# Section Index

1.0 General Information ................................................................. 1
2.0 Obtaining Access to ViewDirect .................................................. 3
3.0 Reports vs. Enterprise Index Topics ............................................. 4
3.1 Reports ...................................................................................... 4
3.2 Enterprise Index Topics ............................................................... 4
4.0 Logon Procedures ........................................................................ 5
4.1 Logon through SCOPROD ............................................................. 5
4.2 Logon through SCOVIEW ............................................................ 6
5.0 The Viewing Menu ....................................................................... 7
6.0 Selecting Reports ......................................................................... 8
6.1 Reports Screen ............................................................................ 8
6.2 Reports Version Screen ................................................................. 9
6.3 Reports Section Index Screen ....................................................... 10
7.0 Selecting Enterprise Index Topics ................................................ 11
7.1 Enterprise Index Topic Screen ....................................................... 11
7.2 Enterprise Index Topic Version Screen ....................................... 12
7.3 Enterprise Index Topic Items Screen ......................................... 13
8.0 Viewing a Report ......................................................................... 14
9.0 Viewing Commands/PF Keys ....................................................... 15
9.1 How to Navigate Through a Report ............................................ 16
10.0 Printing Reports .......................................................................... 18
11.0 Contact Information .................................................................... 20

Appendixes ....................................................................................... 22

List of Reports

List of Topics
**General Information**

ViewDirect is an on-line report distribution system. The reports distributed via ViewDirect are immediately available on-line after the reports are produced. Users can access the on-line reports from their workstations. Further, reports can be printed from ViewDirect, if needed.

Please note that the State Controller’s Office (SCO) maintains two separate ViewDirect databases. The Personnel/Payroll Services Division (PPSD) ViewDirect database contains personnel/payroll related reports. Because of the confidential nature of the reports in this database, only staff in personnel and payroll offices who meets the security requirements will be allowed access to the PPSD ViewDirect database.

The second ViewDirect database contains Fiscal reports and is maintained by the Division of Accounting and Reporting (DAR). For more information on the Fiscal reports in the DAR ViewDirect database, please visit their website link at www.sco.ca.gov/ard/state/viewdirect.pdf.
Obtaining Access To ViewDirect

ViewDirect access requires security approval. System access must be requested via the Security Authorization Form, PSD125A, and sent to the State Controller's Office through departmental security monitors.

Each employee requesting ViewDirect access must provide a printer identification number identified in the “Remarks” column of the PSD125A form. Each ViewDirect user is limited to one printer selection.
Reports vs. Enterprise Index Topics

There are two sections within ViewDirect where reports can be stored and viewed, they are; ‘REPORTS’ and ‘ENTERPRISE INDEX TOPICS’. While all reports are stored in the REPORTS section, some reports are also in the ENTERPRISE INDEX TOPICS. A Complete list of reports currently available can be found in the Appendix Section of this manual.

Following is a brief description of the ‘REPORTS’ and ‘ENTERPRISE INDEX TOPICS’ sections:

**Reports**

In the Report Section, reports are listed by Report Id (example: BOMRPT1) and Report Name (example: Benefit Over Max Report - SSN Included). Reports that are produced once a month will have one version (such as the Leave Activity and Balances (LAB) report). Whereas, reports produced more frequently will have more than one version (such as the Payroll Warrant Register report). Once a Report ID is accessed, it is broken down by Section (Agency Code). For more information on accessing Reports in ViewDirect, please see Section 6.0, Selecting Reports.

**Enterprise Index Topics**

In the Enterprise Index Topics Section, reports are listed by Topic ID (example: PAYREG) and Topic Name (example: Payroll Warrant Register). Once a Topic ID is accessed, it is indexed by key data*. Indexing is necessary when multiple versions of a single report are stored in ViewDirect. Indexing makes it much easier for the user to access a specific report version. For more information on accessing Index Topics in ViewDirect, please see Section 7.0, Selecting Enterprise Index Topics.

Example: Within ViewDirect, 15 payroll cycles of the Warrant Register report are retained. Placing the Warrant Register report in the Enterprise Index Topic, allows the reports to be indexed by the following key data*: Agency-Reporting Unit, Cycle Date, Issue Date and Type of Payment.

* Key data is specific information found on each page of a given report. In the example given above, each page of the Warrant Register report contains the key data specified, therefore indexing is possible.
Logon Procedures

ViewDirect can be accessed from the SCO MENU through SCOPROD or SCOVIEW.

![SCO MENU](image)

**NOTICE:** AUTHORIZATION TO ACCESS THIS SYSTEM IS LIMITED TO CALIFORNIA STATE EMPLOYEES IN THE PROPER CONDUCT OF OFFICIAL STATE BUSINESS. ALL OTHER ACCESS IS UNAUTHORIZED AND UNLAWFUL.

<table>
<thead>
<tr>
<th>PF</th>
<th>APPLICATION</th>
<th>CURRENT STATUS</th>
<th>PF</th>
<th>APPLICATION</th>
<th>CURRENT STATUS</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>SCOPROD</td>
<td>UNKNOWN</td>
<td>2</td>
<td>TSO3</td>
<td>UNKNOWN</td>
</tr>
<tr>
<td>3</td>
<td>SCOTRNG</td>
<td>UNKNOWN</td>
<td>4</td>
<td>TS1</td>
<td>XDOMAIN</td>
</tr>
<tr>
<td>5</td>
<td>PDTSTX</td>
<td>UNKNOWN</td>
<td>6</td>
<td>SY2KD4</td>
<td>UNKNOWN</td>
</tr>
<tr>
<td>7</td>
<td></td>
<td></td>
<td>8</td>
<td>PTEST</td>
<td>UNKNOWN</td>
</tr>
<tr>
<td>9</td>
<td></td>
<td></td>
<td>10</td>
<td>PSTSTX</td>
<td>UNKNOWN</td>
</tr>
<tr>
<td>11</td>
<td>PDTEST</td>
<td>UNKNOWN</td>
<td>12</td>
<td>LOGOFF</td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>SCOVIEWS</td>
<td>UNKNOWN</td>
<td>14</td>
<td>VIEWTEST</td>
<td>UNKNOWN</td>
</tr>
<tr>
<td>15</td>
<td>SCOVDR</td>
<td>UNKNOWN</td>
<td>16</td>
<td>VDRTEST</td>
<td>UNKNOWN</td>
</tr>
</tbody>
</table>

**SELECT APPLICATION BY PF KEY**

*Figure 4.0*

To Log on through:

- **SCOPROD**

  Use the standard log on procedure and at the blank screen, type REPT and press enter. ViewDirect displays the Viewing Menu shown in Figure 4.1.

  
  ![REPT](image)

  XXXXX LAST ACCESS AT 13:57:49 ON MONDAY, APRIL 12, 2001

  SIGN-ON IS COMPLETE

*Figure 4.1*
Press the PF13 key, or if using a PC, the appropriate keys (example: Shift and PF3 key). The ViewDirect logon screen will appear as follows:

![ViewDirect Logon Screen](image)

Enter your Recipient ID (user id used to log in to SCOPROD) and your password (same as used to log in to SCOPROD). ViewDirect displays the Viewing Menu shown in Figure 5.0.
Report selection begins with the Viewing Menu. On the Viewing Menu you specify whether you want to view a Report (R) or Topic Index (T) (refer to the Appendix for a list of available reports and topics). The following section explains how to access the report and topic options.

Note: The list of reports and topic items that you can access contain only the reports and topics you are authorized to view. No others appear on the list.
Selecting Reports

If you entered an R in the Access Options field on the Viewing Menu, the following screens will be displayed for report selection:

1. Report Screen

<p>| COMMAND------ | TIME: 105702 |
| REPORTS |</p>
<table>
<thead>
<tr>
<th>OPTION</th>
<th>REPORT ID</th>
<th>REPORT NAME</th>
</tr>
</thead>
<tbody>
<tr>
<td>-------</td>
<td>---------</td>
<td>------------</td>
</tr>
<tr>
<td>BOMRPT1</td>
<td>BENEFIT OVER MAX REPORT – SSN INCLUDED</td>
<td></td>
</tr>
<tr>
<td>BOMRPT2</td>
<td>BENEFIT OVER MAX REPORT</td>
<td></td>
</tr>
<tr>
<td>X</td>
<td>LASP904C</td>
<td>LEAVE ACTIVITY AND BALANCES REPORT (LAB)</td>
</tr>
<tr>
<td></td>
<td>PDP5711</td>
<td>SUSPENDED TRANSACTIONS</td>
</tr>
<tr>
<td></td>
<td>PDQ0400</td>
<td>DAILY ACTIVITY INDEX</td>
</tr>
</tbody>
</table>

**Figure 6.1**

The Reports screen lists the Report ID and Report name of all the reports you are authorized to view. Press PF8 to scroll forward to view more reports. PF7 scrolls back to the previous screen of reports.

To select a report for viewing, type an ‘X’ in the Option column next to the report you wish to view. Next, press enter and the following screen will be displayed:
2. **Report Versions Screen**

<table>
<thead>
<tr>
<th>Option</th>
<th>Date</th>
<th>Time</th>
<th>Device</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>X</td>
<td>20011217</td>
<td>000316</td>
<td>DISK</td>
<td>AVAILABLE</td>
</tr>
</tbody>
</table>

**Figure 6.2**

The Report Versions screen lists the available versions of the selected report. For example, if there are several days of a daily report available for viewing, the Versions screen lists them in date and time order, starting with the most recent one.

The date is in the YYYYMMDD (year, month and day) format. The time is in the HHMMSS (hours, minutes and seconds) using a twenty-four hour clock, format.

Press PF8 to scroll forward. PF7 scrolls back to the previous screen. To select a report version for viewing, type an ‘X’ in the Option column next to the version you wish to view. Next, press enter and the following screen will be displayed:
3. Report Section Index Screen

![Figure 6.3](image)

The Report Section Index screen lists sections available for viewing. The sorting sequence is in ascending order. To select a section, type an ‘X’ in the Option column next to the section you wish to view and press enter. The system will display the first page of the selected section.

Press PF8 to scroll forward. PF7 scrolls back to the previous screen. To select a report section for viewing, type an ‘X’ in the Option column next to the version you wish to view. Next, press enter and the selected report will be displayed. Please see Section 9.0, Viewing Commands/PF Keys for navigating through the report instructions.
Selecting Enterprise Index Topics 7.0

If you entered a T in the Access Options field on the Viewing Menu, the following screens will be displayed for report selection:

1. Enterprise Index Topic Screen 7.1

The Enterprise Index Topics screen lists the Topic ID and Topic Name of all the topics you are authorized to view. Press PF8 to scroll forward to view more reports. PF7 scrolls back to the previous screen of reports.

To select a topic for viewing, type an ‘X’ in the Option column next to the report you wish to view. Next, press enter and the following screen will appear:
2. Enterprise Index Topic Versions Screen

The Enterprise Index Topic Versions Screen lists the available versions of the selected topic. For example, if there are several versions (such as multiple payroll cycles) of a topic available for viewing, the Versions screen lists them in date and time order, starting with the most recent one.

The date is in the YYYYMMDD (year, month and day) format. Time is in the HHMMSS (hours, minutes and seconds) using a twenty-four hour clock format.

Press PF8 to scroll forward. PF7 scrolls back to the previous screen. To select a report version for viewing, type an ‘X’ in the Option column next to the version you wish to view. Next, press enter and the following screen will appear:
The Enterprise Index Topic Items screen displays a list of the topic items for the topic version you selected. The items listed on this screen are sorted from left to right in ascending order.

Press PF8 to scroll forward. PF7 scrolls back to see the previous screen. To select a topic item for viewing, type an ‘X’ in the Option (O) column next to the topic item you wish to view. Next, press enter and the selected report will be displayed. Please see Section 9.0, Viewing Commands/PF Keys for navigating through the report instructions.

**Additional Topic Report Information:**

Occasionally, the Enterprise Index Topic Items displays ‘…….’ (see example above) in the Topic Item field. This occurs when there is more than one fiscal year for a given Topic Item.
Viewing a Report

The preceding sections describe how to select a report. The selected report will display the following information:

- **Screen Heading – the top three lines contain system information.**

  Line 1 displays messages from the system. For example, if you press a PF key that is not active for report viewing, the system uses the top line to tell you the PF key does not work on the screen.

  Line 2 contains two fields:

  - COMMAND, where you enter commands such as the FIND command for searches. See Section 9.0 for a complete list of available COMMANDS.

  - SCROLL, which allows the user to SCROLL through the report. See Section 9.1 for scrolling information.

  Line 3 contains six fields that provides the: Report ID, Version, Section Code (the section of the report you are viewing), Page, Row and Column.

- **Viewing Window**

  The viewing window displays as much of the report as will fit on the screen at one time. The size of the viewing window depends on the type of terminal you are using. Most of the reports in ViewDirect are too large to view on one screen. Therefore, scrolling is necessary to see the full page.
A number of commands are available to help you navigate through a report. Most commands have a corresponding PF Key. The following summarizes the commands and the PF keys, if applicable.

<table>
<thead>
<tr>
<th>Command</th>
<th>PF Key</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>H (Help)</td>
<td>PF1</td>
<td>Gives information about Viewing and Printing help</td>
</tr>
<tr>
<td>PR (Print)</td>
<td>PF2</td>
<td>Displays the Printing Menu from which you may print any page you are authorized to view.</td>
</tr>
<tr>
<td>END</td>
<td>PF3</td>
<td>Returns you to the previous screen.</td>
</tr>
<tr>
<td>ME (Menu)</td>
<td>PF4</td>
<td>Returns you to the Viewing Menu.</td>
</tr>
<tr>
<td>RF (Repeat Find)</td>
<td>PF5</td>
<td>Searches all occurrences of the string of characters.</td>
</tr>
<tr>
<td>MA (Mark)</td>
<td>PF6</td>
<td>Marks pages for printing.</td>
</tr>
<tr>
<td>U (Up)</td>
<td>PF7</td>
<td>Moves the viewing window up.</td>
</tr>
<tr>
<td>D (Down)</td>
<td>PF8</td>
<td>Moves the viewing window down.</td>
</tr>
<tr>
<td>LE (Left)</td>
<td>PF10</td>
<td>Moves the viewing window to the left.</td>
</tr>
<tr>
<td>RI (Right)</td>
<td>PF11</td>
<td>Moves the viewing window to the right.</td>
</tr>
<tr>
<td>Q (Quit)</td>
<td>PF12</td>
<td>Exit from the Viewing and Printing system.</td>
</tr>
<tr>
<td>F (Find)</td>
<td>N/A</td>
<td>Searches forward for a string of up to 44 characters. This command can only be used once in a Report.</td>
</tr>
<tr>
<td>T (Top)</td>
<td></td>
<td>Moves the viewing window to the beginning of the report.</td>
</tr>
<tr>
<td>B (Bottom)</td>
<td>N/A</td>
<td>Moves the viewing window to the bottom of the report.</td>
</tr>
<tr>
<td>L (Locate)</td>
<td>N/A</td>
<td>Same as the Find except this command is used for all screens except when in a Report.</td>
</tr>
</tbody>
</table>

Further information on using the commands listed above can be found in the following sections.
• How to Navigate Through a Report

Without changing the default fields, the window typically moves to the right or left half of the width of the screen at a time. Example: On an 80 column screen, the window moves 40 columns if scrolling to the right or left. The following describes how to easily navigate through a report.

Commands

Navigating through a report can be accomplished by entering any of the following commands in the Command field.

• **RI(ght)** – moves the screen to the right by the number of columns you specify.

To specify how many columns you wish to move to the right, on the Command line, enter RI and the number of columns you wish to move right (ex. RI 5 will move your screen to the right 5 columns).

• **LE(ft)** – moves the screen to the left by the number of columns you specify.

To specify how many columns you wish to move to the left, on the Command line, enter LE and the number of columns you wish to move to the left (ex. LE 5 will move your screen to the left 5 columns).

• **U(p)** – moves the screen up by the number of rows you specify. This command is the same as entering Row in the SCROLL field.

To specify how many rows you wish to move Up, enter U on the Command line and the number of rows and press enter.

• **D(own)** – moves the screen down by the number of rows you specify. This command is the same as entering Row in the SCROLL field.

To specify how many rows you wish to move Down, enter D on the command line and the number of rows and press enter.

• **T(op)** – to go to the first page of a report, enter a T on the Command line and press enter.

• **B(ottom)** – to go to the last page of a report, enter a B on the Command line and press enter.
• **L(ocate)** – The Locate command is useful when trying to find a specific section of a report (ex. Agency Code/Reporting Unit). This command can only be used on the Report Section or Enterprise Index Topic Items screens. To locate a specific section, enter L and the string of data you are searching for.

Example: If you are in the Enterprise Index Topic Items screen for the Warrant Register report and you are trying to find Agency/Reporting Unit 051-220, enter L 051-220.

• **F(ind)** – The Find command is useful when trying to find specific information of a report (ex. Smith). This command is available once you are inside the report. To Find the specified information, enter F and the string of data you are searching for. Example: To find a record with the name Smith, enter F Smith.

With this command, you can also find all occurrences of specified data by entering the string requested (ex. F Smith) and press enter. After finding the first occurrence, press PF5 to repeat the Find.

**Scrolling**

Scrolling through a report is possible using a combination of PF keys and commands. Scrolling is accomplished by:

In the **SCROLL** field (on the command line to the far right) you have the option of scrolling by:

- **Screen** – scrolls forward one screen at a time.

  To scroll a screen at a time, change the SCROLL field to SCREEN and press PF8 (forward) or PF7 (back).

- **Page** – scrolls forward one page at a time.

  To scroll a page at a time, change the SCROLL field to Page and press PF8 (forward) or PF7 (back.)

- **Line** – scrolls forward however many lines you designate.

  To scroll through the report one line at a time, change the SCROLL field to Line and press PF8 (forward) or PF7 (back).

- **Row** – same as line.

  To scroll through the report one row at a time, change the SCROLL field to Row and press PF8 (forward) or PF7 (back.).
Printing Reports

ViewDirect users are limited to one printer. Printers can only be changed by contacting the ViewDirect Administrator. When changing a printer id, please provide the user id and printer identification number. If you are unsure whether your printer is a mainframe printer, please check with your IT staff for assistance.

Once the job is submitted for printing (per the instructions below), you will receive a message at the top of the screen indicating “Print Request Submitted”. If you do not receive this message, try the following:

1. Make sure the printer is turned on.
2. Log all the way off of the system and log back in. Retry the print request.
3. If after trying numbers 1 and 2 above you are still unable to print, call the SCO Customer Service Help Desk (see attached contact list). Please be prepared to provide your user id and printer id.

The Printing Menu

```
COMMAND--------PR       TIME: 083238

***PRINTING MENU***

REPORT ID: LASP904C
VERSION:  19990317  000316
FROM------PAGE= 000001 OF SECTION:051
TO------PAGE= 000050  OF SECTION:051
NUMBER OF PAGES TO BE PRINTED: 000050
PAGE OUTPUT LIMIT:______
PRINTER: O(0-ONLINE/ B- BATCH)
ON-LINE PRINTER ID: PDXP
BATCH DEVICE ID:
JCL (FOR BATCH PRINT ONLY)
```

**Figure 10.0**

Once you submit a report for printing (as described below), you will be directed to the Printing Menu. Please note that all fields on this menu are pre-filled and you cannot enter data.

In ViewDirect, you have the option of printing the entire report or pages of a report. The following sections provide information on either option:
Printing the Entire Report

Once you are within the report, press PF2 and you will be directed to the Printing Menu. From this Menu, press enter and the entire report will be submitted to your printer.

Printing Portions of a Report

If you do not want to print the entire report (PF2 without one of the following commands prints the entire report), you can mark report pages for printing as follows:

- To print a specific number of pages, beginning on the current page you wish to print, on the command line enter MA(space)# (where # enter the number of pages you wish to print. Example: MA 6 will print the current page plus the following 5 pages). Press PF2 (print) and press enter to submit the print request.

- To print a entire section of a report, beginning on the first page of the section you wish to print, on the command line enter MA(space)S. Press PF2 (print) and press enter to submit the print request.

- To print a block of a data of a report, at the beginning of the block you wish to print, on the command line enter MA(space)B on the command line. Scroll forward to the end of the block of data you wish to print and enter MA(space)B again. Press PF2 (print) and press enter to submit the print request.
Contacts

ViewDirect Administrator (Personnel/Payroll)
  Todd Soto, 322-3055
  David Avila, 322-3987

  Contact the Personnel/Payroll ViewDirect Administrator for questions related to printer change requests, the ViewDirect procedures, problems viewing reports and problems logging on.

ViewDirect Administrator (Fiscal)
  Carl Walker, 322-2794

  The Fiscal ViewDirect Administrator should be contacted for questions related to the Fiscal ViewDirect system.

Security Authorization Form, PSD125A
  SCO Security Administrator,
  Todd Soto, 322-3055
  David Avila, 322-3987

  Contact the Security Administrator for questions related to the Security Authorization form and security requirements.

CLAS Liaison Unit
  Support Staff, 327-0756

  Contact the CLAS Liaison Unit for questions related to the data contained in any of the CLAS reports.

Payroll Liaison Unit
  Support Staff, 323-3081

  Contact the Payroll Liaison Unit for questions related to the data contained in any of the Payroll reports.

Data Management Unit
  Samantha Kelly, 324-7268

  For questions related to the Established Position and Potential Vacancy Reports.

SCO Customer Service Hotline, 324-6716

  Contact the Customer Service Hotline for printing problems.
APPENDIX

Available Reports (R) in ViewDirect

BOMRPT1 – Benefit Over Max – with SSN
BOMRPT2 – Benefit Over Max – without SSNs
LASP6565 – Leave Accounting Intermittent Benefit Tracking Report
LASP904C – Leave Activity & Balances – with SSN
LASP906C – Leave Activity & Balances - without SSNs
PAYREGX – Report version of the Payroll Warrant Register Report
PCFY0403 – Probable Vacant Position Report
PCFY0404 – Abolished Vacant Position Report
PD-A/R – Notice of Accounts Receivable
PD-A/RVRSL – Notice of Accounts Receivable Reversal
PDBLKBAL – Blanket Balance Report
PDBLKMIC – Blanket Expenditure Report
PDB5474A – Retirement Maximum – Compensation Limit Reached
PDC9820 – W2’s To Be Mailed
PDL1192 – High CTO, HC, or EX Earn Report
PDL1212 – State Service Begin Balance
PDL4016 – Unused CTO Greater Than 9 Leave Periods
PDM0500 – Alpha Listing
PDM0501 – Facility Alpha Listing
PDP5711 – Suspended Transactions
PDV1101 – Estab. PSN by PSN Number
PDV1102 – Estab. PSN by Class Title and Psn
PDV1103 – Filled/Vacant PSN Summary by Facility and Class Title
PDV1104 – Dept. Summary Filled/Vacant PSN by Class
PDV1105 – Estab. PSN w/No Expenditures by Facility & Psn
PDV1106 – Estab. PSN w/No Expenditures by Facility
PDV1107 – PSN w/No Expenditure for 3, 4, or 5 mos. By Facility
PDV1108 – PSN w/No Expenditure for 3, 4, or 5 mos. Dept. Summary
PDW5350 – PIP Payroll Transactions (Annual R & R)
PDW5352 – Employment History Summary (Annual R & R)
PDW5354 – Payment History Summary (Annual R & R)
PDW5355 – Payroll Overtime Transactions (Annual R & R)
PDW7170 – Employees Identified as Nonresident Aliens
PDW1579-1 – FLSA Exempt EE’s Not Entitled to Pay – No Budget
PERIODIC – Periodic Position Control Report
PR1720-A – Suspended Payment Report
ROLL8WR – Roll Code 8 Warrant Register Report

Available Topics (T) in ViewDirect

ACTINDX – Daily Activity Index
ACTNDXA – Annual Activity Index
ACTNDXM – Monthly Activity Index
PAYREG – Topic version of the Payroll Warrant Register Report
PDAR_AU – Topic version of the Notice of Accounts Receivable by Agy/Rpt Unit
PDAR_CL - Topic version of the Notice of Accounts Receivable by Clearance Number
PDRV_AU – Topic version of the Notice of Accounts Receivable Reversal by Agy/Rpt Unit
PDRV_CL - Topic version of the Notice of Accounts Receivable Reversal by Clearance Number