

PAYSERV NAVIGATION

Overview

The online flexibility of PayServ enables users to choose from a variety of methods to access information within the system. Each user will develop his or her preferences for what method works best.

Objectives

After completing this chapter, participants will be able to:

- Navigate PayServ menus and pages
- Identify navigational shortcuts
- Use hyperlinks to update information
- Access and change data through the Collapsible Data section
- View history rows for employee data



OBJECTIVE:

- Introduce fundamental PayServ structure and terminology.
- Familiarize students with basic PayServ navigation.

TALKING/KEY POINTS:

- ☐ Sign-on to PayServ.
 - Prompts walk the users through the log-in process. The class will log into the system as a group.
 - The same Single Sign-On is also used for PayServ.
 - Users can use this same ID to login to the training database at their workstations. Password changes monthly.
 - Users should contact their system administrator if they forget their personal username/password upon login at their actual workstations.
- ☐ Introduce the menu structure and terminology.
 - The *Home* page displays two expandable menus: **Favorites** and **Main Menu**.
 - The Favorites menu includes **Recently Used**, a list of recently accessed pages, and **My Favorites**, where users can create and save page links for future use.
 - Differentiate between menu groups (groups of business processes, organized functionally) and folders (specific business processes).

Accessing and Navigating the PayServ Application

When the web browser is first opened, there are a number of prompts to guide the user to the PayServ log-in screen. An example of the log-in page is shown below.

Enter the **User Name** and **Password** then click the **OK** button.

The screenshot shows the login page for the New York State Office of the State Comptroller. At the top, a blue banner reads "New York State Comptroller Thomas P. DiNapoli" and "Office of the State Comptroller" with the state seal. The main content area is white and features the heading "Welcome to the OSC e-Government Website" in red. Below this is the section "Authorized Users Only" with a disclaimer: "This site is for official NYS business only. Unauthorized use or use for purposes other than official NYS business may result in the revocation of access privileges and may be a violation of law." To the left is a portrait of Thomas P. DiNapoli. To the right is a login form with fields for "User Name" and "Password", and "Clear" and "OK" buttons. Below the form, the date and time "1:34:41 Tuesday, May 13, 2014" are displayed. At the bottom center is a red "Entrust" security seal.



OBJECTIVE:

- Review the menu group, folders and content links in PayServ.

TALKING/KEY POINTS:

- Menu is the start of navigation. Each menu expands to folders and content links. Expand each section for the class as you discuss it.
- Favorites - contains **Recently Used**, a list of recently accessed pages, and **My Favorites**, where users can create and save page links for future use.
- Main Menu - includes:
 - PayServ Custom – includes **Employee History Info Summary** – access limited to employees at user's agency. **Statewide Job Summary** – provides access to information for all NYS employees. **Other Folders** – May be available based on your security access.
 - Workforce Administration - includes folders for: **Personal Information** (name & address), **Job Information** (salaries, employee status, hire, rehire, add concurrent job, contract pay and certification), and **Administer Job Change Requests** (Histories, Job Summary, Job Action Request). Stress that all salary information has to be approved prior to being loaded to the Job Data page, and that not all approval is done here.
 - Benefits - contains folders related to Retirement- **TIAA/CREF** (for SUNY and CUNY), **Savings Plans** (view information for Deferred Comp), **Savings Management** (view catch up information for Deferred Comp), and **Retirement Plans** (enroll employee in retirement tier based on election date).
 - Payroll for North America – contains multiple folders: **Employee Pay Data USA** (Additional Pay, Time Entry, Taxes, Deductions, Direct Deposit), **Payroll Processing USA** (review paycheck information), **Retroactive Payroll** (view retro pay calculation results), **Payroll Distribution – Commitment Accounting USA** (view account codes, earnings and pool ids for fiscal years), **Periodic Payroll Events USA** (salary withholding, workers comp, check year to date, earnings, deductions, taxes etc.), and **U. S. Annual Processing** (W-2 reporting information and W-2 reprints).
 - Organizational Development - contains folders defining positions within your organization. We will discuss in greater detail in a few minutes.
 - Workforce Monitoring - contains folders for Workers' Compensation information, a specialized area of Payroll, not covered in this class.
 - Set Up HRMS – contains **Foundation Tables**, including the Job Code Table (the Job Code is a 6 digit number that is system assigned and correlates with the 7 digit title code created by Civil Service. Other tables located here are for OSC use only. The **Product Related** folder is where the Account Code Table, Department Budget Table and Position Pool Tables are located.

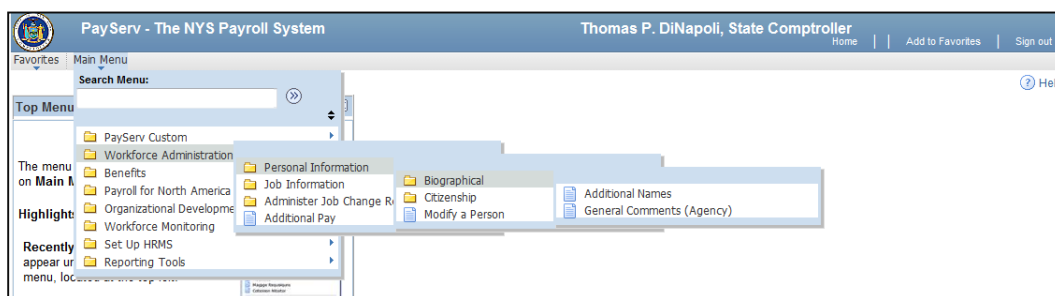
Main Menu, Folders, and Content Links

PayServ functionality is sorted into menu groups, folders, and content links. The Main Menu lists the menu groups to which a user is granted access. Menu groups represent functional categories organized into folders and content links. Folders contain content links leading to search pages.

- Favorites - contains **Recently Used**, a list of recently accessed pages, and **My Favorites**, where users can create and save page links for future use.
- Main Menu - contains:
 - PayServ Custom - content links for review of the NYS employee information contained in PayServ.
 - Workforce Administration - folders related to an employee's Personal, Job, and Contract information.
 - Benefits - folders for the various Retirement and Savings plans.
 - Payroll for North America - payroll information on employees, such as Additional Pay, Time Entry, Taxes, and Direct Deposit.
 - Organizational Development - folders defining positions within an organization.
 - Workforce Monitoring - folders for Workers' Compensation information.
 - Set Up HRMS - folders for Commitment Accounting and the Job Code table.

Content links are windows into the data tables. In the training database, most of the applications are accessed through content links. The menu items are associated with folders, which can contain a single content link or multiple content links.

To access employee data, select the *Modify a Person* content link.





OBJECTIVE:

- Introduce the data retrieval process and search dialog/list box terminology.

TALKING/KEY POINTS:

- ☐ Lead students through the use of the search dialog/list box using *Modify a Person*.
- ☐ Use employee Hamilton Smithfield (Empl ID #N09001146).
- ☐ Search Page:
 - Appears on screen as a result of selecting a component or prompt.
 - The search topic name is displayed at the top of the page to identify where the data is being pulled from.
 - A user can choose Basic Search or Advanced Search, which offers more search fields.
 - Identify rows to retrieve from database: **Empl ID** field, **Name** field or **Last Name** field.
 - Use a partial name search in the example, e.g., “SMI” for Smithfield.
 - If only the first name is known, a search beginning with “%” and the first name will return all employees with that name. NOTE: this can also be used with last name.
 - Explain again that they have statewide access in this environment but will only have access to employees within their agency at their workstations.
- ☐ Display the “begins with” dropdown menu.
- ☐ Edit boxes equipped with a prompt button, such as the **Department SetID** field on the search dialog page, provide a list of data choices for that field. The term “prompt table” reflects a function of the table. Prompt tables store commonly used values. During data entry a prompt table can:
 - Provide an operator with a list of valid values for a field
 - Restrict the values entered into a field to those values residing on the prompt table

Retrieving Data through the Search Dialog Page

A search dialog box displays when a component or prompt is selected.

Advanced Search

The Advanced Search option allows any combination of fields.

The screenshot shows the 'Personal Information' search dialog in the PayServ system. The title bar reads 'PayServ - The NYS Payroll System' and 'Thomas P. DiNapoli, State Comptroller'. The breadcrumb trail is 'Favorites | Main Menu > Workforce Administration > Personal Information > Modify a Person'. The page includes links for 'New Window', 'Help', and 'http'. The main heading is 'Personal Information' with a sub-instruction: 'Enter any information you have and click Search. Leave fields blank for a list of all values.' Below this is a 'Find an Existing Value' button. The 'Search Criteria' section is expanded, showing a list of fields: 'Empl ID:', 'Name:', 'Last Name:', 'Second Last Name:', 'Alternate Character Name:', and 'Middle Name:'. Each field has a 'begins with' dropdown menu and an adjacent text input box. There is an 'Include History' checkbox. At the bottom are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

Basic Search

The Basic Search allows you to search on any single search key or alternate search key.

The screenshot shows the 'Personal Information' search dialog in the PayServ system, but with the 'Basic Search' option selected. The title bar and breadcrumb trail are identical to the previous screenshot. The 'Search Criteria' section is collapsed. The 'Search by:' field is set to 'Empl ID' with a dropdown arrow, followed by a 'begins with' dropdown and a text input box. There is an 'Include History' checkbox. At the bottom are buttons for 'Search' and 'Advanced Search'.



OBJECTIVE:

- Discuss how values are returned and displayed when searching in PayServ.

TALKING/KEY POINTS:

- ☐ Hyperlinks can represent an internal link to another PayServ page or to an employee data page in a search.
- ☐ **Include History** checkbox – this should always be clicked to see all rows of the record.
- ☐ The Search Results list displays
- ☐ Use the **Clear** button to clear text out of the search fields and results.
- ☐ Have the students retrieve the employee's record without the Include History checkbox and show them you can change the access when you are on the page.
- ☐ The quickest way to search is to enter the Empl ID.
- ☐ Searches must include information in at least one field. Do not click the **Search** button if all fields are blank.

All searches must include information in at least one field. When a user enters incomplete information in the search fields of a dialog box, clicking the **Search** button will result in a **Search Results** list, displaying all rows in the table that match the partial entry in the dialog box.

- Enter SMI in the **Last Name** field and click the **Search** button.

The screenshot shows the 'PayServ - The NYS Payroll System' interface. The user is logged in as 'Thomas P. DiNapoli, State Comptroller'. The breadcrumb trail is: Favorites | Main Menu > Workforce Administration > Personal Information > Modify a Person. The page title is 'Personal Information'. Below the title, it says 'Enter any information you have and click Search. Leave fields blank for a list of all values.' There is a 'Find an Existing Value' button. The 'Search Criteria' section has the following fields: Empl ID (dropdown: begins with), Name (dropdown: begins with), Last Name (dropdown: begins with, value: SMI), Second Last Name (dropdown: begins with), Alternate Character Name (dropdown: begins with), and Middle Name (dropdown: begins with). There is an 'Include History' checkbox. At the bottom, there are buttons for 'Search', 'Clear', 'Basic Search', and 'Save Search Criteria'.

- Scroll through the search results.
- Retrieve Hamilton Smithfield's employee record to view his *Biographical Details* or *Contact Information* pages by clicking the appropriate hyperlink.



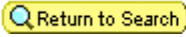




Searches can be done using a partial name, partial Empl ID or if only the first name is known, use % and then the first name in the Name field. The fastest search uses the entire Empl ID.



OBJECTIVE:

- Introduce the page layout, elements and navigational tips.

TALKING/KEY POINTS:

- ☐ To highlight a whole field when the cursor is at the beginning of the line, use **Shift+End**. If the cursor is at the end of the line use **Shift+Home** keys.
- ☐ Tabbing is used to proceed from field to field; **Shift + Tab** goes in the reverse order.
- ☐ Remind the students that the tabs proceed to all fields, such as calendar and prompt fields, not just data fields.
- ☐ **Prompting** is used to select from a list of valid values. Prompting displays another Search page to retrieve a list of values.
- ☐    May not appear on a page if there were no other values in your search list box or if you're adding a value to the system.
- ☐   Each page defaults to Update/Display.

Viewing Records

Tabs can be used to quickly navigate through the pages and fields associated with each content link. Access keys can also be used for navigation.

PayServ - The NYS Payroll System Thomas P. DiNapoli, State Comptroller

Home | Add to Favorites | Sign out

Favorites | Main Menu > Workforce Administration > Personal Information > Modify a Person

New Window ? Help http

Biographical Details | Contact Information | Regional

SMITHFIELD, HAMILTON Person ID: N09001146

Name Find | View All First 1 of 1 Last

Effective Date: 06/25/1998

Format Type: English

Display Name: HAMILTON SMITHFIELD View Name

Biographic Information

Date of Birth: 01/01/1900 113 Years 6 Months

Date of Death:

Birth Country:

Birth Location:

FAS Code:

Prior SSN First 1 of 1 Last

☐ New York Retiree Indicator

☐ Waive Data Protection

Biographical History Find | View All First 1 of 1 Last

*Effective Date: 06/25/1998

*Gender: Unknown

*Highest Education Level: A-Not Indicated

*Marital Status: Single As of:

Language Code:

Alternate ID: N01007567

☐ Full-Time Student

National ID Personalize | Find | View All First 1 of 1 Last

Country	National ID Type	National ID	Primary ID
USA	Social Security Number	105-00-1146	<input checked="" type="checkbox"/>

Save Return to Search Previous in List Next in List Previous tab Next tab Refresh Update/Display Include History

Biographical Details | Contact Information | Regional




Exit a page by clicking the **Return to Search** button. Before leaving the page the system will prompt the user to **Save** or **Cancel** any changes made to date.



OBJECTIVE:



- Review inserting and deleting rows.

TALKING /KEY POINTS:

- ☐ The instructor should save this activity, then add a future-dated row and save.
- ☐ When information is saved, *Saving* will display in the upper right-hand corner, and will be replaced by *Saved* when the data is saved. These messages do not remain on the page.
- ☐ **Scroll Areas** represent a grouping of multiple fields of data. Scroll areas provide push buttons and hyperlinks in navigation bars, enabling the user to scroll through multiple rows of data.
 - **First** means the most recent row, and **Last** is the oldest. Each time a new row is added it is put at the top of the table, becoming the new **First** row of data.
 - The default scroll area contains a data navigation bar with navigation buttons to move between rows and scroll action buttons such as a [View All](#) hyperlink.
 - Inside the scroll area are action buttons  on each row of data that enable the user to insert or delete rows.
 - The number of rows retrieved for a record, the option to view all rows retrieved, or to view a specific number of rows (for example, **View 7** at a time for some inquiry pages instead of **View First**) may be available on a page.

Inserting and Deleting Data Within a Record

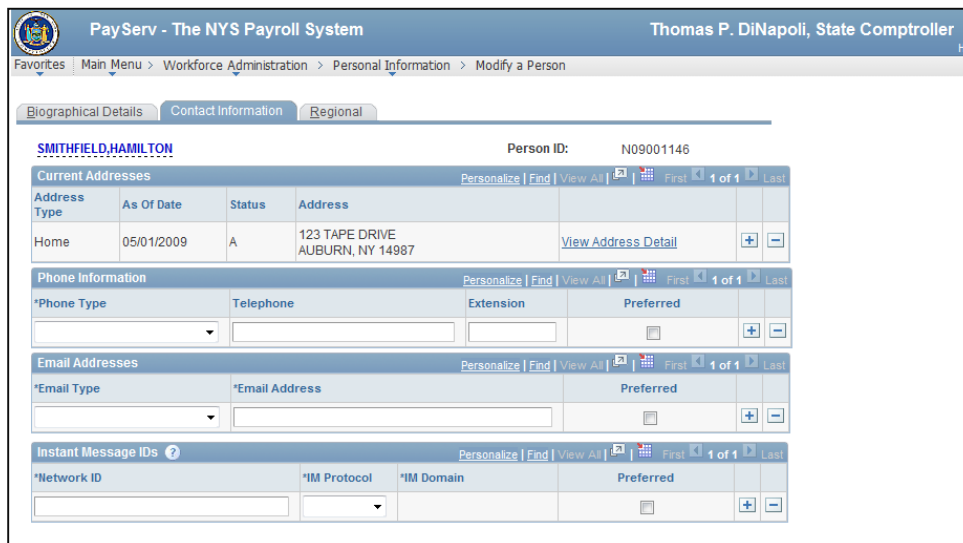


On various pages throughout the system, users have the ability to insert rows of data to update all applicable values and details. In order to update this information on a page, you will use the **Insert**  and **Delete**  action buttons. These buttons are commonly associated with scroll areas.

The header section of the scroll area displays a navigation bar to access hyperlinks for viewing a previous, next, top or bottom row. The navigation bar enables the user to scroll through multiple rows of data or view all rows at one time. Scroll areas are typically grouped together by a frame and a set of controls.


Activity: Change the employee's address.

- Navigate to: *Workforce Administration > Personal Information > Modify a Person.*
- Click the *Contact Information* tab.



- Select View Address Detail to open the *Address History* page.



- Insert a new row. 



OBJECTIVE:

- Continue review of inserting and deleting rows.

TALKING /KEY POINTS:

- ☐ Address History – Note the effective date will default to today's date.
- ☐ Change the **Effective Date** and select Add Address hyperlink.
- ☐ Edit Address - Enter address information and select **OK**.
- ☐ Upon selecting **OK** on *Edit Address* the user is returned to *Address History*. Verify that the information is correct and select **OK** to be returned to *Contact Information*.
- ☐ **Save** the transaction.

- Change the defaulted **Effective Date**.

Address History

Address Type: Home

Address History Find First 1-2 of 2 Last

*Effective Date:	07/25/2013	Address:	123 TAPE DRIVE AUBURN, NY 14987
Country:	USA		
*Status:	A		
Add Address			

Effective Date:	05/01/2009	Address:	123 TAPE DRIVE AUBURN, NY 14987
Country:	USA		
Status:	A		

OK Cancel Refresh

- Click the [Add Address](#) hyperlink.

Edit Address

Country: United States

Address 1: 123 TAPE DRIVE

Address 2:

City: AUBURN State: NY New York

Postal: 14987

County:

OK Cancel

- Change address and select **OK**.
- Click **OK** to return to *Address History*.
- Verify the updated information and click **OK** to return to *Contact Information*.

Biographical Details **Contact Information** Regional

SMITHFIELD, HAMILTON Person ID: N01000148

Current Addresses Personalize Find View All First 1 of 1 Last

Address Type	As Of Date	Status	Address	
Home	01/17/2013	A	465 Great Tree Lane AUBURN, NY 14987	Edit/View Address Detail + -

Phone Information Personalize Find First 1 of 1 Last

*Phone Type	Telephone	Extension	Preferred	
				+ -

Email Addresses Personalize Find First 1 of 1 Last

*Email Type	*Email Address	Preferred	
			+ -

Save Return to Search Previous tab Next tab Refresh

[Biographical Details](#) | [Contact Information](#) | [Regional](#)

- **Save** the transaction.



OBJECTIVE:

- View Saving and Saved messages.

TALKING/KEY POINTS:

- ☐ Use **Hamilton Smithfield** (N09001146) for this activity. Remind the class that this is not a hands-on activity. The class should watch the overhead projection to view the *Saving* and *Saved* messages.
- ☐ The **Save** button in PayServ does not gray out when a page is saved.
- ☐ After the Save button is clicked, the *Saving* message will appear in the upper right corner.
- ☐ Once the data is saved, the *Saved* message will replace the *Saving* message in the upper right corner. The *Saved* message will only appear for a few seconds.
- ☐ If a page is exited without saving data, the system will prompt the user to save or cancel. There is no automatic cancellation without a prompt to save or cancel the data changes.

Viewing the Saving and Saved Messages

When the **Save** button is selected, a *Saving* message will appear in the upper right corner.

Person ID: N09001146

Current Addresses

Address Type	As Of Date	Status	Address	
Home	07/25/2013	A	4545 Main Street Albany, NY 12207	Edit/View Address Detail + -

Phone Information

*Phone Type	Telephone	Extension	Preferred	
				+ -

Email Addresses

*Email Type	*Email Address	Preferred	
			+ -

Instant Message IDs

*Network ID	*IM Protocol	*IM Domain	Preferred	
				+ -

Buttons: [Save](#) [Return to Search](#) [Previous in List](#) [Next in List](#) [Previous tab](#) [Next tab](#) [Refresh](#) [Update/Display](#) [Include History](#)

After the data is saved, the *Saving* message is replaced by a *Saved* message.

Person ID: N09001146

Current Addresses

Address Type	As Of Date	Status	Address	
Home	07/25/2013	A	4546 Main Street Albany, NY 12207	View Address Detail + -

Phone Information

*Phone Type	Telephone	Extension	Preferred	
				+ -

Email Addresses

*Email Type	*Email Address	Preferred	
			+ -

Instant Message IDs

*Network ID	*IM Protocol	*IM Domain	Preferred	
				+ -

Buttons: [New Window](#) [Help](#) [Saved](#)



OBJECTIVE:

- View History for an employee and review shortcuts to find data.

TALKING/KEY POINTS:

- ☐ **View History** and **View All** functions are available on many pages.
- ☐ Use the **View All** functionality with the *Additional Pay* page.
- ☐ The employee used in the example will have multiple Earnings Codes.
- ☐ Review scroll bars in PayServ.
- ☐ Demonstrate the *Additional Pay* page using Arthur Fonazarelli, Empl ID: N09001021.
- ☐ In most cases, a previously searched Empl ID will remain populated in the search field as the user moves around the system. To view a different employee record, the user should click the **Clear** button and enter the new search criteria.
- ☐ There are two ways to view Additional Pay – the page shown here is **view only**. Updating Additional Pay will be discussed later in the training.

View History



Using the menu *Workforce Administration*, select the content link *Additional Pay* and enter Empl ID: N09001021.

- Use the **First** or **Last** buttons, or the arrows, to see the employee's history one row at a time. Use **View All** to see one page of history for the employee.
- Use the **Find** link located on the bar above the **Earnings Code** field (data navigation bar) to find a specific row or Earnings Code. Click on **Find** and type IPF in the prompt box. The *Additional Pay* row for Inconvenience Pay – Full will appear.

Favorites | Main Menu > Workforce Administration > Additional Pay

Additional Pay

Create Additional Pay

FONAZARELLI,ARTHUR EMP ID: N09001021 Empl Record: 0

Additional Pay Find | View All First 1 of 5 Last

Earnings Code: BON **Description:** Bonus Find | View All First 1 of 1 Last

Effective Date: 03/31/2004 **Comments**

Payment Details Find | View All First 1 of 1 Last

Addl Seq Nbr: 1 **End Date:** 05/25/2005

Rate Code: **Reason:** Batch Insr

Annual Addl Earnings: 600.00 **Employee Work %:** 0.5000

Hours: **Hourly Rate:**

Goal Balance: \$600.00

Sep Check Nbr: **OT Eff Date:** 05/27/2004 ☐ Disable Direct Deposit

☒ OK to Pay **Action Date:** 06/10/2004 ☐ Prorate Additional Pay

Applies To Pay Periods

☒ First ☒ Second ☒ Third

Job Information

Save Return to Search



If there are multiple scroll areas on a page, each area will display a data navigation bar with the **First**, **Last** and **View All** links.



OBJECTIVE:

- Review the functionality of hyperlinks.

TALKING/KEY POINTS:

- ☐ Hyperlinks are used to navigate between pages. Two common examples are the hyperlinks used to enter *General Comments* and the links at the bottom of the *Job Data* pages to go to the *Employment Data* page.
- ☐ The specific functionality of some hyperlinks will be covered in later chapters.
- ☐ Demonstrate the link to *General Comments* from the *Job Data* page.
- ☐ The **Go To Row** push button opens a feature allowing users to navigate directly to a specific row by either date or row number. Entering a date will return the row with that date (if one exists) or the nearest previous dated row. This field is not available for users with View Only access.
- ☐ Clicking on some hyperlinks will open a new window. While multiple windows can be open simultaneously, users should get into the habit of opening a window only when it will be in use, as there is a 20 minute inactivity timeout out in PayServ.
- ☐ The user can view multiple windows on the same page by resizing the windows.

Hyperlinks and the “Go To Row” Feature



Navigate to: *Workforce Administration > Job Information > Job Data (Agency)* to access the *Job Data (Agency)* Search page. Enter Empl ID: N09001035.

Work Location: WILCOX, MORTON Employee Empl ID: N09001035 Empl Record: 0

Work Location Find First 1 of 1 Last

*Effective Date: 09/27/2012 Date Created: 10/12/2012 Go To Row

Effective Sequence: 0 *Action: Pay Rate Change

HR Status: Active *Reason: PAV Perf Adv

Payroll Status: Active Job Indicator: Primary Job

Position Number: 00157901 HIGHWAY MTC WORKER 1 Line Number: 62146

NYS Position: 00157901 HIGHWAY MTC WORKER 1

Position Entry Date: 04/23/2009

☐ Position Management Record [Comments](#)

Regulatory Region: USA United States

Company: NYS STATE OF NEW YORK

Business Unit: NYSPY New York State Payroll

Department: 17010 DOT Region 1

- Click on the [Comments](#) hyperlink to open the *General Comments* page for this employee.

General Comments Person ID: N09001035

General Comments Find View All First 1 of 1 Last

Comments By:

Comment Date: 07/25/2013 Sequence Nbr: 0 *Comment Category: Job Req/Ap

Department:

Comment:

- Click the **Go To Row** button to open a feature allowing users to navigate directly to a specific row by either date or row number.

Enter either a date or a row number

As of Date:

Row Number:

OK Cancel Refresh



OBJECTIVE:

- Review how to add My Favorites. This functionality is user-specific, and will be available to the user on any workstation.

TALKING/KEY POINTS:

- ☐ Up to this point, you've seen how to get around the system a little easier; now here are a few more ways to make data retrieval faster. Have students add a page and action to their My Favorites list.
- ☐ **Favorites:** (Menu item)
 - Like a bookmark.
 - Specific to a user.
 - Records the **Menu** and **Action** but not the Key.
 - Name can be modified to reflect a naming convention of user's choice.
 - Stays until deleted from My Favorites list.

Adding My Favorites



Add a page to your My Favorites list to facilitate quick access to a component or page. Navigate to: *Payroll for North America > Employee Pay Data USA > Additional Pay (Agency)*.

- Enter Empl ID N09001021 and click **Search** to open the *Additional Pay (Agency)* page.
- Select *My Favorites > Add to Favorites*

The screenshot shows the 'Create Additional Pay' form in a web application. The breadcrumb trail at the top reads: 'Favorites > Main Menu > Payroll for North America > Employee Pay Data USA > Additional Pay (Agency)'. The form is titled 'Additional Pay 1' and 'Create Additional Pay'. It displays employee information: 'FONAZARELLIARTHUR', 'EMP', 'ID: N09001021', and 'Empl Record: 0'. The 'Additional Pay' section shows 'Earnings Code: BON', 'Description: Bonus', and 'Effective Date: 03/31/2004'. The 'Payment Details' section includes fields for 'Addl Seq Nbr: 1', 'Rate Code', 'Annual Addl Earnings: 600.00', 'Hours', 'End Date', 'Reason', 'Employee W', 'Hourly Rate', 'Goal Balance', 'Sep Check Nbr', '*OT Eff Date: 05/27/2004', and 'Action Date: 06/10/2004'. There are checkboxes for 'OK to Pay' and 'Prorate Additional Pay'. The 'Applies To Pay Periods' section has checkboxes for 'First', 'Second', and 'Third'. At the bottom, there are buttons for 'Save', 'Return to Search', 'Update/Display', and 'Include History'. An 'Add to Favorites' dialog box is open in the foreground, prompting the user to 'Please Enter a Unique Description for this Favorite' with a text field containing 'Additional Pay (Agency)' and 'OK' and 'Cancel' buttons.

Add to Favorites will add the current open page by default. Users can modify the **Description** to match their preferred naming convention.

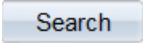
This is a close-up of the 'Add to Favorites' dialog box. It has a title bar with a close button. The text inside reads 'Add to Favorites' followed by 'Please Enter a Unique Description for this Favorite'. Below this is a text input field labeled '*Description' containing the text 'Additional Pay (Agency)'. At the bottom are two buttons: 'OK' and 'Cancel'.



OBJECTIVE

- Position Management Overview

TALKING/KEY POINTS:

- Direct students to Position Data (Agency) Main Menu>Organizational Development>Position Management>Maintain Positions/Budgets>Position Data (Agency).
- Enter **00408139** into the Position Number field and select . Explain that if you were looking for other specific position attributes other fields are available, however this is the quickest way to search.
- Position information is displayed with three tabs, **Description**, **Specific Information** and **Budget and Incumbents**.

Position Data (Agency)

View position information stored in PayServ.

Navigate to: Organizational Development>Position Management>Maintain Positions/Budgets>Position Data (Agency) Search page. Enter 00408139 into the **Position Number** field. Click **Search**.

Position Data (Agency)

Enter any information you have and click Search. Leave fields blank for a list of all values.

Find an Existing Value

▼ Search Criteria

Position Number: begins with ▼ 00408139

Description: begins with ▼

Position Status: = ▼

Department: begins with ▼

Job Code: begins with ▼

Line Number: begins with ▼

Bargaining Unit: begins with ▼

Pay Basis Code: begins with ▼

Salary Grade: begins with ▼

☐ Include History

Search

Clear

[Basic Search](#)
[Save Search Criteria](#)



OBJECTIVE:

- Position Management Overview (continued)

TALKING/KEY POINTS:

- Beginning with the first tab, Description, Position Information, Job Information, Work Location and Salary Plan Information are displayed.
- We will begin with the Description Tab Position Information section:
 - **Position Number:** For Classified Service, positions are created by Civil Service. Other agencies, such as the Office of Court Administration (OCA) and City University of New York (CUNY), create their own positions.
 - **Headcount Status: Vacant or Filled** - indicates if there is an incumbent in the position.
 - **Current Head Count:** Most positions have a 1 out of 1 headcount, meaning one full-time person per position. The position **can** be filled with part-time people as long as the total combined part-time percentage does not exceed 100%.
 - **Effective Date:** The date when something happened to the position – when it was created or changed.
 - **Status: Active or Inactive**
 - **Action Date:** The actual date a change was made to the position, otherwise known as the system date.
 - **Reason:** The reason used for the position change. If a change is made by the agency it will begin with a Z. Agencies that do not maintain their own positions have limited access, and can only change the **Effective Date, Line Number, Employee Type (Hourly to Exception Hourly and vice versa) and Position Pool ID.**
 - **Position Status:** Values include: **Abolished** (position no longer used), **Approved** (approved and useable) and **PR-50** (indicates a downgraded position or trainee).
 - **Status Date:** This date only changes when the Position Status is changed.
 - **Line Number:** Can be changed by the agency to keep group of titles together.
 - **Position End Date:** Used for Temporary or Seasonal Positions
 - **Key Position:** Not used.

Position Data (Agency) (continued)

Position Information is displayed:

Description Tab – Position Information

The screenshot shows a web-based form titled "Position Information" under the "Description" tab. The form contains the following fields and values:

- Position Number:** 00408139
- Headcount Status:** Filled
- Current Head Count:** 1 out of 1
- *Effective Date:** 05/11/2011
- *Status:** Active
- Action Date:** 05/11/2011
- *Reason:** Z12
- Agency Update of Position Data**
- *Position Status:** Approved
- Status Date:** 05/23/2003
- *Line Number:** 27001
- Position End Date:** (empty)
- Key Position:** (checkbox, unchecked)

- **Position Number:** For Classified Service, positions are created by Civil Service. Other agencies, such as the Office of Court Administration (OCA) and City University of New York (CUNY), create their own positions.
- **Headcount Status: Vacant or Filled** - indicates if there is an incumbent in the position
- **Current Head Count:** Most positions have a 1 out of 1 headcount, meaning one full-time person per position. The position **can** be filled with parttime people as long as the total combined part-time percentage does not exceed 100%.
- **Effective Date:** The date when something happened to the position – when it was created or changed.
- **Status: Active or Inactive**
- **Action Date:** The actual date a change was made to the position, otherwise known as the system date.
- **Reason:** The reason used for the position change. If a change is made by the agency it will begin with a Z. Agencies that do not maintain their own positions have limited access, and can only change the **Effective Date, Line Number, Employee Type (Hourly to Exception Hourly and vice versa) and Position Pool ID.**
- **Position Status:** Values include: **Abolished** (position no longer used), **Approved** (approved and useable) and **PR-50** (indicates a downgraded position or trainee).
- **Status Date:** This date only changes when the Position Status is changed.
- **Line Number:** Can be changed by the agency to keep group of titles together.
- **Position End Date:** Used for Temporary or Seasonal Positions
- **Key Position:** Not used.



Position Data (Agency) Continued

TALKING/KEY POINTS:

Job Information Section

- **Business Unit:** NYSPY (New York State Payroll)
- **Job Code:** Six digit number assigned to a Title Code created for Executive Service by Civil Service.
- **Reg/Temp:** Positions can be established as Regular, Temporary or Seasonal. Temporary and Seasonal positions will have End Dates.
- **Full/Part-Time:** Positions can be established as Full-Time, Part-Time or as Voluntary Reduction in Work Schedule.
- **Bargaining Unit:** There are over 126 bargaining units. The most common include: 01 - Security, 02 - CSEA Admin, 03 - CSEA Operational, 04 - CSEA Institutional, 05 - Public Employee Federation (PEF), and 06 - Management Confidential (M/C).
- **Union Code:** Directly tied to the Bargaining Unit and reflects the name of the union.
- **Title:** Long discription of the Title
- **Short Title:** Short description of the Title
- Detailed Position Desciptions: used by CUNY for additional position descriptions.

Position Data (Agency) (continued)

Description Tab – Job Information

Job Information	
*Business Unit:	<input type="text" value="NYSPY"/> New York State Payroll
Job Code:	<input type="text" value="001890"/> VISITOR SVS ASSNT 1
*Reg/Temp:	<input type="text" value="Regular"/>
*Full/Part Time:	<input type="text" value="Full-Time"/>
*Bargaining Unit:	<input type="text" value="02"/> Csea Adm
Union Code:	<input type="text" value="CSE"/> CSEA Administrative Unit
*Title:	<input type="text" value="VISITOR SVS ASSNT 1"/>
Short Title:	<input type="text" value="VISITOR SV"/> Detailed Position Descriptions

- **Business Unit:** NYSPY (New York State Payroll)
- **Job Code:** Six digit number assigned to a Title Code created for Executive Service by Civil Service.
- **Reg/Temp:** Positions can be established as Regular, Temporary or Seasonal. Temporary and Seasonal positions will have End Dates.
- **Full/Part-Time:** Positions can be established as Full-Time, Part-Time or as Voluntary Reduction in Work Schedule.
- **Bargaining Unit:** There are over 126 bargaining units. The most common include: 01 - Security, 02 - CSEA Admin, 03 - CSEA Operational, 04 - CSEA Institutional, 05 - Public Employee Federation (PEF), and 06 - Management Confidential (M/C).
- **Union Code:** Directly tied to the Bargaining Unit and reflects the name of the union.
- **Title:** Long description of the Title
- **Short Title:** Short description of the Title
- **Detailed Position Descriptions:** used by CUNY for additional position descriptions.



Position Data (Agency) Continued

TALKING/KEY POINTS:

Description Tab – Work Location

- **Department:** Name of Department (Agency)
- **Company:** Most commonly NYS, but could also be CNY – City University of NY, CSR – CUNY Scholarships. IEA – Industrial Exhibit Authority, SCF – State Univ Construction Fund or SCL – SUNY Scholarships.
- **Department Location:** This value is usually the same as the Department. But, because the Department of Civil Service does not recognize agencies with a parent/child relationship that are paid on different cycles, PayServ needs to keep these agencies separate. This field is used as an identifier to enable positions to load automatically. An example of this is Environmental Conservation (09000) and Environmental Conservation Hry (09180).
- **Posn Loc:** Assigned by Civil Service and identifies where a position is physically located in NYS. Can be used to verify eligibility of location pay.
- **Employee Type:** Values are Hourly, Exception Hourly and Salaried. Agencies have the ability to change between Hourly and Exception hourly only.
- **Pay Basis Code:** **21P**- Contract, **AJT**- Contract, **ANN**-Biweekly, **APM**- Monthly, **BIW**- Biweekly, **CAL**- Biweekly, **CYF**- Biweekly, **CYP**- Contact, **FEE**- Hourly, **HRY**- Hourly, **LEG**- Biweekly.
- **OT Indicator:** Indicates if position is overtime eligible. Checked = eligible, unchecked = not eligible. Generally, positions Grade 22 and below are overtime eligible.
- **Earnings Program ID:** Identifies what earnings the position is available to receive on Additional Pay and Time Entry (also based on Bargaining Unit and Pay Basis Code).
- **Holiday Schedule:** Identifies what holidays the position is eligible for (also based on Bargaining Unit).

Position Data (Agency) (continued)

Description Tab – Work Location

Work Location	
*Department: 01050 Office of General Services	Company: NYS STATE OF NEW YORK
*Dept Location: 01050 Office of General Services	*Posn Loc: 0110 Albany
*Employee Type: Hourly	*Pay Basis Code: HRY
*Earnings Program ID: HRY Hourly Employees	<input checked="" type="checkbox"/> OT Indicator
	Holiday Schedule: 10DY

- **Department:** Name of Department (Agency)
- **Company:** Most commonly NYS, but could also be CNY – City University of NY, CSR – CUNY Scholarships. EFC – NYS Environmental Fac Corp, IEA – Industrial Exhibit Authority, SCF – State Univ Construction Fund, SCL – SUNY Scholarships, or STF – NYS Science & Tech Foundation.
- **Department Location:** This value is usually the same as the Department. But, because the Department of Civil Service does not recognize agencies with a parent/child relationship that are paid on different cycles, PayServ needs to keep these agencies separate. This field is used as an identifier to enable positions to load automatically. An example of this is Environmental Conservation (09000) and Environmental Conservation Hry (09180).
- **Posn Loc:** Assigned by Civil Service and identifies where a position is physically located in NYS. Can be used to verify eligibility of location pay.
- **Employee Type:** Values are Hourly, Exception Hourly and Salaried. Agencies have the ability to change between Hourly and Exception hourly only.
- **Pay Basis Code:** 21P- Contract, AJT- Contract, ANN-Biweekly, APM-Monthly, BIW- Biweekly, CAL- Biweekly, CYF- Biweekly, CYP- Contact, FEE- Hourly, HRY- Hourly, LEG- Biweekly.
- **OT Indicator:** Indicates if position is overtime eligible. Checked = eligible, unchecked = not eligible. Generally, positions Grade 22 and below are overtime eligible.
- **Earnings Program ID:** Identifies what earnings the position is available to receive on Additional Pay and Time Entry (also based on Bargaining Unit and Pay Basis Code).
- **Holiday Schedule:** Identifies what holidays the position is eligible for (also based on Bargaining Unit).



Position Data (Agency) Continued


TALKING/KEY POINTS:

Salary Plan Information Tab

- **Salary Admin Plan:** Identifies the salary chart used to pay raises and advances for this position (based on Bargaining Unit).
- **Grade:** Identifies the grade a position is allocated to. Grades 600 & 980 can be paid as hourly or annual.
- **Equated to Grade:** Grade 600 annual can be equated to a grade. (This is very helpful for performance advances – when a position is equated to a grade advances can be paid automatically.)
- **Standard Hours:** The system defaults to 40 hours, but the field can be changed for Exception Hourly employees.
- **Approved Salary Rate:** Used for grade 600 (if not equated), 980's and ManCon 668.
- **Additional Compensation:** Used by SUNY and CUNY to pay additional earnings for extra assignments.
- The USA flag conceals fields not used in PayServ.
- **Updated On:** The date the system was updated.
- **Updated By:** The User Name or ID of the person making the change.

Position Data (Agency) (continued)

Salary Plan Information Tab

Salary Plan Information	
*Salary Admin Plan:	CSE
*Grade:	600
Standard Hours:	40.00
Equated to Grade:	
Approved Salary Rate:	11.480000
Additional Compensation:	
 USA	
Updated on:	Updated By:

- **Salary Admin Plan:** Identifies the salary chart used to pay raises and advances for this position (based on Bargaining Unit).
- **Grade:** Identifies the grade a position is allocated to. Grades 600 & 980 can be paid as hourly or annual.
- **Equated to Grade:** Grade 600 annual can be equated to a grade. (This is very helpful for performance advances – when a position is equated to a grade advances can be paid automatically.)
- **Standard Hours:** The system defaults to 40 hours, but the field can be changed for Exception Hourly employees.
- **Approved Salary Rate:** Used for grade 600 (if not equated), 980's and ManCon 668.
- **Additional Compensation:** Used by SUNY and CUNY to pay additional earnings for extra assignments.
- The USA flag conceals fields not used in PayServ.
- **Updated On:** The date the system was updated.
- **Updated By:** The User Name or ID of the person making the change.



Position Data (Agency) Continued

TALKING/KEY POINTS:

Specific Information Tab

Specific Information

- **Max Head Count:** Usually one, representing one person to a position. Multiple part-time employees can occupy one position as long as the total percentage worked does not exceed 100%.
- **Incumbents:** Checks are system generated. If a row is inserted on a filled position, and the information should not be rolled to JOB, the Update Incumbent checkbox can be manually unchecked. All other checks are defaulted by the system.

Education and Government

- **Position Pool Id:** Identifies where the money to pay for the position comes from.
- **Jurisdictional Class:** Assigned by Civil Service for Executive Service.
- **Position FTE (Full-Time Equivalent):** Most positions are 1.00.
- **Adds to FTE Actual Count:** Not used in PayServ.

Position Data (Agency) (continued)

Specific Information Tab

Specific Information Find | View All First 1 of 1 Last

Effective Date: 05/11/2011 Status: Active

Max Head Count:

Incumbents

- ☒ Update Incumbents
- ☒ Include Salary Plan/Grade
- ☒ Budgeted Position
- ☐ Available for Telework

Education and Government

Position Pool ID:

*Jurisdictional Class: Position FTE: ☐ Adds to FTE Actual Count

Specific Information

- **Max Head Count:** Usually one, representing one person to a position. Multiple part-time employees can occupy one position as long as the total percentage worked does not exceed 100%.
- **Incumbents:** Checks are system generated. If a row is inserted on a filled position, and the information should not be rolled to JOB, the Update Incumbent checkbox can be manually unchecked. All other checks are defaulted by the system.

Education and Government

- **Position Pool Id:** Identifies where the money to pay for the position comes from.
- **Jurisdictional Class:** Assigned by Civil Service for Executive Service.
- **Position FTE (Full-Time Equivalent):** Most positions are 1.00.
- **Adds to FTE Actual Count:** Not used in PayServ.



Position Data (Agency) Continued

TALKING/KEY POINTS:

Budget and Incumbent Tab

- **Current Incumbents:** Identifies the incumbent (current employee) if the position is filled.
- **Current Under-Fill Incumbent(s):** Identifies the incumbent and the title they are being paid from if the position is downgraded (PR-50).

Wrap up section on Position Management

Does anyone have any questions?

Position Data (Agency) (continued)

Budget and Incumbent Tab

Description		Specific Information		Budget and Incumbents	
Position Number:		00408139			
Headcount Status:		Filled		Current Head Count: 1 out of 1	
Current Incumbents Personalize Find 1 of 1					
Empl ID	Rcd	Name	Job Effdt	NYS Position	Title
N09001284	0	SUSAN DELHI	06/11/2012	00408139	VISITOR SVS ASSNT 1
Current Under-Fill Incumbent(s) Personalize Find First 1 of 1 Last					
Empl ID	Rcd	Name	Budgeted Position	Title	
1	0				

- **Current Incumbents:** Identifies the incumbent (current employee) if the position is filled.
- **Current Under-Fill Incumbent(s):** Identifies the incumbent and the title they are being paid from if the position is downgraded (PR-50).



OBJECTIVE:

- Provide a brief overview of Query.

TALKING/KEY POINTS:

- ☐ Query is a reporting tool for gathering information from the system.
- ☐ A Query is essentially a series of questions: how much, how often, when?
- ☐ We offer regular Introduction to PS Query classes – just keep an eye on the PS Query Bulletin board for dates.
- ☐ Access to Query is given by OSC Payroll Security.

PS Query

PS Query

PS Query is the query component of PayServ, OSC's payroll application. Query can be used to design and run queries and produce ad-hoc payroll reports.

General Query Overview

All queries are essentially questions – who, how much, how often, when, etc. The questions can be very simple such as “How much was I paid in my last check?” or very complex such as “What were the funding sources associated with all employee earnings in my agency for the previous pay period?”

Asking a good question and obtaining a valid answer is not always as easy as it sounds. It requires an understanding of the information available and how the data is arranged or structured. It requires knowledge of the best way to extract only those pieces of data needed to answer the question. It requires fine-tuning, formatting and other time consuming tasks. But it can be done with practice and patience.

The basics of query design are essentially the same in all query software packages.

- Define a purpose for the query – what do you want to know?
- Select the records (tables and fields that contain the data – where is the data located and what is it called?)
- Define criteria to filter out the information not needed in the report
- Run the query and save the results.

By following these four steps, it is possible to design and run queries to retrieve the information needed for your reports.



OBJECTIVE:

- How to access Query.

TALKING/KEY POINTS:

- ☐ Access is a link available upon logging into PayServ.
 - Click the PS Query application
 - Click Proceed to PS Query button
 - Click the Reporting Tools menu group
 - Click Query Manager
- ☐ Access includes:
 - PS Query Bulletin Board – displays PS Query related messages
 - PS Query
 - Query Data Dictionary – definitions of terms used
 - Locked Generic Queries – queries already created
 - PayServ Navigation Guide
 - Introduction to PS Query Guide – step-by-step guide to creating a query

Log In to PS Query



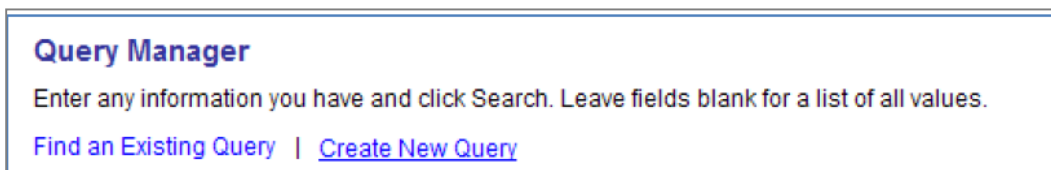
1. Log in to the OSC E-Gov Website



2. Click **PS Query** under the **PayServ Applications** heading.
3. The **PS Query Bulletin Board** opens. The Bulletin Board contains links to PS Query and query training materials, and also displays PS Query related messages.
4. Click the **Proceed to PS Query** button. The **PS Query Main Menu** is now visible in the top left corner of the screen.
5. To open the Query Manager, select **Main Menu** then **Reporting Tools**, and then click on the **Query** folder and select the *Query Manager* page.



The *Query Manager* page includes options for creating a new query or locating an existing query.





OBJECTIVE:

- PS Query Security and Chapter Key Points

TALKING/KEY POINTS:

- ☐ Security is established by your agency.

In general, agency staff have access only to the payroll information for employees who work in their agency. In some cases, employees may have access to multiple agencies, especially if they work in a central office of an agency that has remote facilities or offices. A few control agencies have access to information for all agencies. This “statewide” access is very limited. Many OSC staff have statewide access but in some cases a user may have access to all agencies other than OSC.

Contact your agency security coordinator with any questions about your access rights in PS Query.

- ☐ Types of security include:

Run Only User – these users can run queries designed and saved by other staff but cannot design, modify or save their own queries.

Design Access – these users can design/create new queries, modify existing queries, run queries, delete existing queries, and save queries as public versions for other users to run.

No Access – these users do not have access to PS Query. In some cases, an employee could have access to other payroll applications but not be able to open the PS Query application.

- Components in PayServ consist of one or several pages to perform specific functions.
- Components are organized into logical functional areas by menu groups and menus.
- The scroll area data navigation bar hyperlinks are used to view the various rows in the scroll area.
- Searches can use multiple fields, and search fields can contain partial names.
- Users can access data within a page by expanding Collapsible Data sections.
- Use **Include History** to view all rows of data.
- Favorites are a shortcut to components/pages the user needs to access frequently.
- Query is a tool used to gather information from the system.

Chapter Key Points

- Components in PayServ consist of one or several pages to perform specific functions.
- Components are organized into logical functional areas by menu groups and menus.
- The scroll area data navigation bar hyperlinks are used to view the rows of data contained in the scroll area.
- Searches can use multiple fields, and search fields can use partial names or Empl IDs
- Use **Include History** to view all rows of data.
- Favorites are a shortcut to components or pages the user needs to access frequently.
- **Position Data (Agency)** identifies agency specific position information.
- PS Query allows users to obtain information from PayServ. Users can run pre-defined queries, update existing queries and create new queries.



This is the end of the chapter.

Instructor Notes