Employee Systems Initiative

WebPAN Rewrite

Service Request 16984

User Interface Design

Prepared by: Kevin Fong
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Table of Contents

Table of Contents ...........................................................................................................2

Introduction .....................................................................................................................4

Overview .........................................................................................................................4

Summary of Requirements .............................................................................................4

Analysis ...........................................................................................................................4

User Interface Design Specifications .............................................................................5

Main Menu ......................................................................................................................5

Inbox ...............................................................................................................................5

  Header .........................................................................................................................6

  Body ............................................................................................................................8

  Footer ..........................................................................................................................9

Detail Screen ..................................................................................................................10

  Header .......................................................................................................................10

  Body ..........................................................................................................................11

  Footer ........................................................................................................................13

Notification Selection ..................................................................................................15

Directory .........................................................................................................................17

Routing Option .............................................................................................................18

Audit Review ..................................................................................................................18

  Header .......................................................................................................................19

  Body ..........................................................................................................................20

  Footer ........................................................................................................................21
Revision History
This section records the change history of this document.

<table>
<thead>
<tr>
<th>Name</th>
<th>Date</th>
<th>Reason For Changes</th>
<th>Version</th>
</tr>
</thead>
<tbody>
<tr>
<td>Kevin Fong</td>
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<td>1.01</td>
</tr>
<tr>
<td>Kevin Fong</td>
<td>7/8/05</td>
<td>Incorporate changes from MG, KT</td>
<td>1.02</td>
</tr>
<tr>
<td>Kevin Fong</td>
<td>7/14/05</td>
<td>Incorporate changes from UCLA meeting</td>
<td>1.03</td>
</tr>
</tbody>
</table>
Introduction

Overview

In a meeting held by the Employee Systems Initiative (ESI) Advisory Committee in March 2005, it was unanimously decided that a rewrite of the existing WebPAN application be performed. Major performance issues, and the obsolescence of the language it was written in \(^1\) were the compelling reasons to address the rewrite with a sense of urgency.

Summary of Requirements

In 2000 and 2002, a complete WebPAN specification was developed \(^2\) upon which the Net.Data version of WebPAN was based. The current functionality of the WebPAN application continues to meet the majority of our customers informational requirements, thus, the WebPAN rewrite will deliver the exact same informational data. The only intended change to the new WebPAN is the user interface. The primary objectives of the WebPAN rewrite are to:

- Migrate away from the obsolete Net.Data scripting language
- Enhance performance to acceptable levels
- Improve functionality by incorporating enhanced navigational features

Because the functional requirements of WebPAN already exist \(^3\) and will be adhered to, this document will focus strictly on defining the User Interface (UI) of WebPAN for the new rewrite.

Analysis

A review of the “PAN Post Production Errors and Issues List” and “Proposed PAN Enhancements for UCOP Consideration” was conducted in late April 2005 to assess the features and issues that would be addressed for the WebPAN rewrite. Emphasis was placed only on WebPAN related issues, and not CICS PAN issues.

The majority of the issues were related to enhancing performance on the backend (the database) and for improving the navigational aspects of the WebPAN screens to reduce the number of actions required to perform a specific function. The UI rewrite will take these requests into consideration.

\(^1\) Net.Data reached its end of support date on September 30, 2004. Refer to the following IBM link for more information: www-306.ibm.com/software/data/net.data

\(^2\) Reference Service Request 15213, “Pan Enhancements Requirements”, dated 11/20/00, revised 2/27/02

\(^3\) ibid
User Interface Design Specifications

Main Menu

Employees will access the WebPAN application via the main menu of the Payroll/Personnel System. There are no visual changes from the current implementation:

Inbox

The Inbox presents the user with a summary level view of all PAN notifications in groups of ten (10) by default but may be configured to other values as a parameter. The default action is to display all notifications beginning with the latest entry first, and descending in aging chronological order. The screen is divided into three main areas, a “header”, a “body” and a “footer” section.
Header

Information and Navigation
The Information and Navigation portion of the WebPAN header identifies to whom the current user session belongs to (in the example, the session is owned by “AUCUSR”), and the date and time the current screen was last refreshed. Additionally, there are two hyperlink options:

Main Menu: Selecting this hyperlink will return the user to the top level main menu of the Payroll/Personnel System

Logout: Selecting this hyperlink will close the current WebPAN session and log the user out of the Payroll/Personnel System.

Change Search Criteria
The default action of the Inbox is to present all PAN notifications to the user. A user may narrow the result set of notifications by specifying specific search parameters. Clicking on the “Here” hyperlink will present the user with an advanced search screen (see section titled Notification Selection).

Action Buttons
Clicking the Delete Checked button will delete all notifications that the user has marked for deletion on the current screen. As a safety precaution, a confirmation dialog will be presented when this button is clicked. Selecting Yes will process the deletions and refresh the page with the next ten notifications beginning from the first non-deleted PAN or the next ten if all were marked for deletion. Selecting No or cancels the action.

![Delete Confirmation Dialog](image)
Clicking the **Delete All Read** button will delete all notifications that the user has read. As a precaution, when selected, the user will be prompted with the following confirmation dialog:

![Confirmation Dialog]

Selecting **Yes** will process the deletions and refresh the page with the first ten remaining notifications. Selecting **No** or **Cancel** cancels the action.

### Sort and Display Options

The Sort and Display options provide the user with a means to sort the result sets of their inbox, as well as mark notifications for deletion.

**Delete:**

A notification may be marked for deletion by clicking within this check box. To actually delete the notification, the user must click the **Delete Checked** button in the header. If a user attempts to leave a page with notifications marked for deletion, the following dialog will appear:

![Delete Dialog]

Clicking **Yes** will process the deletions and refresh the page with the next ten notifications beginning from the first non-deleted PAN or the next ten if all were marked for deletion. Selecting **No** cancels the action, and leaves the page. Selecting **Cancel** or **nullifies** the action, but leaves the user on the current page.

**Status:**

A single character/icon indicates whether the notification has been read (a blank), unread (U) and urgent (!). The default sort order is by date in descending order. By clicking on the **Status** header, the notifications are resorted in the following order: urgent unread, unread, urgent, read. Clicking it again will return to the default sort order (date descending). Clicking on the ? mark displays a legend.

**Type:**

A single character identifies the type of reviewer. These are defined as: “M” for Mandatory Reviewer, “P” for Primary Reviewer, “R” for Non-Mandatory Reviewer, “U” for Additional Reviewer added by Preparer, “F” for Forwarded from Reviewer. The default sort order is by date in descending order. By clicking on the **Type** header, the notifications are resorted in the following order: P, F, M, R, U. Clicking
it again will return to the default sort order (date descending). Clicking on the ? mark displays a legend.

**Employee:** The default sort order for notifications is by date in descending order. By clicking on the **Employee** header, the notifications are resorted by employee last name, first name and middle initial in ascending order. Clicking it again will return to the default sort order (date descending).

**Actions:** If a specific notification generates an action, the action(s) will be displayed in this column. A user may not perform an operation on this column header.

**Date:** The default sort order for notifications is by date in descending order. By clicking on the **Date** header, the notifications are resorted by date in reverse chronological order. Clicking it again will return to the default sort order (date descending).

**Preparer:** The default sort order for notifications is by date in descending order. By clicking on the **Preparer** header, the notifications are resorted by preparer name in ascending alphabetical order. Clicking it again will return to the default sort order (date descending).

**Comments:** Any comments entered by a reviewer are displayed in this column. A user may not perform an operation on this column header.

**Legend:** If a user clicks on any of the two “?” symbols on the header, a new browser window will be instantiated and present the user with the following information:

![Legend](image)

**Body**

The body of the inbox presents the user with a summary level view of notifications in groups of ten. From this screen, the user may elect to mark a notification for deletion, or view a specific notification in complete detail.
Delete a notification: To delete a notification, a user would place a check mark in the check box adjacent to the row that is to be deleted. This action only marks a notification for deletion. Note that a check box will not be displayed if Status=’U’ and Type=’M’. Only when a user leaves the current screen, or presses the Delete Checked button will the delete process actually occur.

View Notification Details: To view the full details of a specific notification, a user would click on a name under the Employee column. Contents of the detail view are described in the section titled Detail Screen.

Footer

The footer of the inbox presents the user with navigational functionality. Information displayed on the left portion of the footer indicates the total number of notifications for the user, the current group (in sets of 10) that is being displayed, and the current “page” that the user is on (each page displays ten notifications).

The center portion of the footer allows the user to quickly navigate the notification result sets by page. Nine (9) pages may be navigated, four (4) prior to the current page, or four (4) after the current page. To view pages beyond the current nine displayed, the user would click on Previous or Next to display the next set of ten pages.

The right portion of the footer allows the user to jump to any specific page. This is useful for quickly “jumping” to pages outside the range of the current ten displayed in the center portion. Entering a value less than one (1) will place the user at the first page. Entering a value in excess of the actual number of pages will place the user at the last page.
**Detail Screen**

The detail screen provides full details of a specific notification. Consistent with the look and feel of the WebPAN UI, the detail screen is broken into three main areas: a header, body and footer.

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**Header**

*Information and Navigation*

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**Body**

**Footer**

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**Shortcuts**
Information and Navigation

The Information and Navigation portion of the header identifies who the current user session belongs to (in the example, the session is owned by “AUCUSR”), and the date and time the current screen was last refreshed. Additionally, there are three hyperlink options:

**Main Menu**: Selecting this hyperlink will return the user to the top level main menu of the Payroll/Personnel System.

**Logout**: Selecting this hyperlink will close the current WebPAN session and log the user out of the Payroll/Personnel System.

**Printer Friendly Format**: Selecting this hyperlink will print the header and body of the current pan in its entirety without windows associated navigation bars.

Shortcuts

**Email**: Clicking on the email will instantiate the local email client, pre-populate the “To:” field with the selected email, the “Subject:” field with the first Action code of the PAN, and the message with the contents of the PAN Detail header and body.

**EDB Inquiry**: Clicking on this link will instantiate a new browser and load the Payroll/Personnel system Employee Database with information about the employee from the PAN.

Body

The body of the detail screen provides a logical grouping of the PAN information organized by tabs running horizontally across the top. There are four categories: “Comments”, “General Information”, “Appointments and Distributions” and “List of Reviewers”. The “default” landing spot when entering the detail screen is the Comments tab, which is indicated by a slightly enlarged tab image. The information presented on each tabbed screen will be identical to the information displayed in the current WebPAN application. NOTE: To remain consistent with the current WebPAN UI functionality, the tabs are not “true” tabs in the sense of typical web interfaces; they act simply as hyperlink/bookmarks to specific information on the current page. For example, clicking on the “List of Reviewers” tab will simply position the cursor to the “List of Reviewers” bookmark on the current screen.

![PAN Information grouped by “tabs”](image)
Comments
This tab provides an historical listing of all comments pertaining to the selected PAN. See image on prior page. The footer contains the ability to enter a new comment.

General Information
This tab replicates the information currently provided in the existing WebPAN application. The layout of the current WebPAN General Information screen will be used.

Appointments and Distribution
This tab replicates the information currently provided in the existing WebPAN application. The layout of the current WebPAN Appointments and Distributions screen will be used. Note that this tab/section does not appear on PAN’s which are not related to EDB Entry Update (eg. Time entry PAN’s).
List of Reviewers
This tab replicates the information currently provided in the existing WebPAN application. The layout of the current WebPAN List of Reviewers screen will be used.

Clicking on an email address will instantiate the local email client, pre-populate the “To:” field with the selected email, pre-populate the “Subject:” field with the first Action code of the PAN, and pre-populate the message with the full contents of the PAN Detail screen Header and Body.

Footer

The footer of the detail screen presents the user with the following navigational and update functionality:

- Clicking on the << Return to List button identified by 1 in the diagram above, will close the current detail screen and return the user to the Summary Level screen.

- The navigational area, identified by 2 in the diagram above, allows a user to navigate to the detail screen of an adjacent PAN without having to return to the Summary Level screen. The Previous and Next buttons allow reverse and forward navigation one notification at a time respectively. Alternatively, a user may jump directly to a specific notification by providing the record number in the text box and pressing either the Previous or Next button.

- The Delete >> button, identified by 3 in the diagram above will delete the current notification and automatically advance to the detail screen of the next notification. A confirmation dialog such as the following will appear before actually committing the deletion:
Selecting [Yes] will process the deletion. Selecting [No] or [X] cancels delete.

- The [Add Comment] button, identified by [1] in the diagram above will instantiate the following new browser window:

![Add a Comment](image)

The [Save] button will save the comment to the current PAN and close the comment browser window. The user will be returned to the detail screen of the current PAN. The [Save & Return to List] button will save the comment to the current PAN, close the comment browser window and return the user to the WebPAN inbox. The [Reset] button will clear the comments screen of the comments browser window. The [Cancel] button will close the comment browser window without saving any data and return the user to the detail screen of the current PAN.

- The [Forward to...] button, identified by [5] in the diagram above will instantiate the following new browser window:

![Forward PAN](image)

The addressee may be any valid email address, or an address from the current Pan directory. Clicking on the [Directory] icon will call up the PAN UserID [Directory].
Selecting the **Send** button will send the notification and close the browser window.

Selecting the **Reset** button will clear the Forward To edit box.

Selecting the **Cancel** button will close the browser and return the user to the detail screen.

### Notification Selection

The default action of WebPAN is to display all notifications to a user. To narrow the result set, a user would select the Notification Selection item from the Main Menu to get the following screen:

The list box ① allows a user to select (by default), “All Notifications”, “All EDB Updates” or “All Time Reporting”. Only one of these main categories may be selected.

Alternatively, a user may select *up to* five specific PAN codes from the following category groupings: EDB Action Codes, EDB Update Codes (pre-web), and Time Reporting Transaction Codes. A specific listing of these codes may be found within the current PAN application.

A date range may be specified by selecting one of the radio boxes identified by ② in the prior diagram.
If the “Within” radio button is selected, a user may choose from one of four choices: “All Dates”, “Current Date”, “Last 7 Days”, “One Month”. To specify a range, a user would select the “From” radio button and provide a start and end date. The within and from radio buttons work as exclusive OR’s (XOR), ie, only one can be selected. The UI will be intelligent enough to automatically populate the end date with the start date to improve usability. For example, if the start date were set to 2/1/2005, the end date would automatically populate with 2/2/2005.

The Employee Department identified in the prior diagram as ① will allow a user to specify a department code. No validation of the entry will occur. Similarly, the Employee ID identified in the prior diagram as ④ will allow a user to specify an employee ID. Again, no validation on the entry will occur.

The Preparer User ID and the Reviewer User ID text boxes ⑦ will allow a user to specify a user ID. No validation of the entry will occur. As a reference, a user may click on the ⑨ button which will call the PAN UserID Directory.
From this screen, a user may select a list of known user ID’s defined to PAN by conveniently selecting a radio box next the desired entry and clicking on the **Select** button. This will automatically return the user to the selection screen with the user ID selected.

The Submit button will submit the query and return the notification result set based upon the selection criteria specified. The Reset button will clear the selection form and reset it to default values.

### Directory

The Directory menu option from the Main Menu replicates the same functionality as the current WebPAN implementation. No changes in the user interface will be made.

This screen provides the user with a query only view of all users defined within the PAN system. The default behavior will present all users, sorted by last name and first name in ascending alphabetical order. The user may optionally specify a search on User ID or Department name and provide a partial string to perform the search on. Clicking on the column headers will sort the result sets in Name, User ID, Department, Phone, Email Address or Routing Code order, depending on which header was clicked. Clicking the same header again will revert to the default sort order.

Note that under certain conditions (depending on where and how the directory is called), there may be an option that allows a user to select an ID and have it returned to the calling procedure. In such cases, the directory may appear as follows:
Routing Option

The Routing menu option from the Main Menu replicates the same functionality as the current WebPAN implementation. No changes in the user interface will be made.

Users will have a choice as to how they want to be notified of PAN records. If users select the 'no e-mail routing' option, they will not receive individual e-mail PAN notifications. All of their notifications will be available for review in their WebPAN Inbox. They will receive an e-mail on a periodic basis notifying them of the number of PANs routed to their Inbox that day.

If users select the 'e-mail routing' option, they will receive a formatted e-mail copy of each PAN for which they are a non-mandatory reviewer. If they are a mandatory reviewer, they will receive an e-mail alert to let them know that the PAN is available for review in their Inbox.

All notifications are available for review in the users Inbox regardless of their routing option selection.

Audit Review

The Audit Review option from the Main Menu allows an authorized user to perform a special query on PAN’s by mandatory reviewer ID, department and within a specific date range. The result set of the query will mirror that of the current WebPAN application and offer the same enhanced navigation features incorporated into the general inbox.

The Audit Review screen is divided into three main areas, a “header”, a “body” and a “footer” section.
The header of the audit screen allows the user to specify selection criteria. The Mandatory Reviewer User ID text box allows a user to specify a user ID to search for. No validation of the entry will occur. As a reference, a user may click on the button which will call the PAN UserID Directory. From this screen, a user may select a list of known user ID’s defined to PAN.

The Department text box allows a user to specify a department to search for. As with the Mandatory Reviewer User ID, no validation of the entry will occur.

The date selection fields allow a user to specify a date range. The UI will be intelligent enough to automatically populate the end date with the start date to improve usability. For example, if the start date were set to 2/1/2005, the end date would automatically populate with 2/2/2005.

The submit and reset buttons will either submit the query or reset all the selection criteria to their defaults.
**Body**

The body of the audit review screen presents the user with a summary level view of notifications in groups of ten sorted by transaction date in descending order. To view more details on a specific notification, the user may click on an employee name which will bring up a detail screen of the transaction. See section **Detail Screen** for more information.

The Sort and Display options provide the user with a means to sort the result sets of their inbox.

**Status ?:** A single character/icon indicates whether the notification has been read (a blank), unread (U) and urgent (J). The default sort order is by date in descending order. By clicking on the **Status** header, the notifications are resorted in the following order: urgent unread, unread, urgent, read. Clicking it again will return to the default sort order (date descending). Clicking on the ? mark displays a legend.

**Type:** A single character identifies the type of reviewer. These are defined as: “M” for Mandatory Reviewer, “P” for Primary Reviewer, “R” for Non-Mandatory Reviewer, “U” for Additional Reviewer added by Preparer, “F” for Forwarded from Reviewer. The default sort order is by date in descending order. By clicking on the **Type** header, the notifications are resorted in the following order: P, F, M, R, U. Clicking it again will return to the default sort order (date descending). Clicking on the ? mark displays a legend.

**Mandatory Reviewer:** The default sort order for notifications is by name in ascending order. By clicking on the **Mandatory Reviewer** header, the notifications are resorted by reviewer last name, first name and middle initial in descending order. Clicking it again will return to the default sort order (date ascending).

**Employee:** The default sort order for notifications is by date in descending order. By clicking on the **Employee** header, the notifications are resorted by employee last name, first name and middle initial in ascending order. Clicking it again will return to the default sort order (date descending).
**Actions:** If a specific notification generates an action, the action(s) will be displayed in this column. A user may not perform an operation on this column header.

**Transaction Date:** The default sort order for notifications is by date in descending order. By clicking on the **Transaction Date** header, the notifications are resorted by date in reverse chronological order. Clicking it again will return to the default sort order (date descending).

**Date Reviewed:** The default sort order for Date Reviewed is by date in descending order. By clicking on the **Date Reviewed** header, the notifications are resorted by date reviewed in reverse chronological order. Clicking it again will return to the default sort order (date descending).

**Days Unread in Queue:** The default sort order for Days Unread in Queue is by largest to smallest. By clicking on the **Days Unread in Queue** header, the notifications are resorted in smallest to largest order.

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**Footer**

The footer of the inbox presents the user with navigational functionality. This information is discussed in the **Footer** section of the Inbox chapter.