

VI System Access, Screens and Navigation

This chapter contains instructions for accessing the CALSTARS system and navigating through the menus and includes an introduction to the available function keys and commands.

CALSTARS SYSTEM ACCESS

The CALSTARS system is operated on Office of Technology Services' (OTech) mainframe computers. Access to CALSTARS may be accomplished through:

- ✦ Terminals connected directly via a controller and modem.
- ✦ Personal computers (PCs) with terminal emulation software. (PCs can be stand alone or connected to an agency's Local or Wide Area Network.)

Access to CALSTARS may differ slightly for each agency depending on the agency's data processing equipment configuration, information systems environment and whether the access to the mainframe computers is through a "gateway" from another internal system or through another data processing center. However, once at the CALSTARS sign-on screen, the sign-on procedure becomes the same regardless of the access method.

Security Features

Each CALSTARS agency is required to designate an individual within the organization as the CALSTARS Agency Security Officer. The CALSTARS Agency Security Officer is responsible for establishing and controlling access to the CALSTARS system by agency staff. The CALSTARS Agency Security Officer establishes and controls access by using the CALSTARS Security Table.

There are various levels of security within CALSTARS. The initial security, called Resource Access Control Facility (RACF), is an automated mechanism that validates the identification of an individual at sign-on. There are also restrictive internal features, once signed on, that are based on an individual's designated job duties. In addition, some terminals or PCs are equipped with an external locking mechanism to physically disable use of the keyboard. However, regardless of the number of security features built into the system, the success of the security measures depend largely upon the willingness of employees to adhere to established security procedures and practices.

Sign-On Procedures

The CALSTARS sign-on procedure is diagrammed in Exhibit VI-1.

Signing on to CALSTARS requires two items of information: *User ID* and *Password*. The User ID is established when the CALSTARS Agency Security Officer adds the individual's CALSTARS Security Table record. The Password is established by the individual when they initially log into CALSTARS.

IMPORTANT: The password should be considered confidential information. Once the password has been established, the individual should never share it with others. Also, for the individual's own protection and to prevent fraudulent activity, he or she should sign-off the system when leaving a terminal or PC so that the next individual must log on to CALSTARS using his/her own User ID and Password.

When the data center is accessed, the HWDC logo is displayed on the screen. From this screen, key **cistar** at the cursor, and press **Enter**.

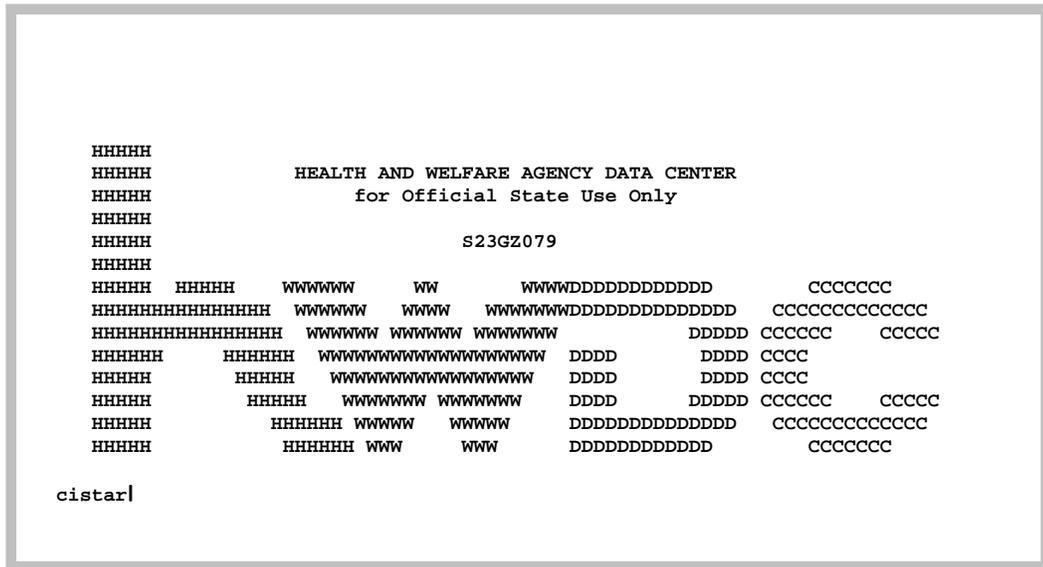
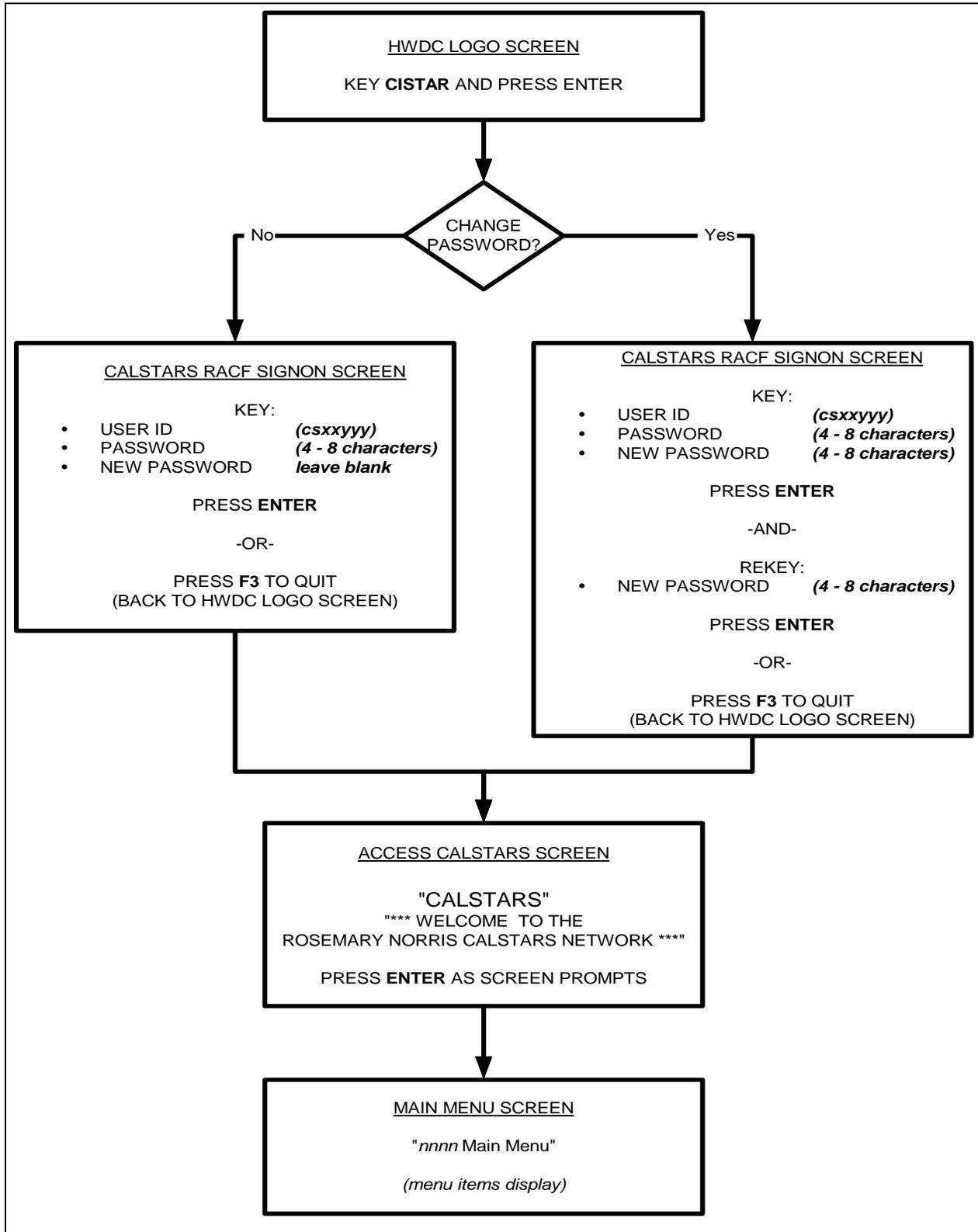


EXHIBIT VI-1
CALSTARS SIGN-ON PROCEDURE



The system responds by displaying the CALSTARS RACF SIGNON screen that prompts for completion of the USERID field. The message: 'Please type your userid and password.' appears at the bottom of the screen. After keying your assigned 7-8 character User ID code in the USERID field, use the "return" key (↵) or **Tab** key to move the cursor to the PASSWORD field. Key your assigned password (4-8 characters), as shown below, and press **Enter**. As the password is keyed, the cursor moves to the right, but no characters are displayed.

NOTE: First-time sign-on for a new User ID requires keying the *temporary* password in the PASSWORD field **and** a *personal* password in the NEW PASSWORD field **before** pressing **Enter**. Refer to the instructions in the *Changing A Password* section (which also apply to a new User ID when establishing a password).

```

CALSTARS RACF SIGNON

USERID: ccxxxyyy
PASSWORD:
NEW PASSWORD:

PF 3=EXIT
Please type your userid and password.
```

Proper sign-on is indicated by the display of the CALSTARS logo screen, shown at the top of the next page. The system prompts for the next step by displaying the highlighted message '020-PLEASE PRESS "ENTER" KEY FOR THE CALSTARS MAIN MENU' at the bottom of the screen:

IMPORTANT: Only three sign-on attempts are allowed for any User ID. If the third sign-on attempt fails, RACF security will prevent any further sign-on attempt. If this occurs, the CALSTARS Agency Security Officer must intercede and reset the password.

```

CCCCCCC   AAAAA LL      SSSS  TTTTTTTT  AAAAA RRRRRR   SSSS
CCCCCCCC  AAAAAA LL      SS  SS  TTTTTTTT  AAAAAA RR  RR   SS  SS
CC        AA  AA LL      SS      TT      AA  AA RR  RR   SS
CC        AAAAAA LL      SSSS  TT      AAAAAA RRRRRR   SSSS
CC        AA  AA LL      SS      TT      AA  AA RR  RR   SS
CCCCCCCC  AA  AA LLLLLL SS  SS  TT      AA  AA RR  RR   SS
CCCCCCCC  AA  AA LLLLLL SSSS  TT      AA  AA RR  RR   SSSS

```

*** WELCOME TO THE ROSEMARY NORRIS CALSTARS NETWORK ***

N E E D H E L P ?

DP PRODUCTION UNIT: CALL (916) 323-7541
CNET 473-7541

ACCOUNTING HOTLINE: CALL (916) 327-0100
CNET 467-0100

*FOR THE LATEST CALSTARS NEWS, PLEASE VIEW THE CALSTARS NEWS (MENU ITEM D.1)

020-PLEASE PRESS "ENTER" FOR THE CALSTARS MAIN MENU

Under normal conditions, the status of the sign-on attempt should be indicated by the screen and message that is displayed. However, if a non-CALSTARS screen or a blank screen is encountered, key **logoff** or **cesf logoff** and press **Enter** to log-off. Attempt to sign-on again using the sign-on process described above. If this fails, call the CALSTARS DP Production Unit at (916) 323-7541 for assistance.

Changing A Password

The CALSTARS password **must** be changed when the user tries to sign-on to CALSTARS for the following three circumstances: **a new User ID** tries to sign-on for the first time, the CALSTARS Agency Security Officer has **reset** the existing user's **password**, or an existing user's **password** is near **expiration**.

New User ID or Reset Password: The *temporary* password, **temp**, is assigned when a **new** User ID is established or when the Agency Security Officer has reset an existing user's password. This password must be changed the first time it is used. If CALSTARS is not accessed within 90 days of the establishment of a new User ID or the resetting of a user's password, the User ID will be revoked. If this occurs, the CALSTARS Agency Security Officer must reset the user's password to get the User ID re-established.

Password Expiration (or personal option): The password for each unique User ID **must** be changed within 90 days of the last time the password was **changed**. When nearing the expiration date, the message 'Your password will expire in *nn* days. Press ENTER to continue.' will appear on the screen. If the password is not changed within 90 days, the User ID is automatically set to "inactive" by RACF security.

To reactivate the User ID, the CALSTARS Agency Security Officer must reset the user's password. Following reactivation of the User ID, the password must be changed on the next sign-on attempt (see the prior paragraph's information about a reset password.).

If the User ID is revoked or in error, the following message will appear at the bottom of the screen: 'Invalid RACF signon attempt. Please enter valid userid and password.' Contact the CALSTARS Agency Security Officer to:

- ❖ Determine the correct User ID format.
- ❖ Reactivate a revoked or inactive User ID.

Please note that previously used password(s) cannot be reused.

To change the password: Key the individual's sign-on ID in the USERID field, the *current password* in the PASSWORD field **and** the *new password* in the NEW PASSWORD field, then press **Enter**. As passwords are keyed in the PASSWORD and NEW PASSWORD fields, the cursor moves to the right, but no characters are displayed. When **Enter** is pressed, the message: 'Please re-enter the new password for verification.' appears at the bottom of the screen.

```
CALSTARS RACF SIGNON

USERID: ccxxyyy

PASSWORD:

NEW PASSWORD:

PF 3=EXIT
Please re-enter the new password for verification
```

Re-key the NEW PASSWORD for verification. If an error occurred and the new password entry was not identical (verified), or if an attempt is made to *reuse* a prior or current password, the following message appears at the bottom of the screen:

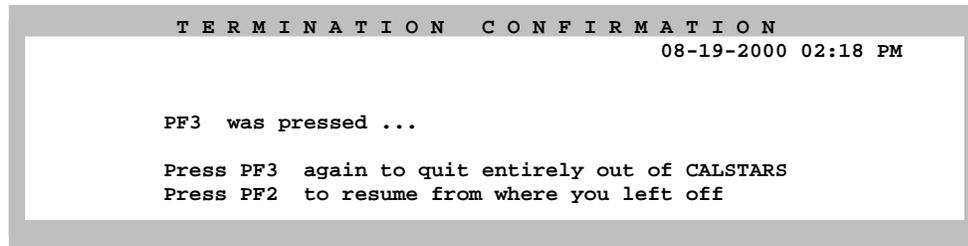
'Your new password is invalid. Please retype.'

If the new password is accepted, the sign-on process will continue with the display of the CALSTARS logo screen (An example of this screen is shown in the previous *Sign-on Procedures* section).

To quit the process of changing the password, press the **F3** key to return to the HWDC logo screen.

Sign-Off Procedures

To sign-off of CALSTARS, press the **F3** key from any screen with the **F3** key labeled "Quit". The Termination Confirmation pop-up window is displayed when **F3** is pressed.



Press **F3** again to complete the sign-off. **Press F2 to cancel the log-off process.**

NOTE: If a non-CALSTARS screen or blank screen is encountered, key **logoff** or **cesf logoff** and press **Enter**. This will terminate the CALSTARS sign-on.

Proper sign-off is indicated when the HWDC logo screen returns.

Exit ROPES Procedure: CALSTARS cannot be directly signed-off from a ROPES screen. Because ROPES is a product external to CALSTARS, special commands are required to exit the ROPES functions prior to exiting CALSTARS. Use the following procedure to exit CALSTARS from the ROPES functions:

V - Browse A Report or **X – Display A Printer/Report Queue** – Press the **F3** key to return to the **G.4 - Printer Control Options** screen. Then press **F3** again to initiate the exit from CALSTARS.

All Others – Press **F12 - Main Menu** to exit any other ROPES function. Then press **F3** again to initiate the exit from CALSTARS.

SYSTEM NAVIGATION

CALSTARS provides a series of menus and entry screens that are available for navigational access. The Main Menu is displayed by pressing **Enter** at the CALSTARS logo screen. The Main Menu provides access to the sub-menus, lists and coding entry screens used for various CALSTARS functions.

The following section describes the types of screens and methods for navigating these screens.

Types of Screens

CALSTARS uses the following types of standardized screens:

MENUS

Menu screens are used to access various available functions. Menus contain a list of "Codes" and "Available Options". Options not allowed for access by an individual (due to security restrictions) are dimmed or appear in a darker color. The CALSTARS Main Menu is the focal point of all CALSTARS functions. The menu system provides the means for navigating the system to access information and perform data entry. All menus (except pop-up menus) have a uniform format to display information on the screen. The Main Menu is shown as a sample, with a legend to identify and describe the specific segments.

```

A  9990  Main Menu                                08-19-2000  08:58 AM
B
      CODE      AVAILABLE OPTIONS
      A         Check Issuance and Processing =>
      B         Claim Schedule Processing =>
      C         Financial Transaction Entry =>
      D         News =>
      E         Reconciliations =>
      F         Monthly and Special Processes =>
      G         Report/File Copy and Printer Request =>
      H         File Inquiry =>
      I         Table Maintenance/Inquiry =>
      J         Timesheet Entry and Adjustment =>

C      Code:  _

D  Command: _____

E  Enter-PF1---PF2---PF3  PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help           Quit

F  The News was last updated on 08-19-2000 at 7:00 AM.  Enter 'D.1' to view.

```

A - Title Line - All menu screens contain a title line that includes the following information:

Organization Code - The Organization Code associated with the User ID keyed on the CALSTARS RACF Sign-on screen. All records and activities are shown for this Organization Code only.

Screen Number and Title - All menus have a screen number (except the Main Menu) and a title. The screen number represents the Option Codes selected from higher level screens. For instance, screen number **D.2** refers to Main Menu Code/Option **D - News** and News sub-menu Code/Option **2 - List of Job Opportunities**.

Date and Time - Displays the current date and time.

B - Body - The central portion of the screen contains a list of options. Some menu screens (e.g., Main Menu) contain a "Code" associated with each available option.

The arrow symbol (=>) to the right of any menu item indicates a lower level menu is available with more options.

Some extended screens (record extends over multiple screens) may be right and/or left scrolled when MORE=>, <=MORE, or <=MORE=> appears on the screen below the Time field. (See the List of Records sample screen on page VI-11.)

C - Code: (entry field below body) - On screens that contain a list of codes in the body, this field provides a space for keying the desired code to select the associated option.

D - Command: - This field is used to navigate to another menu or to an entry screen. This is a powerful tool for quick navigation. By entering the screen number, CALSTARS will navigate directly to that screen. For example, by keying **C.1.2** and pressing Enter, the encumbrance batch header screen immediately appears. When accessed, the screen number and title appears in Segment A as shown below.

A	9990 C.1.2: Encumbrance	08-19-2000	01:21 PM
Function: A (A=Add, C=Change, D=Delete, H=Hold, N=New Batch, O=Override) (P=Print Batch, R=Release, V=View, X=Add Addl Trans)			
DATE	: 08 19 2000	BATCH TYPE: ___	BATCH NUMBER : ___
EDIT IND	: _	FM : ___	

E - PF Key Legend – These lines describe the functionality of the available PF keys. Each available PF key on a screen is labeled with a descriptive title. The functionality of each PF key on a particular screen is described in detail in the section of this manual for the particular accounting function being performed by the screen.

F - Message line – This line provides instructions or other system messages (e.g., Enter changes, 179-TRANSACTION SUCCESSFULLY CHANGED, EG5 - REQUIRED PCA NOT IN PA, etc.).

ENTRY SCREENS

Entry screens allow for the entry of financial transactions or maintenance activities.

```

9990 Encumbrance Transaction Entry                                08-19-2000 01:42 PM

Function: A (A=Add, C=Change, D=Delete, I=Insert)      Go to Seq Nbr: ____
(P=Print Trans, R=Resequence, S=Search)

BATCH:
DATE      : 08 19 2000   TYPE   : 09           NUMBER: 111       FM: 09
SCHEDULE:                SEQ NBR: 1           MODE  : NO EDIT

TC        : ____        MODIFIER : _          FFY        : ____
REF DOC/S: ____        VENDOR/S . ____        DOC DATE  : ____
CUR DOC/S: ____        INDEX    . ____        OBJ DTL/AO: ____
PCA      . ____        AMOUNT   : ____        REVERSE   : _
PROJ/WP . ____        PCA ACTY : ____        LOCATION  : ____
MULTI PUR: ____        VEND INFO: _
ERR OVRD > _

Command: |
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
Help Retrn Quit GetDF BHdr LBtch Bkwrđ Frwrđ Clear Force Dfalt Main
    
```

HELP LIST

Help list screens are accessed by pressing F1–Help when the cursor is placed in certain fields marked with a ">" on transaction entry screens. These fields include Vendor/S, PCA, Index, Project/WP, etc. Help list screens contain a list of table records that may be selected for insertion into the entry screen.

```

9990 Encumbrance Transaction Entry                                08-19-2000 01:37 PM

PCA Search
FFY/PCA:____ or Title: _____

FFY  PCA          TITLE                                     PG EL CMP TSK  A/I
----  -
1986 00391  PVEA FISHING FLEET L/A                                11 35 391      0
1987 00394  PVEA - SCHOOLS PROG - LA                             11 35 380 394  0
1988 00382  PVEA SMALL BUSINESS PROG - SO                         11 35 380 382  0
1988 00383  PVEA NATIVE AMERICAN PROG - SO                       11 35 380 383  0
1988 00384  PVEA SCHOOLS PROG - SO                                11 35 380 384  0
1988 00385  SCHOOLS/SM BUS TECH ASST                              11 35 380 385  0
1988 00392  PVEA SMALL BUSINESS PROG - LA                             11 35 380 392  0
1988 00393  PVEA NATIVE AMERICAN PROG - LA                         11 35 380 393  1
1988 00394  PVEA SCHOOLS PROG - LA                                 11 35 380 394  0
1988 00397  PVEA NATIVE AMERICAN --LA                             11 35 380 397  0

To select desired item, place cursor on that row and press Enter
PF2                PF7  PF8
Retrn              Bkwrđ Frwrđ
    
```

LIST OF RECORDS

List of records screens are for viewing data already maintained in CALSTARS, including data entry during the current day. These include current batch listings, transaction listings, etc.

```

9990 List of Transactions: Screen 1                                08-19-2000 03:44 PM
                                                                MORE=>
BATCH: DATE: 08 19 2000 TYPE: 11 NBR: 111 FM: 10 STATUS: H CLM SCH #:

Function:  (A=Add Addl Trans, P=Print Batch, S=Search)  Go To Seq Nbr:
Enter under F below: (C=Change, D=Delete, I=Insert, V=View)

          CURRENT          OBJECT AO
F   SEQ  TC   FFY   DOC NBR  SFX INDX  SOURCE AS  PCA          AMOUNT R M
-   - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
-     1   101 1999  GARYBUCK 00 0060 160600    01026        2,000.00
-     2   101 1999  REFUND-1 00 0060 160400    01026        1,000.00 R
-     3   101 1999  BIGBUCKS 00 0060 160500    01026        3,000.00
-     4   148 1999                0060 299600 01 80518        1,000.00
                                     *** End of Data ***

Command: _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
          Help Retrn Quit          BHdr  LBtch Bkwrld Frwrld      Left  Right Main

```

Moving to the Next Menu or Screen

There are various methods for moving between screens:

Code - Menu screens contain a list of codes with corresponding options in the "Available Options" list. Key the appropriate code in the Code field to select the desired option.

Command –The Command line allows experienced individuals to select the desired screen by keying the desired screen number (e.g., key **D.2** on the Command line of any screen to move directly to the Job Opportunities Listing).

Move cursor to selection - On F1-Help screens that contain a list of options or records, an option or record may be selected by moving the cursor (using directional keys or a mouse) and pressing **Enter**. This action will insert the selection on the previous screen.

PF Keys - Some PF keys allow for movement between screens. This includes scrolling, returning to the master menu, and movement to specific screens. The functionality of available PF keys is contained in the PF key legend at the bottom of the screen.

Navigating Within a Screen

Data may be entered into each field as required. If a field does not require data entry, the field may be skipped by pressing a Forward Tab key. This moves the cursor to the next field where data may be entered. If the data to be entered into a field consists of fewer characters than the field length, it is not necessary to put in additional spaces to fill the field. Press a Forward Tab key to move the cursor to the next field. The financial transaction and most table entry screens allow skipping over unused or default data settings through the use of a Default PF key. These keys are discussed in Volume 1, Chapter IX, Online Financial Transaction Entry; and in Volume 2, Chapter IV, Table Maintenance Coding Procedures, in the section for the specific table. Once the data is completely keyed and appears to be correct on the screen, press **Enter** to save the data for CALSTARS processing and update. CALSTARS processes the record and returns a message in one of two ways:

- (1) **If errors are detected** in the data, the field(s) in error is highlighted on the screen and the appropriate error message(s) is displayed at the bottom of the screen. The message(s) indicates what is wrong with the data. Corrections may be made by tabbing to the field or fields that are in error and re-keying those fields. Once the data has been corrected, press **Enter** and CALSTARS re-edits the data.
- (2) **If the data is correct**, CALSTARS returns the same screen with a message that indicates that the transaction was successful. This means that the information has been accepted by CALSTARS for processing. Data entry may be continued on that screen or return to the Main Menu for selection of another available option.

Use of the system is maximized by entering all transactions for one function before returning to the Main Menu to select another available option. For example, if both Index Code and Appropriation Symbol table maintenance transactions need to be entered, enter all of the Index Code transactions, and then move to the Appropriation Symbol Table function and enter all of the Appropriation Symbol transactions.

SYSTEM ACCESS AND NAVIGATION PROBLEMS

There may be times that the data entry equipment or CALSTARS fail to operate.

Problems that might occur can generally be grouped into two types:

- ✱ Problems involving system processing and reporting.
- ✱ Problems involving equipment and communicating with CALSTARS.

System Processing and Reporting Problems

CALSTARS system processing and reporting problems usually affect all CALSTARS agencies. When such problems are encountered agencies are advised of the problem and the corrective action being taken through the on-line CALSTARS News screen (Command **D.1**). If you identify a potential system problem for which a NEWS item has not been issued, the problem should be reported *immediately* to the CALSTARS Hotline at (916) 327-0100. The Hotline analyst will alert the proper CALSTARS staff and ensure that affected agencies are notified.

Equipment and Communication Problems

Resolving equipment and communication problems may be different for each agency depending on the agency's local environment and method of accessing CALSTARS. CALSTARS data is processed by OTech mainframe computers. There are a variety of equipment and communication configurations used by agencies to access CALSTARS. These include terminals connected directly to OTech data centers, and stand-alone or LAN/WAN-based PC's indirectly accessing the data centers.

The CALSTARS DP Production Unit provides assistance to agencies to resolve equipment or communication problems. This unit may be contacted at (916) 323-7541. The CALSTARS staff will work closely with OTech and agency staff to try to resolve the equipment or communication problems encountered. However, some problems may reside within the agency's PC and/or LAN/WAN environment. Agencies' Information Services staff must resolve these problems.