CSU The California State University
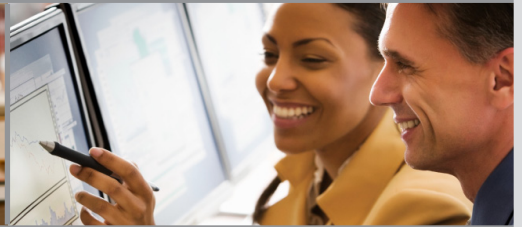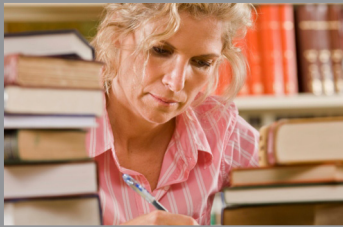
BASIC CIRS
REPORTING

CIRS Campus
Information
Retrieval
System

Basic CIRS Reporting

Presented by Samantha Kelly
State Controller's Office, PPSD
Email: skelly@sco.ca.gov
Phone: 916-324-7268

Support
Email: CIRS@calstate.edu
Web: www.calstate.edu/hrpims
Phone: 916-323-5694

Office
California State University, Systemwide Human Resources
Human Resources – Information Support and Analysis
300 Capitol Mall, 10th Floor
P.O. Box 942850
Sacramento, CA 94250-5878

Headquarters
CSU, Office of the Chancellor
Systemwide Human Resources
401 Golden Shore
Long Beach, CA 90802-4210
Phone: 562-951-4411

TABLE OF CONTENTS

Table Of Contents

Table Of Contents

Module 1

<u>Welcome!</u>

Welcome to CIRS Basic training.

This 3-day session provides instruction on how to use the CIRS ad hoc reporting features and functions. It covers system navigation, basic FOCUS software commands, ad hoc report writing techniques and terminal exercises.

This introductory course will take you through the development process of building ad hoc report requests and developing various outputs from those requests including:

- Online reports

- Batch reports

- Printed reports

- Download files

You will be developing these projects using FOCUS reporting language that uses simple English phrases to start producing meaningful reports immediately.

What is CIRS?

The Campus Information Retrieval System (CIRS) is the systemwide data warehouse for Human Resource information and is a tool for securing management reports both at the campus and system wide level. It was developed and is maintained by CSU, Human Resources, Information Support and Analysis (HR-ISA), and operates within IBM's Time Sharing Option (TSO3) environment on the State Controller's Office (SCO) computer located at the Office of Technology Services' Gold Camp Campus.

CIRS contains multiple functions for retrieving data and maintaining data such as Compendium Reports, Extract Functions, Custom Campus Files, and Online Applications.   For users who are familiar with FOCUS reporting language, the system's ad hoc reporting capabilities can be used to generate custom reports.
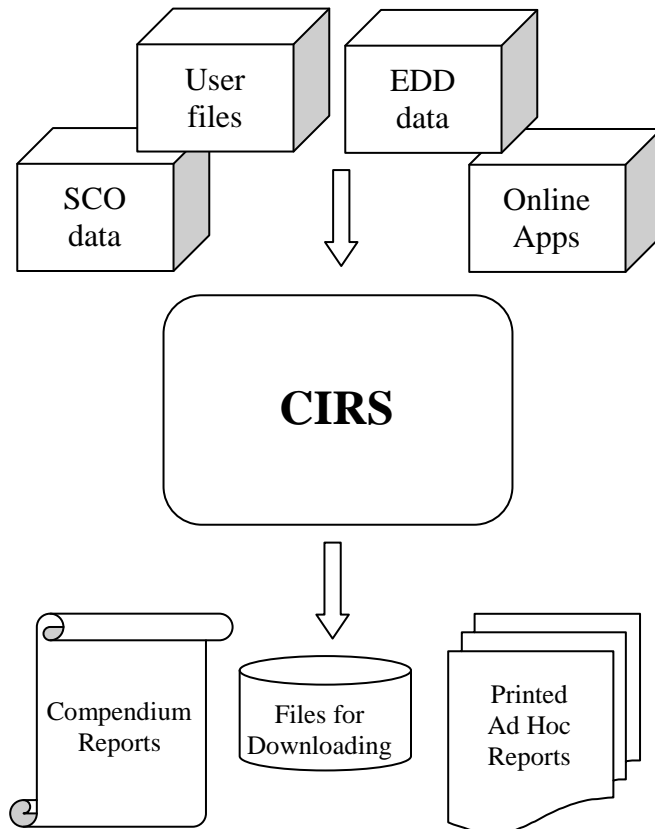
How To Use This Workbook

This course has been developed into modules. Each module assists you in learning a particular ad hoc reporting technique or function. The modules are further broken down into a series of lessons.

The modules build in complexity with later modules reinforcing and completing the information learned in earlier modules. Modules are sized to contain a comfortable amount of new information without overloading the learner.

Assumptions

This course assumes you have no formal training with data processing or writing ad hoc requests but that you are familiar with personnel and/or payroll data. This course does not attempt to teach application.

The material in this course assumes you already have access to CIRS, know how to logon, navigate and use the Compendium feature. It also presumes you are familiar with desktop computers and common software applications; can manipulate windows, launch and close applications; and can use an Internet browser.

Resources

In order to use this training manual, you will need access to the following password protected web-based documents. Contact your campus Security Coordinator for the userid and password.

- CIRS User Manual – www.calstate.edu/hrpims

- CIRS Data Element Dictionary – www.calstate.edu/hrpims/ded

You should also have access to FOCUS documentation, which is available from the vendor, Information Builders.

- FOCUS Documentation – www.informationbuilders.com

Another very valuable resource is your own campus user community. We encourage you to hold regular meetings at your campus to share information and learn more about CIRS and FOCUS.

For additional resources, refer to Appendix A.

Module 2

<u>Ad Hoc Reporting Overview</u>

In this module you will learn:

- The ad hoc report process

- Terminology

- The types of data available

- How to use the DED

Supporting Files/Documents:

- Master File Description for Active Current Status File

- CIRS Data Element Dictionary

Ad Hoc Reporting Process

There are over 24 files (databases) available for ad hoc reporting in CIRS that contain employment history, payment history, or leave accounting information. They can be used alone or merged with one or more files.

In general, the steps for writing a report request are:

1. Determine the data elements (fieldnames) needed for your report

2. Determine which file(s) contain the data elements needed

3. Write a report using FOCUS commands to gather the data

4. Test your report in the online environment with record limits to obtain a sample and verify the results

5. Submit the report without record limits through batch execution

The CIRS main menu, shown below, contains the functions used to create, store and execute your report requests. Each of the functions will be discussed in detail in later modules in this workbook.

```
COMPENDIUM REPORTS   ONLINE APPLICATIONS   CUSTOM FILES    OTHER
                        CIRS PERSONAL LIBRARY
 Cmds  B Browse   C Copy    D Delete       E Edit    Row 1 of 17
       P Print    R Rename  S Submit Batch  O Online Execution
 Cmd  Name      Description                            Changed
  _   AAREPORT  ANNUAL AFFIRMATIVE ACTION REPORT      2003/05/23
  _   EMPHIST   EMPLOYMENT HISTORY REPORT             2003/05/28
  _   EMPLIST   EMPLOYEE LIST - RUN QUARTERLY         2003/05/23
  _   FACULTY   FACULTY STATS                         2003/05/14
  _   FOCSAVE   NO DESCRIPTION FOUND.                 1993/09/23
  _   HISTORY   USE WITH EMPLOYMENT HISTORY EXTRACT   2003/05/28
  _   LEAVEBAL  CURRENT LEAVE BALANCES BY SSA, BY NAME 2003/06/02
  _   MPPADD    ADDRESS AND WORK LOCATION FOR MPPS    2003/05/15
  _   MPPEMP    MPP EMPLOYEES BY EMPLOYMENT DATE      2003/05/23
  _   PAYMENT   USE WITH PAYMENT HISTORY EXTRACT      2003/01/15
  _   PERMAPPT  PERM APPTS SINCE 01/01/03             2003/05/23
  _   PSNCNT1   POSITION COUNT BY TIMEBASE            2003/05/23
  _   PSNCNT2   POSITION COUNT BY CBID                2003/05/23
  _   R08OT     OVERTIME REPORT FOR R08 EMPLOYEES     2003/05/23
  _   STDPAY    STUDENT PAY-CURRENT BUSINESS MONTH    2003/05/23
  _   TOTALSAL  TOTAL SALARY BY AGENCY UNIT           2003/05/15
 F1=Status F2=New  F3=Exit   F4=Locate   F5=Sort      F6=Swap Lib
 F7=Up     F8=Down F9=Search F10=Results F11=HoldFile F12=Extract
```

Note: The screen colors displayed will vary depending upon your emulation software settings.

Terminology

Before you can create, store and execute requests, you need access to a database and knowledge of the information it contains. The terminology below will be used throughout this workbook.

Database	A collection of related data stored together.
Data Element	The name of specific data contained in the database (e.g., Social Security Number).
Fieldname	Descriptive name assigned to the data element in the database (e.g., AC:SSA).
Value	The actual literal (VALUE) for a fieldname (e.g., 001-23-9999 for AC:SSA).
Format Length	Maximum number of characters designated for the values of the fieldname (e.g., AC:SSA has a maximum length of 11 characters).
Format Type	How the data will be displayed. The format types are: A – Alpha D – Decimal DT – Date I - Integer P- Packed Decimal
Description	Description of the fieldname. Corresponds to the Data Element Dictionary (DED) title.
Standard Defines	Temporary fields created using existing data elements within a specific database.

Master File Descriptions

A detailed description of each file, known as a Master File Description (MFD), is available in the CIRS Data Element Dictionary. The MFD is a map of the segments of the data source and all the fields in each segment.

Below is a partial MFD for the Active Current Status (AC) file:

```
Segment Name = ACTIVE          Segment Type = S1


Fieldname             Format          Data Element Description
 * AC:SSA              A    11         Social Security Number
   AC:SSAFOUR          A    4          Social Security Number, Last 4
   AC:LASTNAME         A    21         Name, Last
   AC:FRSTNAME         A    16         Name, First
 * AC:WNAME            A    39         Name, Full
 * AC:BRTHDATE         DT   MDYY       Birthdate
 * AC:AGE              I    6          Age
   AC:SEX              A    1          Sex Code
   AC:ETHNIC           A    1          Ethnic Origin
 * AC:ETHNICGRP        A    3          Ethnic Group
   AC:STREET           A    28         Employee Address, Street
   AC:CTYST            A    25         Employee Address, City and State
   AC:ZIP              A    5          Employee Address, Zip Code
   AC:DISABLE          A    3          Disability Status
 * AC:DISAB            A    1          Disability Status Code
 * AC:DISFACT          A    2          Disability Status Factors
   AC:ADDRWH           A    1          Address Withheld Indicator
 * AC:DAO              A    8          Data as of Date


Segment Name = ACTPSN   Parent = ACTIVE    Segment Type = S1


Fieldname             Format          Data Element Description
   AC:PSNSEQ           A    2          Position Sequence Number
   AC:SSAPSN           A    11         SSA / Position Sequence Key
   AC:DOCT             A    4          Document Processing No.
   AC:AGYUNIT          A    6          Agency and Unit Key
   AC:SEPCODE          A    1          Separation Code
   AC:CAMPUSCD         A    2          Campus Numeric Code
   AC:CAMPUS           A    10         Campus Name Abbreviated
   AC:EMPCBID          A    3          Collective Bargaining Id, Code
   AC:TRANCODE         A    3          Transaction Code, Personnel
 * AC:TRANNAME         A    35         Transaction Code, Name
 * AC:TRANTYPE         A    24         Transaction Code, Type
   AC:EFFDATE          DT   MDYY       Effective Date
 * AC:POSITION         A    13         Position
 * AC:POSITI16         A    16         Position Number
 * AC:SALARY           P    12.2M      Salary Total
   AC:REMARKS          A    10         Employment History Remarks
```

Using the Data Element Dictionary

Open the CIRS Data Element Dictionary (www.calstate.edu/hrpims/ded) in your desktop browser. Lookup the data elements listed below and use the information contained in the DED to answer the questions.

SALARY TOTAL
What is the generic field name?
What is the definition?
What is the format?
In how many files can it be found?

POSITION NUMBER
What are the file prefixes for this data element?
How will the data display?
How would you use this field?

COLLECTIVE BARGAINING ID, CODE
What is the definition?
In which type of files (i.e., employment or payroll) can it be found?
What are the coding values?

What You Have Learned

In this module you learned:

- The ad hoc report process

- Terminology

- The types of data available

- How to use the DED

Module 3

<u>Basic FOCUS Commands</u>

In this module you will learn how to:

- Begin and end requests

- Display data

- Sort report columns

- Select records

Supporting Files/Documents:

- FOCUS Documentation

- CIRS Data Element Dictionary

- Active Current Status Master File Description

FOCUS Report Requests

FOCUS is a non-procedural reporting language. It uses simple English-like phrases to generate ad hoc reports. The basic type of FOCUS report is a tabular report format where the data is arranged in columns.

This workbook will provide only the most basic commands to generate this type of report. Refer to your FOCUS documentation for a complete list of commands and reporting options.

The basic components of a tabular report request, in recommended order, are:

- Execution of standard defines

- Beginning the report request

- Specifying display fields

- Sorting report data

- Selecting records

- Ending the report request

Beginning and Ending Report Requests

The FOCUS reporting language is very flexible and only requires a
command to identify the data source and a command to mark the end of
the request. All other parts of the request are optional. Although not
required, we recommend including comments in your request and
executing the standard defines for the file you are using. The syntax is:

     -∗text
     EX filename
     TABLE FILE filename
     (optional commands)
     END

-* text	Comments you provide to identify the purpose of the request. Each comment line must begin with a hyphen and an asterisk (**-∗**).
EX filename	Creates fields identified with an asterisk (*) in the Master File Description. Filename is any file containing defined fields. Defines must be executed before the TABLE FILE command.
TABLE FILE filename	Initializes the request and specifies the data source for the report request. Filename is any FOCUS database, external file or extracted file.
(optional commands)	All of the other parts of the request are optional - you only need to include the commands and phrases that produce the report you want. This module will discuss the optional commands used to display data, sort report columns and select records.
END	Ends the report request and generates the data. This command must be typed on a line by itself.

Displaying Data

Basic reports retrieve field values from a database and displays those values. The four display commands - also known as verbs - are PRINT, LIST, SUM and COUNT. The syntax of a display command is:

verb fieldname [AND] fieldname

verb   Is the PRINT, LIST, SUM or COUNT command.

fieldname   Is the name of the field to be displayed. It is also known as the display field. A maximum of 256 display fields can be requested in a report. The fields will appear on the report in the same order in which they are specified. For defined fields, the column title on the report will be the fieldname; otherwise the column title will be a 'reader friendly' title.

AND   Is an optional keyword used to improve the readability of the report request. It can be used between any fieldnames and does not affect the report.

Display Command: PRINT

The display command PRINT will display the values of the field(s) specified in your report request.

Report Request

```
-* LIST OF EMPLOYEES
EX AC
TABLE FILE AC
PRINT AC:SSA AC:WNAME
END
```

Report Generated

```
AC:SSA        AC:WNAME
------        --------
001-11-0000  BEAR, JAMES
002-22-0000  RATTLESNAKE, JOHN P
003-33-0000  SEAL, DONALD     F
004-44-0000  GIRAFFE, JOAN
005-55-0000  WHALE, BETSY G
```

Display Command: LIST

LIST works the same as PRINT, except it also numbers the values in the
report. If LIST is used in a report request that includes a sort phrase, the list
counter will reset to 1 each time the value in the first sort field changes.

Report Request

```
-* LIST OF EMPLOYEES
EX AC
TABLE FILE AC
LIST AC:SSA AC:WNAME
END
```

Report Generated

```
LIST  AC:SSA        AC:WNAME
----  ------        --------
1     001-11-0000   BEAR, JAMES
2     002-22-0000   RATTLESNAKE, JOHN P
3     003-33-0000   SEAL, DONALD     F
4     004-44-0000   GIRAFFE, JOAN
5     005-55-0000   WHALE, BETSY G
```

Report Request

```
-* LIST OF EMPLOYEES BY SSA
EX AC
TABLE FILE AC
LIST AC:PSNSEQ AC:POSIT16
BY AC:SSA
END
```

Report Generated

```
                    PSN
AC:SSA        LIST  SEQ  AC:POSIT16
------        ----  ---  ----------
001-11-0000     1   06   111-111-2358-005
002-22-0000     1   01   222-222-2360-001
                2   03   222-222-2482-002
003-33-0000     1   02   333-333-1800-001
004-44-0000     1   02   444-444-2360-001
                2   04   444-444-2360-002
005-55-0000     1   01   555-555-7193-001
```

Display Command: SUM

The display command SUM will add all values of the field you specify for the records in the database and display one summary line. SUM, WRITE and ADD are synonyms and can be used interchangeably. If SUM is used with alphanumeric or date fields, SUM will not add the values; instead, it will display the last value retrieved from the database.

Report Request

```
-* TOTAL OF EMPLOYEE SALARIES
EX AC
TABLE FILE AC
SUM AC:SALARY
END
```

Report Generated

```
  AC:SALARY
  ---------
 $37,698.93
```

Display Command: COUNT

The display command COUNT will count the number of occurrences of the field in the database. By default, a COUNT field has an I5 usage format.

Report Request

```
-* NUMBER OF SALARY FIELDS
EX AC
TABLE FILE AC
COUNT AC:SALARY
END
```

Report Generated

```
AC:SALARY
COUNT
---------
        6
```

Sorting Report Columns

Sorting enables you to group report data in a particular order. Data can be sorted in a column or across a row. The syntax of a sort command is:

sort fieldname

sort   Is the BY or ACROSS command.

fieldname   Is the name of the sort field. Any field in the database can be a sort field.

- Only 1 fieldname can follow a sort command, but multiple sort phrases can be used in a report request.

- Values for the sort field are displayed only once in the report.

- By default, the sorting sequence is from low to high. The sorting sequence can be reversed by using HIGHEST. For example:

    BY HIGHEST AC:SALARY

- The sequence of sort phrases determines the sorting order. Each successive sort is nested within the previous sort.

- You can create a matrix by including both rows and columns in the same report.

Sort Command: BY

The sort command BY is used to sort data into rows.

- Up to 32 BY sort phrases can be used in a report.

- When used with the display command LIST, the counter is reset to 1 each time the major (first) sort value changes.

Report Request

```
-* EMPLOYEE LIST
-* BY SEX
EX AC
TABLE FILE AC
PRINT AC:FRSTNAME
BY AC:SEX
BY AC:LASTNAME
END
```

Report Generated

```
 SEX     AC:LASTNAME          AC:FRSTNAME
 ---     -----------          -----------
 F       BEAR                 ANDREA
         JAGUAR               AMY   A
         SEAL                 JOAN    M
 M       HIPPO                MANUAL
         MONKEY               PAUL
```

Sort Command: ACROSS

The sort command ACROSS is used to sort data into columns.

- Up to 5 ACROSS sort phrases can be used in a report.

- Each ACROSS phrase can retrieve up to 95 sort field values.

- The total number of ACROSS report columns is equal to the total
  number of ACROSS sort field values multiplied by the total number of
  display fields. The maximum number of columns is 256.

Report Request

```
-* EMPLOYEE COUNTS
-* ACROSS SEX
EX AC
TABLE FILE AC
COUNT AC:SSA
ACROSS AC:SEX
END
```

Report Generated

```
SEX
    F      M
-------------
    3      2
```

Suppressing fields: NOPRINT or SUP-PRINT

FOCUS provides this option to suppress the display of field values.

▪ If you use the NOPRINT option with a BY field and create a HOLD
   file, the BY field is excluded from the file.

Report Request

```
-* EMPLOYEE LIST BY LAST NAME
EX AC
TABLE FILE AC
PRINT AC:POSIT16
BY AC:LASTNAME
BY AC:CLASS NOPRINT
END
```

Report Generated

```
 AC:LASTNAME           AC:POSIT16
 -----------           -----------
 BEAR                  250-030-2358-001
 FISH                  250-030-2358-001
                       250-030-2360-002
                       250-030-2482-001
 HIPPO                 250-030-0100-001
```

Selecting Records

You can include selection (screening) criteria in your report requests using the WHERE command. The syntax is:

IF / WHERE fieldname operator literal

IF / WHERE   Is the command phrase for selecting records. The command IF offers a subset of WHERE functionality.

fieldname   Is the field you want to test (the test value).

operator   Is the type of selection operator.

value   Is the alphanumeric or numeric value for the corresponding fieldname. Note: Blank values and values containing spaces must be enclosed in single quotation marks.

- You can use as many IF / WHERE expressions as necessary to define your selection criteria. All criteria must be satisfied in order for a record to be included in a report.

- Simple expressions can be joined with AND and OR logical operators to specify complex selection criteria.

Record Limits

You can limit the number of records FOCUS retrieves that meet your selection criteria. The syntax is:

IF / WHERE RECORDLIMIT EQ number

- Number is any number greater than 0, and indicates the number of records to be retrieved.

- Limit records when you are developing a new report and only need a few records to verify the results and/or design.

- Include a record limit to reduce costs if you know the number of records that meet the test criteria, so that the search does not continue beyond the last record retrieved.

Types Of Selection Tests

Below are examples of operators used in IF / WHERE expressions.
Additional operators can be found in your FOCUS User Manual.

Code	Description	Example
	Equal	`WHERE AC:SEX EQ 'F'`
	Not Equal	`WHERE AC:SEPCODE NE ' '`
	Greater Than	`WHERE AC:SALARY GT 3000`
	Less Than	`WHERE AC:FTE LT 1.0`
	Greater Than or Equal	`WHERE AC:APPTXDTE GE 07012001`
	Less Than or Equal	`WHERE AC:EMPDATE LE 06301998`
	Range	`WHERE AC:AGE FROM 50 TO 65`
	Not in Range	`WHERE AC:UNIT NOT-FROM '300' TO '500'`
	Include character string	`WHERE AC:WNAME CONTAINS 'JONES'`
	Arithmetic Operations	`WHERE AC:SALARY/173.33 GT 25.00`

Example of a screening statement using IF:

```
IF AC:CBID EQ R02 OR R05 OR R07 OR R09
```

Example of a screening statement using WHERE:

```
WHERE AC:CBID EQ 'R02' OR 'R05' OR 'R07' OR 'R09'
```

Example of a compound screening statement – only used with WHERE:

```
WHERE (AC:CBID EQ 'R03')
   OR (AC:CLASS EQ '2353' OR '2354' OR '2363')
```

Summary Of Basic Commands

Function	Syntax	Example
Comment line	`-* text`	`-* ACTIVE EE LIST`
Execute standard defines	`EX filename`	`EX AC`
Begin report request	`TABLE FILE filename`	`TABLE FILE AC`
Display command (verb phrase)	`verb field(s)`	`PRINT AC:WNAME` `      AC:CLASS`
Sort phrase	`sort field`	`BY AC:UNIT NOPRINT` `BY AC:CBID`
Select records	`Screening statement(s)`	`IF AC:SEPCODE EQ ' '`
Limit the records retrieved	`recordlimit`	`IF RECORDLIMIT EQ 5`
End report request	`END`	`END`

Practice

1. Write a report that displays the class code, full time equivalent (FTE) and salary of your active and on-leave employees. Sort the report by employee name.

   Report Generated:

   ```
   AC:WNAME                    CLS     AC:FTE      AC:SALARY
   --------                    ---     ------      ---------
   BEAR, CLARK F               2358      .200      $1,275.00
   FROG, NANCY B               3312     1.000      $6,346.00
   LLAMA, JOAN   M             2360      .500      $3,492.00
                               2360      .500      $3,343.50
   MONKEY, RON J               1038     1.000      $2,917.00
   ```

2. Write a report to generate the total number of active and on-leave positions at your campus. Sort by CBID.

   Report Generated:

   ```
                 AC:POSITION
   AC:CBID       COUNT
   -------       -----------
   C99                     3
   E99                    11
   M80                    50
   R03                   334
   ```

3. Identify the names and job codes of your active and on-leave
   Management Personnel Plan employees. Sort the report by
   employment date.

   Report Generated:

   ```
   AC:EMPDATE      AC:WNAME                    JOB CODE
   ----------      --------                    --------
   01/03/1997      KANGAROO, MARY E            M113
   08/24/1979      CAMEL, JAMES J              M092
   09/01/1983      ADVARK, DIANNE T            L025
   08/07/1989      NEWT, GRACE P               N062
   01/08/1990      WHALE, PETER A              Z244
   ```

4. Identify the total salary for your monthly paid active and on-leave
   employees. Sort the report data by reporting unit and by class code.

   Report Generated:

   ```
   UNT    CLS              AC:SALARY
   ---    ---              ---------
   110    1170             $3,664.00
          3306             $7,865.00
   610    0400            $27,259.00
          0420             $4,695.00
          3300            $13,371.00
   ```

5. Write a report to count your active and on-leave Faculty positions.
   Sort the report by ethnic group and across sex.

   Report Generated:

```
                SEX
                   F      M
AC:ETHNICGRP
-----------------------------
AMI                1      0
ASN               17     17
BLK               11     16
HSP               10      8
N/A                0      1
WHT              211    208
```

_____

_____

_____

_____

_____

_____

_____

_____

What You Have Learned

In this module you have learned to:

- Begin and end requests

- Display data using verb phrases

- Sort the data in your reports

- Select records

Module 4

<u>Creating and Maintaining Requests</u>

In this module you will learn:

- How to navigate in your library

- How to create requests in your library

- How to edit report requests in your library

- How to maintain members in your library

Supporting File/Documents:

- CIRS User Manual

- FOCUS User Manual

Personal Library

The middle portion of the main menu lists report requests in your personal library. By default, your report requests are displayed in alphabetical order along with the date the report request was last changed. If the first line of a report request is a comment line, that line will appear as the description. Otherwise, the text NO DESCRIPTION FOUND will display.

```
COMPENDIUM REPORTS    ONLINE APPLICATIONS   CUSTOM FILES    OTHER
                         CIRS PERSONAL LIBRARY
Cmds   B Browse   C Copy     D Delete      E Edit    Row 1 of 17
       P Print    R Rename  S Submit Batch  O Online Execution
  Cmd   Name      Description                           Changed
   _    AAREPORT  ANNUAL AFFIRMATIVE ACTION REPORT      2003/05/23
   _    EMPHIST   EMPLOYMENT HISTORY REPORT             2003/05/28
   _    EMPLIST   EMPLOYEE LIST - RUN QUARTERLY         2003/05/23
   _    FACULTY   FACULTY STATS                         2003/05/14
   _    HISTORY   USE WITH EMPLOYMENT HISTORY EXTRACT   2003/05/28
   _    LEAVEBAL  CURRENT LEAVE BALANCES BY SSA, BY NAME 2003/06/02
   _    MPPADD    ADDRESS AND WORK LOCATION FOR MPPS    2003/05/15
   _    MPPEMP    MPP EMPLOYEES BY EMPLOYMENT DATE      2003/05/23
   _    PAYMENT   USE WITH PAYMENT HISTORY EXTRACT      2003/01/15
   _    PERMAPPT  PERM APPTS SINCE 01/01/03             2003/05/23
   _    PSNCNT1   POSITION COUNT BY TIMEBASE            2003/05/23
   _    PSNCNT2   POSITION COUNT BY CBID                2003/05/23
   _    R08OT     OVERTIME REPORT FOR R08 EMPLOYEES     2003/05/23
   _    STDPAY    STUDENT PAY-CURRENT BUSINESS MONTH    2003/05/23
   _    TOTALSAL  TOTAL SALARY BY AGENCY UNIT           2003/05/15
 F1=Status F2=New F3=Exit   F4=Locate   F5=Sort       F6=Swap Lib
 F7=Up     F8=Down F9=Search F10=Results F11=HoldFile F12=Extract
```

When your userid was created, 3 members were placed in your library: History, Payment and Verify$. These are reserved for use with the Extract Functions (F12). Do not use these for any other purpose.

Note: Throughout this workbook, the term 'report request' will be used interchangeably with the terms 'member' and 'program'.

Navigation Options

The bottom portion of the main menu contains the function keys used for navigation in your library. For detailed information on the function keys, refer to the CIRS User Manual. Note: This module will only discuss the function keys related to navigation in your library. The other function keys will be discussed in other modules in this workbook.

```
COMPENDIUM REPORTS    ONLINE APPLICATIONS    CUSTOM FILES     OTHER
                       CIRS PERSONAL LIBRARY
Cmds   B Browse    C Copy     D Delete        E Edit    Row 1 of 17
       P Print     R Rename  S Submit Batch  O Online Execution
  Cmd  Name      Description                           Changed
   _   AAREPORT   ANNUAL AFFIRMATIVE ACTION REPORT      2003/05/23
   _   EMPHIST    EMPLOYMENT HISTORY REPORT             2003/05/28
   _   EMPLIST    EMPLOYEE LIST - RUN QUARTERLY         2003/05/23
   _   FACULTY    FACULTY STATS                         2003/05/14
   _   HISTORY    USE WITH EMPLOYMENT HISTORY EXTRACT   2003/05/28
   _   LEAVEBAL   CURRENT LEAVE BALANCES BY SSA, BY NAME 2003/06/02
   _   MPPADD     ADDRESS AND WORK LOCATION FOR MPPS    2003/05/15
   _   MPPEMP     MPP EMPLOYEES BY EMPLOYMENT DATE      2003/05/23
   _   PAYMENT    USE WITH PAYMENT HISTORY EXTRACT      2003/01/15
   _   PERMAPPT   PERM APPTS SINCE 01/01/03             2003/05/23
   _   PSNCNT1    POSITION COUNT BY TIMEBASE            2003/05/23
   _   PSNCNT2    POSITION COUNT BY CBID                2003/05/23
   _   R08OT      OVERTIME REPORT FOR R08 EMPLOYEES     2003/05/23
   _   STDPAY     STUDENT PAY-CURRENT BUSINESS MONTH    2003/05/23
   _   TOTALSAL   TOTAL SALARY BY AGENCY UNIT           2003/05/15
F1=Status F2=New  F3=Exit   F4=Locate   F5=Sort       F6=Swap Lib
F7=Up      F8=Down F9=Search F10=Results F11=HoldFile F12=Extract
```

- F3 = exit your library/CIRS
- F4 = locate a report request
- F5 = sort the report requests
- F7 and F8 = scroll up and down, respectively
- F9 = search for a word, phrase or fieldname in your library

To use a function key:

Press the corresponding key on your keyboard. For example, to sort report requests, press the F5 key.

```
F1=Status F2=New  F3=Exit   F4=Locate   F5=Sort       F6=Swap Lib
F7=Up      F8=Down F9=Search F10=Results F11=HoldFile F12=Extract
```

Depending on the function key selected, the system will either perform the function, or provide an options menu. If an option menu appears, follow the instructions and press the enter key to perform the function.

Creating Requests

Report requests are stored with unique names in your library until you delete them or your userid is deleted. There are several methods of creating report requests, but this module will only discuss creating a report from scratch. Other options will be described later in the workbook.

To create a report request from scratch:

1. From the main menu, press the F2 key to create a new report request.

```
F1=Status F2=New  F3=Exit   F4=Locate   F5=Sort     F6=Swap Lib
F7=Up     F8=Down F9=Search F10=Results F11=HoldFile F12=Extract
```

2. At the pop-up menu, type the name (1 to 8 characters) and press enter.

```
|--------New Report Request---------|
|     ENTER REPORT REQUEST NAME     |
|                OR                 |
| LEAVE BLANK TO enter FOCUS ONLINE |
|                                   |
|          NAME: TRAIN1             |
|-----------------------------------|
```

3. Navigate to the first data entry line using the TAB key and type your FOCUS commands. After the first line has been keyed, move the cursor to the second line using the TAB key and continue keying. Continue in this manner until all commands are keyed.

```
EDIT      PD.CSUCFOC.UUSER(TRAIN1) - 01.01   Columns 00001 00072
Command ===>                                      Scroll ===> PAGE
****** ***************** Top of Data ************************
,,,,,
,,,,,
,,,,,          Type commands
,,,,,           in this space
,,,,,
```

4. When all commands are keyed, press enter. Line numbers will automatically be added to the left of the commands and unused lines will be deleted. After reviewing for typos, press F3 to save and exit.

```
EDIT      PD.CSUCFOC.UUSER(TRAIN1) - 01.01   Columns 00001 00072
Command ===>                                      Scroll ===> PAGE
****** ***************** Top of Data **********************
000001 -* CURRENT EMPLOYEES
000002 EX AC
000003 TABLE FILE AC
000004 PRINT AC:CLASS
000005       AC:FTE
000006       AC:SALARY
000007 BY AC:WNAME
000008 IF RECORDLIMIT EQ 100
000009 END
****** ***************** Bottom of Data **********************
```

Line Edit Commands

The commands listed below can be used to edit lines in your report requests. To use a command, type the command(s) over any of the existing line number(s) and press enter. For example:

```
EDIT    PD.CSUCFOC.UUSER(TRAIN1) - 01.01   Columns 00001 00072
Command ===>                                    Scroll ===> PAGE
****** ****************** Top of Data ***********************
000001 -* ALPHA LIST OF CURRENT EMPLOYEES
000002 EX AC
000003 TABLE FILE AC
000004 PRINT AC:CLASS
000005      AC:FTE
000006      AC:SALARY
000007 BY AC:WNAME
00D009 IF RECORDLIMIT EQ 100
000009 END
****** ***************** Bottom of Data **********************
```

For the commands below, *n* denotes the number of times you want the operation to occur.

Command	Description
A	Indicates the line after which copied or moved lines are to be inserted.
A*n*	Indicates the number of times copied/moved lines will be inserted after the line.
B	Indicates the line before which copied/moved lines are to be inserted.
B*n*	Indicates the number of times copied/moved lines will be inserted before the line.
C	Copy a line.
C*n*	Copy *n* lines starting at this line.
CC	Indicates the beginning and ending of a block of lines to be copied.
D	Delete a line.
D*n*	Delete *n* lines starting at this line.
DD	Indicates the beginning and ending of a block of lines to be deleted.
I	Insert a line following this line.
M	Move this line.
MM	Indicates the beginning and ending of a block of lines to be moved.
R	Repeat a line. The repeated line is inserted after the line containing the R.
R*n*	Repeat this line *n* times.
RR	Indicates the beginning and ending of a block of lines to be repeated.

Command Line Entries

The commands listed below can be entered on the command line when you are editing report requests. Press enter after typing a command. For example:

```
EDIT      PD.CSUCFOC.UUSER(TRAIN1) - 01.01   Columns 00001 00072
Command ===>  SAVE                                Scroll ===> PAGE
****** ****************** Top of Data **********************
```

For the commands below, *n* denotes the number of times you want the operation to occur.

Command	Description
BOTTOM	Scrolls to bottom
C ALL string string	Used to change all characters in the 1st string to characters in the 2nd string. If a string includes spaces, it must be enclosed in single quotes.
CANCEL	Exits the report request without saving any changes since the last save.
COPY	Takes you to the copy screen.
COPY member	Copies the specified member into the current report request.
DOWN *n*	Scrolls down *n* number of lines.
END	Exits the screen and saves changes.
FIND string	Finds the first occurrence of the string. To repeat the find, press F5.
LEFT *n*	Scrolls left *n* number of columns.
LOCATE *n*	Locates line number *n* and brings it to the top of the screen.
RESET	Restores the line number.
RIGHT *n*	Scrolls right *n* number of columns.
SAVE	Saves request without exiting.
TOP	Scrolls to top
UP *n*	Scrolls up *n* number of lines.

Maintenance Commands

All available maintenance commands are identified above the list of your report requests. For detailed information on the commands, refer to the CIRS User Manual. Note: This module will only discuss the commands related to maintaining your library. The other commands will be discussed later in this workbook.

```
COMPENDIUM REPORTS   ONLINE APPLICATIONS   CUSTOM FILES     OTHER
                       CIRS PERSONAL LIBRARY
Cmds  B Browse    C Copy     D Delete       E Edit    Row 1 of 17
      P Print     R Rename  S Submit Batch  O Online Execution
Cmd  Name      Description                              Changed
  _  AAREPORT  ANNUAL AFFIRMATIVE ACTION REPORT        2003/05/23
  _  EMPHIST   EMPLOYMENT HISTORY REPORT               2003/05/28
  _  EMPLIST   EMPLOYEE LIST - RUN QUARTERLY           2003/05/23
  _  FACULTY   FACULTY STATS                           2003/05/14
  _  HISTORY   USE WITH EMPLOYMENT HISTORY EXTRACT     2003/05/28
  _  LEAVEBAL  CURRENT LEAVE BALANCES BY SSA, BY NAME 2003/06/02
  _  MPPADD    ADDRESS AND WORK LOCATION FOR MPPS      2003/05/15
  _  MPPEMP    MPP EMPLOYEES BY EMPLOYMENT DATE        2003/05/23
```

- Browse = view a report request without the ability to make changes
- Copy = copy a report request from your library to the common library or to a new member in your library
- Delete = delete a report request in your library
- Edit = modify an existing report request
- Print = send the report request commands to the printer
- Rename = change the name of a report request

To use a maintenance command:

Type the alpha character to the left of the report name and press the enter key. For example, to rename a report request type an R and press enter.

```
                       CIRS PERSONAL LIBRARY
Cmds  B Browse    C Copy     D Delete       E Edit    Row 1 of 17
      P Print     R Rename  S Submit Batch  O Online Execution
Cmd  Name      Description                              Changed
  R  TRAIN1    ALPHA LIST OF CURRENT EMPLOYEES         2003/10/20
```

.

Practice

1. Using the exercises from Module 3, create report requests in your
    library. Use the naming convention Train1, Train2, etc.

2. Practice using the Line Edit Commands and Command Line Entries.

3. Practice using the function keys related to navigation.

4. Practice using the maintenance commands related to maintaining your
    library.

What You Have Learned

In this module you have learned to:

- Create requests in your library

- Edit report requests in your library

- Maintain members in your library

Module 5

<u>Executing Requests Online</u>

In this module you will learn how to:

- Execute reports in the online FOCUS environment

- View the output in the hot screen

- Fix errors in your report request

Supporting Documents/Files:

- CIRS User Manual

Online Execution

The online FOCUS environment is an interactive environment used primarily to test procedures with record limits and to preview the output before executing in the batch environment. (Batch will be discussed in the next module). Note: Report requests with implied prompting can only be executed in the online environment.

To select report request for online execution:

1. Type an O to the left of the report name and press enter.

```
COMPENDIUM REPORTS   ONLINE APPLICATIONS   CUSTOM FILES    OTHER
                         CIRS PERSONAL LIBRARY
Cmds  B Browse   C Copy    D Delete        E Edit    Row 1 of 17
      P Print    R Rename  S Submit Batch  O Online Execution
 Cmd  Name      Description                              Changed
  O   TRAIN1    CURRENT EMPLOYEES                      2003/05/28
  _   TRAIN2    COUNT OF CURRENT POSITIONS             2003/05/28
  _   TRAIN3    MPP EMPLOYEES                          2003/05/28
```

2. Confirm the file selection (if the confirmation panel is turned on) and press enter.

```
|----------------Confirm Online FOCUS File Selections----------------|
|. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . |
| REPORT REQUEST :  TRAIN1__                                          |
|. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . |
| CAMPUS FILES (FILE SELECTION = X)                                   |
| X  AC  ACTIVE CURRENT STATUS       .  _ PH  PAY DATA CURRENT FY     |
| _  AN  CURRENT STATUS 10/31/ __    .  _ PY  PAYMENT HISTORY EXTRACT |
| _  A54 TRANSACTION DATA            .  _ SN  SENIORITY POINTS        |
| _  CH  CAMPUS HEADER               .  _ SP  SEPARATED CURRENT STATUS|
| _  EH  EMPLOYMENT HISTORY EXTRACT  .  _ ST  STUDENT ASSISTANT       |
| _  LV  LEAVE FILES (LB, LV, LX)    .  _ TR  TRANSACTION DATA        |
| _  PH  PAY DATA PRIOR MONTH        .  _ UI  UNEMPLOYMENT INSURANCE  |
|                                                                    |
|--------------------------------------------------------------------|
```

3. The message PLEASE STANDBY will appear. Press enter to proceed.

```
LIBRARY  = userid

= = > PLEASE STANDBY
***
```

4. The online FOCUS screen will display while FOCUS scans and processes the commands entered in the report request.

```
FOCUS  7.0.9 10/28/2003/10.58.07  8022.03
```

5. If your report does not have errors, the data retrieved will display in the 'hot screen'.

Online File Selection

When a report request is selected for execution, the system will automatically identify the required file(s). When the file confirmation panel is turned on, you will receive a file selection menu (below) with the required file(s) selected. Confirm the selections and press enter.

```
|------------------Confirm Online FOCUS File Selections-----------------|
|   REPORT REQUEST :   TRAIN1__                                          |
| . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . |
|   CAMPUS FILES (FILE SELECTION = X)                                    |
|   X  AC  ACTIVE CURRENT STATUS      .  _ PH  PAY DATA CURRENT FY       |
|   _  AN  CURRENT STATUS 10/31/ __   .  _ PY  PAYMENT HISTORY EXTRACT   |
|   _  A54 TRANSACTION DATA           .  _ SN  SENIORITY POINTS          |
|   _  CH  CAMPUS HEADER              .  _ SP  SEPARATED CURRENT STATUS  |
|   _  EH  EMPLOYMENT HISTORY EXTRACT .  _ ST  STUDENT ASSISTANT         |
|   _  LV  LEAVE FILES (LB, LV, LX)   .  _ TR  TRANSACTION DATA          |
|   _  PH  PAY DATA PRIOR MONTH       .  _ UI  UNEMPLOYMENT INSURANCE    |
|                                                                       |
|   SYSTEMWIDE FILES (FILE SELECTION = X)                                |
|   _  PS   PAY SCALES                .  _ SAN  CURRENT STATUS 10/31/ __ |
|   _  SAC  ACTIVE CURRENT STATUS     .  _ STR  TRANSACTION DATA         |
|                                                                       |
|                   ENTER TO CONTINUE - PF3 TO CANCEL                    |
|-----------------------------------------------------------------------|
```

Additional information:

▪ If the S/AN, PH or SN file is specified in your report request, you will be prompted to provide additional information.

▪ You cannot select a systemwide file (e.g., SAC) and the corresponding campus file (e.g., AC) in the same FOCUS session.

▪ Permanent Hold files, cross referenced files and other 'hidden' files are available whenever any other file is selected.

▪ The following files are only available through batch: prior fiscal years of payment data (i.e, PH and PHS files) and certain leave data files (i.e., LD, LH, and LR).

Online FOCUS Environment

The online FOCUS environment screen displays the current version of
FOCUS along with the date and time you entered the online environment.
The FOCUS prompt (>) is where session commands are typed.

```
FOCUS  7.0.9 10/28/2003/10.58.07  8022.03

> >
```

Below are session commands that can be entered at the FOCUS prompt.
Commands can be typed at the prompt whether one (>), two (>>), or three
(>>>) carets are displayed.

Command	Description
EX or EXEC	Execute a procedure or report request.
? n	Query command, where n is the message number, to display a detailed explanation of a message.
QUIT	Quit the procedure and return to the FOCUS prompt.
RETYPE	Re-display the last report. Note this command can only be used immediately after exiting the hot screen.
HARDCOPY	Sends last report to your default printer.
FIN	Exit the online FOCUS environment.

Hot Screen

If your report does not have errors, the data retrieved will display in the
'hot screen'. Approximately 20 lines of data will display at a time and
each page will contains approximately 60 printed lines.

```
PAGE 1
                            CLS        AC:FTE        AC:SALARY
AC:WNAME                    ---        ------        ---------
--------
BEAR, CLARK F               2358         .200        $1,275.00
FROG, NANCY B               3312        1.000        $6,346.00
LLAMA, JOAN   M             2360         .500        $3,492.00
                           2360         .500        $3,343.50
MONKEY, RON J               1038        1.000        $2,917.00
```

The following keys are used for navigation in the hot screen.

- F3 = exit the hot screen

- F5 = search for a character string

- F7 and F8 = scroll up and down, respectively.

- F10 and F11 = scroll left and right, respectively

Printing Report Data

1. After viewing your report data in the hot screen and returning to the
   online FOCUS screen, type HARDCOPY at the caret prompt in the
   online FOCUS environment and press enter.

```
..REPORT KILLED
> hardcopy
```

2. After pressing enter, the message OFFLINE will appear indicating the
   report was sent to your default printer.

```
..REPORT KILLED

> hardcopy
>   OFFLINE. . .

> > >
```

Fixing Errors Online

If your report request has typos or syntax errors, FOCUS will generate a message with a brief description of the error and/or an error message number. For example, in the request below the fieldname should be AC:WNAME. Note: FOCUS error message number 009 (FOC009) is received anytime the system cannot process the report request due to the previous error(s) identified.

```
   FOCUS  7.0.9 10/28/2003/10.58.07  8022.03
 ERROR AT OR NEAR LINE     7  IN PROCEDURE TRAIN1   FOCEXEC
(FOC003) THE FIELDNAME IS NOT RECOGNIZED: AC:NAME
 BYPASSING TO END OF COMMAND
(FOC009) INCOMPLETE REQUEST STATEMENT
 >
```

To fix errors online:

1. Type EX MAINT at the caret prompt and press enter.

```
BYPASSING TO END OF COMMAND
(FOC009) INCOMPLETE REQUEST STATEMENT
 > ex maint
```

2. When prompted, type the name of the report request (program) and press the enter key **twice**.

```
PLEASE SUPPLY VALUES REQUESTED

PROGRAM=  > train1
***
```

3. You will be placed in your report request under edit mode. After making changes, press F3 to save and return to the online FOCUS environment.

```
EDIT     PD.CSUCFOC.UUSER(TRAIN1) - 01.01   Columns 00001 00072
Command ===>                                  Scroll ===> PAGE
****** ****************** Top of Data **********************
000001 -* CURRENT EMPLOYEES
000002 EX AC
000003 TABLE FILE AC
000004 PRINT AC:CLASS
000005      AC:FTE
000006      AC:SALARY
000007 BY AC:WNAME
000008 IF RECORDLIMIT EQ 100
000009 END
****** ***************** Bottom of Data **********************
```

4. Execute the report again by typing EX at the prompt followed by the program name. If a report is generated, it will display in the hot screen.

```
 > ex train1
```

Exiting The Online FOCUS Environment

1. Type FIN at the caret prompt and press the enter key. When 3
    asterisks appear (***) press the enter key again.

```
..REPORT KILLED
  > fin
```

2. The ad hoc statistics message will appear. This displays a summary of
    the system resources used including CPU (Central Processing Unit)
    time accrued and the approximate CPU cost for your FOCUS session.

```
                AD HOC STATISTICS

 ELAPSED TIME:  22 MINUTES   37 SECONDS

 CPU:   3.41 SECONDS

 APPROXIMATE CPU COST: $ 0.68
 ***
```

3. Press enter after viewing the ad hoc statistics to clear the message and
    return to the main menu.

Practice

Practice what you have learned in this module using all 5 of the report requests entered in your library from the last module.

1. Select a report request for online execution.

2. Fix any errors by using the EX MAINT command.

3. View the output in the hot screen using the navigation keys.

4. Exit the hot screen and, if desired, send the report to your default printer at your campus.

5. Repeat steps 3-6 for the remaining report requests.

6. Exit the online FOCUS environment.

What You Have Learned

In this module you learned how to:

- Execute reports in the online FOCUS environment

- View the output in the hot screen

- Fix errors in your report request

Module 6

<u>Using Batch Functions</u>

In this module you will learn:

- The difference between batch and online execution

- How to submit batch jobs

- How to edit batch reports

- How to print batch reports

- How to download batch reports

Supporting Documents/Files:

- CIRS User Manual

Batch Functions

Batch is an offline FOCUS environment. That means the terminal is free to do other tasks in or out of CIRS, while a job is executing. We recommend submitting your report requests in the batch environment after they have been tested in the online FOCUS environment.

The batch FOCUS environment is required for the following conditions:

- Reports that generate large output files.

- Reports that use prior fiscal years of payment data (i.e, PH and PHS files) and certain leave data files (i.e., LD, LH, and LR).

- Reports that will be edited before printing.

- Reports that will be downloaded to a word processing document (e.g, Microsoft Word).

Batch Versus Online

Below is a chart to help illustrate the differences between the batch and online environments:

Function	Batch	Online
Interactive	No	Yes
Access all CIRS files	Yes	*No
Execute Multiple Report requests	Yes	Yes
Save Report Output	Yes	**Yes
Direct Print Function	Yes	No
Edit Report Output	Yes	No
Download Report Output	Yes	**Yes

* Some CIRS files stored on tape are only available through batch.
** If the results are held to a permanent hold file.

Submitting Batch Jobs

1. To submit a batch job, type an 'S' at the command line to the left of the report request name and press enter. For example:

```
COMPENDIUM REPORTS   ONLINE APPLICATIONS   CUSTOM FILES    OTHER
                      CIRS PERSONAL LIBRARY
Cmds   B Browse   C Copy    D Delete        E Edit     Row 1 of 17
       P Print    R Rename  S Submit Batch  O Online Execution
 Cmd   Name      Description                              Changed
  S    TRAIN1    CURRENT EMPLOYEES                      2003/05/28
  _    TRAIN2    COUNT OF CURRENT POSITIONS             2003/05/28
  _    TRAIN3    MPP EMPLOYEES                          2003/05/28
```

2. Confirm the file selection and direct the output (if the file confirmation panel is turned on) and press enter.

```
|----------------Confirm Batch FOCUS File Selections----------------|
| REPORT REQUEST :  TRAIN1_                                          |
| . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . |
| DIRECT OUTPUT TO :  1   1=REPORT FILE   2=PRINTER                  |
| . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . |
| CAMPUS FILES (FILE SELECTION = X)                                  |
| X  AC  ACTIVE CURRENT STATUS      . _ PH  PAY DATA CURRENT FY      |
| _  AN  CURRENT STATUS 10/31/ __   . _ PY  PAYMENT HISTORY EXTRACT  |
| _  A54 TRANSACTION DATA           . _ SN  SENIORITY POINTS         |
| _  CH  CAMPUS HEADER              . _ SP  SEPARATED CURRENT STATUS |
| _  EH  EMPLOYMENT HISTORY EXTRACT . _ ST  STUDENT ASSISTANT        |
| _  LV  LEAVE FILES (LB, LV, LX)   . _ TR  TRANSACTION DATA         |
| _  PH  PAY DATA FY   __/__        . _ UI  UNEMPLOYMENT INSURANCE   |
| _  PH  PAY DATA PRIOR MONTH                                        |
|-------------------------------------------------------------------|
```

- If the file confirmation panel is turned off, the output will be automatically directed to your batch report file. You can access the file by pressing the F11 key from the main menu.

- If the output is directed to your printer, the report will be automatically sent to your default printer.

3. Note the job number, then press enter to clear the message and return to the main menu.

```
JOB CTBuserid (JOB12345) SUBMITTED
***
```

4. From the main menu, press the F1 key to view the status message and confirm the job completed.

```
 F1=Status  F2=New    F3=Exit    F4=Locate   F5=Sort      F6=Swap Lib
 F7=Up      F8=Down  F9=Search  F10=Results  F11=HoldFile F12=Extract
```

Status and System Messages

Each time you submit a job (e.g., batch, extract, etc.), the system assigns a number to that job. The time it takes for a job to complete depends on the report request, the volume of data being accessed and the amount of activity on the system. You can determine the status of a job by checking the status message, or by noting the system notification message.

Status Message

To check your job's status message, press the F1 key from the main menu.

```
F1=Status  F2=New   F3=Exit    F4=Locate    F5=Sort      F6=Swap Lib
F7=Up      F8=Down  F9=Search  F10=Results  F11=HoldFile F12=Extract
```

A sample status message is shown below. The message indicates the type of job, your userid and the job number and the status. To clear the message, press the enter key.

```
CTBuserid JOB123546 FOCUS BATCH JOB COMPLETED SUCCESSFULLY.
***
```

If you receive a message that indicates 'Contact HR-ISA', please note the job number and message text before calling the CIRS Hotline.

Status messages accumulate throughout the day. If you have submitted more than one job, you will see multiple messages. Refer to the job number to identify the status of a particular job.

System Notification Message

System notification messages are automatically generated when a job is finished and the enter key, or a function key, is pressed while working in CIRS. If have logged off while a job was running, the system notification message will display during the logon process. These messages contain cryptic text and can be ignored because all the pertinent information provided by these messages is available by using the F1 key to check the status of your job. To clear system notification messages, simply press the enter key.

Batch Job Results

If the batch job output was routed directly to your printer, (only available if the default is the file confirmation screen is turned on) the results will automatically print at your default printer when the job has completed. The batch report will contain all FOCUS commands executed and, if there were no errors, the report generated. A partial printed report is shown below.

```
   FOCUS 7.0.9  11/03/2003  09.44.11  8022/03
 FULL SCREEN MODE IS AVAILABLE FOR IBM3270 ONLY

 - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
 FOCUS 7.0.9  09.44.12  10/31/2003  8022.03  LINE 0

 EX TRAIN1

 - - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
 FOCUS 7.0.9  09.44.12  10/31/2003  8022.03  LINE 1

 EX AC
```

If your report was sent to your batch report file, (the default is the file confirmation screen is turned off) the results can be accessed by pressing the F11 key from the main menu and are available for 60 days (or until it is overwritten). The batch report will contain the approximate system cost, all FOCUS commands executed and, if there were no errors, the report generated. The file can be edited, printed or downloaded after the job has completed. A partial batch report is shown below.

```
EDIT   PD.CSUCFOC.RPTUSER.REPORT.UUSER - 01.01 Columns 00001 00072
Command ===>                                       Scroll ===> PAGE
****** ******************* Top of Data ************************
000001     BATCH STATISTICS
000002
000003 CPU:  0 MINUTES  .86 SECONDS
000004 APPROXIMATE CPU COST:  $  .11
000005
000006   FOCUS 7.0.9  11/03/2003  09.44.11  8022/03
000007 FULL SCREEN MODE IS AVAILABLE FOR IBM3270 ONLY.
000008
000009
000010
000011
000012 - - - - - - - - - - - - - - - - - - - - - - - - - - - - -
000013 FOCUS 7.0.9  09.44.12  10/31/2003  8022.03  LINE 0
000014
000015 EX TRAIN1
000016
```

Note: Batch reports are fixed width files and are not formatted for importing into spreadsheets (e.g., Microsoft Excel).

To edit your batch report:

The edit option can be used to simply view your batch report, or to change the batch report before it is printed or downloaded.

1. From the main menu, press the F10 key.

```
F1=Status F2=New  F3=Exit     F4=Locate   F5=Sort     F6=Swap Lib
F7=Up      F8=Down F9=Search  F10=Results F11=HoldFile F12=Extract
```

2. Select option 1 from the batch report results menu and press enter.

```
|----- Batch Report Results -----|
|                                |
|  SELECT: 1   1. EDIT REPORT    |
|              2. PRINT REPORT   |
|              3. DOWNLOAD REPORT|
|--------------------------------|
```

3. You can add, delete or change lines in your batch reports using the same commands available for editing report requests. When editing batch reports, be aware of the carriage control characters located in the first column. Those characters control how the report is printed.

```
EDIT   PD.CSUCFOC.RPTUSER.REPORT.UUSER - 01.01 Columns 00001 00072
Command ===>                                      Scroll ===> PAGE
****** ******************** Top of Data ************************
000148 0 NUMBER OF RECORDS IN TABLE=  10 LINES=   10
000149
000150 1 PAGE     1
```

- 1 = page break
- 0 = blank line
- (hyphen) = double space

4. When you have finished viewing or editing your batch report, press the F3 key to exit and save your changes (if any).

To print your batch report:

You can print your batch report as is, or you can print it after deleting the batch cost information and the FOCUS request statements. Before printing, you should always view the file to verify there were no errors.

1. From the main menu, press the F10 key.

```
F1=Status F2=New  F3=Exit    F4=Locate   F5=Sort     F6=Swap Lib
F7=Up      F8=Down F9=Search  F10=Results F11=HoldFile F12=Extract
```

2. Select option 2 from the batch report results menu and press enter.

```
|----- Batch Report Results -----|
|                                |
|  SELECT:   2  1. EDIT REPORT   |
|               2. PRINT REPORT  |
|               3. DOWNLOAD REPORT |
|--------------------------------|
```

3. At the Printer Options menu, change the default selections, if needed, and press enter to print.

```
|--------------- Printer Options ------------------|
| SELECT PRINTER, COPIES, LINES TO PRINT:          |
|                                                  |
| PRINTER: 2    COPIES: 1      LINES FROM: 000001  |
|                              LINES TO  : 999999  |
|                                                  |
| 1. XXTN8003     2. XXTN8004                      |
|                                                  |
|         ENTER TO PRINT - F3 TO CANCEL            |
|--------------------------------------------------|
```

To download your batch report:

Note: This workbook will only discuss how to download using the emulation software installed on the PC's used for training. If your software is different, refer to that documentation for instructions.

1. From the main menu, press the F10 key.

```
F1=Status F2=New  F3=Exit    F4=Locate   F5=Sort    F6=Swap Lib
F7=Up       F8=Down F9=Search  F10=Results F11=HoldFile F12=Extract
```

2. Select option 3 from the batch report results menu and press enter.

```
|----- Batch Report Results -----|
|                                |
|   SELECT:  3 1. EDIT REPORT    |
|              2. PRINT REPORT   |
|              3. DOWNLOAD REPORT|
|--------------------------------|
```

3. Read the instructions on the download screen and copy the name of the file to be downloaded. Do not make any entries at the download screen. When ready, type GO at the command line.

```
                   DOWNLOAD SCREEN

COMMAND =>  go

  PLEASE READ THE INSTRUCTION CAREFULLY BEFORE PROCEEDING:

  1. AFTER READING THESE INSTRUCTIONS ENTER GO ON THE COMMAND LINE

  2. WHEN THE TSO COMMAND SCREEN APPEARS SWITCH OVER TO YOUR PC.

  3. ENTER YOUR PC COMMANDS TO DOWNLOAD USING THE
     FOLLOWING FILE NAME AS YOUR FROM FILE:

            'PD.CSUCFOC.RPTUSER.REPORT.userid'

     TRANSFER SOFTWARE REQUIRES THAT SINGLE QUOTES ENCLOSE
     THE FROM FILE NAME SPECIFIED ABOVE.  REFER TO YOUR
     SOFTWARE DOCUMENTATION FOR THE CORRECT DOWNLOAD SYNTAX.

  4. WHEN THE DOWNLOAD IS COMPLETE SWITCH BACK TO THE MAINFRAME.

  5. PRESS THE F3 KEY TO EXIT.
```

4. At the TSO command processor screen, open the file transfer program on your PC by clicking on the toolbar icon.

```
TEALE SESSION - EXTRA!® Enterprise                              _ 8 X
File  Edit  View  Tools  Session  Options  Help

------------------ TSO COMMAND PROCESSOR --------------------

Transfer program:  IND$FILE
Transfer type: GET (RECEIVE)
File to transfer: 'PD.CSUCFOC.RPTUSER.REPORT.userid'

===>
```

5. At the transfer file screen, make the entries and selections indicated below then click the ADD TO LIST button. Note: If displayed, un-check the box for any other download profile.

> Host Filename: 'PD.CSUCFOC.RPTUSER.REPORT.userid'
> PC Filename: C:\CIRS\BATCH.DOC
> Host Type: TSO
> Scheme: Text Default

6. After making the selections, click on the TRANSFER button to begin the download process. If prompted to save the transfer list, click NO.
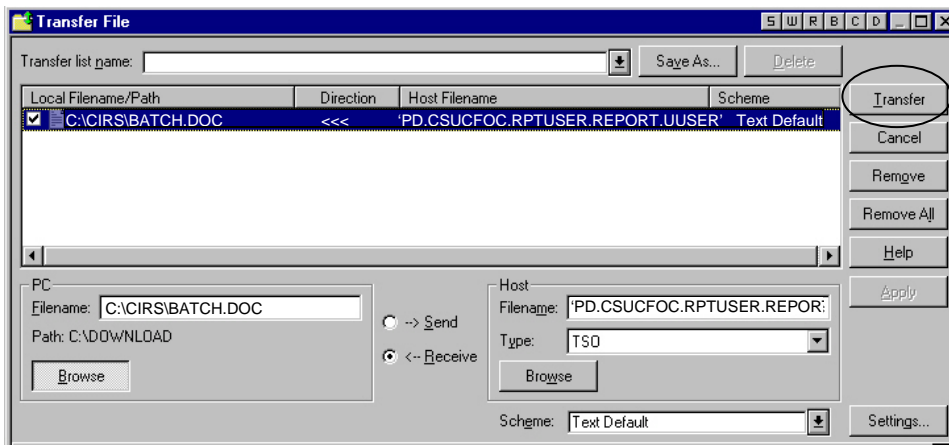
7. After starting the file transfer, the TSO command processor screen will display a message indicating the name of the file along with the transfer settings. Press the F3 key to return to the batch report results menu.

```
------------------ TSO COMMAND PROCESSOR --------------------

Transfer program:  IND$FILE
Transfer type: GET  (RECEIVE)
File to transfer: 'PD.CSUCFOC.RPTUSER.REPORT.userid'

===> IND$FILE  GET 'PD.CSUCFOC.RPTUSER.REPORT.userid' ASCII CRLF


The data below is for information only.
Your emulation software settings:
  Transfer type:
          Type match:
  Transfer name:
          Name match:
```

8. When the file transfer is complete, open the file on your PC and save the document in Word.

Practice

Select a report request (e.g., TRAIN1) in your library and perform the following steps. Be sure to select a request that does not contain errors. If desired, you can remove the record limit before executing.

Part I

- Submit the report request for batch execution and route the output directly to a printer

- Note the job number

- Check the status of your job

Part II

- Submit the report request for batch execution and route the output to your batch report file

- Note the job number

- Check the status of your job

- After confirming the job completed, edit the report to remove processing information (e.g., cost, standard defines, etc)

- Save your changes and send the file to a printer

Part III

- Download the batch report file created in Part II above to a Word document

- Open and, if desired, edit the Word document

What You Have Learned

In this module you have learned:

- The difference between batch and online execution

- How to submit batch jobs

- How to edit batch reports

- How to print batch reports

- How to download batch reports

Module 7

<u>Using Hold Files</u>

In this module you will learn to:

- Create hold files

- Edit hold files

- Browse hold files

- Print hold files

- Download hold files

Supporting Files/Documents:

- CIRS User Manual

- FOCUS User Manual

Hold Files Overview

Hold files allow you to store data (with or without formatting) that will be further processed in CIRS or downloaded. Three hold files are available:

PERMLRG – large enough to hold all the data in your AC file
PERMRPT – generally the same size as your PERMLRG file
PERMSML – used to hold a subset of data (e.g., all R03 positions)

These files are named 'perm' files because the data contained in the files is retained from one CIRS session to the next. The data in the file is retained for 60 days or until new data is written to the file.

This module will only discuss hold files for downloading purposes. For information on creating hold files in order to reuse the data, refer to the Advanced CIRS Reporting workbook.

Creating Hold Files

To create a hold file, you must include specific FOCUS commands in your report request and execute the request using online or batch execution to populate your hold file. The syntax to hold report data is as follows:

ON TABLE HOLD AS filename FORMAT type

filename   Is the name of the hold file (e.g., PERMLRG).

FORMAT type   Specifies the format of the HOLD file created. This command should only be used if the report data will be downloaded. The most commonly used format types are:

LOTUS – creates a comma delimited file
ALPHA – creates a fixed-format character file

For example:

```
EDIT    PD.CSUCFOC.UUSER(TRAIN1) - 01.01   Columns 00001 00072
Command ===>                                Scroll ===> PAGE
****** ****************** Top of Data **********************
000001 -* ALPHA LIST OF CURRENT EMPLOYEES
000002 EX AC
000003 TABLE FILE AC
000004 PRINT AC:CLASS
000005      AC:FTE
000006      AC:SALARY
000007 BY AC:WNAME
000008 IF RECORDLIMIT EQ 100
000009 ON TABLE HOLD AS PERMLRG FORMAT LOTUS
000010 END
****** ****************** Bottom of Data *******************
```

If executed online:

A message will display the number of records retrieved, the number of lines in the file, and the type of file saved.

```
FOCUS  7.0.9   10/20/2003  10.51.08     8022.03

NUMBER OF RECORDS IN TABLE=   100    LINES=  100
LOTUS FILE SAVED. .
>
```

If executed using batch:

Direct the output to your report file. After checking status message(s) to ensure your job completed successfully, view your batch report to determine the number of records retrieved, the number of lines in the file, and the type of file saved.

```
EDIT     PD.CSUCFOC.UUSER(TRAIN1) - 01.01   Columns 00001 00072
Command ===>                                  Scroll ===> PAGE
****** ****************** Top of Data ************************
000325  ----------------------------------------------------
000326  FOCUS 7.0.9  08.56.27  10/20/2003 TRAIN1
000327
000328  TABLE FILE AC
000329  PRINT AC:CLASS
000330       AC:FTE
000331       AC:SALARY
000332  BY AC:WNAME
000333  IF RECORDLIMIT EQ 100
000334  ON TABLE HOLD AS PERMLRG FORMAT LOTUS
000335  END
000336 0  NUMBER OF RECORDS IN TABLE=     100  LINES=     100
000337
000338 0 LOTUS FILE SAVED..
000339
```

Browsing Hold Files

The browse option can be used to verify a hold file before it is printed or downloaded. Changes cannot be made while viewing the report in browse mode.

To browse a hold file:

1. Press the F11 key from the main menu.

```
F1=Status F2=New  F3=Exit   F4=Locate   F5=Sort      F6=Swap Lib
F7=Up     F8=Down F9=Search F10=Results F11=HoldFile F12=Extract
```

2. At the pop-up menu, type your selection at the prompt and press enter.

```
|---------- Hold Files ----------|
|                                |
|  SELECT:   1  1. PERMLRG       |
|               2. PERMSML       |
|               3. PERMRPT       |
|--------------------------------|
```

3. At the next menu, type a 2 as the option and press the enter key.

```
|------- PERMLRG Hold File ------|
|                                |
|  SELECT:   2  1. EDIT          |
|               2. BROWSE        |
|               3. PRINT         |
|               4. DOWNLOAD      |
|--------------------------------|
```

4. Below is an example of the file generated. If desired, you can print or download the file by placing your cursor over the word OPTIONS and pressing the enter key. After viewing, press F3 to exit.

```
  OPTIONS
BROWSE    PD.CSUCFOC.RPTUSER.PERMLRG.UUSER   Line 00000000 Col
Command ===>                                    Scroll ===> PAGE
********************** Top of Data **********************
"BEAR, PAUL                 ","2354",   .400,   1064.00
"COUGAR, CHRIS              ","2358",   .400,   2654.40
"FROG, VIRGINIA             ","2355",   .250,    227.25
"LLAMA, WILLIAM             ","0440",  1.000,   3121.00
"NEWT, KATHY                ","3306",  1.000,   9563.00
```

Editing Hold Files

The edit option can be used to modify a hold file before it is printed or downloaded. Note: Adding or deleting columns of data cannot be done on files that will be used again in FOCUS. This is because FOCUS creates a master file description each time a hold file is created. If fields are added or removed, the file would not match the master file description that FOCUS created and FOCUS would not be able to process the file.

To edit a hold file:

1. Press the F11 key from the main menu.

```
F1=Status F2=New  F3=Exit   F4=Locate   F5=Sort      F6=Swap Lib
F7=Up     F8=Down F9=Search F10=Results F11=HoldFile F12=Extract
```

2. At the pop-up menu, type your selection at the prompt and press enter.

```
|---------- Hold Files ----------|
|                                |
| SELECT:   1  1. PERMLRG        |
|              2. PERMSML        |
|              3. PERMRPT        |
|--------------------------------|
```

3. At the next menu, type a 1 as the option and press the enter key.

```
|------- PERMLRG Hold File ------|
|                                |
| SELECT:   1  1. EDIT           |
|              2. BROWSE         |
|              3. PRINT          |
|              4. DOWNLOAD       |
|--------------------------------|
```

4. Below is an example of the file generated. Changes to the data can be made using the line commands (e.g., adding or deleting lines) or by simply typing over the data. After editing, press F3 to save and exit.

```
EDIT      PD.CSUCFOC.RPTUSER.PERMLRG.UUSER      Columns 000001 000072
Command ===>                                        Scroll ===> PAGE
****** ********************** Top of Data ************************
000001 "BEAR, PAUL                   ","2354",     .400,   1064.00
000002 "COUGAR, CHRIS                ","2358",     .400,   2654.40
000003 "FROG, VIRGINIA               ","2355",     .250,    227.25
000004 "LLAMA, WILLIAM               ","0440",    1.000,   3121.00
000005 "NEWT, KATHY                  ","3306",    1.000,   9563.00
```

Printing Hold Files

Hold files can be printed to verify the data. If any changes are needed, the edit option can be used to modify the data. Note: If the width of your hold file exceeds 132 characters, the lines will wrap when printed.

To print a hold file:

1. Press the F11 key from the main menu.

```
F1=Status F2=New  F3=Exit    F4=Locate    F5=Sort        F6=Swap Lib
F7=Up      F8=Down F9=Search F10=Results F11=HoldFile  F12=Extract
```

2. At the pop-up menu, type your selection at the prompt and press enter.

```
|---------- Hold Files ----------|
|                                |
|  SELECT:   1  1. PERMLRG       |
|               2. PERMSML       |
|               3. PERMRPT       |
|--------------------------------|
```

3. At the next menu, type a 3 as the option and press the enter key.

```
|------- PERMLRG Hold File ------|
|                                |
|  SELECT:   3  1. EDIT          |
|               2. BROWSE        |
|               3. PRINT         |
|               4. DOWNLOAD      |
|--------------------------------|
```

4. At the printer options menu, change the default settings, if needed and press enter.

```
|------------------Printer Options------------------|
| SELECT PRINTER, COPIES, LINES TO PRINT:           |
|                                                   |
|  PRINTER: 1     COPIES: 1      LINES FROM: 000001 |
|                                LINES TO  : 999999 |
|                                                   |
| 1. XXTN8003      2. XXTN8004                       |
|                                                   |
|          ENTER TO PRINT - PF3 TO CANCEL           |
'---------------------------------------------------'
```

5. A message will display indicating the report was sent to the printer. Press enter to clear the message.

```
PRINTING  PD.CSUCFOC.RPTUSER.PERMLRG.UUSER  XXTN8003  1
***
```

Downloading Hold Files

Note: This workbook will only discuss how to download using the emulation software installed on the PC's used for training. If your software is different, refer to that documentation for instructions.

To download a hold file:

1. Press the F11 key from the main menu.

```
F1=Status F2=New  F3=Exit    F4=Locate    F5=Sort      F6=Swap Lib
F7=Up      F8=Down F9=Search F10=Results F11=HoldFile F12=Extract
```

2. At the pop-up menu, type your selection at the prompt and press enter.

```
|---------- Hold Files ----------|
|                                |
|  SELECT:   1 2. PERMLRG        |
|              2. PERMSML        |
|              3. PERMRPT        |
|--------------------------------|
```

3. At the next menu, type a 4 as the option and press the enter key.

```
|------- PERMLRG Hold File ------|
|                                |
|  SELECT:   4 2. EDIT           |
|              2. BROWSE         |
|              3. PRINT          |
|              4. DOWNLOAD       |
|--------------------------------|
```

4. Read the instructions on the download screen and copy the name of the file to be downloaded. Do not make any entries at the download screen. When ready, type GO at the command line.

```
                    DOWNLOAD SCREEN

COMMAND =>   go

  PLEASE READ THE INSTRUCTION CAREFULLY BEFORE PROCEEDING:

  1. AFTER READING THESE INSTRUCTIONS ENTER GO ON THE COMMAND LINE

  2. WHEN THE TSO COMMAND SCREEN APPEARS SWITCH OVER TO YOUR PC.

  3. ENTER YOUR PC COMMANDS TO DOWNLOAD USING THE
     FOLLOWING FILE NAME AS YOUR FROM FILE:

             'PD.CSUCFOC.RPTUSER.PERMLRG.userid'

     TRANSFER SOFTWARE REQUIRES THAT SINGLE QUOTES ENCLOSE
     THE FROM FILE NAME SPECIFIED ABOVE.  REFER TO YOUR
     SOFTWARE DOCUMENTATION FOR THE CORRECT DOWNLOAD SYNTAX.

  4. WHEN THE DOWNLOAD IS COMPLETE SWITCH BACK TO THE MAINFRAME.

  5. PRESS THE F3 KEY TO EXIT.
```

5. At the TSO command processor screen, open the file transfer program on your PC by clicking on the toolbar icon.
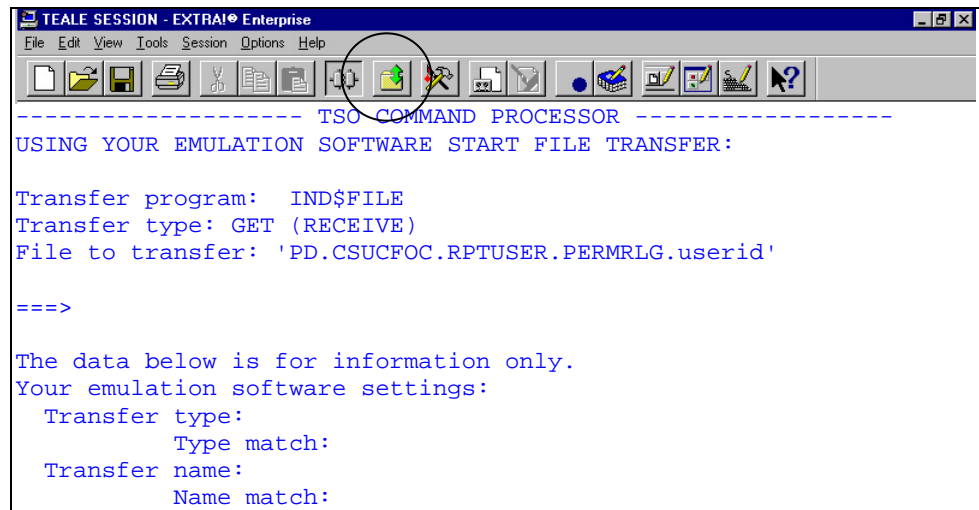
6. At the transfer file screen, make the entries and selections indicated below then click the ADD TO LIST button.

    Host Filename: 'PD.CSUCFOC.RPTUSER.PERMRLG.<u>userid</u>'
    PC Filename: C:\CIRS\PERMLRG.XLS
    Host Type: TSO
    Scheme: Text Default
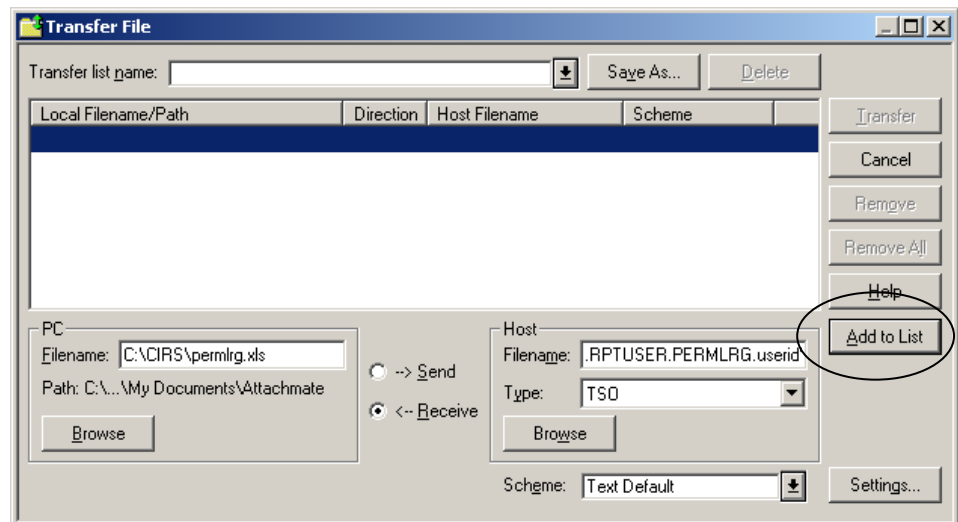
7. If prompted to save the transfer list, click NO.
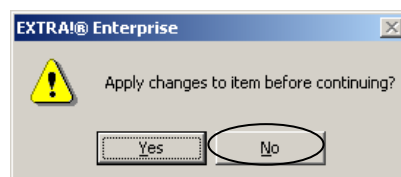
8. Click on the TRANSFER button to begin the download process. If displayed, un-check any other download profile.
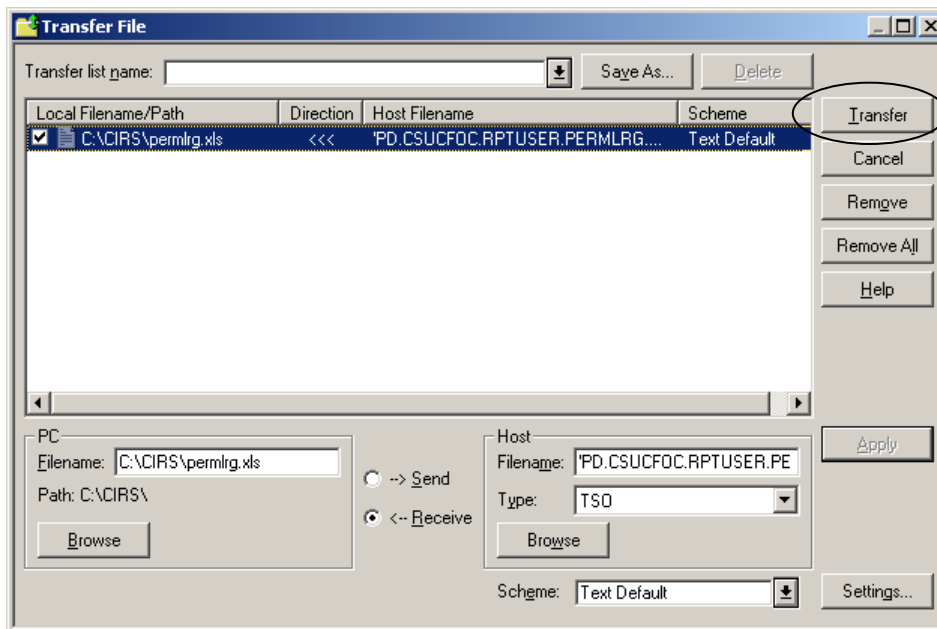
9. After starting the file transfer, the TSO command processor screen will display a message indicating the name of the file along with the transfer settings. This screen is for informational purposes only. Press the F3 key to return to the hold file menu.

```
------------------ TSO COMMAND PROCESSOR ---------------------

Transfer program:   IND$FILE
Transfer type: GET   (RECEIVE)
File to transfer: 'PD.CSUCFOC.RPTUSER.PERMLRG.userid'

===> IND$FILE   GET 'PD.CSUCFOC.RPTUSER.PERMLRG.userid' ASCII CRLF

The data below is for information only.
Your emulation software settings:
  Transfer type: GET
          Type match: YES
   Transfer name: 'PD.CSUCFOC.RPTUSER.PERMLRG.userid'
          Name match: YES
```

10. When the file transfer is complete, **open the Excel program first**, then locate and open the downloaded file on the PC.
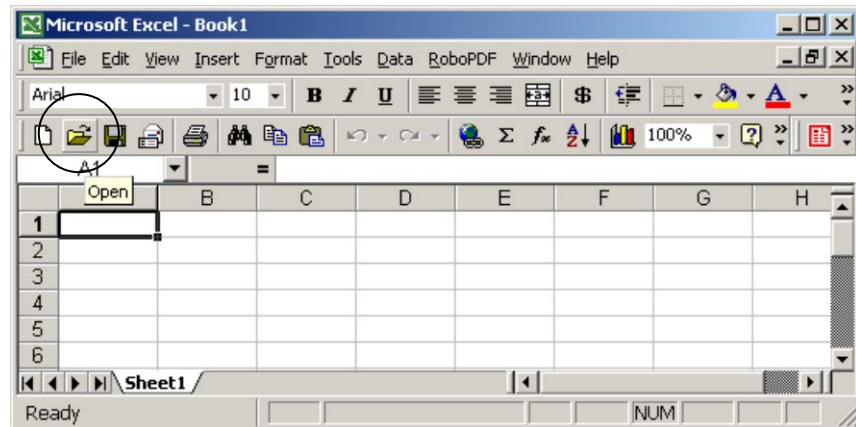
11. The Text Import Wizard will automatically appear. Use the wizard to import the downloaded file. At the first step, select delimited to describe your file and click NEXT.
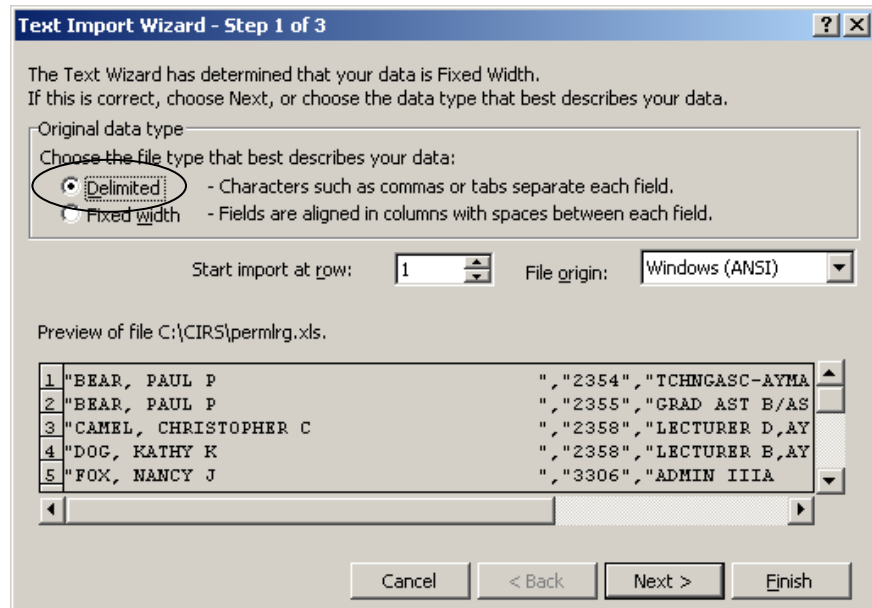
12. At the second step of the import wizard, select 'Comma' as the delimiter to set the columns and click NEXT.
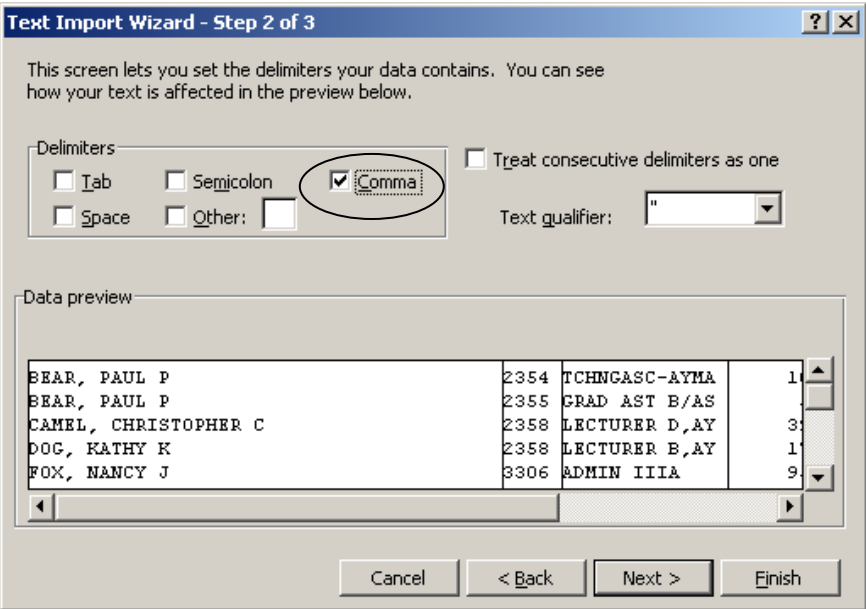
13. For the third step, format the columns (if needed). By default, all columns are formatted as 'General', which will convert numeric values to numbers, date values to dates and all remaining data as text. To change the format, select a column by clicking on it and then click on the column data format. When all columns have been formatted, click on FINISH.
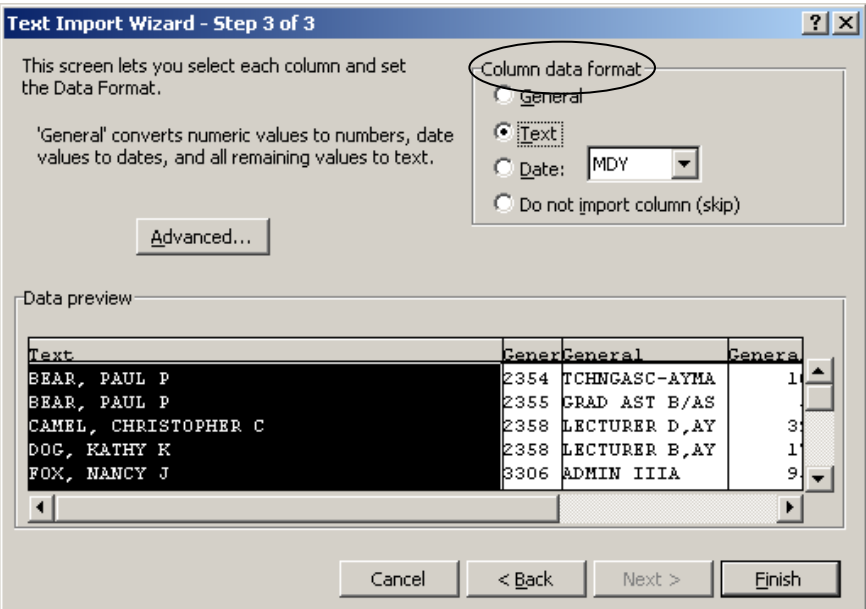
Practice

1. Pick one report request in your library.

2. Add the commands to hold data to one of your hold files.

3. Execute the report request.

4. Browse the data contained in your hold file before downloading.

5. Download the file.

6. If desired, open the downloaded file in the appropriate software program.

What You Have Learned

In this module you learned to:

- Create hold files

- Edit hold files

- Browse hold files

- Print hold files

- Download hold files

Module 8

<u>Customizing Printed Reports</u>

In this module you will learn how to:

- Add headings and footings

- Change column titles

- Change field formats and justification

- Add totals

Supporting Files/Documents:

- FOCUS Documentation

- Active Current Status File

Headings and Footings

The HEADING command is used after the TABLE FILE command and allows you to supply text that will appear at the top of every page of a report. The syntax is:

> **HEADING or HEADING CENTER**
> **"text"**

The FOOTING command is used before the END command and allows you to supply text that will appear at the bottom of every page of a report. The syntax is:

> **FOOTING or FOOTING CENTER**
> **"text"**

- Each line of text can be up to 128 characters in length - including the two double quotes.

- A single report can contain up to 57 lines of text.

- The optional command CENTER will center the text per the report output, not on the page.

- The command FOOTING will automatically give you one blank line after the report data.

- Use a spot-marker to insert blank lines, (e.g., "</2") or to embed the value for a data element (e.g., "DATA AS OF: <AC:DAO").

- The system variable for the current date can be supplied in headings or footings (e.g., "GENERATED: &DATE").

Report Request

```
-* ALPHA LIST OF ACTIVE/ONLEAVE EMPLOYEES
EX AC
TABLE FILE AC
HEADING CENTER
"THE CALIFORNIA STATE UNIVERSITY"
"ACTIVE/ONLEAVE EMPLOYEES AS OF <AC:DAO"
" "
PRINT AC:CLASS
      AC:FTE
      AC:SALARY
BY AC:WNAME
BY AC:SSA NOPRINT
IF RECORDLIMIT EQ 10
FOOTING
"</1"
"REPORT RUN ON - &DATE"
"CREATED BY JANE GARCIA - PERSONNEL </1"
"CONFIDENTIAL DATA - PLEASE HANDLE ACCORDINGLY"
-*ON TABLE HOLD AS PERMLRG FORMAT LOTUS
END
```

Report Generated

```
          THE CALIFORNIA STATE UNIVERSITY
       ACTIVE/ONLEAVE EMPLOYEES AS OF 01/27/2006


 AC:WNAME                  CLS     AC:FTE     AC:SALARY
 --------                  ---     ------     ---------
 ARDVARK, CINDY A          3306    1.000     $10,041.00
 BEAR, CLARK F             2358     .200      $1,275.00
 FROG, NANCY B             3312    1.000      $6,346.00
 KOALA, JOHN L             2358     .600      $3,276.00
 LLAMA, JOAN   M           2360    1.000      $5,248.00
 MONKEY, RON J             1038    1.000      $2,917.00
 O'HARE, JUSTIN J          2354     .267        $713.33
                           2354     .057        $197.01
 PENGUIN, ROSS             6526    1.000      $4,211.00
 YAK, SAMUEL C             3312    1.000      $6,776.00


 REPORT RUN ON – 02/01/2006

 CREATED BY JAN GARCIA - PERSONNEL


 CONFIDENTIAL DATA - PLEASE HANDLE ACCORDINGLY
```

Creating New Column Titles

Default column titles can be changed to a title you supply using the AS command. The syntax is:

> **fieldname AS 'new, title'**

fieldname   Can be a sort field, display (verb) field, column total or row total

title   Is the new column title enclosed in single quotation marks

- To eliminate column titles use AS ' ' (two single quotes without a space between). For example, `PRINT AC:WNAME AS ''`

- Column titles can have up to five lines of text (four commas).

- The AS command can be used to increase or decrease the width of your column titles.

Report Request:

```
EX AC
TABLE FILE AC
SUM AC:FTE  AS 'TOTAL,FTE'
BY AC:SEX  AS 'S,E,X'
BY AC:WNAME  AS 'EMPLOYEE'
IF RECORDLIMIT EQ 5
END
```

Report Generated:

```
 S
 E                                             TOTAL
 X    EMPLOYEE                                    FTE
 -    --------                                  -----
 F    FROG, NANCIE L                            1.000
      MONKEY, GINA S                             .600
 M    BEAR, CLARK                               1.000
      LLAMA, ROLAND J                           1.000
      PENGUIN, RICHARD R                        1.000
```

Changing Column Formats and Title Justification

FOCUS enables you to change the length of the fields and to specify whether column titles are left justified, right justified, or centered. By default, column titles for alphanumeric fields are left justified and column titles for numeric and date fields are right justified. The syntax is:

fieldname / justification / format

fieldname Can be a sort field, display (verb) field, column total or row total.

justification Can be the command R for right justification. L for left justification and C for centered.

format Is an optional format specification **only** for display and row total fields. If used, the type (A, D, I, P,) must remain the same, but the length can be changed.

▪ For ACROSS fields, data values, not column titles, are justified as specified.

▪ Display fields and row totals can be increased or decreased by specifying a new format length.

Report Request:

```
EX AC
TABLE FILE AC
SUM AC:FTE/P6.2
BY AC:SEX
BY AC:WNAME/C
IF RECORDLIMIT EQ 5
END
```

Report Generated:

```
SEX                 AC:WNAME                   AC:FTE
---     ------------------------------------   ------
F       FROG, NANCIE L                           1.00
        MONKEY, GINA S                            .60
M       BEAR, CLARK                              1.00
        LLAMA, ROLAND J                          1.00
        PENGUIN, RICHARD R                       1.00
```

Column Totals and Row Totals

FOCUS enables you to summarize numeric information and produce totals
for columns or rows of numbers in your reports. The syntax is:

> **ON TABLE COLUMN-TOTAL [AS 'name']**
> **ON TABLE ROW-TOTAL [AS 'name']**

- When you are summing fields with different formats, the default
  format is D12.2, otherwise, the format of the total field is the same
  format of the field.

- COLUMN-TOTAL and ROW-TOTAL can be used together to form a
  matrix. If used together, COLUMN-TOTAL must be first.

- Only verb fields are included in the column total.

Report Request:

```
EX AC
TABLE FILE AC
COUNT AC:POSITION
BY AC:CBID
BY AC:CLASS
ACROSS AC:SEX
IF AC:CBID EQ M80
ON TABLE COLUMN-TOTAL ROW-TOTAL
END
```


Report Generated:

```
               SEX
                    F       M      TOTAL
CBID    CLS
----------------------------------------------------
M80     3300        5       6         11
        3306       16      13         29
        3312       20      15         35
        3318        3       3          6
TOTAL              44      37         81
```

Subtotals

The command SUBTOTAL generates a subtotal on all numeric verb fields whenever the sort field changes value. The syntax is:

BY fieldname SUBTOTAL MULTILINES

- The command SUB-TOTAL (with a hyphen) can be used to produce a subtotal for the BY field and any higher-level sort fields when their values change.

- The MULTILINES command suppresses a subtotal line if there is only one value at a sort break and will automatically skip a line between rows.

- The default (fieldname) subtotal title can be changed by using the AS 'text' command.

- A grand total is automatically generated at the end of the report.

Report Request:

```
EX AC
TABLE FILE AC
PRINT AC:FTE
BY AC:WNAME
BY AC:SSA SUBTOTAL MULTILINES AS '  TOTAL FOR:'
IF RECORDLIMIT EQ 5
END
```

Report Generated:

```
AC:WNAME                      AC:SSA            AC:FTE
--------                      ------            ------
FROG, CHRISTOPHER             001-00-1111        1.000

GIRAFFE, RICHARD B            003-00-3333         .917
                                                  .083

   TOTAL FOR: 003-00-3333                        1.000

HIPPO, CHARITY B              004-00-4444        1.000

MOUSE, NORMA K                002-00-2222         .440

TOTAL                                            3.400
```

Sample Report Request

The report request below illustrates all the commands covered in this module. Note that these commands are only useful for printed reports and will be ignored if the data is held to a hold file for downloading.

Report Request

```
-* ALPHA LIST OF ACTIVE/ONLEAVE EMPLOYEES
EX AC
TABLE FILE AC
HEADING CENTER
"THE CALIFORNIA STATE UNIVERSITY"
"ACTIVE/ONLEAVE EMPLOYEES AS OF <AC:DAO"
" "
PRINT AC:WNAME/C/A25  AS 'EMPLOYEE'
     AC:CLASS         AS 'CLASS'
     AC:FTE           AS 'FTE'
     AC:SALARY/P8.2M  AS 'SALARY'
BY AC:WNAME NOPRINT
ON TABLE COLUMN-TOTAL
FOOTING
"</1"
"REPORT RUN ON - &DATE"
"CREATED BY JANE GARCIA - PERSONNEL </1"
"CONFIDENTIAL DATA - PLEASE HANDLE ACCORDINGLY"
END
```

Report Generated

```
          THE CALIFORNIA STATE UNIVERSITY
       ACTIVE/ONLEAVE EMPLOYEES AS OF 01/27/2006


     EMPLOYEE            CLASS       FTE        SALARY
--------------------     -----       ---        ------
ARDVARK, CINDY A         3306       1.000    $10,041.00
BEAR, CLARK F            2358        .200     $1,275.00
FROG, NANCY B            3312       1.000     $6,346.00
KOALA, JOHN L            2358        .600     $3,276.00
LLAMA, JOAN   M          2360       1.000     $5,248.00
MONKEY, RON J            1038       1.000     $2,917.00
O'HARE, JUSTIN J         2354        .267       $713.33
O'HARE, JUSTIN J         2354        .057       $197.01
PENGUIN, ROSS            6526       1.000     $4,211.00
YAK, SAMUEL C            3312       1.000     $6,776.00

 TOTAL

                                    7.124    $41,000.34


 REPORT RUN ON – 02/01/2006
 CREATED BY JAN GARCIA - PERSONNEL


 CONFIDENTIAL DATA - PLEASE HANDLE ACCORDINGLY
```

Practice

Modify the programs in your library as follows:

1. Add headings that provide a description of the report data.

2. Add footings containing reference data (e.g., report request name, contact information, etc.).

3. Change the default column titles to 'reader friendly' titles.

4. Eliminate excess space between the data columns by changing the column length.

5. Add totals (where applicable).

6. Add a small record limit (100 records or less) to your reports if needed.

After you have modified your reports, execute them using either online or batch execution.

What You Have Learned

In this module, you have learned how to customize printed reports by:

- Adding headings and footings

- Changing column titles

- Changing field formats and justification

- Adding column totals, row totals and subtotals

Module 9

<u>Using Joined Files</u>

In this module you will learn:

- What joined files are

- The different type of joins

- How to use fields from joined files

Supporting Documents/Files:

- FOCUS Documentation

- CIRS Data Element Dictionary

- Active Current Status File

- Degree Level File

- Job Code File

- Pay Scales File

What Are Joined Files

JOIN is a FOCUS command that allows you to link related files by a common field.   Joined files act as a single integrated data structure allowing you to report on two or more files as if they are a single file.

Due to security issues, this command has been turned off for CIRS users. However, to assist your report writing, HR-ISA has developed automatic joins and pre-programmed joins.

To merge data from two or more files that are not automatically joined or that do not have a pre-programmed join, use the MATCH command. Refer to your FOCUS documentation for information.

Automatic Joins

All of the current status files (i.e., AC, SAC, AN and SAN) have fields
that are linked to fields in cross-referenced files. Cross-referenced files
are single segment files that primarily contain information for coded fields
in the main file.

For example, AC:DEGLEV in the Active Current Status file is linked to
DEGLEV in the Degree Level file. Similarly, AC:JOBCODE is linked to
JC:JOBCODE in the Job Code file. Refer to the file descriptions in the
CIRS Data Element Dictionary to identify files automatically joined.

Active Current Status File
(Host File)

```
AC:SSA
AC:WNAME
AC:SEX
AC:ETHNIC
```

```
AC:TRANCODE
AC:EFFDATE
AC:DEGLEV
AC:UNIT
AC:CLASS
AC:SERIAL
AC:JOBCODE
```

Degree Level **File**
(Cross-Referenced File)

```
DEGLEV
DEGREE
```

Job Code File
(Cross-Referenced File)
```
JC:JOBCODE
JC:JOBTITLE
JC:JOBABBRV
JC:AFFCODE
```
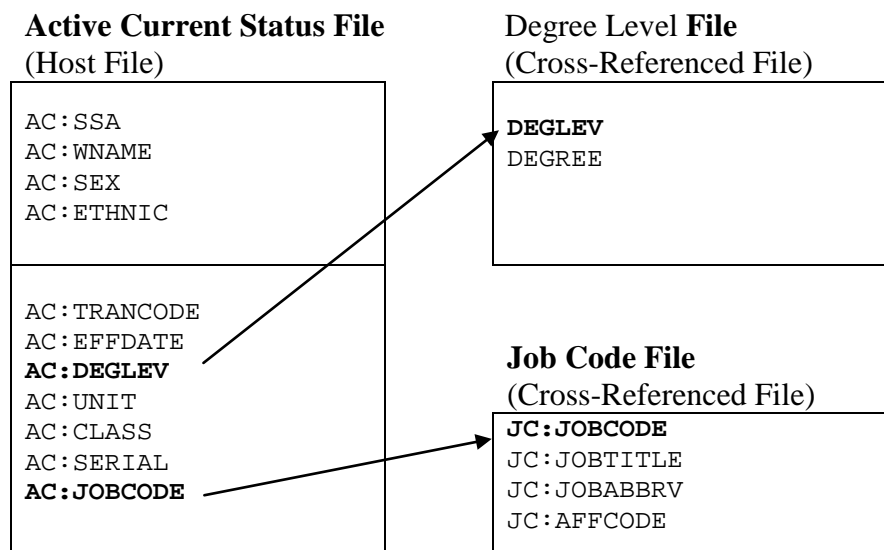
To use an automatic join:

If the file you are using is automatically joined to a file containing the
needed data, simply use the fieldname in your report request. Cross-
referenced files are automatically allocated when any other file is selected
for Online or Batch execution.

For example:

```
EX AC
TABLE FILE AC
COUNT AC:POSIT16
BY DEGREE
END
```

Pre-programmed Joins

A series of pre-programmed joins are available to link frequently used combination of files. All of the major files in CIRS have pre-programmed joins to other files.   A complete list of pre-programmed joins is available in the CIRS Data Element Dictionary. The naming convention for all pre-programmed joins is shown below.

$$J \; \underline{A \; C} \; \underline{P \; S}$$

    Join   Host File   Cross-Referenced File
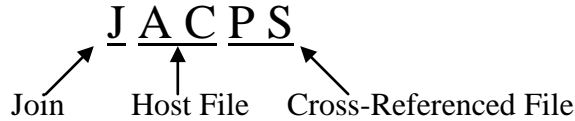
When a pre-programmed join is executed, it links the files and executes the standard defines for the joined files. For example, the join: JACPS links records in the Active Current Status file to records in the Pay Scales file by Class and Range Code, and executes the defines for both files.

```
-*EXAMPLE OF A JOIN          JOIN CLEAR
EX JACPS          ------->   JOIN AC:CLASSRNG IN AC
TABLE FILE AC                TO PS:CLASSRNG IN PS AS JACPS
                             EX AC
                             EX PSFLDS FILENM=AC
```

To use a pre-programmed join:

Execute the join name in place of the standard defines. The file name specified for the TABLE FILE command is the HOST file. Be sure to use the correct file prefix when specifying fieldnames in the joined file. When executing the report request, you must select the major file(s) specified in the join.   Any cross-referenced files included in the join will be automatically allocated when the other files are selected.

For example:

```
EX JACPS
TABLE FILE AC
COUNT AC:POSIT16
BY PS:TITLE
END
```

Practice

Modify the practice report requests from Module 3 and execute the reports in the Online FOCUS environment to generate data. Be sure to include record limits in your requests.

1. Modify practice report TRAIN1 to include **abbreviated class title**. Format per the sample below.

   Report Generated:

   ```
   AC:WNAME            CLS    TITLE            AC:FTE    AC:SALARY
   --------            ---    -----            ------    ---------
   BEAR, CLARK F       2358   LECTURER, D AY     .200    $1,275.00
   FROG, NANCY B       3312   ADMIN IIA         1.000    $6,346.00
   LLAMA, JOAN   M     2360   PROFESSOR, AY      .500    $3,492.00
                       2360   PROFESSOR, AY      .500    $3,343.50
   MONKEY, RON J       1038   AA/S-12MO-NE      1.000    $2,917.00
   ```

2. Modify practice report TRAIN2 to sort the report by CBID code and by **CBID name (abbreviated)**. Format per the sample below.

   Report Generated:

   ```
                                    AC:POSITION
   CBID    CBID NAME                    COUNT
   ----    ---------                -----------
   C99     CONF. CLASS                        3
   E99     EXCLUDED                          11
   M80     MPP                               50
   R01     PHYSICIANS                         1
   R03     FACULTY                          334
   ```

3. Modify practice report TRAIN3 to include the employees' **abbreviated job code title**. Format per the sample below.

   Report Generated:

   ```
                                    JOB    ABBREVIATED
   AC:EMPDATE    AC:WNAME           CODE   JOB CODE TITLE
   ----------    --------           ----   --------------
   01/03/1997    KANGAROO, MARY E   M113   MGR, LIB. CIRCULTAION
   08/24/1979    CAMEL, JAMES J     M092   DN, CVC
   09/01/1983    ADVARK, DIANNE T   L025   FACULTY RES & DEV SUP 2
   08/07/1989    NEWT, GRACE P      N062   ASSOC DEAN, COLL OF BUS
   01/08/1990    WHALE, PETER A     Z244   SW HUMAN RES ADMIN PRO 1
   ```

What You Have Learned

In this module you have learned:

- The difference between automatic joins and pre-programmed joins

- How to include fields in your report requests from cross-referenced files

- How to include fields in your report requests using pre-programmed joins

- How to select files for joined files

Module 10

<u>Creating Temporary Fields</u>

In this module you will learn:

- Overview of temporary fields

- Syntax for computed fields

- General syntax for defined fields

- Syntax for decode expression

Supporting Documents/Files:

- CIRS Data Element Dictionary

- FOCUS Documentation

Temporary Fields Overview

A variety of temporary fields can be created from existing fields in the database by using the COMPUTE and DEFINE commands. The maximum number of fields, both real and defined, that can be referenced in a report request is 256.

The major difference between COMPUTE and DEFINE is the point of calculation.

Computed fields are calculated on the results of a SUM, PRINT, or COUNT command <u>after</u> all records have been selected, sorted, and summed.

Defined fields are calculated <u>after</u> records are selected per the screening criteria, but <u>before</u> the sorts and display commands are applied.

Syntax For Computed Fields

Temporary fields created by the COMPUTE command, are calculated on the **table results** after all records have been selected, sorted, and summed. The syntax is:

> **TABLE FILE filename**
> **display command**
> **COMPUTE newfield [/format] = expression;**
> **END**

filename   Any database available in CIRS.

display command   Is PRINT, SUM OR COUNT followed by fieldname(s). Also referred to as the verb phrase.

newfield   New name for the field being created. The name can contain up to 12 characters without blanks. Special characters allowed are the dollar sign ($), colon (:), underscore (_) and pound sign (#).

/format   Optional command to specify the format type, length and edit options for the values of the new field.

= expression;   Expression establishing the value of the new field.

- Specify the COMPUTE command after the display command inside the TABLE request.

- Computed fields are only available for the specified report request.

- Optionally, a field can be referred to by its report column position (C1 for the first column, C2 for the second, etc). BY fields are not counted.

- Only 256 fields may be defined for a single file and the total length of all defined fields and real fields cannot exceed 12,288 characters.

- The computed field can be used in subsequent screening statements, but cannot be used as sort fields.

Compute Example

The report example below uses the COMPUTE command to determine the new salary rate for employees after receiving a 3 percent increase.

Report Request:

```
-* EMPLOYEE SALARY INFO
EX AC
TABLE FILE AC
PRINT AC:CLASS AC:BASEPAY
COMPUTE NEWSAL = AC:BASEPAY * 1.03;
BY AC:WNAME
END
```

Report Generated:

```
AC:WNAME                   CLS     AC:BASEPAY       NEWSAL
--------                   ---     ----------       ------
COUGAR, CHRIS              2358     $6,278.00      6,569.34
FROG, NANCY L              3306     $9,375.00      9,656.25
LION-JUGUAR, ANN           2355       $800.00        824.00
MONKEY, GORDON S           2360     $6,868.00      7,074.04
NEWT, KATHERINE            2358     $4,110.00      4,233.30
```

Compute Practice

Modify your report request named TRAIN4 to include an annual salary rate. Use the COMPUTE command to determine the annual rate.

Report Generated:

```
AGY   UNT            AC:SALARY            ANNUAL
---   ---            ---------            ------
160   194            $3,664.00         43,968.00
      232            $2,865.00         35,380.00
      401            $7,259.00         87,108.00
230   200            $5,281.00         63,372.00
      210            $3,371.00         40,452.00
```

Report Request:

Syntax For Defined Fields

Temporary fields can be created using the DEFINE command. The calculation is performed on each record retrieved per the screening statements. The result of the expression is treated as though it is a real field stored in the database. The syntax is:

> **DEFINE FILE filename ADD**
> **newfield/format = expression;**
> **END**

filename   Any database available in CIRS.

newfield   New name for the field being created. The name can contain up to 12 characters without blanks. Special characters allowed are the dollar sign ($), colon (:), underscore (_) and pound sign (#).

/format   The type, length and edit options for the new field values. Valid types are A (alphanumeric), D (floating-point double-precision), F (floating-point single-precision), I (integer), P (packed decimal), and D, W, M, Q, or Y used in a valid combination (date). The length of the format cannot exceed 8 characters.

= expression; Expression establishing the value of the new fieldname. Note: There are several types of expressions. This workbook will only discuss DECODE expressions. For information on the other expressions, refer to your FOCUS documentation.

END   Required to end the DEFINE.

- Specify the DEFINE command after executing the standard defines for the file and before beginning the TABLE request.

- ADD must be part of the syntax to add the new FIELDNAME(s) to the automated DEFINES for the database.

- Once a new FIELDNAME is defined, it is available for the entire FOCUS session and can be used in verb phrases, sort phrases, screening statements or in another define expression.

- Only 256 fields may be defined for a single file and the total length of all defined fields and real fields cannot exceed 12,288 characters.

- Alpha (A) values and Smart Dates must be enclosed in single quotes.

Decode Expression

The decode expression can be used to create new file values for existing values when there is a one-to-one relationship. The syntax is:

> **DEFINE FILE filename ADD**
> **new_field/format = DECODE fieldname**
> **(value 'new value'**
> **value 'new value');**
> **END**

- All values containing special characters or blanks must be enclosed in single quotes (including negative numbers).

- Alphanumeric or numeric values can be decoded.

- The decode expression cannot be used for 'AND' or 'OR' conditions.

- By default, alphanumeric field values that are not explicitly listed will be assigned a blank value. Integer fields will be assigned a numeric zero (0).

Define Example

Report Request:

```
EX AC
DEFINE FILE AC ADD
GENDER/A6 = DECODE AC:SEX
          (F FEMALE
           M MALE);
END
TABLE FILE AC
COUNT AC:SSA
BY GENDER
ON TABLE COLUMN-TOTAL
END
```

Report Generated:

```
        AC:SSA
GENDER  COUNT
------  ------
            1
FEMALE   1855
MALE     1419

TOTAL    3275
```

Define Practice

Modify your report named TRAIN5 so that the values 'female' and 'male' are displayed instead of the characters 'F' and 'M'. Use the DECODE expression to define the new values.

Report Generated:

```
               SEX
               FEMALE   MALE
   AC:ETHNICGRP
   ------------------------------
   AMI                 1       0
   ASN                17      17
   BLK                11      16
   HSP                10       8
   N/A                 0       1
   WHT               211     208
```

Report Request:

What You Have Learned

In this module you learned:

- Overview of temporary fields

- Syntax for computed fields

- General syntax for defined fields

- Syntax for decode expression

Module 11

<u>Common Library</u>

In this module you will learn:

- Common library procedures

- How to access the common library

- How to find reports in the common library

- How to execute reports in the common library

- How to copy programs to and from the common library

Supporting Documents/Files:

- CIRS User Manual

Common Library Procedures

The common library is where all users and HR-ISA staff can share report requests. Common library members can be used 'as is' or can be copied to your library and modified. Be aware that changes an owner makes to her/his member could impact your use of the report request or define. To avoid this, we recommend copying the needed report request to your own library.

The procedures for the common library are as follows:

- Never edit a report request in the common library unless you are the owner. To prevent accidentally changing a report request, use the browse command when viewing report requests in the common library.

- Never place confidential information (e.g, SSN's) in the common library.

- All report requests in the common library must contain a comment line with the text 'OWNER USERID:' followed by a space and your userid.

- As a courtesy to others using the common library, report requests should contain statements that identify the purpose of the request, the files used and any special instructions needed. Refer to AAUSER in the common library for suggested comment lines.

- Report requests placed in the common library on a permanent basis must be listed in the index named AAINDEX.

- Any report request not listed in AAINDEX will be deleted on a monthly basis on the first calendar day of each month.

Accessing The Common Library

All the navigation options, maintenance commands and execution commands available for your personal library are also available for the common library.

1. To swap your personal library with the common library, press the F6 key from the main menu.

```
F1=Status  F2=New    F3=Exit    F4=Locate    F5=Sort      F6=Swap Lib
F7=Up      F8=Down   F9=Search  F10=Results  F11=HoldFile F12=Extract
```

2. You will receive a screen indicating the common library is loading.

```
|--- Loading Common Library ---|
|                              |
|   Members Loaded:    275     |
|                              |
|------------------------------|
```

3. After it has finished loading, the common library will display. To return to your personal library, press the F6 key again.

```
                     CIRS COMMON LIBRARY
Cmds      B Browse   C Copy    D Delete       E Edit    Row 1 of  417
          P Print    R Rename  S Submit Batch  O Online Execution
Cmd  Name     Description                             Changed
 _   AAINDEX   INDEX OF ALL FOCUS REQUESTS IN THE COMMON  2003/07/22
 _   AAMSG     THIS CONTAINS A 6 MONTH BACKLOG OF MESSAGE 2003/07/23
 _   AAPGRP    CSUS AFFIRMATIVE ACTION JOB GROUPS         2003/10/24
 _   AAPJOBGP  CSUS REPORT: CLASS TITLES BY JOB GROUP     2003/10/24
 _   AAPGRP    CSUS AFFIRMATIVE ACTION JOB GROUPS         2003/10/24
 _   AAPROBEE  SDSU ACAD AFFRS PROB MPLOYEES              2003/07/29
 _   AAUSER    (TYPE ONE LINE DESCRIPTION HERE PS         2003/10/24
 _   ACDIVCD   CSUN ABBREVIATED DIVISION NAME FOR AC FILE 1999/03/15
 _   ACJC      POSITION COUNT BY JOBCODE                  2003/10/24
 _   ADDRESS   DOWNLOAD ACTIVE EMPLOYEE ADDRESS INTO      2003/10/30
F1=Status F2=New    F3=Exit    F4=Locate    F5=Sort      F6=Swap Lib
F7=Up     F8=Down   F9=Search  F10=Results F11=HoldFile F12=Extract
```

4. If you know the name of the report request in the common library, you can locate it quickly by pressing the F4 key and typing the name and pressing the enter key.

```
|----------Locate Report Request---------|
|        ENTER REPORT REQUEST NAME        |
|                 OR                      |
|            BEGINNING LETTERS            |
|                                         |
|         NAME:   DAILY___                |
|-----------------------------------------|
```

Finding Report Requests

There are two methods of finding report requests in the common library that meet your reporting needs. You can either browse the common library index (AAINDEX) and/or use the search function (F9).

To browse the index:

The common library member AAINDEX is a user maintained list of programs, defines and instructions that are intended to be used and/or copied by all CIRS users. Items listed in the index are retained in the common library on a permanent basis.

1. Type a B at the command line to the left of the report request AAINDEX and press enter.

```
                         CIRS COMMON LIBRARY
Cmds      B Browse   C Copy       D Delete      E Edit    Row 1 of 417
          P Print    R Rename     S Submit Batch  O Online Execution
Cmd   Name     Description                                    Changed
 B    AAINDEX   INDEX OF ALL FOCUS REQUESTS IN THE COMMON    2003/07/22
 _    AAMSG     CONTAINS A 6 MONTH BACKLOG OF MESSAGES       2003/07/23
 _    AANWHIR3  AFFIRMATIVE ACTION NEWHIRES                  2003/07/29
 _    AAPGRP    NO DESCRIPTION FOUND.                        1999/03/15
```

2. All the members in the index are listed in alphabetical order and provide the file(s) used along with a brief description.

```
 BROWSE    PD.CSUCFOC.COMMON(AAINDEX) - 01.99   Columns 00001 00072
Command ===>                                      Scroll ===> PAGE
************************* Top of Data ****************************
 ENTER THE NAME OF THE REPORT REQUEST, THE MAJOR FILE(S) USED AND A
      SHORT DESCRIPTION OF THE PURPOSE OF THE REPORT REQUEST.

   ** PLEASE PLACE NEW ENTRIES IN ALPHABETIC ORDER BY REPORT NAME **

REPORT        FILE(S)        PURPOSE
--------   -------------   -------------------------------------
AACUST25                   CUSTOM FILE INFO FOR FRESNO
AACUST30                   DEPT DECODE FILE INFO FOR CAMPUS HUMBOLDT
AACUST60                   CUSTOM FILES FOR CAMPUS SACRAMENTO
AAMSG                      MESSAGES ON CIRS MESSAGE BOARD
AAPGRP     AC,PS           CSUS AFFIRMATIVE ACTION JOB GROUPS
```

3. To find a report, scroll through the list using the F7 and F8 keys or enter FIND 'string' at the command line.

```
BROWSE    PD.CSUCFOC.COMMON(AAINDEX) - 01.99   Columns 00001 00072
Command ===>  find daily                          Scroll ===> PAGE
************************* Top of Data ****************************
```

5. After identifying a report, note the name and press F3 to exit and return to the library.

To use the search function:

1. Press the F9 key from the main menu

```
F1=Status   F2=New    F3=Exit    F4=Locate    F5=Sort      F6=Swap Lib
F7=Up       F8=Down   F9=Search  F10=Results  F11=HoldFile F12=Extract
```

2. At the search menu, type the search string (1- 15 characters) and press the enter key. Note: If the search string contains a space, quotes are not needed. For example:

```
|---------- Search Common Library ---------|
|                                          |
|   ENTER SEARCH STRING  daily             |
|                                          |
|------------------------------------------|
```

3. While the system is searching the library, a message will display indicating the number of matching members found.

```
|------Searching Personal Library-----|
|                                     |
|   MATCHING MEMBERS FOUND:   5       |
|                                     |
|-------------------------------------|
```

4. When the search has completed, the system will display the matching report requests and the number of members (rows) found will be shown in the upper right corner.

```
              RESULTS OF PERSONAL LIBRARY SEARCH = FACULTY
Cmds     B Browse  C Copy    D Delete      E Edit      ROWS 5
         P Print   R Rename  S Submit Batch  O Online Execution
Cmd  Name     Description                          Changed
     CDAILY    CHICO: REPORT OF STUDENT ASSISTANT   2003/08/13
_    CPDAILY   DAILY PAYROLL REPORT (PY FILE)       2003/08/13
_    DAILY     CREATES 4 REPORTS FOR VERIFYING DAILY 2003/08/13
_    DAILYPAY  DAILY PAYROLL REPORT-PAGE BREAKS BY PIP 2003/08/13
_    FRDAILYAC PY DAILY REPORT FOR ACCTNG SVCS      2003/05/14
************************ Bottom of data ************************
```

- If desired, you can perform another search within the results of the previous search by pressing the F9 key and entering another search string. When the F3 key is pressed, you will be returned to the main menu.

- If the system does not find any report requests that contain the search string, a message will display in the upper right corner indicating there were no matches. To initiate another search, press the F9 key again.

Executing Report Requests

Report requests in the common library can be executed either online or through batch using the same commands as those used in your library. Note: Reports may contain text or screening statements specific to a particular campus.

1. To execute a report, type your selection (S or O) at the prompt to the left of the name and press enter

```
                 RESULTS OF PERSONAL LIBRARY SEARCH = FACULTY
Cmds      B Browse   C Copy      D Delete       E Edit        ROWS 5
          P Print    R Rename    S Submit Batch O Online Execution
Cmd  Name      Description                                     Changed
 _   CDAILY    CHICO: REPORT OF STUDENT ASSISTANT AND STUDENT 2003/08/13
 _   CPDAILY   DAILY PAYROLL REPORT (PY FILE)                 2003/08/13
 S   DAILY     CREATES 4 REPORTS FOR VERIFYING DAILY PAYROLL  2003/08/13
 _   DAILYPAY  DAILY PAYROLL REPORT-PAGE BREAKS BY PIP, A54,  2003/08/13
 _   FRDAILYAC PY DAILY REPORT FOR ACCTNG SVCS                2003/05/14
****************************Bottom of data ****************************
```

2. With either method of execution, the required file(s) will automatically be selected. If the file confirmation panel is turned on, confirm the selections and press enter to submit.

```
|--------------- Confirm Batch FOCUS File Selections -------------|
|. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .|
| REPORT REQUEST : DAILY                                          |
|. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .|
| DIRECT OUTPUT TO: 1  1=REPORT FILE  2=PRINTER                   |
|. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .|
| CAMPUS FILES (FILE SELECTION = X)                               |
| _ AC  ACTIVE CURRENT STATUS   .  X PY  PAYMENT HISTORY EXTRACT |
| _ AN  CURRENT STATUS 10/31/__ .  _ PHS PAYMENT DATA SUMMARY    |
| _ A54 TRANSACTION DATA        .  _ SN  SENIORITY POINTS        |
| _ CH  CAMPUS HEADER           .  _ SP  SEPARATED CURRENT STATUS|
| _ EH  EMPLOYMENT HISTORY EXTRACT . _ ST  STUDENT ASSISTANT     |
| _ LV  LEAVE FILES (ALL)       .  _ TR  TRANSACTION DATA        |
| _ PH  PAY DATA FY 02/03       .  _ UI  UNEMPLOYMENT DATA       |
| _ PH  PAY DATA PRIOR MONTH    .                                |
|                                                                |
| SYSTEMWIDE FILES (FILE SELECTION = X)                          |
| _ PS  PAY SCALES              .  _ SAN CURRENT STATUS 10/31/__ |
| _ SAC ACTIVE CURRENT STATUS   .  _ STR TRANSACTION DATA        |
|                                                                |
|              ENTER TO CONTINUE = F3 TO CANCEL                  |
|----------------------------------------------------------------|
```

3. If executed online (without errors), and records were retrieved, the results will display in the hot screen. If submitted through batch, confirm the job has completed by pressing the F1 key. After confirming the job completed, press the F10 key to access your batch results.

Copying From The Common Library

If you find a member in the common that you would like to use, you can copy it to your library and make any changes needed.

Reminder! Never edit a report request in the common unless you are the owner of that report.

1. From the common library, type a C at the command line to the left of the report request and press enter.

```
                  RESULTS OF PERSONAL LIBRARY SEARCH = FACULTY
Cmds      B Browse   C Copy      D Delete      E Edit         ROWS 5
          P Print    R Rename    S Submit Batch  O Online Execution
Cmd  Name    Description                                    Changed
 _   CDAILY    CHICO: REPORT OF STUDENT ASSISTANT AND STUDENT 2003/08/13
 _   CPDAILY   DAILY PAYROLL REPORT (PY FILE)                 2003/08/13
 C   DAILY     CREATES 4 REPORTS FOR VERIFYING DAILY PAYROLL  2003/08/13
 _   DAILYPAY  DAILY PAYROLL REPORT-PAGE BREAKS BY PIP, A54,  2003/08/13
 _   FRDAILYAC PY DAILY REPORT FOR ACCTNG SVCS                2003/05/14
****************************Bottom of data ****************************
```

2. At the confirm copy screen, the name of the report being copied is automatically supplied as the name of the report in the destination library. To accept the default name, press enter.

```
|------------- Confirm Copy ----------|
|                                     |
|   COPY DAILY     OF COMMON LIBRARY  |
|     TO DAILY     OF PERSONAL LIBRARY|
|                                     |
|    ENTER TO CONTINUE - F3 TO CANCEL |
|-------------------------------------|
```

3. The message COPIED will appear in the upper right corner of the screen. To clear the message, press enter. To return to your library, press F3.

```
                  RESULTS OF PERSONAL LIBRARY SEARCH = FACULTY
Cmds      B Browse   C Copy      D Delete      E Edit        COPIED
          P Print    R Rename    S Submit Batch  O Online Execution
Cmd  Name    Description                                    Changed
 _   CDAILY    CHICO: REPORT OF STUDENT ASSISTANT AND STUDENT 2003/08/13
 _   CPDAILY   DAILY PAYROLL REPORT (PY FILE)                 2003/08/13
 _   DAILY     CREATES 4 REPORTS FOR VERIFYING DAILY PAYROLL  2003/08/13
 _   DAILYPAY  DAILY PAYROLL REPORT-PAGE BREAKS BY PIP, A54,  2003/08/13
 _   FRDAILYAC PY DAILY REPORT FOR ACCTNG SVCS                2003/05/14
****************************Bottom of data ****************************
```

Copying To The Common Library

If you have a member in your library that you would like to share with others, you can copy it to the common library. When it is copied to the common using the method below, the system will automatically insert a line that identifies you as the owner. Do not move, modify or delete this line.

Reminder! If your program is not added to AAINDEX in the common library, or if it does not have an owner userid on the 2nd line of the owner statement, it will be deleted at the close of the calendar month.

1. From your personal library, type a C at the command line to the left of the report request and press enter.

```
                        CIRS PERSONAL LIBRARY
Cmds      B Browse   C Copy       D Delete      E Edit    Row 1 of 17
          P Print    R Rename     S Submit Batch  O Online Execution
Cmd  Name      Description                                   Changed
 _   AAREPORT  ANNUAL AFFIRMATIVE ACTION REPORT            2003/05/23
 _   EMPHIST   EMPLOYMENT HISTORY REPORT                   2003/05/28
 C   EMPLIST   EMPLOYEE LIST - RUN QUARTERLY               2003/05/23
```

2. At the confirm copy screen, press the F6 key to change the destination library to the common library (if needed). To accept the default name, press enter.

```
|------------------ Confirm Copy ----------------------|
|                                                      |
|        COPY EMPLIST  OF PERSONAL LIBRARY             |
|          TO EMPLIST  OF COMMON LIBRARY               |
|                                                      |
| ENTER TO CONTINUE F3=CANCEL F6=CHANGE COPY-TO LIBRARY |
|------------------------------------------------------|
```

3. The message COPIED will appear in the upper right corner of the screen. To clear the message, press enter.

```
                        CIRS PERSONAL LIBRARY
Cmds      B Browse   C Copy       D Delete      E Edit     COPIED
          P Print    R Rename     S Submit Batch  O Online Execution
Cmd  Name      Description                                   Changed
 _   AAREPORT  ANNUAL AFFIRMATIVE ACTION REPORT            2003/05/23
 _   EMPHIST   EMPLOYMENT HISTORY REPORT                   2003/05/28
 _   EMPLIST   EMPLOYEE LIST - RUN QUARTERLY               2003/05/23
```

Practice

1. Find a report request in the common library that seems useful.

2. Execute the report request in the common library.

3. Copy the report request from the common library to your library.

4. Copy a report request from your library to the common library. Name the request in the common library as follows: AAA + your userid.

What You Have Learned

In this module you have learned:

- Common library procedures

- How to access the common library

- How to find reports in the common library

- How to execute reports in the common library

- How to copy programs to and from the common library

Module 12

<u>Employment History Files</u>

In this module you will learn:

- The information contained in the Transaction Data (TR) file

- The information contained in the Employment History (EH) file

- The differences between the TR and EH files

- How to create an Employment History Extract file

Supporting Documents/Files:

- CIRS User Manual

- Transaction Data File

- Employment History Extract File

Employment History Files Overview

CIRS has two files that contain Personnel/Payroll Transaction (PPT) data from 1976 forward for your faculty and staff. The files are: Transaction Data (TR), the Systemwide Transaction Data (STR) and Employment History Extract (EH).

Refer to the chart below for a summary of the file differences:

Item	Transaction Data (TR) & Systemwide Transaction Data (STR)*	Employment History Extract (EH)
Timeframe	Transactions effective from January 1, 1976 forward	Same as TR. Transactions can optionally be selected based on key entry date
Records	Excludes Deleted, Voided, Fixed, Eliminated, A54 and Student transactions	Deleted, Voided, Fixed, Eliminated and A54 transactions can optionally be included**
Data Elements	Selected fields on PPT. STR does not include SSN and Name.	Most fields on PPT
Common Use	These files could be used to obtain transaction counts and for historical reporting.	This file could be used to generate Employment History Summaries, to verify keying and to create a 'point in time' file
Update Schedule	Daily	The source file for the EH extract function is updated immediately upon entry of a PPT
Additional Info	Fields not found in the TR or STR file may be available in the EH file	The EH file must be created with specified parameters before using

*The Systemwide Transaction Data (STR) file provides access to all campus data for selected fields (Excludes SSN and Name).

**Student transactions will be included in the EH extract file unless a position sequence is supplied with the SSN.

TR File Practice

1. Identify employees permanently appointed (Transaction code = A50) in the last 6 months. Print their name, position number, and CBID. Sort the report by effective date.

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

2. Count the number of campus retirements (Transaction code = S70) during the last 5 calendar years. Sort the report across years. Note that an employee in two or more positions may have two or more retirement transactions counted.

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

STR File Practice

2. Count the number of system wide retirements (Transaction code = S70) during the last 5 calendar years. Sort the report by campus across years.

STR File Practice

Employment History Extract Process

The Employment History Data Base (EHDB), contains all Personnel/
Payroll Transactions (PPT's) keyed by your campus from 1976 through
the current date.

The CIRS Employment History Extract process allows you to extract data
from the EHDB and build an Employment History (EH) file by specifying
the following parameters:

- SSN Group

- Date Type/Range

- File Type

- Output File

**Employment
History
Database**

Extract Process

**EH
Extract
File**
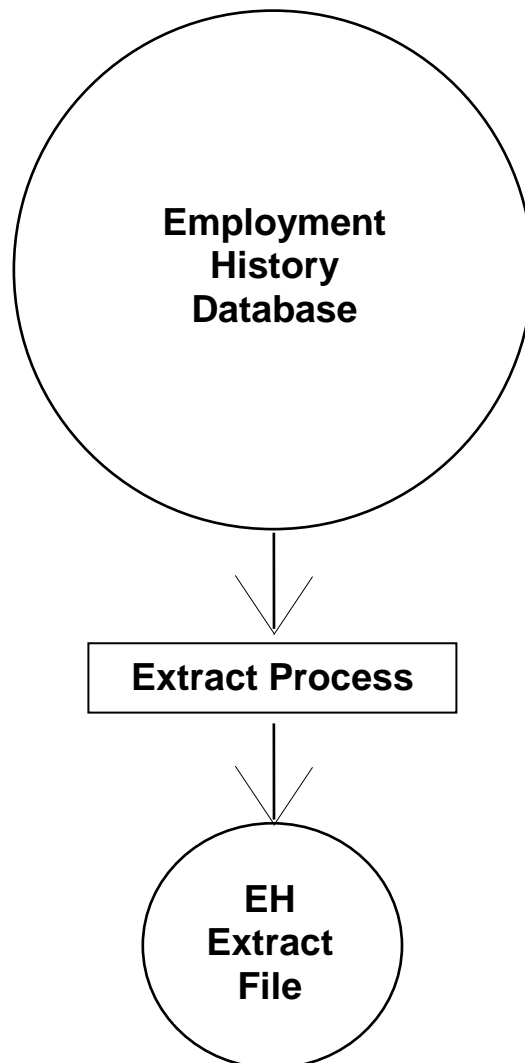
To create an EH file for ad hoc reporting:

1. From the main menu, press the F12 key.

```
F1=Status   F2=New     F3=Exit    F4=Locate    F5=Sort       F6=Swap Lib
F7=Up       F8=Down  F9=Search  F10=Results  F11=HoldFile  F12=Extract
```

2. Select option 1 at the extract data menu and press enter.

```
|-------------------- Extract Data -------------------|
|                                                     |
|   SELECT 1    1. EH - EMPLOYMENT HISTORY EXTRACT FILE  |
|               2. PY - EMPLOYMENT HISTORY EXTRACT FILE  |
|               3. EMPLOYMENT VERIFICATION REPORT       |
|-----------------------------------------------------|
```

3. Make an entry in each section of the Employment History Extract
    Process screen before pressing enter.

```
Status
             EMPLOYMENT HISTORY EXTRACT PROCESS
. . . . . . . . . . . . . . . . . . . . . . . . . . . . .
SELECT SSN OPTION:    1   1. ALL SSN'S IN TR FILE
                          2. SSN'S IN LIBRARY MEMBER: HISTORY
                          3. SSN'S IN HOLD FILE: PERMSML
. . . . . . . . . . . . . . . . . . . . . . . . . . . . .
SELECT DATE TYPE:     1   1. EFFECTIVE DATES
       AND                2. ENTRY DATES
ENTER DATE RANGE:            FROM _____  TO _____  YYMMDD
                            FROM 760101 TO CURRENT
. . . . . . . . . . . . . . . . . . . . . . . . . . . . .
SELECT FILE TYPE      1   1. ABSOLUTE
                          2. RELATIVE
                          3. CURRENT STATUS
. . . . . . . . . . . . . . . . . . . . . . . . . . . . .
             PRESS ENTER TO SUBMIT OR F3 TO EXIT
```

4. Select additional options, if needed, and confirm the selections. Press enter to confirm and submit the job.

```
|-----------------  EH ADDITIONAL OPTIONS  --------------|
|                                                        |
|   N (Y OR N) INCLUDE A98 TRANSACTIONS FOR SSN'S SUPPLIED |
|   N (Y OR N) INCLUDE VOIDS, FIXES, DELETES, ELIMINATES  |
|   N (Y OR N) INCLUDE A54 TRANSACTIONS                   |
|                                                        |
|              CURRENT SELECTIONS                         |
|                                                        |
|       SSN OPTION: ALL SSN                               |
|        DATE TYPE: EFFECTIVE                             |
|              FROM  ------ TO -------                    |
|        FILE TYPE: ABSOLUTE                              |
|                                                        |
|           ENTER TO SUBMIT - PF3 TO CANCEL              |
|--------------------------------------------------------|
```

5. When you receive a message indicating the job was submitted, make a note of the job number and press enter to clear the message.

```
 JOB CTEUXABC(JOB12345) SUBMITTED
 ***
```

6. From the main menu, check status (F1 key) to confirm the extract completed before using the file.

```
 F1=Status  F2=New   F3=Exit   F4=Locate   F5=Sort    F6=Swap Lib
 F7=Up      F8=Down  F9=Search F10=Results F11=HoldFile F12=Extract
```

Extract Verification

After creating your extract file, you should test the file for employees with data overflow. Data overflow occurs when the volume of history extracted for an individual employee exceeds the maximum record length allowed (31748 bytes). Typically, this occurs when you are extracting history for a large range of dates.

Employees with data overflow will have a value of X for the field: EH:OVERFLOW.   To test the EH file, execute the following commands:

```
    EX EH
    TABLE FILE EH
    PRINT EH:SSA EH:WNAME EH:OVERFLOW
    IF EH:OVERFLOW EQ X
    END
```

If you identify an employee with data overflow, generate another EH file for that social security number and select a smaller timeframe.

EH File Practice

1. Identify employees permanently appointed (Transaction code = A50) during the prior 6 months. Print their name, position number, CBID and **probation code end date**. Sort the report by appointment effective date.

   Extract Process Selections:

   SSN Option - _____

   Date Type & Range - _____

   File Type - _____

   Additional Options - _____

   Report Request:

   _____

   _____

   _____

   _____

   _____

   _____

   _____

   _____

   _____

   _____

   _____

   _____

   _____

   _____

   _____

   _____

   _____

   _____

   _____

   _____

EH File Practice con't,

2. Extract all employment history data for yourself (supply a range of dates appropriate) and use report requests in the common library to generate an employment history summary report.

- Make the selections indicated below at the Employment History Extract screen, and press the enter key:

  SSN Option - SSN'S IN LIBRARY MEMBER (HISTORY)
  Date Type & Range - EFFECTIVE DATES FROM -?- TO -?-
  File Type - ABSOLUTE
  Additional Options - none

- Enter your social security number in your library member named HISTORY. When you press F3 to save/exit, you will receive a message indicating the extract job was submitted.

```
EDIT   PD.CSUCFOC.UUSER(HISTORY) - 01.01 Columns 00001 00072
Command ===>                                  Scroll ===> PAGE
****** **************** Top of Data ********************
000001 -* ONLY FOR USE WITH EMPLOYMENT HISTORY EXTRACT
000002 -* ENTER 1 SSN PER LINE, WITH OR WITHOUT DASHES
000003 -* AFTER ENTERING SSN(S), PRESS F3 TO SUBMIT.
000004 -*
000005 123-45-3789
```

- Check your job's status from the main menu (F1 key) to confirm the extract completed successfully. Be sure to note if any records have data overflow.

```
F1=Status  F2=New    F3=Exit    F4=Locate   F5=Sort    F6=Swap Lib
 F7=Up      F8=Down  F9=Search  F10=Results  F11=HoldFile F12=Extract
```

- Navigate to the common library (F6 key). Locate and execute the report request named HSTSUMRY. Alternately, you can execute PIMSSCRN.

EH File Practice con't

3. Obtain a count of active positions at your campus, excluding E99
   students, as of March 1, _____. Sort the report by CBID and job
   family name. Include a grand total on your report.

   Report Generated:

   ```
                        COUNT OF POSITIONS
                        DATA AS OF 03/01/xx

                                                     POSITION
    CBID    JOB FAMILY NAME                          COUNT
    ----    ---------------                          --------
    E99     EXCLUDED OR UNKNOWN                             1
    M80     EXECUTIVE, ADMINISTRATIVE, MANAGEMENT          10
    R03     FACULTY                                         6

    TOTAL                                                  17
   ```

   Extract Process Selections:

   SSN Option - _____

   Date Type & Range - _____

   File Type - _____

   Additional Options - _____

   Report Request:

   _____

   _____

   _____

   _____

   _____

   _____

   _____

   _____

   _____

   _____

   _____

   _____

What You Have Learned

In this module you have learned:

- The information contained in the Transaction Data (TR) file

- The information contained in the Employment History (EH) file

- The differences between the TR, STR and EH file

- How to create an Employment History Extract file

Module 13

<u>Payment History Files</u>

In this module you will learn:

- The types of payment files available

- The data contained in the payment files

- How to generate Payment Extract files

- How to verify a successful extract

Supporting Documents/Files:

- CIRS Data Element Dictionary

- Payment Data File

- Payment History Extract File

- Pay History Summary File

Payment History Files Overview

The Pay Data, Payment History Extract and the Pay Data Summary files each contain payment information on your employees. However, the files vary in the time frame, data elements and records they contain. Refer to the chart below for a summary of the file differences.

Item	Pay Data (PH)	Payment History Extract (PY)	Pay Data Summary (PHS)
Timeframe	Data by fiscal year from 01/84 forward -or- the prior business month	Data for the last 36 business months - and/or- the current business month	Data for the current and 5 prior fiscal years through the prior business month
Records	All payments issued to your faculty, staff and students, including those issued by other campuses	Payments issued to your faculty, staff and students by your campus	Payments issued to your faculty, staff and students by your campus
Data	Payments and Deductions	Payments and Deductions	Selected fields for Payments only
Common Use	Reporting on payments and deductions for the entire fiscal year or prior business month	Reporting on payments and deductions issued in the current business month	Reporting on payments for multiple fiscal or calendar years
Update Schedule	The PH file is refreshed at the close of the calendar month and is available on the first working day of the new calendar month	The source file for the PY extract function is updated after every payroll cycle. Refer to the DED for the dates the current business month file is emptied	The PHS file is refreshed at the close of the calendar month and is available on the second working day of the new calendar month
Additional Information	Prior FY data is only available through Batch **Check for summarized records**	The PY file must be created with specified parameters before using	Only available in Batch **Check for summarized records**

PH File Practice

1. Write a report reflecting total overtime wages (Payment Type: 1) paid at your campus for the previous fiscal year. Sort the data by pay period. Provide a subtotal for each pay period.

2. Identify employees who had a deferred compensation deduction (Deduction Type: TD) for the prior pay period. Display the employee names in alphabetical order by reporting unit.

Payment History Extract Process

Information from the online payment history file (HIST) is available from the last daily payroll cycle to the prior 36 months of payments.

The CIRS Payment History Extract process allows you to extract data from HIST and build a Payment History Extract (PY) file by specifying the following parameters:

- SSN Option

- Date Type/Range

- File Source

- Output File
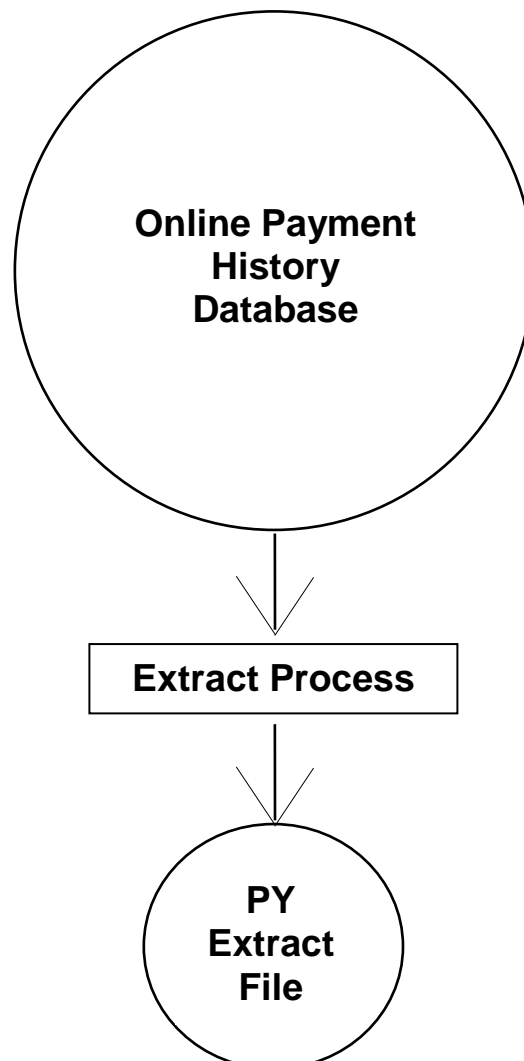
Online Payment History Database

Extract Process

PY Extract File

To create a PY file for ad hoc reporting:

1. From the main menu, press the F12 key.

```
 F1=Status  F2=New    F3=Exit    F4=Locate   F5=Sort      F6=Swap Lib
 F7=Up      F8=Down  F9=Search  F10=Results  F11=HoldFile  F12=Extract
```

2. Select option 2 at the extract data menu and press enter.

```
|-------------------- Extract Data ------------------|
|                                                    |
  SELECT 2     1. EH - EMPLOYMENT HISTORY EXTRACT FILE  |
|             2. PY - EMPLOYMENT HISTORY EXTRACT FILE  |
|             3. EMPLOYMENT VERIFICATION REPORT       |
|----------------------------------------------------|
```

3. Make an entry in each section of the Payment History Extract Process
    screen before pressing enter.

```
Status    Download
                  PAYMENT HISTORY EXTRACT PROCESS
. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .
   SELECT SSN OPTION:  1  1. ALL SSN'S
                          2. SSN'S IN FOCEXEC(PAYMENT)
                          3. SSN'S IN PERMSML
. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .
   SELECT DATE TYPE:   1  1. CYCLE FROM 010702 TO 010715   YYMMDD
         AND              2. PAY PERIOD FROM ____ TO ____  YYMM
   ENTER DATE RANGE:
. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .
   SELECT FILE SOURCE  1  1. CURRENT BUSINESS MONTH
                          2. CURRENT & PRIOR 36 BUSINESS MONTHS
. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .
   SELECT OUTPUT FILE: 1  1. PY
                          2. SCO PRODUCTION (NON-CENTURY COMP)
                          3. PC EDIT
                          4. DECENT. FORMAT
. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .
              PRESS ENTER TO SUBMIT OR F3 TO EXIT
```

To create a PY file for ad hoc reporting – con't

4. Confirm the selections and press enter to confirm and submit job.

```
Status
   .----------------------------------------------------.
   |                 CURRENT SELECTIONS                 |
   |                                                    |
   |       SSN OPTION: ALL SSN                          |
   |        DATE TYPE: CYCLES                           |
   |             FROM  2001/07/02 TO 2001/07/15         |
 . |        FILE TYPE: CURRENT MONTH                    |
   |      OUTPUT FILE: PY                               |
   |                                                    |
   |          ENTER TO SUBMIT   PF3 TO CANCEL           |
 . '----------------------------------------------------'.
```

5. When you receive a message indicating the job was submitted, make a note of the job number and press enter to clear the message.

```
JOB CTPUXABC(JOB12345) SUBMITTED
***
```

6. Check STATUS to confirm a successful completion before using the file.

```
Status    Download
                PAYMENT HISTORY EXTRACT PROCESS
. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .
```

Extract Verification

After creating your extract file, you should test the file for employees with data overflow. Data overflow occurs when the volume of history extracted for an individual employee exceeds the maximum record length allowed (31748 bytes). Typically, this occurs when you are extracting history for a large range of dates.

Employees with data overflow will have a value of X for the field: PY:OVERFLOW. To test the PY file, execute the following commands:

```
EX PY
TABLE FILE PY
PRINT PY:SSA PY:WNAME PY:OVERFLOW
IF PY:OVERFLOW EQ X
END
```

If you identify an employee with data overflow, generate another PY file for that social security number with a smaller range of pay periods.

PY File Practice

1. Extract 36 months of payment history data for yourself and use a
    common library report request to generate a payment history summary
    report.

    - Make the selections below at the Payment History Extract screen
      and press enter.

SSN Option -	SSN'S IN LIBRARY MEMBER (PAYMENT)
Date Type & Range -	RANGE OF PAY PERIODS
File Type -	CURRENT & PRIOR 36 MONTHS
Output Format -	PY

    - Enter your social security number in your library member named
      PAYMENT and press F3 to save/exit. You will receive a message
      indicating the extract job was submitted.

```
EDIT  PD.CSUCFOC.UUSER(PAYMENT) – 01.01 Columns 00001 00072
Command ===>                               Scroll ===> PAGE
****** **************** Top of Data **********************
000001 -* ONLY FOR USE WITH EMPLOYMENT HISTORY EXTRACT
000002 -* ENTER 1 SSN PER LINE, WITH OR WITHOUT DASHES
000003 -* AFTER ENTERING SSN(S), PRESS F3 TO SUBMIT.
000004 -*
000005 123-45-3789
```

    - Check STATUS to confirm the extract completed successfully. Be
      sure to note if the status message indicates data overflow.

```
 F1=Status  F2=New    F3=Exit    F4=Locate   F5=Sort      F6=Swap Lib
 F7=Up      F8=Down   F9=Search  F10=Results F11=HoldFile F12=Extract
```

    - Navigate to the common library (F6). Locate and execute the
      report request named PAYSUMRY. Alternately, you can execute
      HISTSCRN.

2. Identify payments issued to E99 students in the current business month for the prior pay period. List the students in alphabetical order and display the data per the report sample below.

<u>Report Generated</u>:

```
                    STUDENT PAYCHECKS

                           PAY
                           PRD    AGY/
 SOC SEC       STUDENT NAME  DATE   UNIT      WARRANT
-----------    ------------  ----   ------    -------
 333-00-0000   ABBOTT, R     9902   200109    01269888
 111-00-0000   BOOKER, BA    9902   200110    01254000
 222-00-0000   DAWSON, ZK    9902   200114    01254100

 REPORT RUN ON:
```

<u>Extract Process Selections</u>:

SSN INPUT OPTION - _____

DATE SELECTION - _____

FILE SOURCE - _____

OUTPUT FORMAT - _____

<u>Report Request</u>:

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

_____

What You Have Learned

In this module you have learned:

- The types of payment files available

- The data contained in the payment files

- How to generate Payment Extract files

- How to verify a successful extract

Module 14

<u>Employment Verification</u>

In this module you will learn:

- The information contained in, and the purpose of an employment verification report

- How to generate an employment verification report

- How to print an employment verification report

Supporting Documents/Files:

- CIRS User Manual

Employment Verification Report Overview

HR-ISA developed the employment verification report as a tool for completing requests from credit lenders to verify your employee's employment and payment history. By default, the report summarizes payments and employment history for the current and two prior calendar years.

Below is only a partial sample of the generated report:

```
10/23/03                    THE CALIFORNIA STATE UNIVERSITY
                             EMPLOYMENT VERIFICATION REPORT
                                  PIMS REPORT PDC0016B
                             ISSUE DATES: 01/01/01- 01/01/03

NAME: ARMADILLO        BEN C              SSN: 000-00-1111

PAYMENT HISTORY INFORMATION:
                    2001        2000        1999
  REGULAR:      45,086.15   49,205.71
  OVERTIME:
  SHIFT:
  OTHER:         3,000.00    7,000.00      600.00
  TOTAL:        48,086.15   56,205.71      600.00

EMPLOYMENT HISTORY INFORMATION:
-----------------------------------------------------------------
  PSN SEP    EFFECT   TRAN   POSITION NUMBER    CLASS TITLE   TIME
  SEQ CODE   DATE     CODE                                    BASE
-----------------------------------------------------------------
  01   S    06/18/01  A54    000-400-4660-905  SPC CONSULT   INT
       S    06/02/01  A54    000-113-4660-905  SPC CONSULT   INT
       S    01/06/01  A54    000-113-4660-905  SPC CONSULT   INT
       S    01/02/01  A54    000-400-4660-905  SPC CONSULT   INT
       S    06/06/00  A54    000-179-4660-905  SPC CONSULT   INT
       S    06/03/00  A54    000-400-4660-905  SPC CONSULT   INT
       S    05/06/00  A54    000-179-4660-905  SPC CONSULT   INT
       S    05/01/00  A54    000-179-4660-905  SPC CONSULT   INT
       S    04/16/00  A54    000-179-4660-905  SPC CONSULT   INT
```

Creating an Employment Verification Report

Note: The steps below will only discuss how to create an employment
verification report using the default settings.

1. From the main menu, press the F12 key.

```
F1=Status   F2=New    F3=Exit    F4=Locate   F5=Sort      F6=Swap Lib
F7=Up       F8=Down   F9=Search  F10=Results F11=HoldFile F12=Extract
```

2. Select option 3 at the extract data menu and press enter.

```
|-------------------- Extract Data ------------------|
|                                                    |
  SELECT 3     1. EH - EMPLOYMENT HISTORY EXTRACT FILE  |
|              2. PY - EMPLOYMENT HISTORY EXTRACT FILE  |
|              3. EMPLOYMENT VERIFICATION REPORT       |
|----------------------------------------------------|
```

3. At the employment verification extract screen, accept the default range
    settings (option 1) by pressing enter.

```
Status    Report
                    EMPLOYMENT VERIFICATION
. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .

SELECT RANGE: 1  1. YEAR-TO-DATE AND TWO PRIOR CALENDAR YEARS
                    OF PAYMENT/EMPLOYMENT HISTORY DATA

                 2. ENTER PAYMENT HISTORY ISSUE DATES
                    FROM  840104  TO  999999    YYMMDD
                    ENTER  EMPLOYMENT HISTORY EFFECTIVE DATES
                    FROM  760101  TO  999999    YYMMDD


. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .
NOTE: ONCE YOU HAVE PRESSED THE ENTER KEY TO SUBMIT AN EMPLOYMENT
      VERIFICATION EXTRACT, YOUR FOCEXEC(VERIFY$) WILL DISPLAY.
      AT THIS POINT YOU CAN ENTER SOCIAL SECURITY NUMBERS THAT YOU
      WISH TO PRINT ON THE EMPLOYMENT VERIFICATION REPORT.
. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .
                PRESS ENTER TO SUBMIT OR PF3 TO EXIT
```

4. In your library member named VERIFY$, enter one social security
    number per line. When finished, press F3 to save/exit.

```
EDIT    PD.CSUCFOC.UXABC(VERIFY$) - 01.51    Columns 00001 00072
Command ===>                                     Scroll ===> PAGE
****** ****************** Top of Data ************************
000100 111-22-3333
000200 222-11-4444
****** ****************** Bottom of Data *********************
```

5. When you receive a message indicating the extract job was submitted,
    make a note of the job number and press enter to clear the message.

```
 JOB CTVUXABC(JOB15226) SUBMITTED
 ***
```
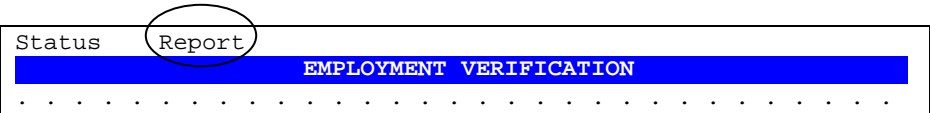
6. Check STATUS to confirm a successful completion.

```
Status    Report
                 EMPLOYMENT VERIFICATION
. . . . . . . . . . . . . . . . . . . . . . . . . . . . . .
```

Printing an Employment Verification Report

The resulting employment verification report is written to your Batch
Report file. You can navigate to the main menu and select your batch
report by using the F10 key, or you can use the shortcut available from the
employment verification screen.
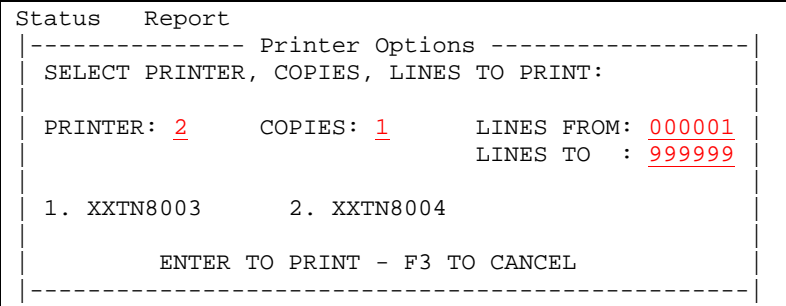
To print the report using the shortcut:

1. After confirming a successful completion, select REPORT from the
   employment verification extract screen and press enter.

```
Status    Report
                      EMPLOYMENT VERIFICATION
. . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . . .
```

2. Select Option 2 from the pop-up menu and press enter.

```
Status    Report
             .----------------------.
             | 2  1. EDIT BATCH REPORT  |
             |    2. PRINT BATCH REPORT |
             '------------------------'
```

2. Make changes, if needed, to the print selections and press enter.

```
Status    Report
|-------------- Printer Options -----------------|
| SELECT PRINTER, COPIES, LINES TO PRINT:        |
|                                                |
| PRINTER: 2    COPIES: 1     LINES FROM: 000001 |
|                             LINES TO  : 999999 |
|                                                |
| 1. XXTN8003     2. XXTN8004                    |
|                                                |
|        ENTER TO PRINT - F3 TO CANCEL           |
|------------------------------------------------|
```

Practice

Generate an Employment Verification report for yourself.

1. Select the extract function from the main menu.

2. Select the employment verification option.

3. Accept the default settings by pressing enter.

4. Enter your social security number at your library member named
    VERIFY$ and press F3 to save/submit your job.

5. Make a note of the extract job number before clearing the message.

6. Check status to confirm a successful completion.

7. View and/or print your batch report.

What You Have Learned

In this module you have learned:

- The information contained in, and the purpose of an employment
  verification report

- How to generate an employment verification report

- How to print an employment verification report

Module 15

<u>Closeout</u>

- Ad Hoc Report Procedures

- Summary of FOCUS commands

- Recommendations for Successful Reporting

Ad Hoc Report Procedures

When you need data from CIRS, follow these steps:

---

1. Check the Compendium

- ▪ Reports are pre-generated

- ▪ Hundreds of reports are available for each campus

- ▪ Use of the Compendium is free

- ▪ You don't need to know FOCUS commands

---

2. Check the Common Library Index

- ▪ Contains programs written by users at other campuses

- ▪ Programs can be copied into your library and modified

- ▪ Always verify the results before using

If you didn't find a report or program using steps 1 and 2, then

---

3. Write an Ad Hoc Report Request

- ▪ Determine the data needed for your report

- ▪ Determine which file(s) contain the data elements identified

- ▪ Write a report to gather and/or format the needed data

- ▪ Test with record limits in the Online FOCUS environment

- ▪ After testing, remove the record limit and execute using Batch

Summary of FOCUS Commands

Syntax	Function
`-* text`	Comment line
`EX filename or EX joinname`	Executes standard defines or pre-programmed join
`DEFINE FILE filename ADD`	Begins your defined fields
`newfield/format = expression;`	Creates defined field
`END`	Ends your define(s)
`TABLE FILE filename`	Begins report request
`HEADING` `" text "`	Places heading text at top of every page of report
`verb fieldname fieldname`	Verb phrase to display data
`sort fieldname`	Sort phrase (s) to sort data
`WHERE fieldname relation value`	Screening criteria
`WHERE RECORDLIMIT EQ number`	Limits records for testing
`ON TABLE COLUMN-TOTAL ROW-TOTAL`	Generates grand totals on table data
`ON TABLE HOLD AS permfile` `FORMAT type`	Places data in a permanent hold file for downloading.*
`FOOTING` `" text "`	Places footing text at bottom of every page of report
`END`	Ends report request

* Note: Formatting commands (e.g., Headings, Footings, Totals, etc.) are ignored when data is placed in a hold file.

Recommendations for Successful Reporting

- Allow an in-house training period of 2-3 hours per week for 1 month to become comfortable with the system and familiar with basic Ad Hoc report writing.

- Inform staff/managers of Ad Hoc reporting capabilities.

- Develop procedures for requesting, processing and providing Ad Hoc reports.

- Hold regular meetings among Ad Hoc users to share information and promote networking.

<u>Appendix A, Contacts</u>

CIRS

Hotline	technical support for CIRS users	916-323-5694 or cirs@calstate.edu
Training	classes for beginner or intermediate CIRS users	916-322-1386
Website	online resource for system updates, reporting techniques, training schedule, system information and reference materials	www.calstate.edu/hrpims/hrpims
Data Element Dictionary	online resource containing all the master file descriptions, fieldname, tables and additional data necessary to use the ad hoc reporting capabilities	www.calstate.edu/hrpims/ded
FOCUS Documentation	FOCUS for Mainframe, Creating Reports, Version 7.6	www.calstate.edu/hrpims/FOCUS_Documentation.htm

Chancellor's Office

Human Resources	HR administration policies and procedures	562-951-4411 or www.calstate.edu/hr

Information Builders

IBI	FOCUS documentation or to request training from the software vendor	www.IBI.com

State Controller's Office

Information Security Office	to reset passwords and restore revoked userids	916-322-8094

Office Of Technology Services (OTech)

Help Desk	to halt printing, line and equipment problems, to install additional hardware	916-464-4311

Appendix B, Campus Codes

Campus Name XX:CAMPUS	User Prefix	Campus XX:CAMPX	Campus Code XX:CAMPUSCD
BKERSFIELD	UU	H	35
CHANNEL IS	UL	Y	72
CHICO	UA	E	20
CHNCLR OFF	UX	A	01
DOMINGUEZ	UD	L	55
EAST BAY	UG	B	05
FRESNO	UF	F	25
FULLERTON	UM	K	50
HUMBOLDT	UH	G	30
LA	UY	J	45
LONG BEACH	UW	I	40
MARITIME	U6	W	07
MONTEREY	U5	V	06
NORTHRIDGE	UZ	P	70
POMONA	UK	C	10
SACRAMENTO	US	M	60
SAN BERN	UO	N	63
SAN DIEGO	UR	O	65
SAN FRAN	UE	Q	75
SAN JOSE	UI	R	80
SAN MARCOS	U3	U	68
SLO	UP	D	15
SONOMA	UV	S	85
STNISLAUS	UJ	T	90

Appendix C, Frequently Used Files

Below is a brief description of the 5 most frequently used ad hoc reporting files. Each of the files contain data for faculty, staff and management employee positions. For complete information about a specific file, refer to its master file description in the CIRS Data Element Dictionary.

Campus Employment Data Files

FILE	UPDATED	DESCRIPTION
Active Current Status * (AC)	Weekly	Snapshot of current transactions for active and on-leave position sequences as of the prior Friday. This file does not include separated positions, student data, or special pay appointments. Use for reporting on current campus population.
Employment History Extract (EH)	On Demand	Transactions 1976 through the current date for a specified set of SSN's. May include separated positions, student data, and special pay appointments. Voided, eliminated, fixed or deleted transactions can be optionally selected. Use for employment history summaries and for reports requiring fields not available in the TR file.
Transaction Data * (TR)	Daily	Transactions from 1976 through the prior day for active and separated positions. Only **selected fields** from each transaction are available. Excludes student and special pay appointments, voids, deletes, fixes and eliminated transactions. Use to get transaction counts and historical data.

* A systemwide version of this file (with confidential data excluded) is also available.

Campus Payment Data Files

FILE	UPDATED	DESCRIPTION
Payment Data (PH)	Monthly	Payments and deductions issued to your employees, including student and special pay appointees, during the prior business month or the current and prior fiscal years back to 01/01/1984. Includes all payments issued to your employees, regardless of the issuing campus. Use to get payment and deduction information for entire campus or employee groups.
Payment History Extract (PY)	On Demand	Payments and deductions issued to your employees, including student and special pay appointees, during the last 36 months through the last daily cycle for a specified set of SSN's. Use to report on payments issued in the current business month and for payment history summaries.

Cross Referenced Files

FILE	UPDATED	DESCRIPTION
Pay Scales (PS)	As Needed	Current information for all active and abolished classes. All major files have a pre-programmed join to this file. Use to include Pay Scales information (e.g., Class Title) in reports.