

**PPS Requirements
PAN Modifications**

Service Request 16921

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1.0 Background

Major enhancements to the Post Authorization Notification (PAN) subsystem were added to the base Payroll/Personnel System (PPS) in release 1415, provided to campuses on June 12, 2002. Included in these enhancements was the addition of a web interface for review of notifications.

Campuses who have installed these enhancements have submitted suggestions for some additions and changes that they believe will improve the ease of use of the web based PAN. Additionally, campuses and UCOP personnel have reported some errors in the PAN processes that should be corrected.

These requirements outline the system modifications needed to correct the reported errors and to implement some of the suggestions received from campuses. Note that some suggestions are still being reviewed and may be addressed in future requirements.

2.0 PPS Modifications

2.1 Overview of PPS Modifications

The following changes to the web and CICS PAN functions are being requested in these requirements. Detailed specifications for each change in this list are included in the subsequent sections of this document.

Web PAN Changes

1. Provide a printer-friendly version of the web Notification Detail page
2. Correct the display of directory information on the Routing Option page
3. Display the reviewer's current routing option on the Routing Option Notification Selection page
4. Add two messages when the routing option is changed
5. Enhance the explanation text on the Routing Option page
6. Display the phone number on the web PAN Directory page
7. Revise search on Department code so it is not case sensitive
8. Provide a 'save and return' option on the Notification Detail page
9. Reposition the 'Logout' link to reduce the incidence of inadvertent logouts
10. Enhance the date selection on the Notification Selection page

CICS PAN Changes

1. Enhance the Last Name search function on the CICS PAN Directory screen
2. Correct the page numbering on the CICS PAN Inbox screens
3. Correct the behavior related to entry of an 'urgent' priority on the comments screen

2.2 Web Pan Modifications

2.2.1 Printer-friendly Format

The PAN web page "Post Authorization Notification Detail" should offer a "Printer Friendly Format" option. For consistency, it is suggested that the same icon that is used in web EDB Inquiry be used, and that the printer friendly version be presented in the same way as in EDB Inquiry, by presenting the formatted page in a new window which can then be printed and closed.

2.2.2 Directory Information on Routing Option Selection Page

The Routing Option Selection page displays information from the PAN directory for the reviewer. There is an error on this page in that only the UserID and e-mail address of the reviewer are displayed; the Reviewer name and phone number are not being displayed. This should be corrected so that the Reviewer name and phone number from the directory are displayed.

2.2.3 Display Current Routing Option

Currently the drop down box on the PAN Routing Option Selection page always displays "E-mail routing" in the drop down box, regardless of the reviewer's current routing option. This should be modified so that when the reviewer accesses this page, the drop down box displays the reviewer's current option, as follows:

- If the value of the PAN Routing Code for the reviewer is 'E', the drop down box should display 'Email routing'.
- If the value of the PAN Routine Code for the review is not 'E', the drop down box should display 'No email routing'.

2.2.4 Message When Routing Option Changes

Currently a message is issued when the 'Submit' button is clicked and the option in the drop down is the same as the reviewer's current setting ("Email routing is already set to 'yes'" or "Email routing is already set to 'no'").

A message should also be issued when the reviewer changes options. After the reviewer clicks the 'Submit' button, messages should be issued as follows:

- If the previous setting was 'no email' and the user has selected 'email', the message text should be "You have elected to receive notifications in e-mail in addition to your inbox. Press OK to submit the change". In addition to the 'OK' option, a 'Cancel' option should be presented.
- If the previous setting was 'email' and the user has selected 'no email', the message text should be "You have elected to cancel email copies of notifications. Your notifications will continue to be available for review in your inbox. Press OK to submit the change." In addition to the 'OK' option, a 'Cancel' option should be presented.

2.2.5 Change Text on Routing Option Page

The paragraph on the page should be replaced with the following wording:

- If you select the 'no email routing' option, you will not receive individual e-mail PAN notifications. All of your notifications will be available for review in your web PAN inbox. You will receive an e-mail each day notifying you of the number of PANs routed to your in-box that day.
- If you select the 'email routing' option, you will receive a formatted email copy of each PAN for which you are a non-mandatory reviewer. If you are a mandatory reviewer, you will receive an e-mail alert to let you know that the PAN is available for review in your inbox.

Note that all notifications are available for review in your in-box regardless of your routing option selection.

2.2.6 Web Pan Directory Page

The PAN UserID Directory page does not display the phone number from the PAN Directory. This should be corrected so that the phone number is displayed. Note that the phone number is displayed in the CICS PAN directory page.

2.2.7 Case Sensitive Entry of Department

On the Notification Selection page and the Audit Review page, the search for a matching Department code is case-sensitive. For example, if 'geog' is keyed in the field, no entries are returned, but if 'GEOG' is keyed, matched entries are found.

Change the search so that it is not case sensitive. 'GEOG', 'geog', 'Geog', 'geoG', and so on should all be considered a match.

2.2.8 PAN Detail Page Options

Campus reviewers have requested a 'Save and Return' option on the PAN Detail page. This would allow the reviewer to add comments to the Notification and return directly to the PAN Inbox, rather than having to save the comment and then navigate to the top of the page and click on inbox to return.

Currently the 'Save' and 'Reset' buttons are positioned to the right of the comments entry box, aligned with the bottom of the box. These existing buttons should be moved up, aligned with the top of the box. A new button should be added in the original position of the 'Save' and 'Reset' buttons. This button should be labeled 'Save and Return to Inbox'. When this button is clicked, the entered comments should be added to the PAN and the reviewer should be returned to the PAN Inbox page.

2.2.9 Position of Logout

Campus reviewers remarked that the position of 'Logout' on the Notification Detail page is very close to the 'Inbox' link, resulting in the reviewer occasionally logging out by mistake.

Move the link for inbox to the same line as the links to 'Main Menu' and 'Logout', align it under the 'Userid' label, and change the name of the link from 'Inbox' to 'Return to Inbox'.

2.2.10 Date Selection Criteria

Currently on the Notification Selection screen, the reviewer can specify selection of notifications by selecting a begin date and time, and an end date and time from drop down boxes. The initial display for the begin date in the drop down box is the date of the oldest PAN. The initial display for the end date is shown as midnight of the next day (so, on September 30, the date in the drop down is shown as 12:00 A.M. October 1).

This has proven to be confusing to reviewers.

This screen should be enhanced to provide the following options to the users to select notifications:

1. An option to select notifications for the Current Day. When this option is selected, all the notifications with a date equal to the current date should be selected.
2. An option to select notifications for the Last Seven Days. When this option is selected, notifications with a date equal to the current date and each of the last six calendar dates should be selected. For example, if the user selects the 'last 7 days' option on Wednesday, October 29, at 13:33, all notifications from with dates beginning Thursday, October 23 through Wednesday, October 29 should be selected.
3. An option to select notifications for the Current Month. When this option is selected, notifications where the month/year of the date equals the current month/year should be selected.
4. An option to select notifications for a specific Date Range. When this option is selected, the user enters a 'From date' and a 'To Date'. All notifications with a date equal or later than the 'from date', and no later than the 'to date', should be selected.

The resulting screen current shows the requested date range as follows:

Date & Time: From 10/26/2003 12:00 AM To 10/30/2003 12:00 AM

This should be modified to remove the time, and to show the date range used. The date range should be displayed whether the user entered Current Day, Last 7 Days, Current Month, or entered a date range.

Date Range: From 10/26/2003 To 10/30/2003

2.3 CICS PAN Modifications

2.3.1 CICS Directory Page

When a last name is entered in the name search field, and there are multiple matches for the last name, the result is returned with the last occurrence of the string match rather than the first. The user can use the F7 key to get to the previous matches, however, the user may not realize there are additional matches since they are on a previous page.

This should be corrected to that the first matched name is presented at the top of the page with the other matches following. For example:

Smith, Adam
Smith, Bruce
Smith, Candace
Etc.

The search also requires a complete last name, rather than attempting to match on a partial character string. For example, if the above three names are in the directory, and the user enters 'Smit' in the last name search field, the system returns a 'No matches' message.

This should be corrected to show all matches where the beginning of the last name matches to the character string, even if that string is not the entire name.

Note that the web PAN directory screen correctly presents the first matched occurrence first with the additional matched names immediately following, and also matches on partial names.

2.3.2 CICS PAN Inbox

When there are more than 99 CICS inbox pages of notifications, the page number format displayed on the screen is in reverse order. For example, "Page 117 of 11" is displayed when it should be "Page 11 of 117".

This should be corrected.

2.3.3 CICS Comments Entry Page

When the preparer sets the Notification Priority to 'U' for 'Urgent' and then presses the 'Enter' key at any time before pressing 'Update', the 'Urgent' value in the Notification Priority field is set back to the default value of 'Regular'.

This should be modified so that the entered value is retained unless the preparer overrides it or hits cancel.