s queue and then the PPS system has to wait until it can send the output before moving on to the next PPS user’s print request.

For those using a Mac, the only difference is that your printer daemon software is called “Intersolv” and it is available from the IET Desktop group.

- On either of the two LPR lines, enter the word “lp” and (@) your Mac’s IP address.
- Press F5 update
- Press F3 to return to the other PPS screens.

The “S” indicates the line is “selected”. When you either print a screen using the F4 key or when you print an IDOC (inquiry report menu), it will be sent to this Intersolv software running on your Mac that acts like a print queue. If your printer is on the network and has its own IP address, you too can print directly to the printer. See instructions and concerns above.

More information about the printing software is available at the IET Desktop web site: http://desktop.ucdavis.edu/pps/pcprint.html

LOGGING OFF
The F12 key will exit you from the PPS menu and return you to the “Supersession” Menu. The F3 key will exit you from that menu. A pop-up screen will confirm your exit – pressing the enter key will confirm that decision.

It is not a good idea to close the screens by using the “X” the top right corner of your telnet window. That actually does not end your PPS menu but leaves your link to PPS sitting open or “active”.
## GLOSSARY

<table>
<thead>
<tr>
<th>Term</th>
<th>Definition</th>
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<tbody>
<tr>
<td>APPT</td>
<td>Appointment. Part of the employee’s current employment records which show the job title, which the employee was appointed to.</td>
</tr>
<tr>
<td>COA</td>
<td>Chart of Accounts.</td>
</tr>
<tr>
<td>DIST</td>
<td>Distribution. Part of the employee’s current employment record, which shows the funds which the pay is distributed across.</td>
</tr>
<tr>
<td>DOS</td>
<td>Description of Service. How pay and time are classified. I.e. ‘REG’ – regular pay. Not all DOS codes are used in PPS, some are just in the pay cycle like ‘VLA’ – accrued vacation.</td>
</tr>
<tr>
<td>EDB</td>
<td>Employee Data Base. Often the Inquiry screens within PPS are referred to as “EDB Inquiry”.</td>
</tr>
<tr>
<td>ENTRY/UPDATE</td>
<td>A short-hand reference to the on-line PPS Entry/Update screens.</td>
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<tr>
<td>FAU</td>
<td>Full Accounting Unit</td>
</tr>
<tr>
<td>IDOC</td>
<td>The menu name for the printing of an Employee’s payroll information. It has also become a short-hand reference for the paperwork that replaced the PAF for validating where an employee works.</td>
</tr>
<tr>
<td>INTERSOLV</td>
<td>The short-hand reference to the software used to route print jobs (screen prints or IDOCs) to your network printer in the MacIntosh environment.</td>
</tr>
<tr>
<td>OPTRS</td>
<td>On-line Payroll Time Reporting System. Part of PPS. Additional training is required before you can be granted access to update employees’ on-line time records.</td>
</tr>
<tr>
<td>PAF</td>
<td>Personnel Action Form. This paper form was made obsolete by the on-line PPS system. It ceased to be used 12/31/1999 however some people refer to PAF when verifying employment however we now use the IDOC.</td>
</tr>
<tr>
<td>PAN</td>
<td>Post Authorization Notification. Part of the PPS Entry/Update system. It is the method for tracking significant changes to the employee’s records.</td>
</tr>
<tr>
<td><strong>PPS</strong></td>
<td>Payroll/Personnel System. A generic term for the inquiry and update payroll and personnel system. History and time reporting subsystems are also part of the system. It is used by all UC campuses and it is run at Office of the President for our campus and medical center.</td>
</tr>
<tr>
<td><strong>RPM</strong></td>
<td>Rapid Print Manager. The software used to route print jobs (screen prints or IDOCs) to your network printer in the PC environment.</td>
</tr>
<tr>
<td><strong>TN3270</strong></td>
<td>Telnet 3270. The software on your PC or Macintosh to communicate with the IBM mainframe in Oakland where PPS runs. The most popular versions are the Queens TN3270 for the PC and Browns University TN3270 for the Macintosh.</td>
</tr>
<tr>
<td><strong>UCOP</strong></td>
<td>University of California Office of the President. Also referred to as “OP” or “Office of the President”. The PPS system for UC Davis runs at the Office of the President in Oakland.</td>
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ADDITONAL HELP:

Email assistance
There are Email list serves for supporting PPS Entry/Update and Online Time Reporting System (OPTRS). If you have a PPS account, you will automatically be signed up for the PPS list and if you have OPTRS access, you will be on that list. There is an additional list, pps-info@ucdavis.edu, for technical staff supporting PPS users.

All three of these lists are used by the central offices to announce any system issues, changes, deadlines and other information important to the Payroll/Personnel System. As most PPS-related notes will be simultaneously sent to all three lists, it is not necessary to sign up for the pps-info list if you are a PPS or OPTRS user.

To sign up for the optional PPS-Info, visit the A&FS website at http://afs.ucdavis.edu/casforms/email-lists/email-list-subscribe.cfm and select the applicable list.

If you have any questions or need password changes, send an Email to the PPS Help Desk at: ppshelp@ucdavis.edu.

Classes
Classes are offered through Staff Development for the PPS Entry/Update and OPTRS systems. Please see the Payroll/Personnel directory on the Staff Development web site: http://sdps.ucdavis.edu/course_catalog/hr_management/index.html.

PPS Guides and Helpful Hints
Instructional guides to assist PPS users with transactions that range from simple, one minute entry to complex, multi-step transactions in both online and CICS PPS. Visit the PPS web page for these guides at http://afs.ucdavis.edu/systems/pps/pps-help/index.html.

Departmental and Central Office Contacts
Each college/division has identified a contact for PPS questions and access issues. Their names can be found on the PPS Officers & Coordinators list at http://afs.ucdavis.edu/systems/pps/coordinators-e-officers.html.

Central office staff are available to assist with payroll and tax related questions. This list can be found on the PPS web site at http://afs.ucdavis.edu/our_services/payroll-services/contact-us/staff_list.html.

If you have any questions or need password changes, send an Email to the PPS Help Desk at: ppshelp@ucdavis.edu.