

## 1.7 PRINTING PERSONNEL SUMMARY DOCUMENTS (IDOC)

### Overview

The Personnel Summary Document (IDOC) provides a brief summary of current personnel/employment and appointment/distribution information of an individual employee. It is an optional report which may be generated and used at the discretion of the service center. After an employee record is updated, an IDOC may be printed to provide a hard copy which shows current employee information.

### Policy Summary

The Personnel Summary Document is the only Employee Document (IDOC) used at UCSC. This document closely resembles the Payroll Personnel Action Document (PPAD) format. Other Employee Documents may contain misleading information and should not be printed.

The Personnel Summary Document can be printed for communicating with supervisors and employees, or for verifying information such as separation or benefits concerns.

### Before You Start

If you have not established a printer with the PPS system, you must do that prior to printing a Personnel Summary Document (IDOC). See *Selecting a Printer* in this section. If you have previously selected a printer, proceed with the instructions for selecting an employee document.

### Selecting a Printer

Note: If you will always be printing at the same printer, this step needs to be taken only once – the first time you want to print a document.

1. Log onto the Payroll Personnel System.
2. In the Next Function field, type **PRNT** to access the Printer Selection Menu.

#### PRINTER SELECTION MENU

```

TN3270 - uccmvb to host uccmvb.ucop.edu
Session Edit Commands Settings Help
UCPRNT0-E0943          SCT System Admin      03/27/97 08:31:07
                      Printer Selection      Userid: SCPPSLAH

To select a printer, place the cursor on the appropriate line and press Enter

Selected Number of Copies: 01 (Default is 1)
Printer   Printer ID   Description
-         -         -
-         AIS4MP      AIS SIMPLEX PORTRAIT
-         AIS4SP      AIS DUPLEX PORTRAIT
-         APO        ACADEMIC H.R.
-         CATS-SC1   CATS SUPPORT CENTER
-         CDL        CATS BUSINESS OFFICE
-         HUMHR     HUMANITIES HR
-         ISCAAC    ADAM-TEST
-         K8W       KRAISER-8TH FLR WEST
-         LIBOFF    MCHENRY LIB. OFFICE
-         NSBO-431  NATSCI BUS. OFFICE
-         LPR1
-         LPR2

Next Func:
U0105 A default printer has not been designated
===>
F: 1-Help      3-Return     4-Print     5-Update
F:            8-Forward    9-Jump

IBM-3278-2-E 08:49:34

```

Your cursor will be positioned in the “Number of copies” field. 01 is the only number of copies available.

3. If the printer is listed on the first page of the Printer Selection Menu, skip to the next step. If the printer is not listed on the first page, press **F8 Forward** until the printer you wish to select is displayed on the screen.

- Use the **TAB** key to position the cursor in the Select Printer column next to the printer you wish to select and press **Enter** to select your printer. **Caution:** Do not type any characters into the selection field (not even an “S”). On this function the printer where your cursor is positioned when you press Enter is selected. If you type a character, the cursor will jump to the next line, and the following printer will be selected.

A message should be displayed that the “Input is Accepted”.

- Press **F5 Update** to update PPS with your printer selection. This printer will remain your selected printer until you re-select a different printer.

## Personnel Summary Documents Data Entry

Navigate to the IDOC function from the Main Menu to print employee documents. Fast-path navigation from Inquiry or the EEDB is available for IDOC.

### Printing a Personnel Summary Document

- Type **IDOC** in the Next Function field.
- Type the employee ID, name, or social security number in the appropriate field.
- Press **Enter**.
- Press **F8 Forward** to move to page two of the Employee Documents. The “Personnel Summary Document” is the only Employee Document used at UCSC.

- You may choose between a landscape and portrait format of the Personnel Summary Document. (Landscape formatting is generally preferred.) Using the **TAB** key, move the cursor to the desired format, type ‘S’ to select, then press **Enter**.
- Press **F5 GenDoc** to generate and print a Personnel Summary Document.

#### DOCUMENT SELECTION MENU - SECOND PAGE

#### SELECTING A PERSONNEL SUMMARY DOCUMENT FROM THE MENU

```

TN3270 - uccmvsb to host uccmvsb.ucop.edu
Session Edit Commands Settings Help
PPIDOC0-10980 SCT Employee Docs 03/27/97 08:26:44
02/28/97 11:32:13 Document Selection Menu Userid: SCPPSLAH
ID: 010000100 Name: NAVIGATION, JOSEPH B Pri Pay: MA
Pg 02 of 02

Separation Documents : - Staff
                     - Academic
                     - Student
                     - Layoff

Personnel Summary Documents : S All - Landscape
                              All - Portrait

Benefits Summary Documents : - Benefits Enrollment
                              - Retirement and Savings

Next Func: ___ ID: _____ Name: _____ SSN: _____

===>
F: 1-Help 2-Cancel 3-PrevMenu 4-Print 5-GenDoc
F: 7-Backward 9-Jump 12-Exit
IBM-3278-2-E 08:45:22

```

### Sample Personnel Summary Document

See the following page for a sample employee document.