

VI System Access, Screens and Navigation

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

CALSTARS SYSTEM ACCESS

The CALSTARS system is maintained at the Health and Human Services Data Center (HHSDC), formerly known as the Health and Welfare Data Center (HWDC). Access to CALSTARS at HHSDC may be accomplished through:

- ✦ Terminals connected directly to HHSDC via a controller and modem; or
- ✦ 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 HHSDC access is through a "gateway" from another internal system or through another data processing center. However, once at the CALSTARS sign-on screen, the sign-on procedure becomes the same regardless of the access method.

Security Features

Each CALSTARS agency is required to designate an individual within the organization as the CALSTARS Agency Security Officer. The CALSTARS Agency Security Officer is responsible for establishing and controlling access to the CALSTARS system by agency staff. The CALSTARS Agency Security Officer establishes and controls access by submitting CALSTARS Form 95, CALSTARS Security Form, to the CALSTARS Security Administrator at the Department of Finance.

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

Sign-On Procedures

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

Signing on to CALSTARS requires two items of information: *User ID* and *Password*. The User ID is established using the CALSTARS Form 95. The Password is established by the individual using the signon ID.

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 in the event of fraudulent activity, he or she should sign-off the system when leaving a terminal or PC so that the next individual must log on to CALSTARS using his/her own User ID and Password.

When the HHSDC is accessed, the old HWDC logo is displayed on the screen. From this screen, key **cistar** at the cursor, as shown below, and press **Enter**.

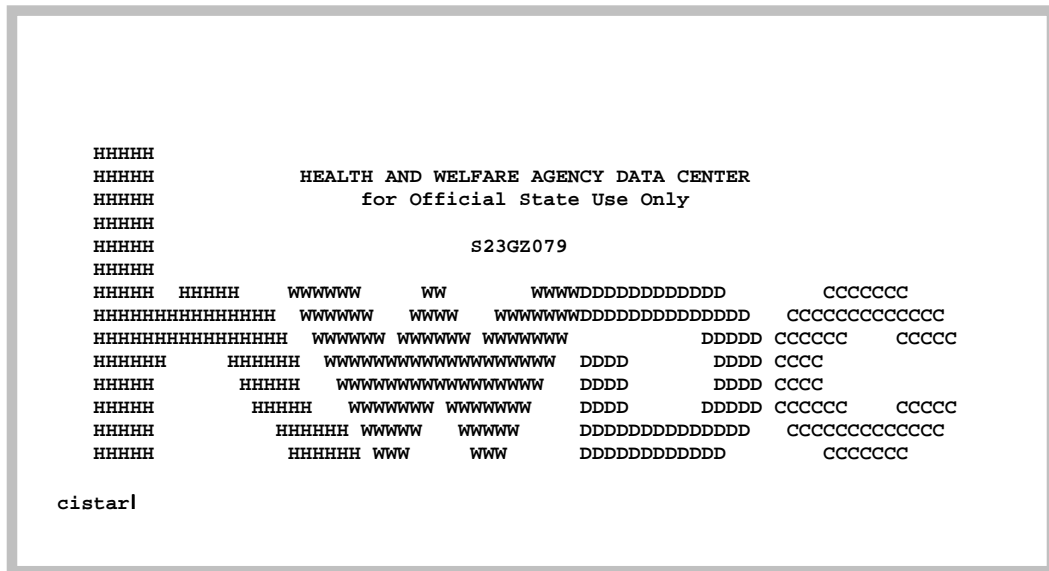
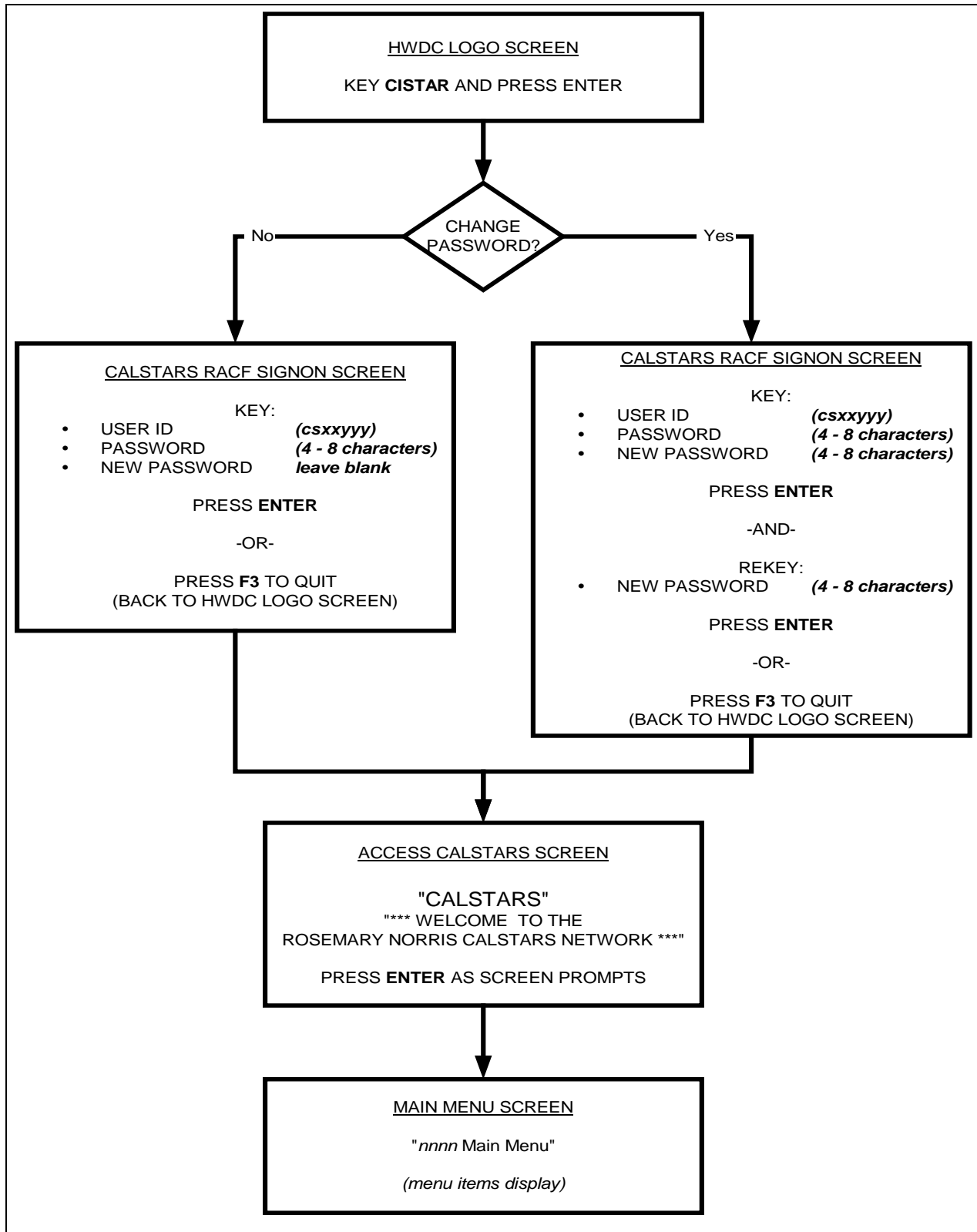


EXHIBIT VI-1
CALSTARS SIGN-ON PROCEDURE



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

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

```

CALSTARS RACF SIGNON

USERID: ccxxxxxx
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 DEPRESS "ENTER" KEY TO DISPLAY CALSTARS MAIN MENU' at the bottom of the screen:

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

```

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 DEPRESS "ENTER" KEY TO DISPLAY CALSTARS MAIN MENU

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

Changing A Password

The CALSTARS signon must be changed for two circumstances: **a new User ID** is established or an existing **password is near expiration**:

New User ID: The *temporary* password for each new User ID must be changed the first time the User ID is used. The Password, **temp**, must be entered as the initial signon password and a 'New Password' entered to protect the actual (*secret*) password for the person to whom the User ID is assigned. Also, if the new User ID is not used (CALSTARS is not accessed) within 90 days of being established, the User ID is revoked. Then the CALSTARS Agency Security Officer must be contacted to get the User ID re-established.

Password Expiration (or personal option): The password for each unique User ID must be changed within 90 days of the last time the password was changed. When nearing the expiration date, the message 'Your password will expire in *nn* days. Press ENTER to continue.' will appear on the screen. If the password is not changed within 90 days, the User ID is automatically set to "inactive" by RACF security. To re-activate the User ID signon, the agency Security Officer must contact the CALSTARS Security Administrator and request re-activation. Following

re-activation of the User ID, the password must be changed on the next sign-on attempt (using the Password **temp** and then moving the cursor to the 'New Password' field) and entering a new (*secret*) password.

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

- ❖ Determine the correct User ID format, or
- ❖ To re-establish a revoked User ID or
- ❖ Enter a new password if an invalid password(s) entry was attempted three times.

The following restrictions apply when changing a password:

- ❖ The password may be changed no more than once per day; and
- ❖ Previously used password(s) cannot be reused.

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

```

                                     CALSTARS RACF SIGNON

                                     USERID: ccxyyy
                                     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), the following message appears at the bottom of the screen:

'Your new password is invalid. Please retype.'

The cursor is positioned at the NEW PASSWORD for entry of the correct verifying password.

System acceptance of the new password is indicated by the display of the CALSTARS logo screen shown in the *Sign-on Procedure* section above.

If an attempt is made to *reuse* a prior or current password, the following message is displayed:

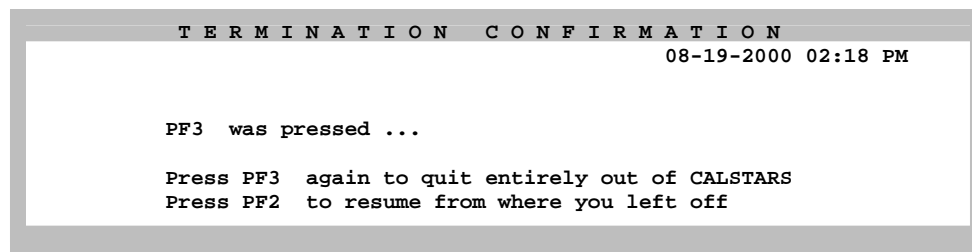
'Your new password is invalid. Please retype. '

A different password must be keyed and verified.

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

Sign-Off Procedures

To sign-off of CALSTARS, press the **F3** key from any screen with the **F3** key labeled "Quit", except ROPES (Printer Request Screen, Functions V-Browse and X-Display Printer/Report Queue). The Termination Confirmation pop-up window is displayed when **F3** is pressed, as shown below.



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

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

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

Exit ROPES Procedure: Because ROPES is a product external to CALSTARS, special commands are required to exit some ROPES functions prior to exiting

CALSTARS. Use the following procedure to exit from the Command **G.4** - Printer Request Screen functions listed below. From:

V - Browse A Report – Press the **F3** key to return to the ROPES Menu. Then press **F3** again to initiate the exit from CALSTARS.

X – Display A Printer/Report Queue – Key **prin** over the **ROPO** displayed at the bottom of the screen and press **Enter** to return to the ROPES Menu. Then press **F3** again to initiate the exit from CALSTARS.

All Others – Press **F12** - Main Menu to exit any other ROPES function prior to exiting 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.

On May 8, 2000, CALSTARS began a phased implementation of a new menu structure and redesigned screens. Until implementation is complete, some menu selections will link to redesigned screens while others will link to the old screen formats. The following information refers to the new menu structure and redesigned screens. Screens that have not been redesigned will work as they did before the beginning of the phased implementation.

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

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

```

A  9990  Main Menu                                08-19-2000  08:58 AM

B          CODE          AVAILABLE OPTIONS

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

C          Code: 1_

D  Command: _____

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

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

```

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

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

Screen Number and Title - All menus have a screen number and title (except the Main Menu). 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 - 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 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 'stringing' the codes together (e.g., **C.1.2**) access is available to a new batch header to enter an encumbrance batch. When accessed, the code and title appears in Segment A as shown below.

```

A      9990 C.1.2: Encumbrance                                08-19-2000 01:21 PM

Function: A (A=Add, C=Change, D=Delete, H=Hold, N=New Batch, O=Override)
         (P=Print Batch, R=Release, V=View, X=Add Addl Trans)

DATE      : 08 19 2000      BATCH TYPE:  ___      BATCH NUMBER :  ___
EDIT IND  :  _              FM          :  _
    
```

E - PF Key Legend - Describes 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 each section of this manual for the particular accounting function being performed by the screen.

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

Lists

These screens contain a list of table entries that may be viewed and selected for data insertion into a transaction. These include Vendor, PCA, Index, Project/WP, etc.

```

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

PCA Information Search by FFY/PCA or Title

FFY/PCA: | ___  ___  or Title: _____

  FFY   PCA   TITLE                                     TYPE A/I
  ----  ----  -----
1998   73200  COMMUNITY SCHOLARSHIP PROGRAM GRANT-WP93      1   0
1998   73204  COMMUNITY SCHOLARSHIP PROGRAM GRANT-WP94      1   0
1998   80844  FED RECPTS-STATE LOAN REPAY SCO 44 ACCT        1   0
1998   89100  FED RECPTS: STATE LOAN 139/94-WP93             1   0
1998   89104  FED RECPTS: STATE LOAN 139/94-WP94             1   0
1998   89200  FEDERAL RECEIPTS-EACH/PCH WP93                 1   0
1998   89204  FEDERAL RECEIPTS-EACH/PCH WP94                 1   0
1998   89300  FED RECEIPTS-COMM SCHOLARSHIP GRANT WP93       1   0
1998   89304  FED RECEIPTS-COMM SCHOLARSHIP GRANT WP94       1   0
1998   80890  FEDERAL RECEIPTS-ST LOAN REPAYMENT             1   0

To select the desired PCA #, place the cursor on that row and Enter
Enter-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF1
Retrn                                     Bkwrđ Frwrđ
    
```

ENTRY SCREENS

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

```

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

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

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

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

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

LIST OF RECORDS SCREENS

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

```

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

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

F   SEQ TC  FFY  CURRENT          OBJECT AO          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 Bkwrđ Frwrđ      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 - This field 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 screens that contain a list of options or records, an option or record may be selected and viewed by moving the cursor (using directional keys or a mouse) and pressing **Enter**.

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 Entry screen allows skipping over unused or default data settings by using 'Default settings' (Discussed in Volume 1, Chapter IX, Online Financial Transaction Entry.) 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, and
- ✪ Problems involving equipment and communicating with CALSTARS.

CALSTARS system processing and reporting problems usually effect all CALSTARS agencies. When such problems are encountered agencies are advised of the problem and the corrective action being taken through the on-line CALSTARS News screen (Command **D.1**). If you identify a potential system problem for which a NEWS item has not been issued, the problem should be reported *immediately* to the CALSTARS Hotline at (916) 327-0100, CNET 467-0100.

Identifying the cause of and resolving equipment and communication problems may be different for each agency depending on the agency's local environment and method of accessing CALSTARS. CALSTARS is maintained and the data is processed at HHSDC. There are a variety of equipment and communication configurations used by agencies to access CALSTARS at HHSDC. These include terminals connected directly to HHSDC, terminals connected to the Teale Data Center, and stand-alone or LAN/WAN-based PC's accessing either data center (HHSDC or Teale).

CALSTARS staff work closely with HHSDC, Teale and agency staff to resolve any equipment or communication problems that may be encountered. However, some problems may reside within the agency's PC and/or LAN/WAN environment. Agencies' Information Services staff must resolve these problems.

Production Control Assistance

The CALSTARS Production Control Unit provides assistance to agencies to resolve equipment or communication problems. Production Control may be contacted at (916) 323-7541, CNET 473-7541.

The Production Control telephone number is displayed on the CALSTARS Welcome Screen and by pressing **F1-Help** to see the Help screen from the Main Menu.

Hotline Assistance

The Hotline staff assists with accounting and report analysis questions. They may be reached at (916) 327-0100, CNET 467-0100

The Hotline telephone number is displayed on the CALSTARS Welcome Screen and by pressing **F1-Help** to see the Help screen from the Main Menu.