Re: Release: 535
Service Request: 3606, 3607
Programs: PPACAULT (New), PPACTION (New), PPAPTDPT (New), PPDB2VSM, PPPVREDT, PPP010, PPP050, PPP080, PPP120, PPP142, PPP170, PPP250, PPPVSMDB2, USER08, USER12
DB2 Programs: PPACAUPD (New), PPACTUTL (New), PPACTUTW (New), PPPOEDB2, PPOT535 (New), USER17
Copymembers: CPFDXACF, CPFDXAHN, CPLNKACA (New), CPLNKACT (New), CPLNKAP3 (New), CPOTXCME, CPOTXTRN, CPWSDB01, CPWSDB20, CPWSRAC (New), CPWSXACN (New), CPWSXEDB, CPWSXERR, CPWSXIDC, CPWSXIZ, CPWSXOLD, CPWSXTBL
DDL Members: IXACT01C, PPPVACT1, PPPVACT2, PPPVOT01, PPPVOT02, PPPVOT03, PPPVU17A, TBACT01C, TBAPP00C, TBAPP02A, TBSIS00C, TBSIS02A, TBPERR00C, TBPERR03A, TSDACT01C, VIOEB01, VIOEB08, VIOEDB17
Include Members: 9 (Refer to Attachment 1)
Bind Members: PPOT535 (New), PPP120 (New), PPP142 (New), PPP170 (New), PPP250 (New)
Forms: UPAY 560, UPAY 580, UPAY 640A
Table Updates: Data Element Table, System Messages Table, Report Description Table
Urgency: Not Urgent

This release primarily addresses Service Request 3607, Implementation of Revised Action Codes, and partially addresses Service Request 3606, implementation of enhancements for Financial Aid/Work Study.

This release is the first of what is anticipated to be three phases of implementation of data changes to the Base System for the implementation of Action Codes and the revised Personnel Action Form (PAF). Subsequent phases will address related revisions to the Compute and monthly reporting processes, and to Merit, Range, and Mass Change processes.

Service Request 3607
Service Request 3607 asks for the implementation of a new Personnel Action Codes structure which provides the ability to associate actions with specific appointments and distributions, as well as to the overall employee record. In addition, several Personnel data element changes in support of the revised action codes are included as part of the revisions to the PAF, required for the implementation of the new Action Code Structure.

**Service Request 3606**

Service Request 3606 asks for the implementation of Financial Aid/Work Study limit processing and reporting. As part of this service request, there is a requirement that the Work Study Program Code be moved from the appointment to the distribution on the employee record. This release addresses only the movement of the Work Study Program Code in concert with changes to the PAF. A subsequent release will address system changes to Financial Aid/Work Study process in the Base System.

**Overview of Changes**

This release addresses changes to the EDB and the EDB Maintenance process in support of Action Codes and new/revised Personnel data elements processing. The actions codes structure is described in the enclosed general design document. Definitions of the new and revised Personnel data elements are described in the enclosed requirements definitions. Three specifics of changes included in this release are described below:

- **Edits**

  The implementation of the new action codes structure was based on the assumption that existing personnel action edits in the EDB Maintenance process would be preserved and that no new editing would be provided. As a result, there are no new Personnel Action triggered edits of other employee record data.

  The addition of Last Day on Pay as well as the implementation of Appointment Grade, Distribution Step, and Distribution Off/Above Scale Indicator involve new consistency edits:

  - **Grade**

    The value of Grade on an appointment is edited for consistency with the Appointment Personnel Program. Only Executive, APS, and MAP appointments can have an associated Grade value. In the event that a Grade value is entered on an appointment associated with any other Personnel Program, then a message will be issued (08-720, 12-920).

    On those appointments where the presence of a grade value is legitimate, then the grade value must correspond to the acceptable values for the personnel program; otherwise, a message will be issued (08-718, 12-923).

    When an entered value for Grade does not correspond to that associated with the Title Code Table entry, then the system will set the Appointment Grade value to that from the Title Code Table, and issue a message (08-719, 12-921).

  - **Step**

    The value of Step is edited in the context of the appointment/distribution. Only Academic and Staff appointments can legitimately have an associated distribution Step value. If a distribution Step value is encountered on a distribution for any other Appointment Personnel Program, then a message will be issued (08-721, 12-925).

    If the value of Step is not within the range for that of the Appointment Personnel Program, then a message is issued (08-724, 12-924).
Further, the value of step is edited in the context of the Distribution Off/Above Scale Indicator, and a message issued when the value of Step does not coincide with that for the combination of Appointment Personnel Program and Off/Above Scale Indicator (08-722, 12-926).

- Last Day On Pay

The value of Last Day on Pay is edited in the context of Separation Date. Last Day on Pay is "in conflict" with Separation Date whenever the value of Last Day on Pay is greater (later) than that of Separation Date. In such instances, a message will be issued (08-723) during editing. Of elements Last Day on Pay and Separation Date, when a non-zero value exists for only one of the elements, then the other will take on that non-zero value and a message to that effect will be issued (12-922, 12-927).

- PAF Printing

The revised PAF printing process incorporates the display of action codes at the appointment and distribution levels, in addition to the employee level. Since only one action can be printed on the PAF at each level, a user specified hierarchy of PAF Action Code printing was implemented. This hierarchy is identified in Attachment 2.

- DB2 EDB Changes

The addition of multiple occurrence action codes over all levels of the employee records required the implementation of a new DB2 EDB table, the Action Code (ACT) Table. Because of the number of possible action codes and effective dates that could be retained at a given level, there was no room to add these elements to the VSAM-format EDB without undertaking a major conversion of the Base System to accommodate an expanded VSAM-format EDB segment set. Therefore, the implementation of Action Code related data elements proceeded under the assumption that access to these elements would be not be via the VSAM-format EDB. As a result, it was necessary to implement an EDB Change File, similar to that issued with Release 513 for the Compute, in the EDB Maintenance process. This Change File will initially carry only changes related to Action Codes. The EDB Change File will be generated by PPP120, and used by PPP142, and PPP170.

**Programs**

PPACAUTL (New)

This new called module develops an array of action codes, from the EDB ACT Table, to facilitate program processing of action codes.

PPACTION (New)

This new called module performs the derivation of Action Codes and associated Action Codes Effective Dates based on entered action codes and employee record data changes.

PPAPTDPT (New)

This new called module performs the derivation of the Appointment Department Code. PPAPTDPT is called by USER12.

PPDB2VSM

This called module has been modified to incorporate new and revised data elements in the VSAM-format EDB structure. Note that Action Code elements are not included in this module.

PPVREDT
This called module has been revised to be consistent with the revised PAF transaction format.

PPP010

PPP010 has been modified to bypass segment number editing of Data Element Table transactions, and to allow a value of zero for Internal Start Position and Internal Start Length on Data Element Table entries.

PPP050

This called module has been revised to be consistent with the revised PAF transaction format.

PPP080

PPP080 has been revised to intercept Data Element Activity records with Action Code values and to establish the Action Code Array used in edit processing.

PPP120

PPP120 has been revised to intercept Data Element Activity records with Action Code values and to establish the Action Code Array used in edit processing. PPP120 has also been modified to issue EDB Change (EDBCHG) records which identify the changes in action codes for the update process (PPP142).

PPP142

PPP142 has been modified to receive the EDB Change File (EDBCHG) produced by PPP120 and apply data element changes to the EDB ACT Table.

PPP170

PPP170 has been revised to produce the revised PAF form. PPP170 has also been modified to read the EDB Change (EDBCHG) file in addition to the Employee Change File (ECF) to determine proper PAF highlighting.

PPVSMDB2

This called module has been modified to incorporate new and revised data elements in the VSAM-format EDB structure. Note that Action Code elements are not included in this module.

PPP250

PPP250 has been modified to report on Action Codes at all levels. Since PPP250 displays action codes in a "floating" format, as with Deduction entries, immediately after all Deduction and BRSC entries.

USER08

USER08 has been modified to perform limited action code derivation for existing edit processing. USER08 has also been modified to edit Last Day on PAY, Grade, Step, and Off/Above Scale data elements as described above.

USER12

USER12 has been modified to derive action codes and action code effective dates, via call to PPACTACTION. USER12 has also been modified to derive the Appointment Department Code via call to PPAPTDPT. Additional modifications in support of action code related processing were made.
DB2 Programs

PPACAUPD (New)
This new called module drives the updates the EDB ACT Table from EDB Change File records.

PPACTUTL (New)
PPACTUTL is a new called module which returns ACT Table rows from the EDB to calling programs.

PPACTUTW (New)
PPACTUTW is a new called module which inserts, updates, or deletes ACT Table rows. PPACTUTW is called by PPACAUPD to update the ACT Table.

PPIOEDB2
Called module PPIOEDB2 has been revised to reflect the elimination of data element from the VSAM EDB structure.

PPOT535 (New)
PPOT535 is a one-time program which performs the initialization of Last Day on Pay, Grade, Appointment Department, Distribution Step, Off/Above Indicator, and Work Study Program Code.

USER17
USER17 has been modified to return to PPP170 the appropriate action code value at a given level, according to the specified print hierarchy (see Attachment 2), and the action code description. To facilitate this function, PPP170 now accesses the DB2 EDB directly.

Copymembers

CPFDXACF
This existing copymember has been modified to replace the current 'Actions' field with an 'Action-Key' and a Filler.

CPFDXAHN
This existing copymember has been modified to replace the current 'Actions' field with an 'Action-Key' and a Filler.

CPLNKACA
This is a new copymember which describes the linkage for the PPACAUTL subroutine.

CPLNKACT
This is a new copymember which describes the linkage for PPACTUTL.

CPLNKAC1
This is a new copymember which describes the linkage for PPACTON.

CPLNKAP3
This is a new copymember which describes the linkage for PPAPTDPT.

CPOTXCMF
This existing copymember has been modified to include five new fields for identifying action codes being processed in the EDB maintenance cycle.

CPOTXTRN
This existing copymember has been modified to replace the current 'Actions' field with an 'Action-Key' and a Filler.

CPWSDB01
This existing copymember has been modified to include the new data data element 'Last-Day-on-Pay. Two obsolete data elements have been commented out.

CPWSDB20
This copymember has been revised to reflect the changes in the revised PAF processing and the addition of new personnel data elements. Seven data elements have been commented out and five data elements have been added.

CPWSRACCT
This is a new copymember which describes the working-storage layout for an Action Code table row.

CPWSXACN
This is a new copymember which is an array that is used to store entered and derived action codes.

CPWSXEDB
This copymember has been revised to reflect the changes in the revised PAF processing and the addition of new personnel data elements. Nine data elements have been commented out and six data elements have been added.

CPWSXERR
This existing copymember has been modified to replace the current 'Actions' field with an 'Action-Key' and a Filler.

CPWSXIDC
This existing copymember has been modified to include two data elements used in the new action code processing.

CPWSXINZ
This existing copymember has been revised to include the addition of data elements for the revised PAF processing and the new personnel data elements. Obsolete data elements have been commented out.

CPWSXOLD
This existing copymember has been modified to replace the current 'Actions' field with an 'Action-Key' and a Filler.

CPWSXSTBL
This existing copymember has been revised to include the addition of data elements for the revised PAF processing and the new personnel data elements. Obsolete data elements have been commented out.

**DDL Members**

Eighteen DDL members are included in this release. Three of these members create objects for the new Action Code table. Three of these members provide alters to tables PPPER, PPPAPP and PPPDIS and three members include all columns for each of the altered tables.

Nine of the DDL members sent with this release create DB2 views which are used in both the new and revised program modules. Refer to the Attachment 1 for the relationship between DDL member name, view name and DCL/Include name. Refer to the installation instructions for descriptions of each DDL member.

**Include Members**

Nine Include members are included in this release. They correspond to the nine views in the DDL members mentioned above. Refer to the Attachment 1 for the relationship between DDL member name, view name and DCL/Include name.

**Bind Members**

Bind members for the one time program, PPOT535, and for mainline programs PPP120, PPP142, PPP170 and PPP250 are included in this release.

**Forms**

UPAY 560

The Personnel Action Form (PAF) has been redesigned to implement the requirements for Action Code processing, Financial Aid-Work Study and five Personnel Data Element additions/changes.

UPAY (580)

The Payroll Modification Worksheet has been revised to reflect the changes that have been made to the PAF.

UPAY (640A)

The Payroll Maintenance Worksheet-I has been revised to reflect the changes that have been made to the PAF.

**Table Updates**

Updates to the Data Element, System Messages, and Report Description Tables are included in this release. Messages are included on paper and in machine readable form.

The Report Description Table update transactions included in this release include delete transactions to eliminate existing Base System RDT entries. Campuses should carefully review the local Report Description Table to insure that new PAF printing entries are being properly established. The new RDT transactions included in this release support the entire set of RDT entries necessary to implement the Base System PAF print.
Test Plan

A complete test plan is included with the release. Campuses are encouraged to use the base system test materials, as well as augmenting them with any desired local tests.

Installation

Installation instructions are documented in a separate document included in this release.

Timing of Installation

At this time, installation of this release should proceed as far as test installation only. Because of the volume of changes involved, this release has been limited to those changes to the EDB Maintenance process for Action Codes, and do not include additional edit logic changes necessary to fully implement Work Study Program Code editing at the distribution level. In addition, the changes to the EDB structure necessitate changes to additional modules used in downstream processes. The next release under Service Request 3607 will address these changes, and allow for production implementation of the Action Code related changes.

As usual, campuses are encouraged to install this release in as timely a fashion as possible, and in the normal numeric sequence of releases.

If there are any questions, please send electronic mail to ISCJAG@UCCVMA, or call on (415)987-0518.

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    Jerry Wilcox

Jon Good
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ATTACHMENT 2

PAF ACTION CODE DESCRIPTIONS - PRIORITY SEQUENCE

EMPLOYEE

01 INITIAL HIRE
02 RE-HIRE
06 SEPARATION
07 LEAVE WITH PAY
08 LEAVE W/OUT PAY
09 CHG LV RET DT
19 CHG HOME DEPT
23 CFG BELI
15 CHG VISA
21 INTR-CAMPUS TRF
35 TRSF SYSTEMWIDE
36 TRSF STATE/LAB
30 MASS PURGE
51 TRSF MED CNTR
20 OTHER
91 NULL ACTION

APPOINTMENT

10 PROMOTION
11 DEMOTION
12 LATERAL TRSF
14 EMPL DIF ACA SR
37 RECLASS-DOWN
38 RECLASS-UP
39 RECLASS-LATERAL
52 CAS TO CAREER
13 ADDL EMPLOYMENT
17 RENEWAL/REAPPT
25 MASS TITLE CHG
26 ADD STIPEND
34 TERMINAL APPT
53 PHASED RET
16 CHG % FULL TIME
24 CHG LV PLAN CD
40 OTHER
92 NULL ACTION

DISTRIBUTION

04 MERIT INCREASE
27 SYSTEM MERIT
41 6-MONTH INC
42 EXC/EQUITY INC
43 OTHR PAY RT CHG
44 CASUAL INCREASE
45 CHG NG SAL-HSPC
46 CHG % FULL TIME
48 ADD STIPEND
28 RANGE ADJ
33 MANUAL RANGE
18 FUNDING CHANGE
47 MASS ACT/FD CHG
49 MASS DUC CHG
50 OTHER
93 NULL ACTION