



Human Resources Center
University of California, Berkeley

User's Manual



Questions?
Call: (510) 643-1783
E-mail: pawshelp@berkeley.edu
Visit: <http://hrweb.berkeley.edu/hrcenter.htm>

TABLE OF CONTENTS

INTRODUCTION

Overview of PAWS	1
Confidentiality	1
PAWS Workflow	1

Access PAWS

Logging On	3
------------------	---

Create Ticket

Create Ticket	4
Save Ticket	7
Route Ticket	8
Submit Ticket	9
E-mail Notification	9

Approve Ticket

Edit and Approve Ticket	10
Making Changes After Approval	12

Track Ticket

Track Ticket	13
--------------------	----

Copying PAWS Tickets	14
-----------------------------------	-----------

Making Changes to Your Dashboard

Personal Information	15
Tickets	16
Homepage	18

Reporting

Custom Reports	21
EXAMPLE 1: Export to Excel	22
EXAMPLE 2: Metrics & Graphs	24
Saved Reports	28

INTRODUCTION

OVERVIEW OF PAWS

UC Berkeley's new Personnel Action Work System (PAWS) was created in 2010 in conjunction with the launch of the Human Resources Center (HRC). PAWS is a system that will minimize email traffic, consolidate information gathering, provide a tracking system for both the HRC and its clients, and allow for an electronic approval system. It is not meant to replace the consultative side of HR. Employee Relations issues should not be sent through the system. If you have questions or concerns, please call the HRC directly. PAWS is focused on the action, transaction, and sharing of information between the HR Center and client departments. PAWS brings together all of the major HR actions into one online platform and aims to streamline the process of providing HR services to all of the units in Administration, Chancellor's Office and IST/ICIO.

PAWS will help to ensure that all the needed information is provided at one time and in one location so HRC staff and department employees are not constantly emailing back and forth asking for additional information. It will allow the HRC to document the actions that have been requested and approved; and allows departments to track the progress of their requests. These metrics will allow the HRC and clients to see how long requests are taking to be addressed, handled, and processed. The HRC plans to use the information to establish a baseline and then improve turnaround time, client service, and other performance metrics.

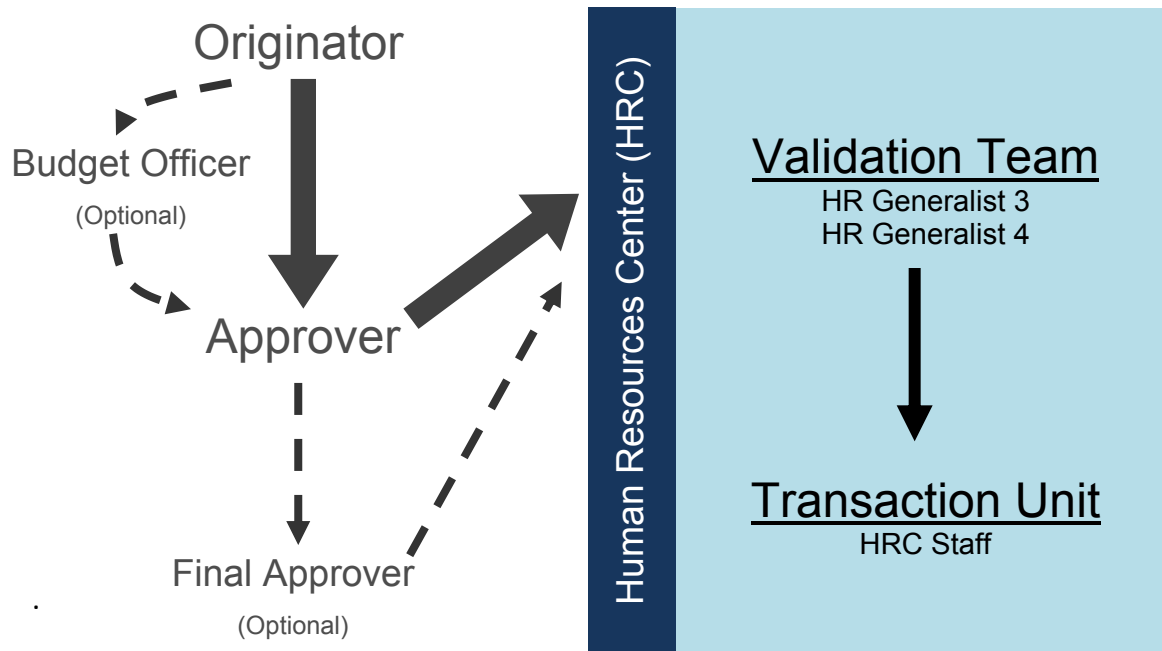
CONFIDENTIALITY

One important aspect of HR is confidentiality. With the exception of department heads, only those employees who touch a ticket are able to view a given ticket. This ensures that no one has access to a ticket if they do not originate it or approve it.

PAWS WORKFLOW

Each department has designated "originators" and "approvers." In some departments, one person may play the role of both originator and approver. The roles have been set according to the designation assigned by the head of the department. Originators start the ticket and enter in as much information as possible. They will submit the ticket to the department Approver(s). Each approver has been delegated authority to approve HR transactions for employees in that department. Once an Approver has approved the ticket it is automatically routed to the appropriate HRC Validation Team. See Diagram 1 below for an overview of the workflow.

Diagram 1: Overview of PAWS Workflow



If you have any questions about HR processes, please e-mail pawshelp@berkeley.edu

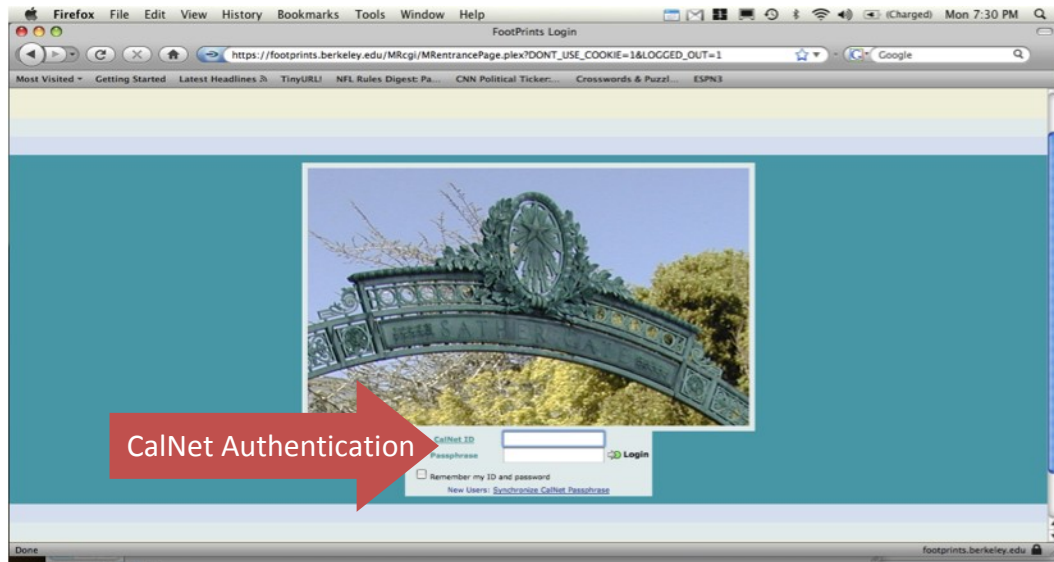
CHAPTER 1 – Access PAWS

LOGGING ON

Go to: <http://footprints.berkeley.edu>

Note: You must be an authorized user in order to access PAWS

Log on to PAWS using your CalNet ID and Passphrase:



Once you have successfully logged on, you will be taken to the Dashboard where you can create, edit, approve, and submit a ticket. You can also see all tickets assigned to you that are pending.

PAWS
 PERSONNEL ACTION WORK SYSTEM

Subject ☒ Keyword ☐ Number ☐
 [Advanced](#)

Project Personnel Action Work System
 User: Katrina Spencer

[Project Home](#)
[Create Ticket](#)
[Address Book](#)
[Search](#)
[Reports](#)
[Flashboard](#)
[Knowledge Base](#)
[Communication](#)
[My Preferences](#)
[Calendar](#)
[Administration](#)
[Help](#)
[Logout](#)

My Dashboard

Project Totals - Personnel Action Work System

Open	2	Request	1
Active	8	Submit For Approval	4
Pending Approval	0	Rejected Approval	0
Approved	0	Pending Validation	1
Rejected Validation	0	Validated	0
Closed	0		

Display: **My Assignments**

Displaying 1 - 6

Ticket #	Priority	Assigned Personnel	Last Edited On	Status	Subject	Department	All
27	Medium	Rick Mens Cox	08/13/2010	Open	checkcheck	Human Resources	<input type="checkbox"/>
26	High	Katrina Spencer	08/13/2010	Submit For Appr	Hourly waged finance person	HR	<input type="checkbox"/>
25	Low	Katrina Spencer	08/13/2010	Submit For Appr	Spot Award	HR	<input type="checkbox"/>
24	Medium	Katrina Spencer	08/13/2010	Submit For Appr	New Contract hire	HR	<input type="checkbox"/>
23	Medium	Katrina Spencer	08/13/2010	Submit For Appr	Changing the funding of a career employee as of...	HR	<input type="checkbox"/>
22	Medium	Katrina Spencer	08/13/2010	Open	Oski Stipend	Human Resources	<input type="checkbox"/>

Find:

☐ Highlight all ☐ Match case
 Reached end of page, continued from top

Done
 footprints.berkeley.edu

CHAPTER 2 – Create Ticket

CREATE TICKET

From the dashboard, click on “Create Ticket:”



The screenshot shows the PAWS (Personnel Action Work System) interface. A red arrow points to the 'Create Ticket' link in the left sidebar. The dashboard displays the following data:

Project Totals - Personnel Action Work System

Open	2	Request	1
Active	8	Submit For Approval	4
Pending Approval	0	Rejected Approval	0
Approval	0	Pending Validation	1
Rejected Validation	0	Validated	0
Closed	0		

My Assignments

Ticket #	Priority	Assigned Personnel	Last Edited On	Status	Subject	Department	All
27	Medium	Rick Mena Cox	08/13/2010	Open	checkcheck	Human Resources	<input type="checkbox"/>
26	High	Katrina Spencer	08/13/2010	Submit For Appr	Hourly waged finance person	HR	<input type="checkbox"/>
25	Low	Katrina Spencer	08/13/2010	Submit For Appr	Spot Award	HR	<input type="checkbox"/>
24	Medium	Katrina Spencer	08/13/2010	Submit For Appr	New Contract hire	HR	<input type="checkbox"/>
23	Medium	Katrina Spencer	08/13/2010	Submit For Appr	Changing the funding of a career employee as of...	HR	<input type="checkbox"/>
22	Medium	Katrina Spencer	08/13/2010	Open	Oski Stipend	Human Resources	<input type="checkbox"/>

A pop-up window will appear. Note: if necessary, you must configure your Internet browser to allow pop-up windows. In the “Subject” field, enter information relevant to the ticket. This will be the subject line in all e-mail communications. **Fields marked with an asterisk (*) are required.**

Click on the “Action Information” tab and select the appropriate action type:

The screenshot shows a web browser window with the URL <https://footprints.berkeley.edu/MRCgi/MRTicketPage.plex?USER=dspencer&MRP=y8HrRgD>. The page title is "New Ticket for Personnel Action Work System". The "General Information" section includes fields for Subject (GIVE OKSI Bear a stipend), Priority (Medium), Status (DRAFT), Requester Name (Last, First), Email Address, and CalNetID. Below this, the "Action Information" tab is selected, displaying a dropdown menu with the following list of action types:

- Make a Selection
- Affiliate Request
- Appointment - Extend or Renew
- Chartstring Change
- Classification
- Contract Request - Athletics
- Hire Career Employee
- Hire Contract Employee
- Hire Limited Employee
- Hire Student Employee
- Leaves (FMLA, Disability, etc)
- Other HCM Change
- Payment Request - Athletics
- Payroll Correction
- Re-classification
- Re-Hire Retiree
- Recruitment
- Report Request
- Salary Adjustment
- Separation

There are currently twenty-eight different action types:

Achievement Award	Leaves (FMLA, Disability, etc)	Salary Adjustment
Affiliate Request	Other HCM Change	Separation
Appointment - Extend or Renew	Payment Request - Athletics	Service Awards
Chartstring Change	Payroll Correction	SPOT Award
Classification	Payroll Expense Transfer	Stipend
Contract Request- Athletics	Re-classification	START Program
Hire Career Employee	Re-hire Retiree	Student Appointment - Extend or Renew
Hire Contract Employee	Recruitment	Supervisor Change
Hire Limited Employee	Recruitment - Student	
Hire Student Employee	Report Request	

Each action type generates a different pop-up window with unique fields. PAWS is specifically designed so that department users only have to give necessary and relevant information for each particular action type they are requesting, without redundant or superfluous information. Each action type, however, does require information from the department, such as employee name, chartstring, etc. that the HRC does not have. All fields that are marked with an asterisk

(*) must be filled out before a ticket can be submitted. Without required information, the action cannot be completed.

As an example, if you select the action type “Stipend” the following pop-up window appears:

For more info, click on the “Policy Information” button and you will be redirected to the appropriate HR policy webpage

STIPEND
Request a stipend for an employee. A stipend is compensation for temporary performance of higher-level duties or other significant duties not part of the employee's regular position.

Policy Information (button)

Requesting Department* Human Resources [FMHUM]
This can be found on Cal Photo ID, BAIRS or HCM.

Employee ID* 123456789

Requested Start Date of Stipend* Mon Day Year
08 01 2010
current date ☐

Employee Name (Last, First)* Bear, Oski

Current Job Title No Choice

Requested End Date of Stipend* Mon Day Year
12 31 2010
current date ☐

Reason or justification*
Doing higher work level

Stipend should be on current chartstring(s).
Do not fill out 'Chartstring Field Section' ☒

Percent Increase (compared to old monthly salary)

Monthly Stipend Amount* 300.00

Chartstring Field Section
If more than two chartstrings are required for this request, please enter them into a spreadsheet and use the "Attachments" tab to load them into this ticket.

CHSTR1 - Chartstring %

CHSTR1 - Acct# 51015 Non-budgeted Career Staff

CHSTR1 - Fund# 69799

CHSTR1 - Dept# 21940

CHSTR1 - Program# 72

CHSTR1 - Project

CHSTR1 - Flex FMHTY

CHSTR1 - Start Date (optional) Mon Day Year
current date ☐

CHSTR1 - End Date (optional) Mon Day Year
current date ☐

CHSTR2 - Chartstring %

CHSTR2 - Acct# No Choice

CHSTR2 - Fund#

CHSTR2 - Dept#

CHSTR2 - Program#

CHSTR2 - Project

CHSTR2 - Flex

CHSTR2 - Start Date (optional) Mon Day Year
current date ☐

CHSTR2 - End Date (optional) Mon Day Year
current date ☐

SAVE Note: You must click this 'SAVE' button BEFORE clicking the 'SAVE' button on the main Edit Page.

Reminder: Fields that are red are mandatory and must be completed before you are allowed to save. Black fields are optional fields.

Please remember to click “Save.” You must click this “Save” button before you can click Save on the main “Create Ticket” page.

NOTES TAB:

The “Notes Tab” allows you to leave information, messages, or comments for your HR Generalist. Please enter a message in the Notes field explaining what action you are requesting and answer any questions you think your approver or the Validation Team may have about the ticket. This is the first thing that displays when a ticket is opened. It is a way to track communication and to ensure all information is provided. This is where your HR Generalist will also leave messages for you to read or respond to. [When a note is added to the ticket, it will also generate an email with the message included.]

ATTACHMENTS TAB:

Some action types, like reclassification, require that you attach documentation. Please attach all needed files (on the “Attachments” tab) to expedite the action.

The screenshot shows the 'New Ticket for Personnel Action Work System' form. The 'General Information' tab is active. Fields include: Subject (Give Oski Bear a stipend), Priority (Medium), Status (DRAFT), Requester Name (Last, First), Email Address, and CalNetID. Below these are tabs for Contact Information, Action Information, Note, Attachments, Assigned Personnel and Notifications, and Time Spent. Red arrows point to the 'Notes' and 'Attachments' tabs.

SAVE TICKET

Once you are ready to save the ticket you must

- 1 Set the status to “Draft”;
- 2 Click “Save.”

The screenshot shows the same form, but the 'Status' dropdown is open, showing 'DRAFT' selected. A red arrow points to the 'SAVE' button, and another red arrow points to the 'DRAFT' option in the Status dropdown.

You may save a ticket multiple times before submitting it to your approver.

ROUTE TICKET

You may route your ticket to other authorized users in your department to add information, edit, or make other necessary changes before submitting the ticket for approval. This may be a budget officer, another originator, or your approver.

To route your ticket, you must click on the “Assigned Personnel and Notifications” tab and follow these steps:

- Step 1: Select the affected department from the “Project Members” list. Click on the “+” sign next to the department name to reveal all of the authorized users in the department. Choose the user(s) to whom you would like to route the ticket.
- Step 2: Click on the right arrow to add a name to the “Assigned Personnel” field. You may select multiple names.
- Step 3: **OPTIONAL:** To add a non-authorized individual’s e-mail address to the ticket, click on the “cc” field and a pop-up window will appear. Enter the e-mail address (or multiple addresses separated by commas) in the empty field at the top. These individuals will receive a copy of the e-mail notification that is sent when the ticket is submitted. However, they will **NOT** have access to view or edit the ticket. This is one way to notify an employee that an action has been requested.

The screenshot shows the 'New Ticket for Personnel Action Work System' interface. The form includes fields for Subject, Priority, Requester Name, CalNetID, Status, and Email Address. Below these are tabs for Contact Information, Action Information, Note, Attachments, and Assigned Personnel and Notifications. The Assigned Personnel and Notifications tab is active, showing a list of Project Members on the left and Assigned Personnel on the right. A 'Send Email To' section is also visible.

STEP 1
Select dept.
Then select assignee.

STEP 2
Click right
arrow to add
name to
“assigned
personnel”
field.

STEP 3
(optional)
Add any non-
authorized
individual’s
email

Assigned Personnel/
Notifications Tab

SUBMIT TICKET

To submit your ticket for approval:

- 1 Set the status to "Submit for Approval";
- 2 Click "Save."

2 – SAVE

1 – Submit for Approval

Before you submit your ticket for approval, please remember:

1. Your approver must be selected in the "Assigned Personnel" field of the "Assigned Personnel and Notifications" tab. See the "Routing a Ticket" section (p. 9).
2. If you are an Originator *and* an Approver, you may just click "Approved".
3. All required fields must be full before submitting the action (see below).

E-MAIL NOTIFICATION

PAWS is designed to send you an e-mail every time you, or somebody in the workflow changes the status of the ticket. These e-mails provide you with confirmation that you have submitted the ticket for approval and allows you to track the progress of your action request through the entire process.

CHAPTER 3 – Approve Ticket

EDIT AND APPROVE TICKET

After the Originator has submitted a ticket to you for approval, the ticket will appear in your work list on the PAWS dashboard:

The screenshot shows the PAWS (Personnel Action Work System) dashboard. The left sidebar contains navigation links: Project Home, Create Ticket, Address Book, Search, Reports, Flashboard, Knowledge Base, Communication, My Preferences, Calendar, Administration, and Logout. The main area displays 'My Dashboard' with a 'Project Totals' summary table and a 'My Assignments' table. A red arrow labeled 'Work list' points to the 'My Assignments' table.

Open	Request
2	1
Active	Submit For Approval
8	4
Pending Approval	Rejected Approval
0	0
Approved	Pending Validation
0	1
Rejected Validation	Validated
0	0
Closed	
0	

Ticket #	Priority	Assigned Personnel	Last Edited On	Status	Subject	Department
27	Medium	Rick Mena Cox	08/13/2010	Open	checkcheck	Human Resources
26	High	Katrina Spencer	08/13/2010	Submit For Appr	Hourly waged finance person	HR
25	Low	Katrina Spencer	08/13/2010	Submit For Appr	Spot Award	HR
24	Medium	Katrina Spencer	08/13/2010	Submit For Appr	New Contract hire	HR
23	Medium	Katrina Spencer	08/13/2010	Submit For Appr	Changing the funding of a career employee as of...	HR
22	Medium	Katrina Spencer	08/13/2010	Open	Oski Stipend	Human Resources

When you click on the ticket, it will appear in a new pop-up window. Click on “Edit” in order to access the ticket, to make changes to fields, verify information, and approve the ticket.

The screenshot shows a pop-up window titled 'Ticket 22 in Personnel Action Work System'. The browser address bar shows the URL: <https://footprints.berkeley.edu/MRcgi/MRTicketPage.plex?USER=kspencer&MRP=96iOnnZC>. The window contains a 'General Information' section with the following details:

Subject	Oski Stipend	Status	Open
Priority	Medium		
Submitter	Antonio Santiago		
Requester Name (Last, First)	Santiago, Antonio; Santiago, Antonio G.; Santiago, Antonio Gonzalo	Email Address	asantiago@berkeley.edu
CalNetID	asantiago		
Assigned Personnel(s)	Katrina Spencer		

Below the general information, there are tabs for 'Contact Information', 'Action Information', 'Note', 'Assigned Personnel and Notifications', 'Time Spent', and 'History'. The 'Note' tab is selected, showing the following notes:

- Entered on 08/13/2010 at 11:19:46 PDT (GMT-0700) by Rick Mena Cox: Higher level of work is being done on a special project. Please use the added chart string with the flex field. Thanks and have a wonderful day. :P Rick
- Entered on 08/12/2010 at 12:00:09 PDT (GMT-0700) by Antonio Santiago: Test!

To edit or add information to the action type fields, you must click on the “Edit Dependent Fields” link on the “Action Information” tab.

Edit Ticket 22 in Personnel Action Work System -- General Information

Subject*: Oski Stipend
 Priority*: Medium
 Status*: DRAFT
 Submitter: Antonio Santiago
 Requester Name (Last, First): Santiago, Antonio;San
 Email Address: asantiago@berkeley.edu
 CalNetID: asantiago

Attachments | Assigned Personnel and Notifications | Time Spent | History

Contact Information | **Action Information*** | Note

Action Type*: Stipend
[Edit Dependent Fields](#)

This will return the pop-up window for the selected action type with all of the information that has been previously saved. For more information, see pp. 6-7 above. Remember to save.

Dependent Ticket Fields

STIPEND
 Request a stipend for an employee. A stipend is compensation for temporary performance of higher-level duties or other significant duties not part of the employee's regular position.

Policy Information

Affected Department*: Human Resources (FHHUH)
 Employee ID*: 123456789
 Requested Start Date of Stipend*: 08/01/2010
 Reason or justification*: Doing higher work level
 Stipend should be on current chartstring(s). Do not fill out 'Chartstring Field Section' ☒
 Percent Increase (compared to old monthly salary):
 Monthly Stipend Amount*: 300.00

Employee Name (Last, First)*: Bear, Oski
 Current Job Title: No Choice
 Requested End Date of Stipend*: 12/31/2010

Chartstring Field Section
 If more than two chartstrings are required for this request, please enter them into a spreadsheet and use the "Attachments" tab to load them into this ticket.

CHSTR1 - Chartstring %
 CHSTR1 - Acct#: 51015 Non-budgeted Career Staff
 CHSTR1 - Fund#: 69799
 CHSTR1 - Dept#: 21940
 CHSTR1 - Program#: 72
 CHSTR1 - Project:
 CHSTR1 - Flex: FHHUH
 CHSTR1 - Start Date (optional):
 CHSTR1 - End Date (optional):

CHSTR2 - Chartstring %
 CHSTR2 - Acct#: No Choice
 CHSTR2 - Fund#:
 CHSTR2 - Dept#:
 CHSTR2 - Program#:
 CHSTR2 - Project:
 CHSTR2 - Flex:
 CHSTR2 - Start Date (optional):
 CHSTR2 - End Date (optional):

SAVE Note: You must click this 'SAVE' button BEFORE clicking the 'SAVE' button on the main Edit Page.

Note: You cannot approve a ticket until all of the required fields are completed.

When all of the required fields are complete and you are ready to approve the ticket:

- 1 Select "Approved" in the status dropdown menu;
- 2 Click "Save."

The screenshot shows a web browser window titled "Edit Ticket 28 in Personnel Action Work System". The address bar shows the URL "https://footprints.berkeley.edu/MRcgi/MRTicketPage.plex". The page has a "SAVE" button and a "Details" link. The main form is titled "Edit Ticket 28 in Personnel Action Work System -- General Information". It contains fields for "Subject*" (Give Oski Bear a stipend), "Priority*" (Medium), "Status*" (DRAFT), "Submitter" (Douglas Spencer), "Requester Name (Last, First)*" (Spencer, Katrina), "Email Address*" (kspencer), and "CalNetID*" (kspencer). A red arrow labeled "2 - SAVE" points to the "SAVE" button. Another red arrow labeled "1 - Approved" points to the "Approved" option in the "Status*" dropdown menu. Below the main form are tabs for "Attachments", "Assigned Personnel and Notifications", "Time Spent", and "History". The "Assigned Personnel and Notifications" tab is active, showing "Contact Information" and "Action Information*" sections. The "Action Information*" section has a dropdown for "Action Type*" (Stipend) and a link for "Edit Dependent Fields".

Your ticket has now been approved and will be automatically routed to the HRC Validation Team that is assigned to your department (see Diagram 1 on p. 2 above).

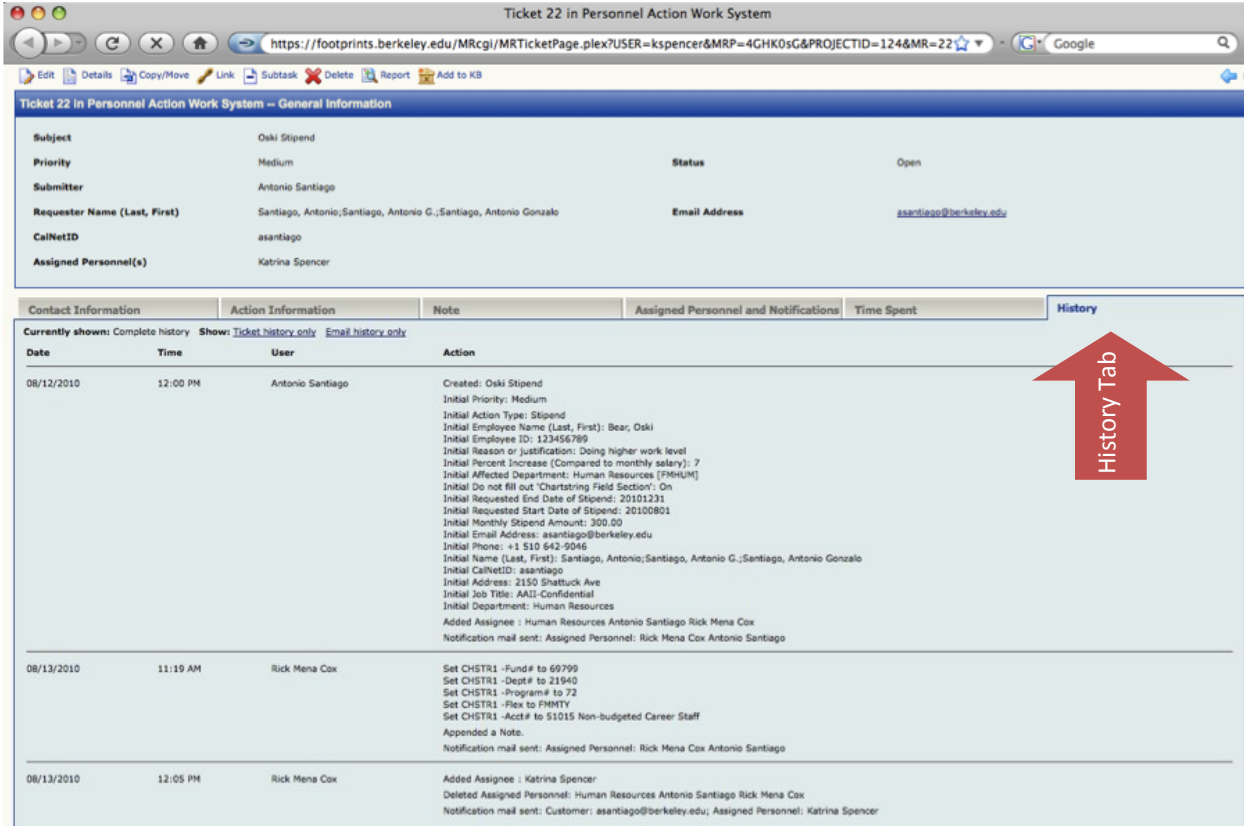
MAKING CHANGES AFTER APPROVAL

If you realize that there is a mistake with any of the data you have entered, please contact a member of your HRC Validation team to discuss the changes that need to be made.

Chapter 4 – Track Ticket

TRACK TICKET

To check the status of a ticket, click on the “History” tab. This allows you to view the complete history of the ticket, including its current status. Everything (e.g., notes, status changes, and workflow) will be listed:



The screenshot shows a web browser window titled "Ticket 22 in Personnel Action Work System". The URL is <https://footprints.berkeley.edu/MRcgi/MRTicketPage.plex?USER=kspencer&MRP=4GHK0sG&PROJECTID=124&MR=22>. The browser has a toolbar with buttons for Edit, Details, Copy/Move, Link, Subtask, Delete, Report, and Add to KB.

The main content area is titled "Ticket 22 in Personnel Action Work System -- General Information". It contains the following fields:

Subject	Oski Stipend	Status	Open
Priority	Medium		
Submitter	Antonio Santiago		
Requester Name (Last, First)	Santiago, Antonio; Santiago, Antonio G.; Santiago, Antonio Gonzalo	Email Address	asantiago@berkeley.edu
CalNetID	asantiago		
Assigned Personnel(s)	Katrina Spencer		

Below the general information is a tabbed interface with the following tabs: Contact Information, Action Information, Note, Assigned Personnel and Notifications, Time Spent, and History. The History tab is selected, and a red arrow points to it with the text "History Tab".

The History tab displays a table of actions:

Date	Time	User	Action
08/12/2010	12:00 PM	Antonio Santiago	Created: Oski Stipend Initial Priority: Medium Initial Action Type: Stipend Initial Employee Name (Last, First): Bear, Oski Initial Employee ID: 123456789 Initial Reason or Justification: Doing higher work level Initial Percent Increase (Compared to monthly salary): 7 Initial Affected Department: Human Resources [FMHUM] Initial Do not fill out 'Chartstring Field Section': On Initial Requested End Date of Stipend: 20101231 Initial Requested Start Date of Stipend: 20100801 Initial Monthly Stipend Amount: 300.00 Initial Email Address: asantiago@berkeley.edu Initial Phone: +1 510 642-9046 Initial Name (Last, First): Santiago, Antonio; Santiago, Antonio G.; Santiago, Antonio Gonzalo Initial CalNetID: asantiago Initial Address: 2150 Shattuck Ave Initial Job Title: AAI-Confidential Initial Department: Human Resources Added Assignee: Human Resources Antonio Santiago Rick Mena Cox Notification mail sent: Assigned Personnel: Rick Mena Cox Antonio Santiago
08/13/2010	11:19 AM	Rick Mena Cox	Set CHSTR1 - Fund# to 69799 Set CHSTR1 - Dept# to 21940 Set CHSTR1 - Program# to 72 Set CHSTR1 - Flex to FMHMY Set CHSTR1 - Acct# to 51015 Non-budgeted Career Staff Appended a Note. Notification mail sent: Assigned Personnel: Rick Mena Cox Antonio Santiago
08/13/2010	12:05 PM	Rick Mena Cox	Added Assignee: Katrina Spencer Deleted Assigned Personnel: Human Resources Antonio Santiago Rick Mena Cox Notification mail sent: Customer: asantiago@berkeley.edu ; Assigned Personnel: Katrina Spencer

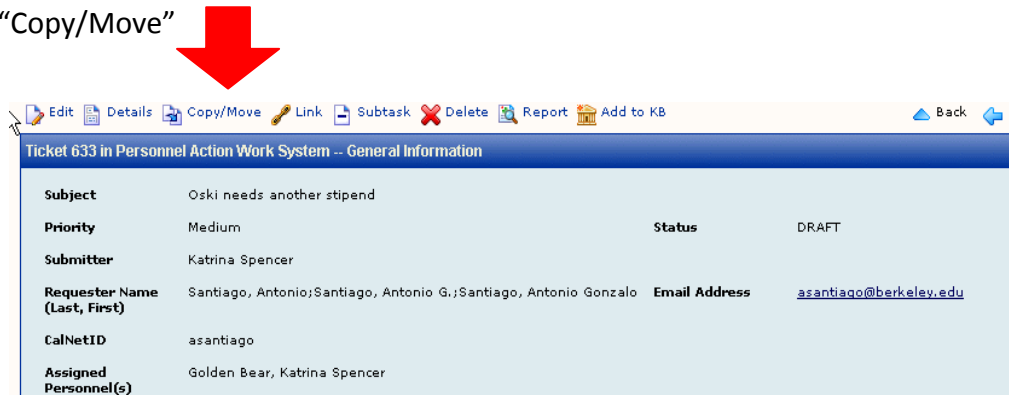
Please feel free to call the HRC at (510) 643-1783 if you have any questions regarding the status of your ticket.

COPYING PAWS TICKETS

Copying a ticket will minimize the number of times you have to enter information in PAWS, while still keeping each transaction separate for tracking and reporting purposes. The original ticket will be copied exactly – this includes notes, comments, and status. Please make all necessary changes before saving the new ticket. You may delete all previous notes before saving. Additionally, please talk to your HRC Generalist to ensure of how to clone tickets or if you have a regular type of ticket you would like to close so you are both clear on protocol.

To copy a ticket, choose the ticket you would like to copy by clicking on it on your dashboard.

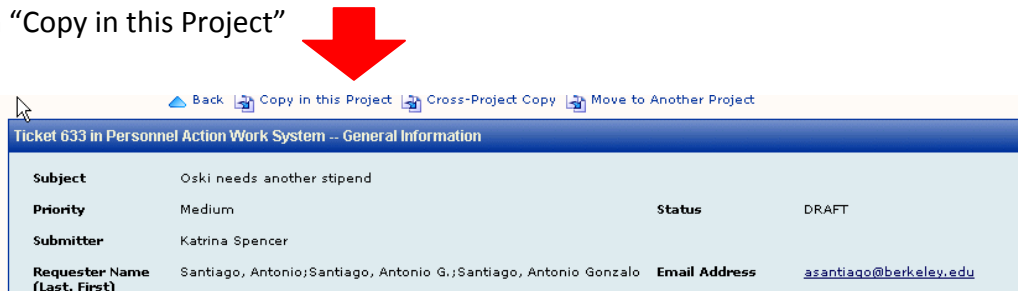
Click on “Copy/Move”



The screenshot shows the top navigation bar of the PAWS system with buttons: Edit, Details, Copy/Move, Link, Subtask, Delete, Report, and Add to KB. A red arrow points to the 'Copy/Move' button. Below the navigation bar is a section titled 'Ticket 633 in Personnel Action Work System -- General Information' containing the following details:

Subject	Oski needs another stipend		
Priority	Medium	Status	DRAFT
Submitter	Katrina Spencer		
Requester Name (Last, First)	Santiago, Antonio; Santiago, Antonio G.; Santiago, Antonio Gonzalo	Email Address	asantiago@berkeley.edu
CalNetID	asantiago		
Assigned Personnel(s)	Golden Bear, Katrina Spencer		

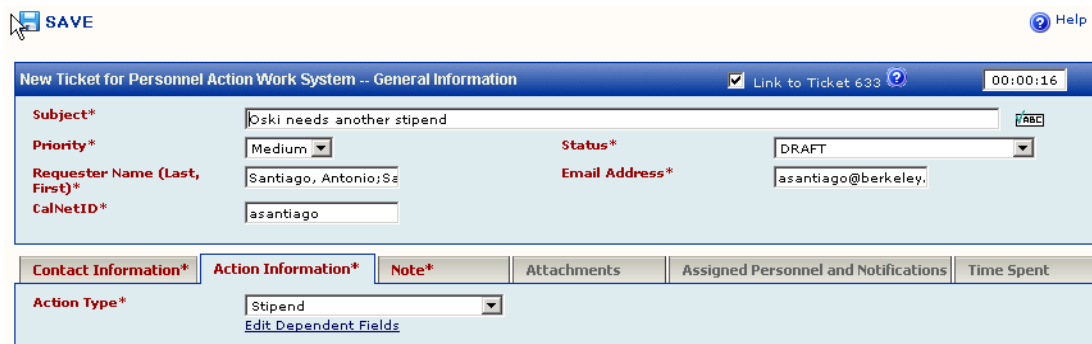
Click on “Copy in this Project”



The screenshot shows the same navigation bar as the previous image, but with a red arrow pointing to the 'Copy in this Project' button. Below the navigation bar is a section titled 'Ticket 633 in Personnel Action Work System -- General Information' containing the same details as the previous image:

Subject	Oski needs another stipend		
Priority	Medium	Status	DRAFT
Submitter	Katrina Spencer		
Requester Name (Last, First)	Santiago, Antonio; Santiago, Antonio G.; Santiago, Antonio Gonzalo	Email Address	asantiago@berkeley.edu
CalNetID	asantiago		
Assigned Personnel(s)	Golden Bear, Katrina Spencer		

A copy of your previous ticket will appear on your screen. You may now edit the ticket as necessary. The ticket will be assigned a new number when you click “save”.



The screenshot shows the 'New Ticket for Personnel Action Work System -- General Information' form. At the top, there is a 'SAVE' button and a 'Help' icon. The form includes a checkbox labeled 'Link to Ticket 633' which is checked. The form fields are as follows:

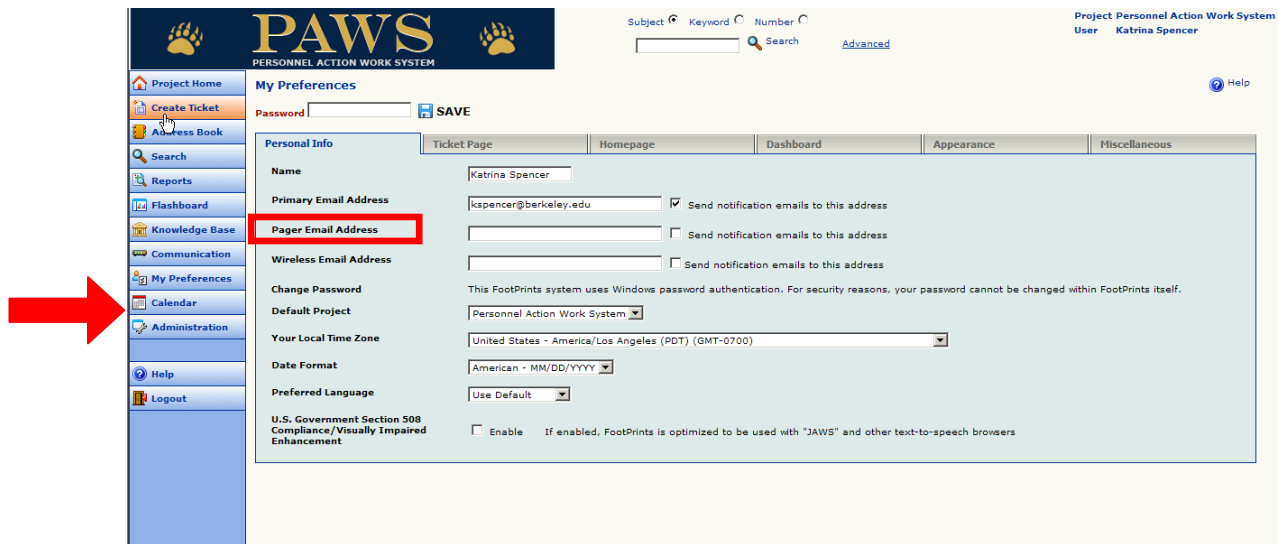
Subject*	Oski needs another stipend		
Priority*	Medium	Status*	DRAFT
Requester Name (Last, First)*	Santiago, Antonio;Sa	Email Address*	asantiago@berkeley.
CalNetID*	asantiago		

Below the form fields are tabs for 'Contact Information*', 'Action Information*', 'Note*', 'Attachments', 'Assigned Personnel and Notifications', and 'Time Spent'. The 'Action Information*' tab is selected, showing 'Action Type*' as 'Stipend' and a link to 'Edit Dependent Fields'.

MAKING CHANGES TO YOUR DASHBOARD

You can personalize your dashboard so you can see information that is relevant and helpful to you.

Select “My Preferences” on the left hand side.



The screenshot shows the PAWS (Personnel Action Work System) interface. On the left sidebar, the 'My Preferences' link is highlighted with a red arrow. The main content area shows the 'My Preferences' page with a 'Password' field and a 'SAVE' button. Below this, there are tabs for 'Personal Info', 'Ticket Page', 'Homepage', 'Dashboard', 'Appearance', and 'Miscellaneous'. The 'Personal Info' tab is selected, displaying fields for Name, Primary Email Address, Pager Email Address (highlighted with a red box), and Wireless Email Address. There are also checkboxes for sending notification emails to these addresses. Other settings include Change Password, Default Project, Your Local Time Zone, Date Format, and Preferred Language. A note at the bottom mentions U.S. Government Section 508 Compliance/Visually Impaired Enhancement.

PERSONAL INFO TAB

The first screen that will appear is the “Personal Info” tab. There are two things that you may want to change on this tab:

1. Email Notifications. If you would like to disable the email notification you can unclick the box next to “Send notification emails to this address”. You can also send the notification to a different email.
2. Default Project. If you are using multiple Footprints projects, you can click on the arrow and choose the “Personnel Action Work System” as your default.

Remember that you must enter your CalNet password and hit “Save” for the changes to take place.

TICKET PAGE TAB

This tab deals primarily with what is displayed initially once you create a ticket.

The screenshot shows the PAWS (Personnel Action Work System) interface. The top navigation bar includes links for Subject, Keyword, Number, and a Search button. The user is logged in as Katrina Spencer. The left sidebar contains various navigation options like Home, Create Ticket, Address Book, Search, Reports, Flashboard, Knowledge Base, Communication, My Preferences, Calendar, Administration, Help, and Logout. The main content area is titled 'My Preferences' and has a 'SAVE' button. The 'Ticket Page' tab is selected and highlighted with a red box. It contains several sections with radio buttons for 'Enable' or 'Disable' and dropdown menus for 'Tab Displayed'.

Here is a brief description of what each item:

1. Multiple Windows - By choosing "disable" it allows some pages to be loaded on the main page, rather than opening a new window.
***Recommended – "enable"**
2. Interface Style – By choosing "Tabs" your ticket display will look like this:

The screenshot shows the 'New Ticket for Personnel Action Work System -- General Information' form. The form has a blue header with the title and a timer showing 00:00:07. The form is divided into two main sections. The top section contains fields for Subject, Priority, Status, Requester Name (Last, First), Email Address, and CalNetID. The bottom section contains tabs for Contact Information, Action Information, Note, Attachments, Assigned Personnel and Notifications, and Time Spent. The Action Information tab is selected, showing an 'Action Type' dropdown menu.

If you select “Expand/Collapse” your ticket will look like this:

New Ticket for Personnel Action Work System -- General Information

Subject*

Priority* Medium **Status**

Requester Name (Last, First) **Email**

CalNetID

Contact Information

Select Contact History Clear

Requester Name (Last, First) **Email**

CalNetID **Phone**

Department **Address**

Job Title

Action Information*

Action Type* Make a Selection

Note

Quick Notes Search Knowledge Base

Font family Font size

3. **Tab Displayed** – The default for Create Page is “Contact Information”. This means that the tab that will display when you “Create Ticket” is the “Contact Information” tab. If you would like to see the “Action Information” tab first, you may select that from the drop down menu.

For PAWS we do not use “Edit Page” or the “Detail Page”.

4. **Automatic Spell Checker** – If you “enable” the automatic spell check, it will automatically spell check your text before saving or updating your ticket.
5. **HTML Note Editor** – If “enabled,” the Notes tab/field can include a control bar that allows you to format the text, change the font type, size, and color, and create bulleted and numbered lists and tables. If disabled, a plain text box is used instead. ***Recommended – “enable”**
6. **Flip-Thru Note View** – When “enabled,” the ticket will only show one note at a time and you will be required to click a button to see older notes. ***Recommended – “disable”**

7. **Edit Most Recent Description**— If you “enable”, each ticket you edit will display all previous notes, as well a text box for writing a new note.
8. **Prefill New Issues With My Contact Information**—If “enabled,” the Contact Information section of the ticket is always pre-populated with the Address Book record of the person who is logged into PAWS.
***Recommended – “enable”**
9. **Open attachments from a new window**—If “enable”, a new window is opened when you click on a file attachment to download it.
* **Recommended – “disable”**
10. **Behavior after issue create/edit**—The three options in this drop-down are:
 - **Close window and/or refresh homepage** closes the ticket/window or refreshes the page to the PAWS homepage when a ticket is submitted
 - **Display issue details** displays the ticket details page in a new window (in multi-window mode) or in the main frame (in single window mode) after you have saved the ticket.
 - **Display confirmation page only** displays the Issue number, Project name, time tracking data, and a View Issue button or, in multi-window mode, a View Issue button and a Close Window button. Clicking the View Issue button displays the Issue details page.
11. **Quick Descriptions/Signatures**—If you select the link, a pop-up window is displayed that allows you to create pre-defined text with which to populate the Description field in the Create Issue and Edit Issue pages.

HOMEPAGE TAB

This tab allows you to change the defaults on your homepage.

For PAWS the “Lists Available on Homepage” are pre-determined.

Default List – This allows you to choose which tickets you would like to see. The two that are most common default choices are “My Assignments” and “[Department] Team Assignments”.

Auto-Refresh Interval – This means that PAWS will refresh and any new ticket that is assigned to you will be on your homepage.

Maximum Tickets per screen – If you are in a department with a lot of tickets it can be helpful to have a higher number. This will allow you to scroll down the page and see up to 100 tickets without having to switch to a new screen.

(HOMEPAGE TAB – Continued)

Default Sorting – this will sort your tickets automatically for you according to your preference. You have the option to choose both a “Primary Sort Field” and a “Secondary Sort Field”.

Homepage Columns – This feature allows you to select fields that you would like displayed on your homepage. For example, if you would like to have “Status” on your homepage you would select “Status” from the “Available Fields” and hit “Add Field”. It would then show up on the “Displayed Fields” and on your homepage. This can be helpful in sorting tickets and displaying information that is important to you and to your department.

The “Dashboard”, “Appearance”, and “Miscellaneous” Tabs are not used in PAWS.

NOTE: YOU MUST ALWAYS ENTER YOUR CALNET PASSWORD AND HIT “SAVE” FOR SELECTED CHANGES TO TAKE EFFECT.

REPORTING

Custom Reports allows you to create reports with a wide variety of options. You can choose to have reports exported to Excel, which allows you to save reports, work with the data, or share the reports with people who do not use PAWS. The reporting feature is robust, and can produce any type of report with any information; however, it takes a little time to figure out how to produce the correct type of report to get the necessary information.

For Training Purposes, two examples are shown below.

To start, choose “Reports” from the menu on the left-hand column of the homepage. Then click “Custom”.



The first screen you see is shown below.

The screenshot shows the 'New Custom Report' dialog box with the 'Style' tab selected. The dialog has a title bar with a question mark icon and the word 'Help'. Below the title bar are seven tabs: 'Style', 'Heading', 'Formatting', 'Ticket Criteria', 'Contact Criteria', 'Advanced Criteria', and 'Save/Run'. The 'Style' tab is active and contains four radio button options: 'Columns' (selected), 'Wrapped', 'Metrics/Graphics', and 'Export'. Each option has a description. At the bottom, there is a checkbox labeled 'Include metrics with your Column or Wrapped style report.'.

Style	Description
<input checked="" type="radio"/> Columns	One Ticket per line in a table.
<input type="radio"/> Wrapped	A list of Tickets. Supports line breaks; good for reports that include many fields.
<input type="radio"/> Metrics/Graphics	Display sums, averages, and counts only.
<input type="radio"/> Export	Export data to a text file. Allows FootPrints data to be imported into spreadsheets or other programs.

☐ Include metrics with your Column or Wrapped style report.

Style Tab - There are four choices displayed on the Style Tab:

- **Columns**—Issue data is displayed in fixed columns. One ticket is displayed per row. Columns can be selected from any available fields.
- **Wrapped**—Each ticket returned is displayed in its own mini-table. Line breaks can be used to wrap data to multiple rows, for example, to place the Description in its own row. This style is useful for printing reports that contain many fields.
- **Metrics and Graphics***—Allows you to create custom metrics and graphs of counts, averages and sums on any field. Single and two-level metrics are supported. Output options include table, bar, and pie charts.
- **Export***—Export data to an Excel file that can be saved on your computer.

The two styles that are most useful for PAWS reporting are:

- 1) Metrics/Graphics and
- 2) Export.

For training purposes, we will show you step by step how to create 3 reports. These are the reports that the HRC is most often asked to provide. By understanding how these specific reports are created, we hope you will be able to go beyond the examples and run reports that are helpful and meaningful to your department.

EXAMPLE 1 (Export/Excel Report): You would like to run a report that shows all tickets ever created by your department, with some of the pertinent information.

Step 1 - Choose the "Export" option on the Style Tab.

New Custom Report

Style	Formatting	Ticket Criteria	Contact Criteria	Advanced Criteria	Save/Run
<input type="radio"/> Columns	One Ticket per line in a table.				
<input type="radio"/> Wrapped	A list of Tickets. Supports line breaks; good for reports that include many fields.				
<input type="radio"/> Metrics/Graphics	Display sums, averages, and counts only.				
<input checked="" type="radio"/> Export	Export data to a text file. Allows FootPrints data to be imported into spreadsheets or other programs.				
<input type="checkbox"/> Include metrics with your Column or Wrapped style report.					

Step 2 – Select the Formatting Tab

New Custom Report

Style **Formatting** Ticket Criteria Contact Criteria Advanced Cr

FIELDS DISPLAYED

Type of Field

☐ FootPrints Fields

☒ Ticket Information

☐ Contact Information

Fields

'Berkeley SPOT Award' For
 Action Type
 Affected Department
 Affiliate End Date of Action
 Amount
 Apparel Contract
 Appointment %
 Appointment Type
 Appointment Type (superv
 Background Check Require
 Background Check/Fingerp
 Brief Explanation of Repo

+ Add Field
 Change Order
 Remove
 Reset

Selected Fields

Ticket Number
 Priority
 Status
 Subject
 Last Edit Date
 Date Submitted
 Assigned Personnel
 Action Type

Notes to include

☒ All Notes ☐ Original ☐ Most Recent ☐ 2 Most recent ☐ 3 Most recent

Step 3 – Choose which “Selected Fields” you would like on your report. Each Field in the “Selected Fields” box represents a column in your Excel spreadsheet. To add fields, click on the field in the left box and hit “Add Field”. It will appear in the Selected Fields box.

Step 4 – Select which notes to include in the report.

Step 5 – Click on the Ticket Criteria Tab.

New Custom Report Help

Style Heading **Formatting** **Ticket Criteria** Contact Criteria Advanced Criteria Save/Run

(Note: When no values are selected for a choice/drop-down field, there will be no search on that field.)

GENERAL INFORMATION

Subject

Note

Assigned to

Not Assigned
 Golden Bear
 Human Resources
 Steven McCabe
 Richard Cox Mena
 Sandra A PALMER
 Jeannine Raymond
 Susan Roach
 Advanced Assignment Controls

Priority

High
 Medium
 Low

Keyword (any field)

Attachment filename

Submitted by

Wendy Adachi
 Russell Ahn
 Eric Anglim
 Sheila Asfaha
 Patti Baba
 Jo Baker
 Sandy BARBOUR
 Marguerite Bennett

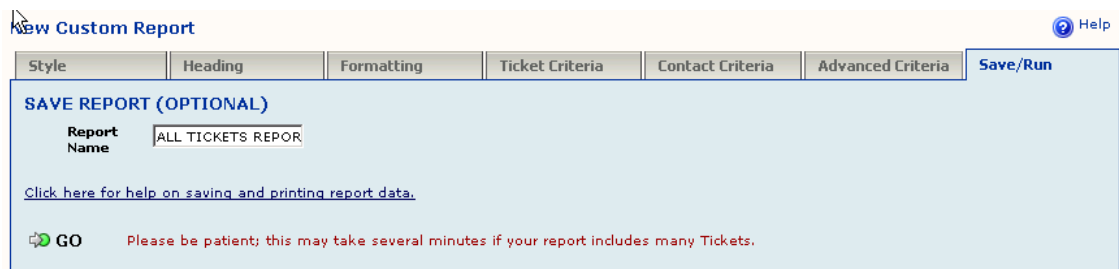
Status

Open
 DRAFT
 Submit For Approval
 Pending Approval
 Rejected Approval

Step 6 – Select “Assigned to” the Golden Bear Department and/or all Golden Bear Department users (to select all, click on the top name, scroll to the bottom, hold “shift” and click on the last name. This means you would like any ticket assigned to selected individuals to appear on the report.

Step 7 – Select “Status” of tickets – for this example, select all statuses including Closed. This will allow you to see all tickets that have been created in your department.

Step 8 – Click on the “Save/Run” tab.



The screenshot shows the 'New Custom Report' interface. At the top, there is a navigation bar with tabs: Style, Heading, Formatting, Ticket Criteria, Contact Criteria, Advanced Criteria, and Save/Run. The 'Save/Run' tab is active. Below the tabs, there is a section titled 'SAVE REPORT (OPTIONAL)'. Inside this section, there is a 'Report Name' field with the text 'ALL TICKETS REPORT' entered. Below the field, there is a link: 'Click here for help on saving and printing report data.' At the bottom of the section, there is a 'GO' button with a green arrow icon and a message: 'Please be patient; this may take several minutes if your report includes many Tickets.'

Step 9 (optional) – If this is a report you want to regularly run, you may name the report. Doing so will allow you to save your preferences and give you the ability to run the report as needed.

Step 10 – Click on “Go”. This will generate a report in Excel. If you named the report, it will also automatically save your report.

EXAMPLE 2 (Metric Report): You would like to run a report that shows the time it takes to close tickets, by action type. (Remember, the report will only show/reflect tickets that you have access to.) For this example we will use “Metrics/Graphics” report.

Note: If you selected “Export” you will not have this tab as an option. The graphs from the Metric report are difficult to save and/or export. This should largely be used only if you plan on printing out graphs for a specific purpose.

There are many options you can explore within Metrics reporting. For training purposes, we will show an example of just one Metric report.

Step 1 – Choose “Metric/Graphic” on the Style tab.

Step 2 – (optional) Click on Heading tab. This tab allows you to name your report, and also to select other information to be displayed at the top of your report.

The screenshot shows the 'New Custom Report' interface with the 'Heading' tab selected. The 'Style' tab is also visible. The 'Report Title' field is empty. Under 'Also Include', there are four checkboxes: 'date', 'time', 'project name', and 'logo graphic', all of which are currently unchecked.

Step 3 – Select the Metrics tab.

The Metrics tab is where you determine what kind of report you would like to create. This is useful if you would like to show graphs or other information regarding the number of tickets, the status of tickets, or action type in graphical representation.

The screenshot shows the 'New Custom Report' interface with the 'Metrics' tab selected. The 'Type' section has three radio buttons: 'Count', 'Average' (which is selected), and 'Sum'. The 'Field' dropdown is set to 'Time to Close Ticket'. The 'Subtotal By' dropdown is set to 'Action Type'. The 'Format' dropdown is set to 'table and chart'. The 'Chart Type' dropdown is set to 'Bar'. The 'Sort' dropdown is set to 'by metric value descending'. To the right of the dropdowns are two buttons: a green '+' button labeled 'Add' and a red 'X' button labeled 'Delete'.

Step 4 – Choose “Average”.

Step 5 – In the Field dropdown, select “Time to Close Ticket”.

Step 6 – For the Subtotal by dropdown, choose “Action Type”.

Step 7 – Select the Format. For this example, we will choose “Table and Chart”

Step 8 – Select “Bar Chart”.

Step 9 – Sort “by metric value descending”.

Step 10 – Click “Add”

Next, select the "Ticket Criteria" Tab. On this tab you have the option of choosing any kind of General Information or Ticket Information to run reports by.

(Note: When no values are selected for a choice/drop-down field, there will be no search on that field.)

GENERAL INFORMATION

Subject:

Note:

Assigned to: **Step 11**

Keyword (any field):

Attachment filename:

Submitted by: **Step 12**

Priority:

Status: **Step 12**

For this example, we will select:

Step 11 – “Assigned to” all department users (to select all, click on the top name, scroll to the bottom, hold “shift” and click on the last name).

Step 12 – Select “Status” of tickets – because we want to include all status, especially closed ticked, select all statuses including Closed.

NOTE: For most reports no selection needs to be made on the Contact Criteria Tab or Advanced Criteria Tab.

Step 13 – Click on the Save/Run Tab

SAVE REPORT (OPTIONAL)

Report Name:

[Click here for help on saving and printing report data.](#)

GO Please be patient; this may take several minutes if your report includes many Tickets.

Step 14 – (optional) – If this is a report you want to regularly run, you may name the report. Doing so will allow you to save the current report and give you the ability to run the report as needed.

Step 15 - Click "Go"

A new window will appear with the information you have requested. You may print or copy the information.

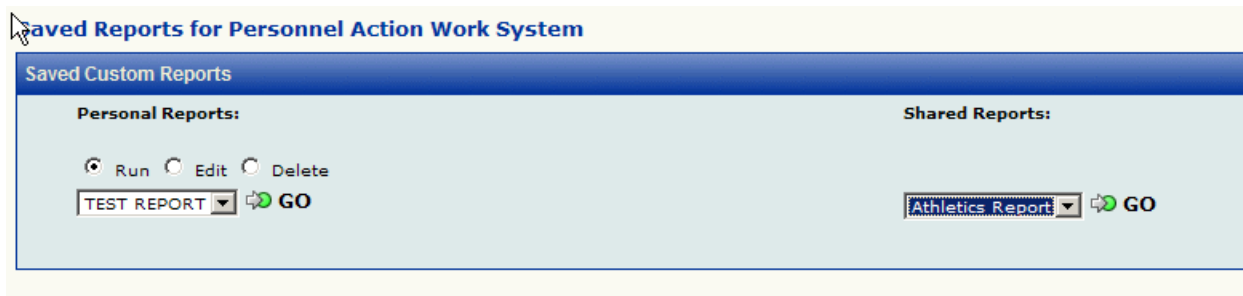
SAVED REPORTS

This feature allows you to run a saved report. *Reminder: Your reports will only show tickets that you have access to.*

To run a saved report, click "Reports". Then select "Saved".



The follow screen will appear:



From the drop down menu you can choose your saved report. Only reports that **you** have created will show up in your Personal Reports. You have three options:

- Run – This allows you to run the report.
- Edit – This allows you to make changes to a saved report.
- Delete – This feature deletes a saved report.

Once you have selected your option, click “Go” to generate the report.

Shared Reports: Only HRC staff can create Shared Reports. If there is a specific report that you would like created, please talk to your HRC contact.