



VI System Access, Screens and Navigation

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

CALSTARS SYSTEM ACCESS

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

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

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

Security Features

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

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

Sign-On Procedures

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

Signing on to CALSTARS requires two items of information: USERID and PASSWORD. The USERID is established when the CALSTARS Agency Security Officer adds the individual's CALSTARS Security Table record. The password is established by the individual when they initially sign-on to CALSTARS. Passwords must be 8 characters, begin with an alphabetic character are case sensitive, must contain at least one alphabetic uppercase letter (A-Z) or one national character (#, @, \$), at least one alphabetic lowercase (a-z) and at least one number (0-9).

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

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

```

                                STATE OF CALIFORNIA
                                OFFICE OF TECHNOLOGY SERVICES

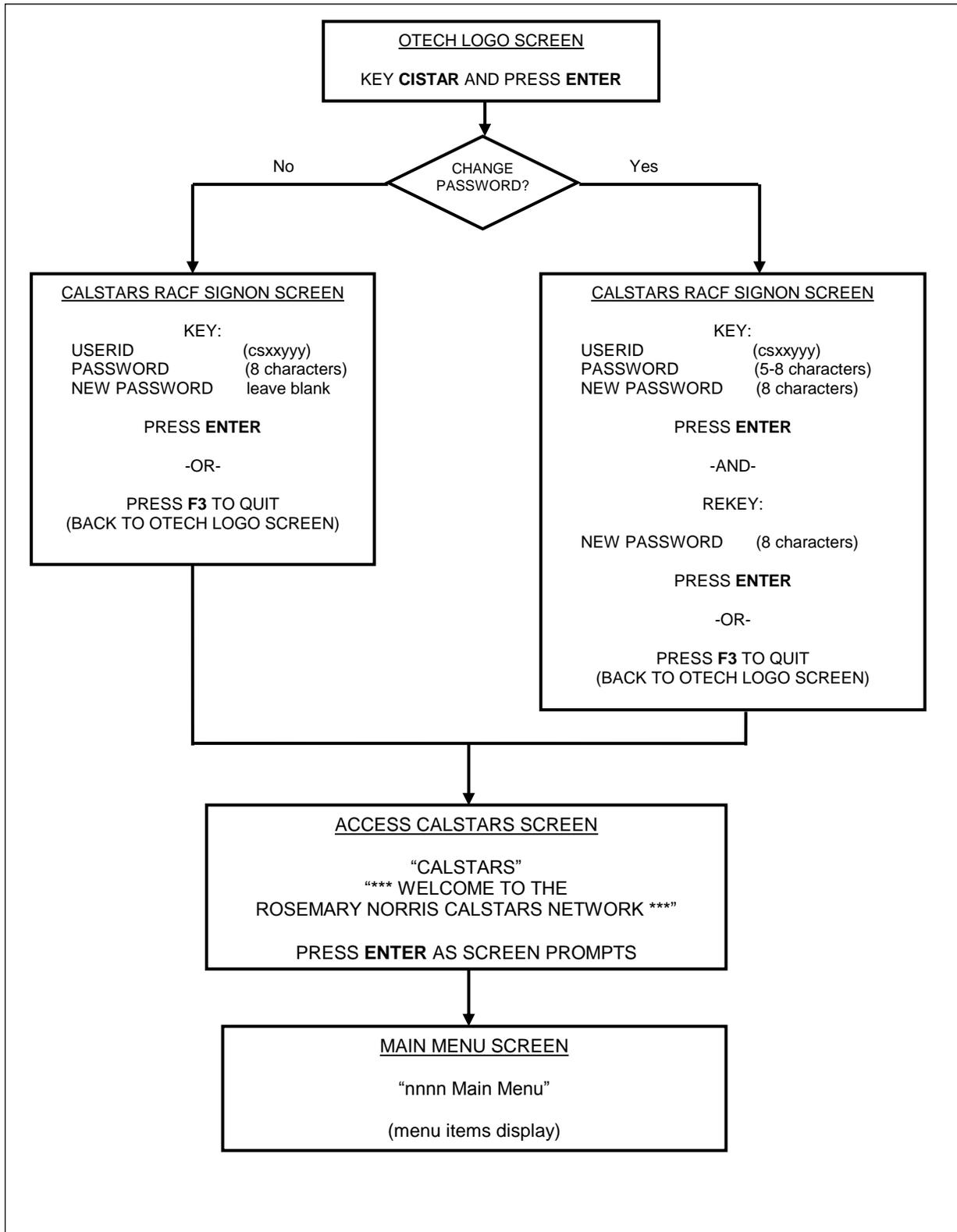
      000000      TTTTTTTTTT      EEEEEEEEEEE      CCCCCC      HHH      HHH
0000000000      TTTTTTTTTT      EEEEEEEEEEE      CCCCCCCCCC      HHH      HHH
0000      0000      TTT      EEE      CCCC      CCC      HHH      HHH
0000      0000      TTT      EEE      CCC      HHH      HHH
0000      0000      TTT      EEEEEEE      CCC      HHHHHHHHHHH
0000      0000      TTT      EEE      CCC      HHH      HHH
0000      0000      TTT      EEE      CCCC      CCC      HHH      HHH
0000000000      TTT      EEEEEEEEEEE      CCCCCCCCCC      HHH      HHH
000000      TTT      EEEEEEEEEEE      CCCCCC      HHH      HHH

UNAUTHORIZED ACCESS TO ANY STATE OF CALIFORNIA COMPUTING SYSTEM CONTAINING US
GOVERNMENT OR STATE OF CALIFORNIA INFORMATION IS A CRIMINAL VIOLATION OF PENAL
CODE SECTION 502 AND/OR APPLICABLE FEDERAL LAW AND IS SUBJECT TO CIVIL AND
CRIMINAL SANCTIONS. ACCESSING ANY SYSTEM WHILE EXCEEDING ONES AUTHORIZATION OR
IN WAYS NOT INTENDED BY THE STATE OF CALIFORNIA SHALL BE SUBJECT TO DISCIPLINARY
ACTION, PROSECUTION OR BOTH. USERS SHALL HAVE NO EXPECTATION OF PRIVACY.

====> cistar

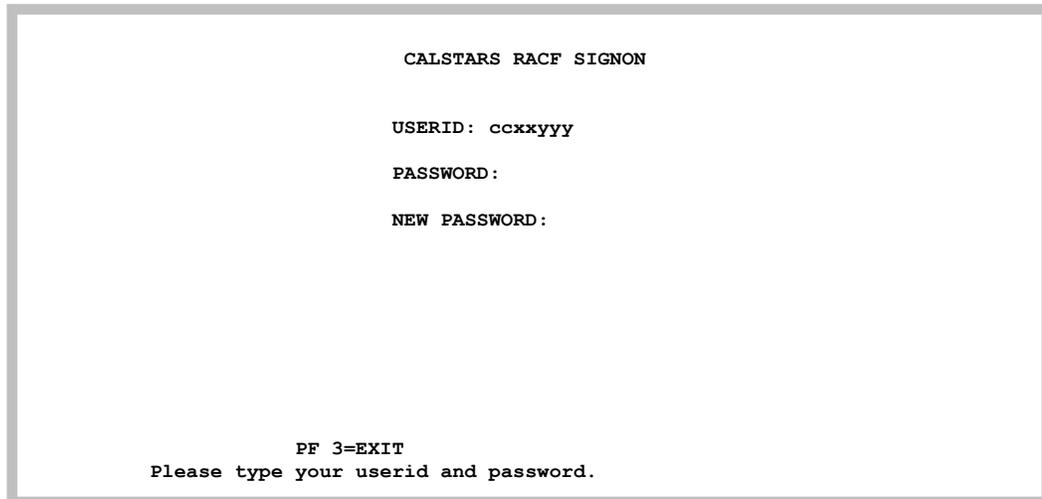
```

EXHIBIT VI-1
CALSTARS SIGN-ON PROCEDURE



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

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



```

CALSTARS RACF SIGNON

USERID: ccxyyy

PASSWORD:

NEW PASSWORD:

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

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

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

```

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

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

                                N E E D  H E L P ?

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

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

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

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

```

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

Changing A Password

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

New USERID or Reset Password: The temporary password 12345, is assigned when a new USERID is established or when the Agency Security Officer has reset an existing user's password. This password must be changed the first time it is used. If CALSTARS is not accessed within 90 days of the establishment of a new USERID or the resetting of a user's password, the USERID will be revoked. If this occurs, the CALSTARS Agency Security Officer must reset the user's password to get the USERID re-established.

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

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

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

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

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

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

```

                                CALSTARS RACF SIGNON

                                USERID: ccxxyyy
                                PASSWORD:
                                NEW PASSWORD:

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

```

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

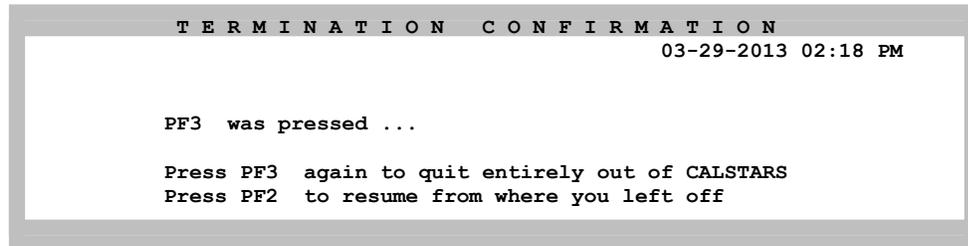
'Your new password is invalid. Please retype.'

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

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

Log-Off Procedures

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



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

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

Proper log-off is indicated when the OTECH logo screen returns.

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

- V – Browse A Report** – Press the **F3** key to return to the **G.4** - Printer Control Options screen. Then press **F3** again to initiate the exit from CALSTARS.
- X – Display A Printer/Report Queue** – Press the **F3** key to return to the **G.4** - Printer Control Options screen. Then press **F3** again to initiate the exit from CALSTARS.
- All Others** – Press **F12** - Main Menu to exit any other ROPES function. Then press **F3** again to initiate the exit from CALSTARS.

SYSTEM NAVIGATION

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

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

Types of Screens

CALSTARS uses the following types of standardized screens:

MENUS

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

```

A  9990 Main Menu                                03-29-2013  08:58 AM

B          CODE          AVAILABLE OPTIONS

          A      Check Issuance and Processing =>
          B      Claim Schedule Processing =>
          C      Financial Transaction Entry =>
          D      News =>
          E      Reconciliations =>
          F      Monthly and Special Processes =>
          G      Report/File Copy and Printer Request =>
          H      File Inquiry =>
          I      Table Maintenance/Inquiry =>
          J      Timesheet Entry and Adjustment =>

C          Code:  _

D  Command: _____

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

F  The News was last updated on 03-29-2013 at 7:00 AM.  Enter 'D.1' to view.

```

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

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

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

Date and Time - Displays the current date and time.

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

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

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

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

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

A	9990 C.1.2: Encumbrance	03-29-2013 01:21 PM
Function: A (A=Add, C=Change, D=Delete, H=Hold, N=New Batch, O=Override) (P=Print Batch, R=Release, V=View, X=Add Addl Trans)		
DATE	: 08 19 2000	BATCH TYPE: __
EDIT IND	: _	BATCH NUMBER : ____
		FM : __

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

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

ENTRY SCREENS

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

```

9990 Encumbrance Transaction Entry                                03-29-2013 01:42 PM

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

BATCH:
DATE       : 03 29 2013      TYPE       : 09           NUMBER: 111       FM: 09
SCHEDULE:                   SEQ NBR:    1           MODE  : NO EDIT

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

Command: | _____
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Retrn Quit  GetDF BHdr  Lbtch Bkwrdr Frwrdr Clear Force Dfalt Main
    
```

HELP LIST

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

```

9990 Encumbrance Transaction Entry                                03-29-2013 01:37 PM

PCA Search
FFY/PCA: _____ or Title: _____

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

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

LIST OF RECORDS

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

```

9990 List of Transactions: Screen 1                                03-29-2013 03:44 PM
                                                                MORE=>
BATCH: DATE: 03 29 2013 TYPE: 11 NBR: 111 FM: 10 STATUS: H CLM SCH #:
Function: (A=Add Addl Trans, P=Print Batch, S=Search) Go To Seq Nbr:
Enter under F below: (C=Change, D=Delete, I=Insert, V=View)

```

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

```

*** End of Data ***

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

```

Moving to the Next Menu or Screen

There are various methods for moving between screens:

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

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

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

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

Navigating Within a Screen

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

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

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

SYSTEM ACCESS AND NAVIGATION PROBLEMS

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

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

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

System Processing and Reporting Problems

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

Equipment and Communication Problems

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

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