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## II-C Data Files

Agencies can obtain data files for standard reports, system generated daily and monthly batch reports, CALSTARS Financial Master files and tables. Data files, also called data sets, are stored at the Office of Technology Services (OTech) under specific data set names. Data sets are available for standard reports for fourteen days and for Table and File Copy for seven days. Data sets can also be retained for long-term report storage.

This chapter includes the following topics:

- ✦ Requesting data files
- ✦ Data set naming conventions
- ✦ Accessing data sets
- ✦ Accessing E1 data sets
- ✦ Accessing G1 data sets
- ✦ Monarch software.

The following sections describe how to request a data set of a standard report system generated report, table, and file. Additional detailed information regarding the Table and File copy processes and standard and system generated report long-term storage is provided in this chapter. For detailed information about requesting standard reports, refer to Chapter II-A in this volume. To view the available options for a specific report, refer to the individual report chapter (Chapter III) in this volume.

### REQUESTING DATA FILES

All data files, except system generated reports, are requested from the CALSTARS Main Menu through Command **G**, Report/File/Table Requests/Printer Opts screen as described in the following sections.

#### Data Sets Of Standard Reports

Data sets of Standard reports are requested through Command **G.3** by keying a **D**, **G** or **F** in the Output Destination field on the Report Selection Options screen. Data sets are also created when an **N** is keyed in the Output Destination field when requesting immediate reports, but these data sets are not retained as long as data sets requested with a **D**.

### Data Sets of Standard Reports For Long-term Storage

Standard reports for long-term storage are requested by keying an **E** in the Output Destination field on the Report Selection Options screen. When the **E1** Output Destination code is keyed on the Report Option Selection screen, a data set is created at OTech. The data sets created for long-term storage at OTech are referred to as **E1** files. Although the **E1** files are similar to other reports requested with a **D1** or **F1** Output Destination, the **E1** files are only produced in zip-compressed format and their retention periods are longer.

Only one version of an **E1** report file per fiscal month is retained for standard reports. If an **E1** report file is ordered with the same level of detail and options as a previous report for the same fiscal month, the new file overwrites (overlays) the old file. Therefore, care must be taken to vary the reporting options when ordering pre and post Cost Allocation/Fund Split reports with an **E1** output destination.

**NOTE:** No warning message is issued when a file is overwritten.

Creating data sets for long-term storage at OTech is an efficient, cost effective method of archiving reports. All standard reports, with the exception of the ET1 (Time Sheet Exception Report), ET2 (Time Sheet Turnaround Documents), and QC1 (Cost Allocation Exception Report), may be stored as data sets at OTech.

### Data Sets of Standard Reports For Web Browser View (Go Online)

Data sets of Standard reports are requested through Command **G.3** by keying a **G** in the Output Destination field on the Report Selection Options screen. When **G1** is keyed, an electronic report file of a CALSTARS standard report is created after the CALSTARS overnight processing cycle is finished and a data set is created at OTech. The data set is available for viewing, printing, saving, exporting, and emailing through a web browser. The following OTech link has more information and tutorials on the Go Online procedures:

[http://www.otech.ca.gov/training/go\\_online.asp](http://www.otech.ca.gov/training/go_online.asp).

### Prerequisite for Go Online Report Output Option

To access the Go Online (**G1**) report output option for both Standard and System Generated Reports it must first be setup by the Department of Finance CALSTARS Production Control Unit. The Agency must send an e-mail to [prodcntl@dof.ca.gov](mailto:prodcntl@dof.ca.gov) and include the following information:

- ✪ 'Report Routing Add Go Online' in the subject line of the e-mail
- ✪ Organization Code
- ✪ Add G1 report output option

### Data Sets of System Generated Reports

To request a data file of a system generated report, send an e-mail to [calstars@dof.ca.gov](mailto:calstars@dof.ca.gov) and include the following information:

- ✪ 'Report Routing' in the subject line of the e-mail
- ✪ Organization Code
- ✪ Report ID and Title (refer to [www.dof.ca.gov/html/calstars/SysGenRept.htm](http://www.dof.ca.gov/html/calstars/SysGenRept.htm))
- ✪ Specify designation D1 or E1 or G1
- ✪ Type of change - Indicate if the request is a permanent change or if the data file is needed only one time.

### Data Sets of System Generated Reports for Long-term Storage

When a system generated report has a **E1** Output Destination code it is created at OTech. The data sets created for long-term storage at OTech are referred to as **E1** files. Although the **E1** files are similar to a **D1** Output Destination, the **E1** files are only produced in zip-compressed format and their retention periods are longer.

Each version of an E1 report file will be retained for system generated reports with date and time. Therefore, care must be taken to determine if the E1 option is appropriate for the System Generated Report you are requesting, because some System Generated Reports are generated daily and storage cost can increase significantly.

### Data Sets of System Generated Reports for Web Browser View (Go Online)

When a system generated report has a **G1** Output Destination code it is created at OTech. The data set is available for viewing, printing, and downloading through a web browser.

### Data Sets of Tables

The following types of data sets of tables are available through Command **G.1**, Request Table Copy:

**Table data** - is available for both Statewide and Agency tables. Statewide tables are maintained by CALSTARS staff and are established in accordance with the Uniform Codes Manual.

**Record layout** - is a listing of the *format* of the table, which includes the key length, data sequence and record length, field name, field size and data characteristics of each field.

An example of the Table Copy screen is shown here:

```

9990 G.1: Request Table Copy                                12-09-2004 03:23 PM

Enter under F below: (D=File Data, L=Record Layout)

F          TABLE NAME          F          TABLE NAME
-  -----
-  Appropriation Symbol      - AS      DGS Invoice Allocations  - EA
-  Budget Sequence          - BS      DGS Services             - OD
-  Cost Allocation           - CA
-  Employee Master File     - EF
-  Index Code                - IC
-  Organization (Descriptor) - DT
-  PCA                       - PA
-  Project Control           - PC
-  Statewide (Descriptor)   - DT
-  Timesheet                - TS
-  Vendor Edit              - VE

Command:
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
      Help  Retrn Quit                                     Main

```

To request a copy, key a **D** (file data) or **L** (record layout) in the "F" column to the left of the desired table(s) and press **Enter**. When the copy request is accepted, the **D**(s) in the "F" column change to \* and the **L**(s) change to #.

If another request is submitted before the screen is exited, the # or \* indicators for the previous requests are displayed in one color and the # or \* indicators from the most recent request are displayed in a different color. These indicators remain on the screen until the screen is exited. If the screen is exited and the screen is accessed again, the "F" column is blank.

When a table copy is requested, the table does not include maintenance performed that day. The table includes data **as it existed after the last nightly update** (IEUP cycle). Since the copy of the table is 'as it existed' after the last IEUP cycle, there is no reason to request a second copy on the *same* day. If a second copy is accidentally requested, a second copy exists as well as the cost associated with the duplicate request.

When a record layout is requested, the record layout is copied from the CALSTARS production file **as it exists at the time the request is made**.

## Data Sets Of Files

Data sets of files are available through Command **G.2**, Request File Copy. File copies can be requested for agency specific CALSTARS timesheets, budget files and various financial files, e.g., Operating File, History File, Vendor Payment File. The data selected is based on the logon Organization Code.

An example of the File Copy screen is shown here:

```

9990 G.2: REQUEST FILE COPY                                12-09-2004 03:21 PM

Enter under F: D=File Data, L=Record Layout,
                U=Data with Unpacked Fields, R=Layout with Unpacked Fields
F              FILE NAME                                F              FILE NAME
-----
- Allotment - AL - Operating - OP
- Appropriation - AP - Payroll Extract - PE
- Cash Control - CC - Schedule 10 - Current Year - B1
- Check - CK - Schedule 10 - Prior Year - B2
- Document - DF - Schedule 10R - Current Year - B3
- General Ledger - GL - Schedule 10R - Prior Year - B4
- Grant Project - GP - Subsidiary - SF
- History - Current Month - HY - Vendor Payment - VP
- History - Prior Month - HY - Warrant Number File - WN
- History - Prior Year (FM 13) - HY
- Labor Transaction - LT

Command:
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help  Retrn Quit                                Main

```

To request a file copy, key a **D** (file data) or **L** (record layout) in the "F" column to the left of the desired table(s) and press **Enter**. When the copy request is accepted, the **D**(s) in the "F" column change to \* and the **L**(s) change to #.

The Request File Copy screen has two additional functions, **U** for Data with Unpacked Fields and **R** for Layout with Unpacked Fields. The **U** and **R** functions may only be selected for files that currently have packed amount fields, which are Allotment, Appropriation, Cash Control, Check, Document, General Ledger, Grant Project, Operating, Payroll Extract, Subsidiary, and Vendor Payment.

Except for the History Files and Budget Files, the Request File Copy produces a copy of the entire file. No selection options are available as when requesting Standard Reports.

The Request File Copy screen provides three options for History File (HY) transactions:

Current Month - Transactions coded with the Current Fiscal Month ending with transactions successfully posting the previous processing night.

Prior Month - Transactions coded with the Prior Fiscal Month.

Prior Year - Transactions coded with FM 13. Data is only available in an FM 13 file between June 30 and the date an agency runs the Year-end Close process.

If another file copy request is submitted before the screen is exited, the # or \* indicators for the previous requests are displayed in one color and the # or \* indicators from the most recent request are displayed in a different color. These indicators remain on the screen until the screen is exited. If the screen is exited and the screen is accessed again, the "F" column is blank.

When a file copy is requested, the file does not include maintenance performed that day. The file includes data **as it existed after the last nightly update** (IEUP cycle). Since the copy of the file is 'as it existed' after the last IEUP cycle, there is no reason to request a second copy on the *same* day. If a second copy is accidentally requested, a second copy exists as well as the cost associated with the duplicate request.

When a record layout is requested, the record layout is copied from the CALSTARS production file **as it exists at the time the request is made**. An example of the file layout for the Check File is displayed in Exhibit II-C-1.

The file copy is transferred to the Node/Userid specified in **Part II** on the CALSTARS Security Form (CALSTARS 95). Note that if the Node/Userid is left blank on the form, the default Node/Userid (OTech/CSOrg#) are used. If the node is at OTech, the process should take only fifteen or twenty minutes. If the node is a remote node, the process may take as long as six hours depending on (1) the size of the file copy and (2) the volume of traffic on the communication line. If the file is not available, call the Production Control Unit at (916) 323-7541.

### Table And File Copy Retention And Costs

Table Copy and File Copy data sets sent to an OTech Node/Userid have a **7-day retention period**. Files (data sets) sent to other Node/Userids cannot be tagged with a limited retention period.

**Recommendation: Extract data or run agency programs against the Table Copy and File Copy data as soon as practical.** This should help keep data storage costs to a minimum and conserve storage resources (storage costs may significantly exceed the file copying costs). Once the data has been used, the Table Copy and File Copy files should be purged (**D-Delete** data set).

Each agency using Table Copy and File Copy pays for the actual usage cost. Once the data set is sent to the agency's Node/Userid, storage costs for those files are the agency's responsibility.

EXHIBIT II-C-1  
SAMPLE OF A FILE LAYOUT FROM COMMAND G.2 FILE COPY

```

* * * * *
*           BEGINNING OF COPY MEMBER  CK$VREC           *
*           CHECK FILE                                   *
*           RECORD LENGTH  105                           *
*           KEY           LENGTH  23                       *
*           PRIOR CHANGE DATE: 03-01-86 (GY)             *
*           CURRENT CHANGE DATE: 08-14-96 (VFS)         *
* * * * *

01 CK-RECORD.
  03 CK-CONTROL-KEY.
    05 CK-ORG-CODE                               PIC X(4) .
    05 CK-CHECK-NUMBER.
      07 CK-CHECK-ACCOUNT-NUM                   PIC X(3) .
      07 CK-CHECK-SEQUENCE-NUM                 PIC X(6) .
    05 CK-FUND4.
      07 CK-FUND-1                               PIC X .
      07 CK-FUND-NUMBER                         PIC X(3) .
    05 CK-SUB-FUND4.
      07 CK-SUB-FUND-1                           PIC X .
      07 CK-SUB-FUND2-4                         PIC X(3) .
    05 CK-SEQUENCE-NUMBER                       PIC 9(2) .
  03 CK-I-INFORMATIONAL-ELEMENTS.
    05 CK-I-CHECK-DATE8.
      07 CK-I-CHECK-DATE-CC                     PIC X(2) .
      07 CK-I-CHECK-DATE.
        09 CK-I-CHECK-YY                       PIC X(2) .
        09 CK-I-CHECK-MM                       PIC X(2) .
        09 CK-I-CHECK-DD                       PIC X(2) .
    05 CK-I-CHECK-AMT-X.
      07 CK-I-CHECK-AMT                         PIC S9(9)V99 COMP-3.
    05 CK-I-REVERSE                             PIC X .
    05 CK-I-VENDOR-ID.
      07 CK-I-VENDOR-NO                         PIC X(10) .
      07 CK-I-VENDOR-SUFFIX                     PIC X(2) .
    05 CK-I-VENDOR-NAME                         PIC X(30) .
    05 CK-I-TRANS-YEAR4.
      07 CK-I-TRANS-YEAR-CC                     PIC X(2) .
      07 CK-I-TRANS-YEAR                       PIC X(2) .
    05 CK-I-FISCAL-MONTH                       PIC X(2) .
    05 FILLER                                   PIC X(19) .

* * * * *
*           END OF COPY MEMBER  CK$VREC           *
* * * * *

```

### Prerequisites For Using Table Copy And File Copy

To order table and file data sets, agency staff must have access to the G.1 Table Copy and G.2 File Copy screens. Like other Main Menu functions, access to the Table Copy (Command **G.1**) and File Copy (Command **G.2**) is controlled through the Signon ID. One or more agency staff can have access to these functions. Agencies must request this access through the submission of CALSTARS Security Forms. (CALSTARS 95) The forms will need to specify a Node/Userid if different from the default Node/Userid (OTech/CSorg#).

**NOTE:** The **agency** CALSTARS Security Officer should have the form and instructions.

To use the data files produced by the Table Copy and File Copy, an agency needs to have access to the Node/Userid where the CALSTARS files are transmitted. The agency also must have a certain level of expertise to make use of the data once it is available. This expertise includes the ability to use data center software or to download the data to an agency facility for further processing. It is also important that the individuals working with the raw file data have knowledge of accounting and the accounting objectives that each of the files is designed to accomplish.

### DATA SET NAMING CONVENTIONS

A standard naming convention is used to define the *content* and *origin* of the data set. All data sets created through Command **G.1**, **G.2**, and **G.3** are cataloged in a library until OTech system or agency maintenance is performed, whichever occurs first. Exhibits II-C-3, II-C-5, and II-C-7 display the naming convention for each type of data set, give an example of a data set name for each Output Destination type, and describes what each component of the data set name represents. The standard naming convention is also displayed for system generated reports in Exhibits II-C-4 and II-C-6.

EXHIBIT II-C-3  
 COMMAND G.3 (CALSTARS STANDARD REPORT REQUEST)  
 DATASET NAMING CONVENTION

Source	Naming Convention									
Record Key ==>	1	2	3	4	5	6	7 8	9	10	
Standard Report Request - Data (D1)	<b>CS9990.CSTARB04.RPME0001.DQ.D2121217.T204408</b>									
Standard Report Request - 'Now' (N1)	<b>CS9990.CSTARQ12.RPME0230.NQ.D2121217.T134358</b>									
Standard Report Request - File (F1)	<b>CS9990.CSTARQ16.RPME0001.FZ.D2121217.T134359</b>									
RECORD KEY:  <b>1 – CS</b> = stands for "CALSTARS" <b>2 – 9990</b> = Organization Code of request/user <b>3 – CSTAR</b> = CALSTARS standard report <b>4 - B04</b> = 3-digit report ID (e.g., <b>B04</b> , <b>H00</b> , <b>Q16</b> , etc.) <b>5 – R</b> = Requestable report <b>6 – PME0001</b> = Level of report detail (FM = <b>PM</b> or <b>CM</b> , <b>PY</b> , <b>01-13</b> ; Period = <b>E</b> or <b>M</b> , <b>Y</b> , <b>C</b> , <b>P</b> , <b>I</b> , <b>-</b> ; and I-P-O-F = <b>0001</b> or various 0-9) <b>7 – D</b> = report Destination Code ( <b>D</b> - Data, <b>F</b> - File, <b>N</b> - Now) <b>8 – Q</b> = data compression ( <b>Q</b> - unzipped text file, <b>Z</b> – zipped text file) * <b>9 – D2001217</b> = Date ('D') 1-digit Century, Year, Month and Day ( <b>2121217</b> = December 17, 2012) <b>10 – T134358</b> = Time ('T') file created, hhmmss ( <b>134358</b> = 1:43:58 PM)										

EXHIBIT II-C-4  
SYSTEM GENERATED REPORTS  
DATASET NAMING CONVENTION

Source	Naming Convention							
Record Key ==>	1	2	3	4	5	6	7	8
System Generated Report Request - Data ( <b>D1</b> )	<b>CS9990.CFBH00-1.SYSGENED.DQ.D2121217.T204408</b>							
<p>RECORD KEY:</p> <p><b>1 – CS</b> = stands for "CALSTARS"</p> <p><b>2 – 9990</b> = Organization Code of request/user</p> <p><b>3 – WWWWWWWW</b> = Report ID (e.g., <b>CFB800-4</b>etc.)</p> <p><b>4 – SYSGENED</b> = System Generated</p> <p><b>5 – D</b> = report Destination Code (<b>D</b> - Data)</p> <p><b>6 – Q</b> = data compression (<b>Q</b> - unzipped text file, <b>Z</b> – zipped text file) *</p> <p><b>7 – D2001217</b> = Date ('D') 1-digit Century, Year, Month and Day (<b>2121217</b> = December 17, 2012)</p> <p><b>8 – T134358</b> = Time ('T') file created, hhmmss (<b>134358</b> = 1:43:58 PM)</p>								

\* Data Sets ordered with a Destination Code of 'D' are created with "unzipped" (uncompressed) **and** "zipped" (compressed) versions. Compressed report files can be as much as 95% smaller than the uncompressed file and download proportionally faster. However, once downloaded, the compressed file must be expanded in the local environment (at the agency) using PKUNZIP or other software such as WINZIP. This software is widely available, easy to use and requires only a few minutes to execute.

EXHIBIT II-C-5  
 COMMAND G.3 (CALSTARS STANDARD REPORT REQUEST)  
 ELECTRONIC REPORT STORAGE (E1) NAMING CONVENTION

Source	Naming Convention
Record Key ==>	1 2 3 4 5 6 7 8 9 10 11 12 13 14
Standard Report Request – Electronic Storage (E1)	<b>CS.ES2222.FM333344.WWWX5555.GL6666.MVV.EZ</b>
RECORD KEY:  1 – <b>CS</b> = fixed field denoting <b>CALSTARS</b> 2 – <b>ES</b> = fixed field denoting <b>Electronic Storage</b> 3 – 2222 = Organization Code of request/user 4 – <b>FM</b> = fixed field denoting <b>Fiscal Month</b> 5 – 3333 = Fiscal Year 6 – 44 = Fiscal Month 7 – WWW = Report ID (e.g., B04, H00, Q16, etc.) 8 – X = P Indicator (“X” is the placeholder if P option is blank) 9 – 5555 = Level of detail (IPOF) 10 – <b>GL</b> = fixed field denoting GLAN option (if selected) 11 – 6666 = GLAN Option (if selected) 12 – <b>M</b> = fixed field denoting <b>Month</b> option 13 – <b>VV</b> = FM Option 14 – <b>EZ</b> = fixed field denoting <b>Electronic Zipped</b>	

EXHIBIT II-C-6  
 SYSTEM GENERATED REPORTS  
 ELECTRONIC REPORT STORAGE (E1) NAMING CONVENTION

Source	Naming Convention							
Record Key ==>	1	2	3	4	5	6	7	8
System Generated Report Request – Electronic Storage (E1)	<b>CS.ES9990.CFB800-4.SYSGE.D2121102.T182546.EZ</b>							
RECORD KEY:  <b>1 – CS</b> = fixed field denoting <b>CALSTARS</b> <b>2 – ES</b> = fixed field denoting <b>Electronic Storage</b> <b>3 – 2222</b> = Organization Code of request/user <b>4 – WWWWWWWW</b> = Report ID (e.g., CFB800-4etc.) <b>5 - SYSGE</b> = System Generated <b>6 – D2001217</b> = Date ('D') 1-digit Century, Year, Month and Day ( <b>2001217</b> = December 17, 2000) <b>7 – T134358</b> = Time ('T') file created, hhmmss ( <b>134358</b> = 1:43:58 PM) <b>8 – EZ</b> = fixed field denoting <b>Electronic Zipped</b>								

EXHIBIT II-C-7  
 COMMAND G1 AND G.2 (CALSTARS TABLE AND FILE COPY)  
 DATASET NAMING CONVENTION

Source	Naming Convention
Record Key ==>	1   2   3   4   5   6   7
Agency Descriptor Tables <b>D-Data</b>	<b>CS9990.DATA.DT9990.QSAM. D2121124.T102247</b>
Stwde Descriptor Tables <b>D-Data</b>	<b>CS9990.DATA.DT0000.QSAM. D2121124.T110236</b>
History files <b>D-Data</b>	<b>CS9990.DATA.HYPM.QSAM. D2121218.T110829</b>
Budget Sequence <u>Sch 10</u> <b>D-Data</b>	<b>CS9990.DATA.CS10CY.QSAM. D2121218.T110552</b>
Budget Sequence <u>Sch 10R</u> <b>D-Data</b>	<b>CS9990.DATA.CS10PY.QSAM. D2121218.T111029</b>
Other files <b>D-Data</b>	<b>CS9990.DATA.AS.QSAM. D2121215.T094250</b> <b>CS9990.DATA.GP.QSAM. D2121215.T094833</b> <b>CS9990.DATA.DF.QSAM. D2121215.T095120</b> <b>CS9990.DATA.OP.QSAM. D2121215.T094050</b>
Record format (all files and tables) L-Layout	<b>CS9990.LAYOUT.OP.QSAM. D2121106.T112645</b>
RECORD KEY:  <b>1 – CS</b> = stands for "CALSTARS"  <b>2 – 9990</b> = Organization Code of request/user  <b>3 – DATA</b> = type of content, Command <b>G.1</b> and <b>G.2</b> ( <b>DATA</b> or <b>LAYOUT</b> )  <b>4 – DT9990</b> = File ID ( <b>DT</b> = Descriptor table) <b>and</b> Org Code (org <b>0000</b> = statewide table)  <b>HYPM</b> = File ID ( <b>HY</b> = History File; <b>and</b> Period ( <b>PM</b> , <b>CM</b> , <b>PY</b> )  <b>CS10CY</b> = File ID ( <b>CS</b> = Budget Sequence, <b>10</b> = Schedule 10) <b>and</b> Fiscal Year ( <b>CY</b> = Curr Yr)  <b>CS10RPY</b> = File ID ( <b>CS</b> = Budget Seq, <b>10R</b> = Schedule 10R) <b>and</b> Fiscal Year ( <b>PY</b> = Pr Yr)  <b>AS</b> = File ID ( <b>AS</b> = Appropriation Symbol Table)  <b>5 – QSAM</b> = type of file (text file)*  <b>6 – D2001124</b> = Date (' <b>D</b> ') 1-digit Century, Year, Month and Day ( <b>2121124</b> = November 24, 2012)  <b>7 – T102247</b> = Time (' <b>T</b> ') file created, hhmmss ( <b>102247</b> = 10:22:47 AM)	

\* Table and File Copy Data Sets are not generated as a "zipped" file.

**ACCESSING DATA FILES (DATA SETS)**

Data sets can be accessed by using the OTech Time Share Option (TSO) and entering a USERID signon. The information in this section is not comprehensive or intended to replace training available from OTech, but it provides background information about the screens and basic coding needed to access data sets. The steps are shown here:

**Step 1:** Access the OTech timeshare option (TSO) by entering the authorized TSO domain code and pressing **Enter**. (Example: 'ctso') See the following screen.

```

HHHHH
HHHHH          HEALTH AND WELFARE AGENCY DATA CENTER
HHHHH          for Official State Use Only
HHHHH
HHHHH          S23GZ080
HHHHH
HHHHH HHHHH   WWWWWW   WW   WWWDDDDDDDDDDDD   CCCCCC
HHHHHHHHHHHHHHHHHH WWWWWW   WWW   WWWWWWDDDDDDDDDDDD   CCCCCCCCCCCC
HHHHHHHHHHHHHHHHHH WWWWWW   WWWWWW   WWWWWW   DDDD   CCCCCC   CCCCC
HHHHHH   HHHHH   WWWWWW   WWWWWW   DDDD   DDDD   CCCC
HHHHH   HHHHH   WWWWWW   WWWWWW   DDDD   DDDD   CCCC
HHHHH   HHHHH   WWWWWW   WWWWWW   DDDD   DDDD   CCCCC   CCCCC
HHHHH   HHHHH   WWWWWW   WWWWWW   DDDDDDDDDDDDD   CCCCCCCCCCCC
HHHHH   HHHHH   WWW   WWW   DDDDDDDDDDD   CCCCCC
ctso
    
```

**Step 2:** Key your TSO USERID and press **Enter**. Example: 'csxxx'

```

IKJ56700A ENTER USERID -

csxxx
    
```

**Step 3:** In the space following "Password ==>" (prompted by the cursor position), key your password and press **Enter**.

**NOTE:** the password will not be visible on the screen.

```

----- TSO/E LOGON -----

Enter LOGON parameters below:                RACF LOGON parameters:

Userid   ==> CSXXX

Password ==>

Procedure ==> TSOGENRL                      Group Ident ==>

Acct Nbr ==> CSTSOXXX0T

Size     ==> 4096

Perform  ==>

Command  ==>

Enter an 'S' before each option desired below:
        -Nomail          -Nonotice          -Reconnect          -OIDcard

PF1/PF13 ==> Help    PF3/PF15 ==> Logoff    PA1 ==> Attention    PA2 ==> Reshow
You may request specific help information by entering a '?' in any entry field

```

**Step 4:** A new screen will appear which will show '\*\*\*\*' or 'READY' on the last line. Press **Enter** if the '\*\*\*\*' is present. When the 'READY' appears, key **ispf** and press **Enter**. **Alternatively, advanced** TSO users may by-pass the next two steps by keying **ispf 3.4** and pressing enter.

```

IKJ56455I CSXXX LOGON IN PROGRESS AT 12:41:23 ON OCTOBER 28, 2010
*****      Welcome to TSO on the Cannery shared MVS System *****
              for Cannery information see SYS2.NEWS

** 10/28/10 The OTech Adabas/Natural Users Group will meet on
            Wednesday, November 3, 2010, at 1:00pm in the 7th floor
            conference room at DOF/CALSTARS on 915 L Street. This is
            the perfect place to network with other users of Software
            AG products. It is an excellent environment to discuss
            problems and develop workable solutions. For more
            information, please contact OTech Adabas Support at
            adabas@state.ca.gov

** 10/27/10 A new QuickRef 7.3 database is available for testing on
            S1S1. Use QWTEST instead of QW to use the new database. It
            will be installed as the production database on November
            28th. For problems contact George Chen @ 464-4164.

ALLOCATING SYSPROC
READY
ispf

```

**Step 5:** In the space following "Option ==>" (prompted by the cursor position), key **3** and press **Enter**. ('UTILITIES' is selected.)

```

                                ISPF Primary Option Menu

0 Settings      Terminal and user parameters      User ID . . : CSXXX
1 View          Display source data or listings   Time. . . . : 12:44
2 Edit          Create or change source data      Terminal. . : 3278
3 Utilities     Perform utility functions         Screen. . . . : 1
4 Foreground    Interactive language processing   Language. . : ENGLISH
5 Batch         Submit job for language processing Appl ID . . : ISR
6 Command       Enter TSO or Workstation commands TSO logon : TSOGENRL
7 Dialog Test   Perform dialog testing           TSO prefix: CSXXX
9 IBM Products  IBM program development products   System ID  : S1S1
10 SCLM         SW Configuration Library Manager   MVS acct. : CSTSOXXX
11 Workplace    ISPF Object/Action Workplace     Release . . : ISPF 5.9
H HWDC Util     HWDC Utilities
I IOF           Interactive Output Facility
P PANVALET     Browse, Edit and Utilities

Enter X to Terminate using log/list defaults

Option ==> _____
F1=Help      F2=Split      F3=Exit      F7=Backward F8=Forward  F9=Swap
F10=Actions  F12=Cancel

```

**Step 6:** In the space following "Option ==>" (prompted by the cursor position), key **4** and press **Enter**. ('DSLIS' is selected.)

```

                                Utility Selection Panel
                                More:      +
1 Library       Compress or print data set. Print index listing. Print,
                rename, delete, browse, edit or view members
2 Data Set      Allocate, rename, delete, catalog, uncatalog, or display
                information of an entire data set
3 Move/Copy     Move, or copy members or data sets
4 Dslist        Print or display (to process) list of data set names.
                Print or display VTOC information
5 Reset         Reset statistics for members of ISPF library
6 Hardcopy      Initiate hardcopy output
7 Transfer      Download ISPF Client/Server or Transfer data set
8 Outlist       Display, delete, or print held job output
9 Commands      Create/change an application command table
11 Format        Format definition for formatted data Edit/Browse
12 SuperC       Compare data sets (Standard Dialog)
13 SuperCE      Compare data sets Extended (Extended Dialog)
14 Search-For   Search data sets for strings of data (Standard Dialog)
15 Search-ForE Search data sets for strings of data Extended (Extended Dialog)
Option ==> _____
F1=Help      F2=Split      F3=Exit      F7=Backward F8=Forward  F9=Swap
F10=Actions  F12=Cancel

```

**Step 7:** In the space following "DSNAME LEVEL ==>" (move the cursor to this position), key **csnnnn.\*** (where 'nnnn' is the org code) and press **Enter**. The '\*' (asterisk) is a "wildcard" to display all data sets associated with the csnnnn agency ID.

```

                                Data Set List Utility
                                More:      +
blank Display data set list      P Print data set list
    V Display VTOC information    PV Print VTOC information

Enter one or both of the parameters below:
Dsnam Level . . . CS9990.*
Volume serial . . _____

Data set list options
Initial View
 1 1. Volume                      / Confirm Data Set Delete
 2. Space                        / Confirm Member Delete
 3. Attrib                       / Include Additional Qualifiers
 4. Total                        / Display Catalog Name
                                / Display Total Tracks

When the data set list is displayed, enter either:
"/" on the data set list command field for the command prompt pop-up,
Option ==>
F1=Help      F2=Split    F3=Exit      F7=Backward  F8=Forward   F9=Swap
F10=Actions  F12=Cancel
    
```

**Step 8:** Referring to the line commands listed on the previous screen (Step 7), key **B** or **S** in the **left position** under the "COMMAND" column to retrieve the data set from archive and press **Enter**.

```

DSLIS - DATA SETS BEGINNING WITH CS9990.* ----- ROW 1 OF 12
COMMAND ==>                                         SCROLL ==> PAGE

Command - Enter "/" to select action                Message                Volume
-----
CS9990.CSTARB04.RPME0001.DQ.D2001217.T204408      D30768
CS9990.CSTARB04.RPME0001.DZ.D2001217.T204408      D30902
CS9990.CSTARQ12.RCMY0001.NQ.D2001217.T134358      BROWSED D93219
CS9990.CSTARQ12.RPM-0230.NZ.D2001217.T134358      D31153
CS9990.CSTARQ16.RPM-0000.FQ.D2001217.T134359      D93017
CS9990.CSTARQ16.RPM-0000.FZ.D2001217.T134359      D31145
CS9990.DATA.AS.QSAM.D2001215.T094250              D92273
  b CS9990.FATRANS.INPUT1                          Info - S CS1034
    CS9990.ISPF.V44.ISPPROF                          CS1005
    CS9990.ISPF.ISPROF                                D30259
    CS9990.LAYOUT.OP.QSAM.D2001109.T071849          D30382
    CS9990.TS0.BROADCAST.MSGS                        D30256
***** End of Data Set list *****

Command ==>                                         Scroll ==> PAGE
F1=Help      F2=Split    F3=Exit      F5=Rfind    F7=Up       F8=Down     F9=Swap
F10=Left     F11=Right   F12=Cancel
    
```

**Step 9:** Using the '**S**', Information (short) command and pressing **Enter** displays the expiration date and other information about the data set.

**NOTE:** *The data set is **only available for 7 days** before it is deleted automatically by system maintenance.*

```

                                Data Set Information
                                More:      +
Data Set Name . . . . . : CS9990.FATRANS.INPUT1

General Data                      Current Allocation
Management class . . . : MCPERM2      Allocated tracks . . : 150
Storage class . . . . . : SCSTD        Allocated extents . . : 1
Volume serial . . . . . : CS1034
Device type . . . . . : 3390
Data class . . . . . : **None**
Organization . . . . . : PS
Record format . . . . . : FB
Record length . . . . . : 650
Block size . . . . . : 27950
1st extent tracks . . . : 150
Secondary tracks . . . . : 15
Data set name type :
                                SMS Compressible : NO

Creation date . . . . . : 2007/05/03   Referenced date . . . : 2010/10/28
Expiration date . . . . . : 2155/12/31

Command ==>
F1=Help      F2=Split      F3=Exit      F7=Backward  F8=Forward  F9=Swap
F12=Cancel

```

## ACCESSING E1 DATA FILES

**E1** report files can be downloaded onto a PC or a LAN using FTP file transfer software. There is no limit to the number of times a file may be downloaded during the storage period at OTech. Once downloaded, a file must first be un-zipped (uncompressed) before it may be viewed. A variety of software programs are available for this purpose.

The following steps are typically taken to retrieve and view an **E1** report file. However, the procedures may vary depending upon the software used. Through a local PC with electronic links to OTech, follow these steps:

- ✪ To copy the file from OTech to a local PC using the FTP file downloading software:
  - Invoke the file downloading software.
  - Connect to OTech using your FTP user name and password.
  - Change the OTech working directory to CS.ESorg# (for most users, the default mainframe directory should be set to CS.ESorg#).
  - Select the file to be downloaded.
  - Select the PC directory where the downloaded file will be placed.
  - Specify a binary transfer.
  - Start the downloading process.
  - Rename the downloaded PC file giving it a “zip” file extension (e.g.: Q12.zip).

- ✦ To uncompress the downloaded file using unzipping software:
  - Invoke the unzipping software.
  - Select the downloaded file.
  - Select the report within the file (for E1 files there will be only one report).
  - Select the PC directory where the unzipped report file will be placed.
  - Start the unzipping process.
  - Rename the unzipped report file giving it a “txt” or “prn” file extension (e.g., Q12.txt).
- ✦ To open the unzipped report file using report-viewing software (e.g: Monarch, MS Word)
  - Format the report (if needed)

Since users can only access files in the CS.ES(agency code) directory using the FTP logon, agencies should set the FTP software’s default mainframe directory to the CS.ES(agency code) file directory. Viewing other file directory lists through FTP software unnecessarily uses mainframe resources and increases the agency’s data center charges.

If renaming the files cannot be accomplished using the file downloading and the unzip software, file names can be changed using Windows Explorer.

### Resources Required To Retrieve E1 Files

To access the E1 files at the data center, agencies must establish an electronic link between a PC and the OTech FTP server. Some agencies may already be able to establish this link. Others may need to work with their agency’s Information Technology section, CALSTARS Production Control, and OTech to make the connection.

All agencies are assigned a separate FTP logon that allows access to an OTech session specifically established for FTP transfers. This logon only allows access to the agency’s CS.ES(agency code) file directory. Since multiple users can access the E1 files through FTP at the same time, only one logon is needed by an agency. Unlike CALSTARS and CTSO, the password for this logon does not expire. To activate the logon, the CALSTARS Agency Security Officer should contact the CALSTARS Production Control Unit at (916) 323-7541 or e-mail: [prodcntl@dof.ca.gov](mailto:prodcntl@dof.ca.gov).

Although the FTP logon password does not expire, an agency may change its password if desired. If the FTP software does not have a **new** password field, the password can still be changed. To change the password, type the following in the password field: the current password, a “/”, the new password, a “/”, and the new password again (e.g., Password: oldpassword/newpassword/newpassword). The new password is required the next time a client logs on.

The client's PC requires file downloading, unzipping, and report viewing software. The FTP file downloading software facilitates the transfer of the electronic file from OTech to the PC. There are many FTP file transfer software packages available. Some PC terminal emulator packages (e.g., Passport) also include downloading software. The unzipping software decompresses the file from "zipped" format to text format. Some software utility packages (like McAfee System Works) include zip-compression programs. In addition, there are many file compression software packages available that are compatible with the zipped file format. The report viewing software presents the text file in a form that may be displayed and printed. Agencies may already have some or all of these capabilities on their PCs as part of other software packages. If additional software is needed, the agency's software policies should be consulted prior to procurement.

CALSTARS supports Monarch software for working with report data files. Besides viewing the reports, this personal computer software allows clients to export data from the files to popular database and spreadsheet formats.

If clients only need to view the reports, most word processing packages may be used. The Windows operating system includes two simple word processors, Notepad and WordPad. Because Notepad cannot open large files, WordPad is generally a better choice for viewing CALSTARS reports. Other word processing packages (e.g. MS Word or WordPerfect) may be used, but additional formatting may be required so the report lines and spacing display correctly. Although formatting the reports takes a little extra work, using an agency's standard word processing package may be advantageous. For example, portions of the formatted reports may be sent as e-mail attachments to various managers and clients.

### Retention Period For E1 Files

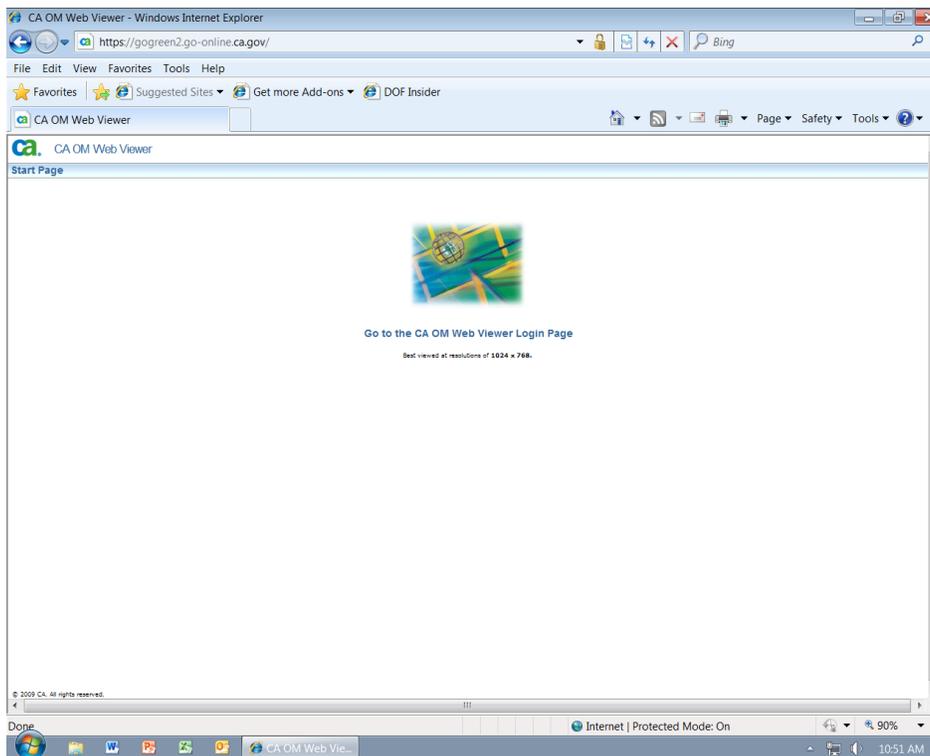
E1 report files are initially stored on disk at OTech. If a report file is not accessed for 35 days, the file is automatically archived to tape. An E1 file is retained at the data center for six years from the file creation date. At the end of the six-year period, the report file is deleted from the data center's disks or tapes. The file is deleted after six years regardless of how often the file has been accessed. The retention period can be set for eight years for the E1 report files, the CALSTARS Agency Security Officer must send a request via e-mail to [calstars@dof.ca.gov](mailto:calstars@dof.ca.gov) and the request will be evaluated. If an agency wishes to delete an E1 file prior to its purge date the CALSTARS Agency Security Officer must send a request via e-mail to [calstars@dof.ca.gov](mailto:calstars@dof.ca.gov). The e-mail must include the file's data set name.

If a file has been archived to tape, the file must be moved back to disk before the file may be retrieved (downloaded). Therefore, retrieving a file after it is archived to tape will take longer than retrieving a file directly from disk. (During testing, the retrieval from tape storage to a PC took approximately one minute, but the time varies based on the data center's workload.) Clients are not required to submit a special request to have the report files moved from tape to disk. The process is automatic when the report file is requested.

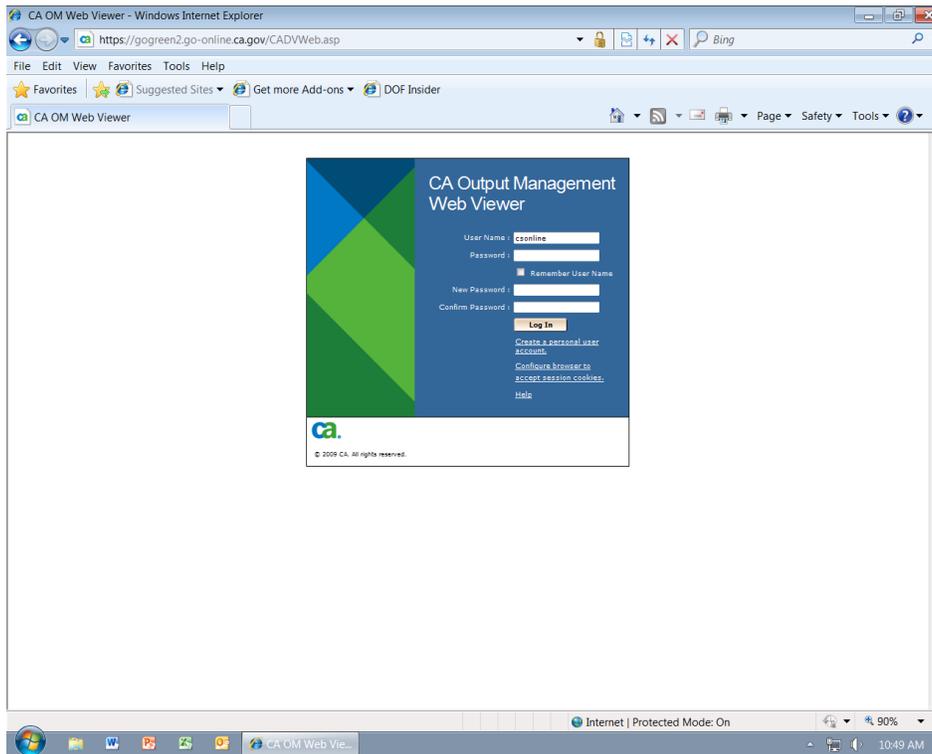
## ACCESSING G1 DATA FILES (WEB BROWSER)

Data sets can be accessed on the web by logging in the OTech Web Browser. The information in this section is not comprehensive or intended to replace tutorials available from OTech, but it provides background information about the screens and access to the data sets. The steps are shown here:

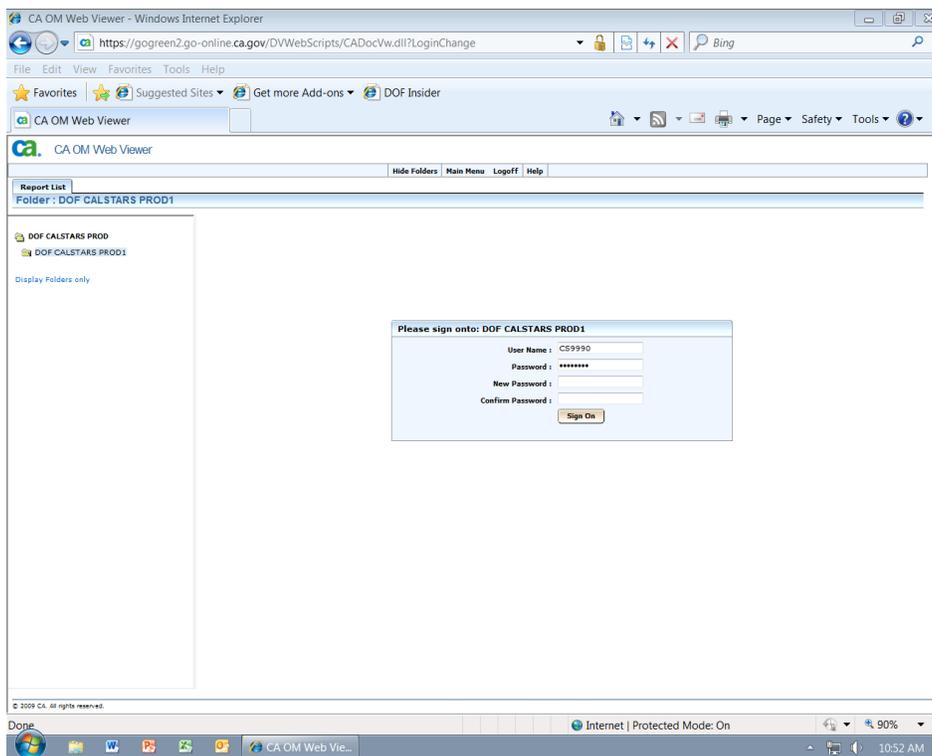
**Step 1:** Access the OTech CA Output Management Web viewer located at: <https://gogreen2.go-online.ca.gov>. and click on the “Go to the CA OM Web Viewer Login Page”



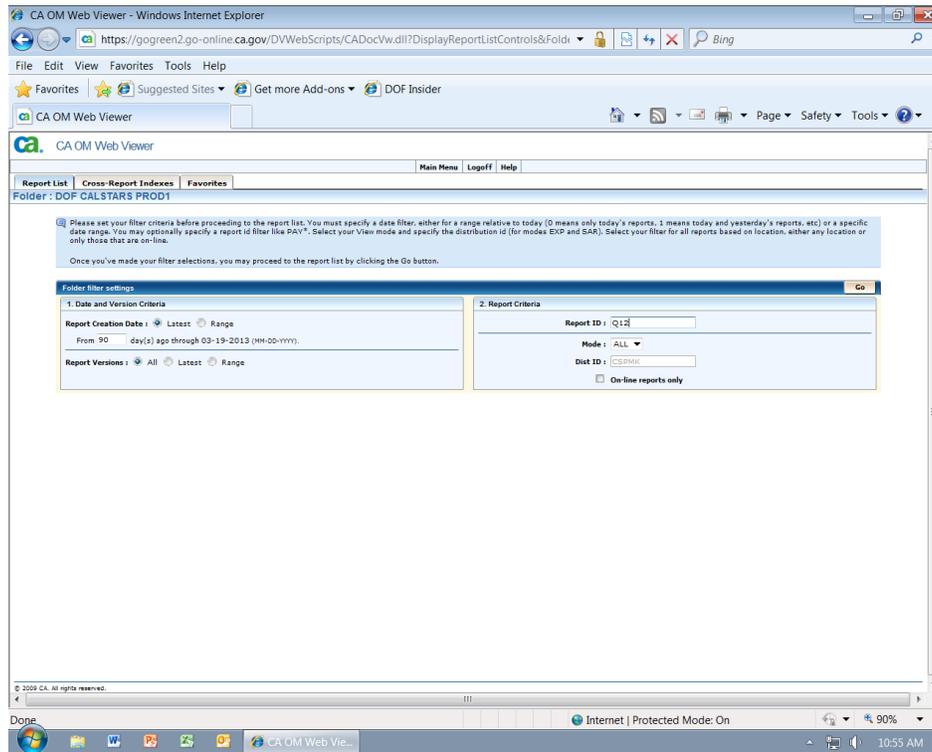
**Step 2:** Type “csonline” in the User Name field and enter.



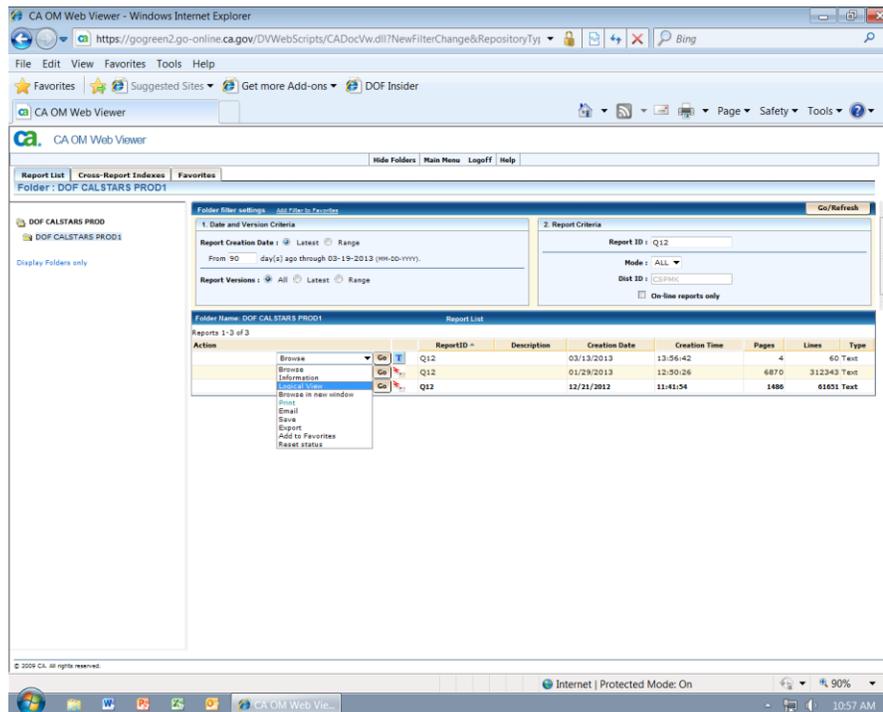
**Step 3:** Type in your User Name and Password and Sign On



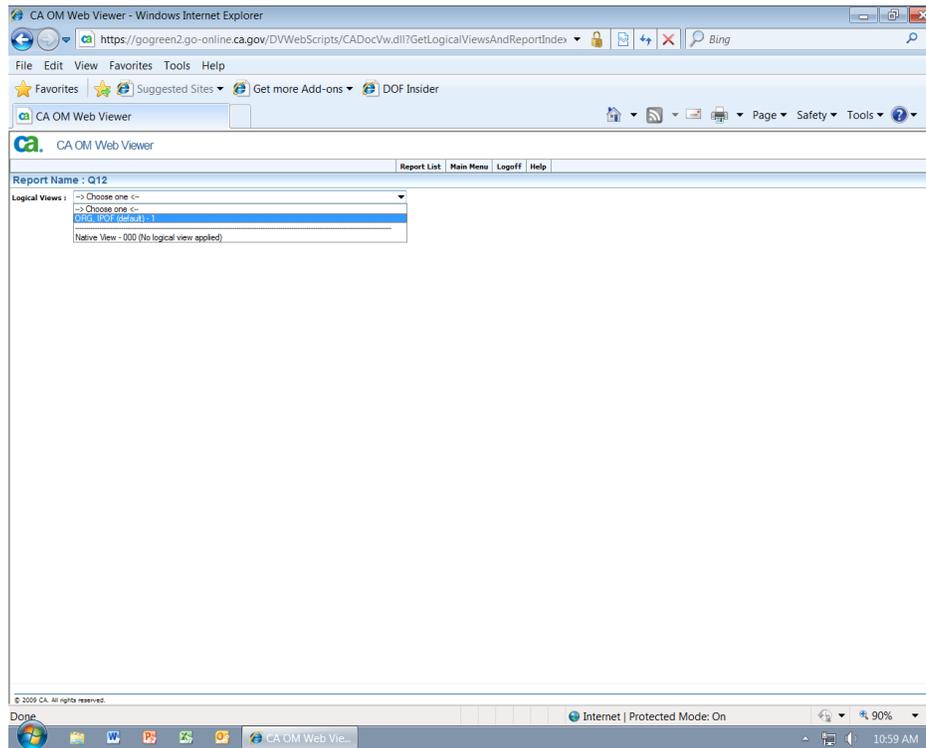
**Step 4:** Type in the Date and Version Criteria and Report ID or leave the Report ID blank for all reports available and enter.



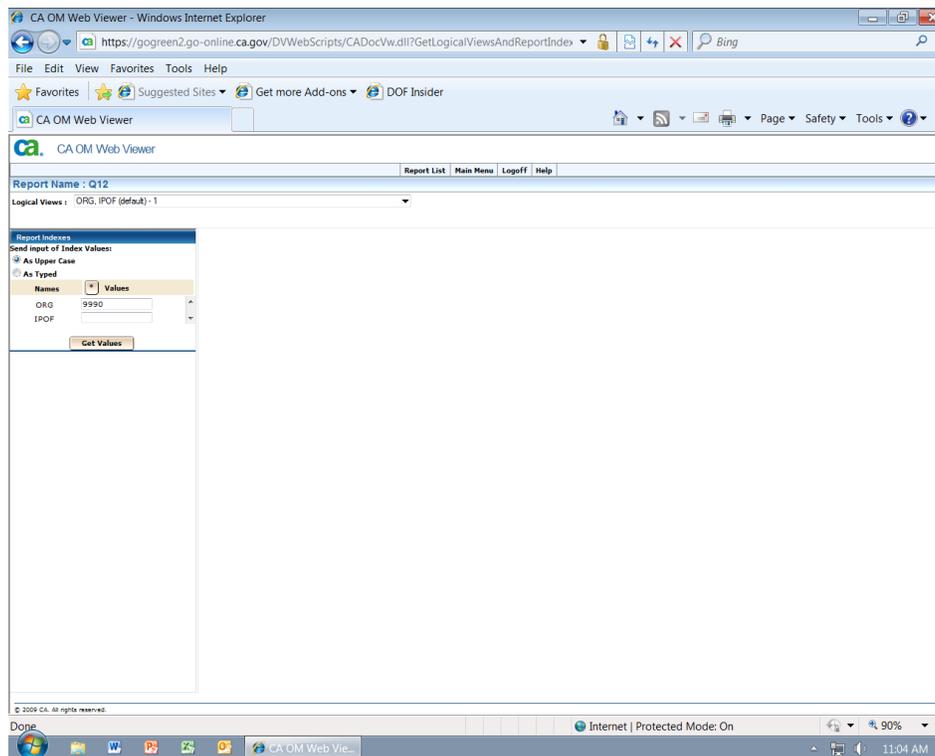
**Step 5:** In the Action drop down choose 'logical view' and click on 'Go' button.



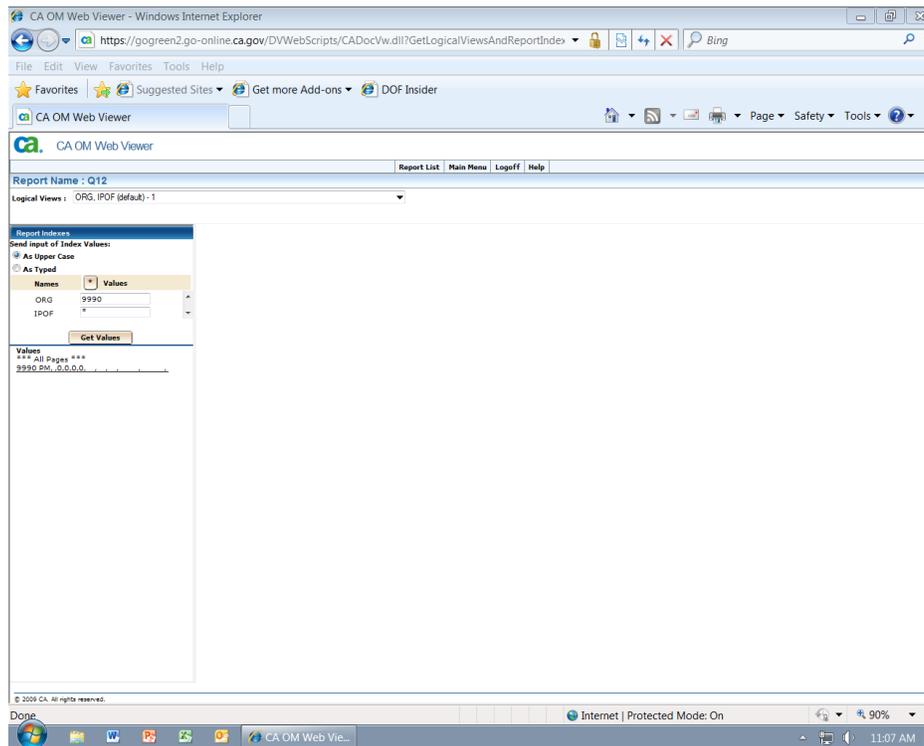
**Step 6:** In the Logical Views click on the ORG, IPOF (default) – 1.



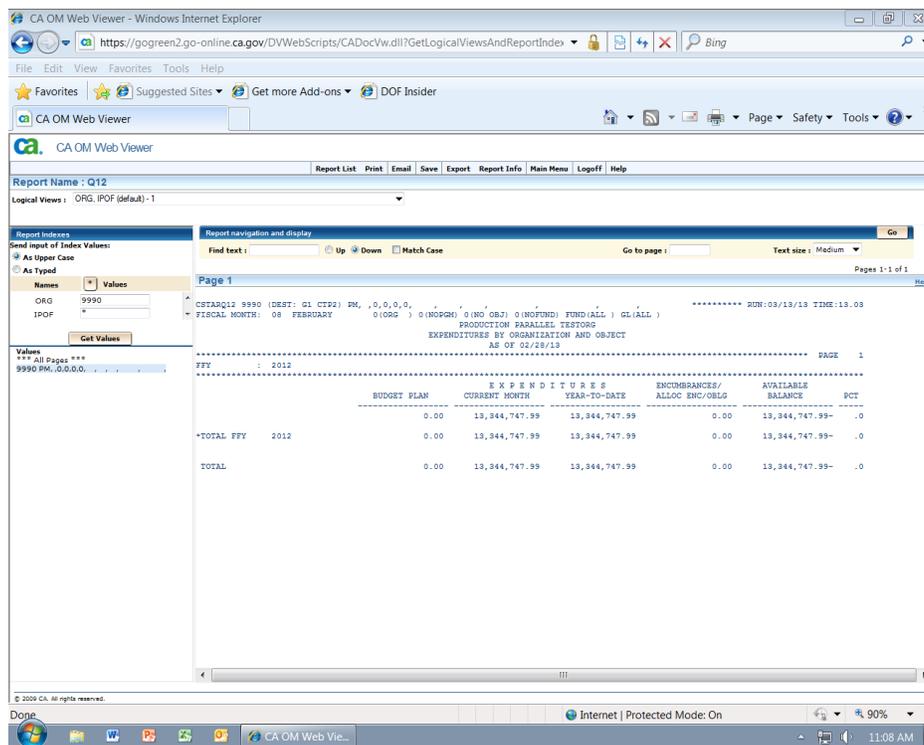
**Step 7:** Type the ORG and IPOF or leave blank and Click on the Get Values button.



Step 8: Click on the reports available under the Values column.



Step 9: Report will be displayed.



## Instructions For Selected Software

CALSTARS has detailed instructions on various CALSTARS report file software packages used internally by analysts. These include:

- ✦ How to perform an FTP transfer using Passport (v6.0-601) or WS\_FTP LE (v5.08).
- ✦ How to unzip a downloaded file using PowerArchiver (v.6.11).
- ✦ How to format a downloaded CALSTARS report in MS Word.
- ✦ How to establish a MS Word 2000 macro that formats a downloaded CALSTARS report.

Copies of these instructions will be provided upon request. To request a copy, send an e-mail to [calstars@dof.ca.gov](mailto:calstars@dof.ca.gov). Please note that the instructions may need revision depending on the version of software you have.

## MONARCH SOFTWARE

Monarch software is a data access and analysis tool that can view, extract, query and export report data.

Monarch for Windows is a PC based software program from the Datawatch Corporation. Monarch is a data access and analysis tool that will view, extract, query and export report data. Monarch's capabilities and benefits to CALSTARS agencies include:

- ✦ The ability to "mine data" from CALSTARS report files for further processing in other PC-based software.
- ✦ The reduction of re-keying of data.
- ✦ Special pricing for CALSTARS agencies.
- ✦ User-friendly software.

To further assist agencies, Monarch Training Classes are provided on an ongoing basis. The schedule of Monarch classes is available on the internet at <http://www.dof.ca.gov/accounting/calstars/training/>.

For information regarding the acquisition or operation of Monarch, contact CALSTARS at the following:

Phone: (916) 445-0211, ext. 2803  
E-mail: [calstars@dof.ca.gov](mailto:calstars@dof.ca.gov)  
FAX: (916) 323-4049