



LOUISIANA DEPT. OF HEALTH & HOSPITALS

Medicaid Eligibility Data System

External Design Part 6: System Wide Standards

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My Heading 1

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Introduction

This document serves as a central reference to the basic concepts, features and facilities of the **Medicaid Eligibility Data System** or **MEDS**.

Note: The examples in this document are from another system and are only used to illustrate the basic concepts that are used in the MEDS system.

The following topics are included:

- Screen format
- PF-Keys
- Direct commands
- Hot keys
- Automatic display of last used key
- Help
- Menu screens
- Browse screens
- Maintenance screens
- Multiline maintenance screens
- Moreable fields
- Audit trails
- Workflow Tracking (Review List)
- Glossary of terms

Screen Format

There are a number of different types of screens in MEDS, however they all adhere to the following basic format.

TRAN PROGRAM	***** SUBSYSTEM HEADER ***** NAME OF THE TRANSACTION	*DATE *TIME
*ACTION : _ (A,B,C,D,M,N,P)		
KEY FIELD : _____		
ATTRIBUTE 1: _____ +		
ATTRIBUTE 2: 999 MAIN STREET_____ >		
ATTRIBUTE 3: _ (Y,N)		
*Tran: _____ Act: _ Key: _____		
ENTER-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11---PF12---		
Help Main Retn Quit		
MESSAGE LINE		

Format of Lines Common to Every Transaction

The first two lines and the last three lines of every screen will always be in the same format:

- The first line will contain the following:

The transaction name beginning in column 6.

The name of the subsystem.

The date, format: MM/DD/YY.

- The second line will contain the following:

Panel designation. See the Screen Notations section below for more information.

or

The program name beginning in column 6.

The name of the transaction (screen).

The time, right justified, ending in column 75. Format: HH:MM:SS. For example:

16:21:16.

or

Panel designation. See the Screen Notations section below for more information.

- The standard "direct command line" will be placed on the fourth from the last line on the screen. See the Direct Commands section below for more information.
- Beneath the direct command line will be the standard PF-key line. See the PF Keys section below for more information.
- The second to last line will contain a short description for those PF-keys that are valid on the transaction.
- The last line will contain any messages that occur.

The format of the lines that appear between the first two and last four lines varies depending upon the type of transaction. The above is an example of a generic maintenance transaction. Later sections of this manual provide examples of the format of menus, browse screens and maintenance transactions.

Screen Notations

Various notations are used to provide hints that more information / functionality is available than what is obvious. The following provides a brief description of the notations.

Notation	Description
+	After a field, indicates the field is moreable . See the Moreable section below for more information.
>	After a field, indicates the field is moreable and additional data is present . See the Moreable section below for more information.
n >	At the top of a screen, indicates there are n more screens to the right . This notation is used on both browse and maintenance screens. See the Browse Screens section below for more information.
< n	At the top of a screen, indicates there are n more screens to the left . This notation is used on both browse and maintenance screens. See the Browse Screens section below for more information.
(A,B,C...)	After a field, indicates the list of valid values that may be entered in the field.

Date Fields

All date fields in the MEDS system are entered and displayed in a format that complies with year 2000 standards. The same format will be used for both 'input' and 'display only'. The format is as follows:

- **Input** fields must be entered, and will be displayed in format MM/DD/YYYY. For example"

Date of Birth : 09/13/1995
Renewal Date : 10/24/2001

- **Display only** fields, on browse screens, maintenance screens and reports, will be displayed in format MM/DD/YYYY. For example:

Application Date: 10/14/1998
Date of Death : 01/05/2000

PF Keys

The two lines above the message line at the bottom of each screen indicate which PF keys may be used on the screen. PF1 through PF20 are available. PF21 through PF24 are reserved. PF1 through PF12 are used to cater for common functionality (help, standard transaction navigation, etc). PF13 through PF20 are equivalent to PF1 through PF8 respectively. The function associated with each is dependent on the definition created by the user.

PF1 through PF12—Common Functionality PF Keys

The following describes the standard PF keys and their uses. (Some screens have additional PF keys not listed below - these keys are explained in the Hot Keys section below.)

For all screens:

<u>PF Key</u>	<u>Description</u>
PF1 Help	Press PF1 to display field help if the cursor is positioned on a field or global help if the cursor is not positioned on a field. Field help is a list of possible values for the field or it is text describing the field. Global help is a list of topics related to the screen. See the Help section below for more information.
PF2 Main	Returns to the main menu for the system that you are working in. If you're on a main menu and PF2 is pressed, you are returned to the main menu defined for the user.
PF3 Retn	Returns to the previous transaction. If you're in a window, press PF3 to return to the screen from which the window was invoked.
PF4 Quit	Exits MEDS.

The following keys are specified where applicable:

<u>PF Key</u>	<u>Description</u>
PF7 Back	Displays the previous screen of information. You can only scroll backwards over data that is part of the current scroll session. A new scroll session is established whenever you change the scroll starting values. A scroll session has a maximum of 20 screens.
PF8 Fwrđ	Displays the next screen of information. You can scroll forward through data until you reach the end of the file.
PF10 Left	Displays the screen to the left of the current screen. At the leftmost screen, you can press PF10 to wrap the display around to the rightmost screen.
PF11 Rđht	Displays the screen to the right of the current screen. At the rightmost screen, you can press PF11 to wrap the display around to the leftmost screen.

Direct Commands

You may perform all MEDS functions by choosing options from menus, however as you become more familiar with the menu structure, you will need the menus less and less. Direct commands allow you to go directly to any function or menu for which you are authorized, from anywhere within MEDS, without the intervening menus.

Every MEDS screen contains this line directly above the PF key line:

*Tran: ____ Act: _ Key: _____

The **Tran** is the id of the transaction that you wish to invoke. Active help is available. See the Active Help section below for more information.

The **Act** field is the action code you wish to pass to the next transaction. See the Maintenance Screens, Action Codes section below for more information about action codes.

The **Key** field is key information you wish to pass to the next transaction. For example, if you desire to display a Rate record and you happen to know the id of the rate, you could enter the rate id.

The following are examples of direct commands:

- *Tran: RTRATF Act: _ Key: _____

This direct command would cause the rate maintenance transaction to be invoked (assuming that RTRATF is the transaction id of the rate maintenance transaction).

- *Tran: RTRATF Act: D Key: 101_____

This direct command would cause rate 101 to be displayed on the rate maintenance transaction.

The entry of "Act" and "Key" are optional. These fields are provided to save a screen interaction. The second example from above is the equivalent of:

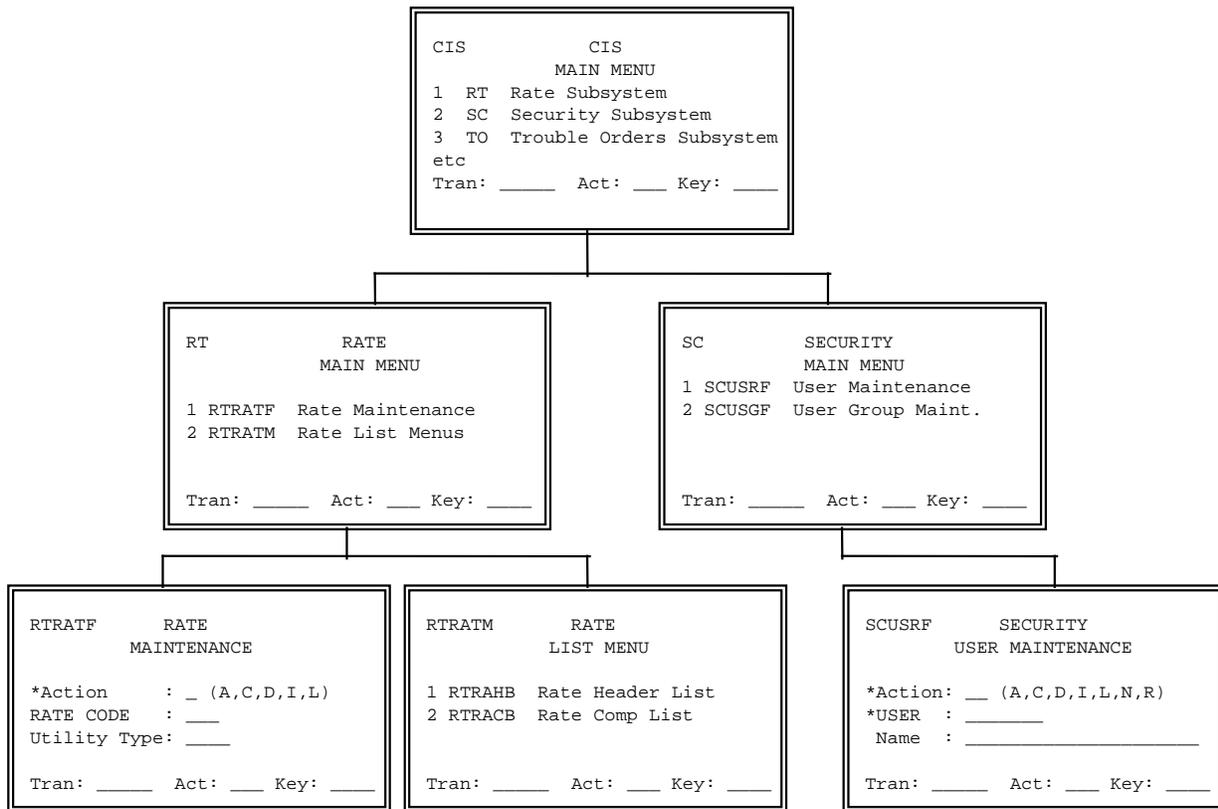
- First accessing the rate maintenance transaction (either via menus or through a direct command) and then
- Entering an action of "D" and a rate id of "101".

If the key to a record is made up of multiple fields, such as the key to a Rate Header record, enter the multiple fields separated by commas or slashes. For example, the Key field on a direct command for an interim rate code of 101, with an effective date of 01/01/1991 would be entered as follows:

Key: 101,1,1,1991

It should be stressed that the direct command is provided so that you do not have to go through the menu hierarchy to invoke a transaction. Rather, you can simply enter the id of the transaction in ANY transaction's direct command line.

The following diagram represents a MEDS transaction hierarchy, selecting a transaction from the main menu will lead to transactions at a lower level.



In order to invoke the rate maintenance transaction (RT RATE) from the user maintenance transaction (SCUSRF), simply enter the following in the direct command line on SCUSRF:

*Tran: RTRATE Act: _ Key: _____

YOU DO NOT HAVE TO GO THROUGH THE MENU HIERARCHY TO ACCESS THE TRANSACTION.

Hot Keys

In addition to the direct commands, which may be used from any screen within MEDS, certain screens will have "hot keys". Hot keys are PF Keys that transfer control to another transaction. If a hot key is defined to a screen, an identifier of the transaction invoked by the hot key is displayed beneath the relevant PF key. For example,

```
ENTER-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---  
      Help  Main Retn  Quit           Rate
```

Pressing the hot key PF6 is the equivalent of having entered "RTRATF" in the direct command line and pressing enter.

Automatic display of last used key value

MEDS keeps track of the latest value of all key fields when appropriate. The system will automatically use the last used key value when a transaction is invoked. If a direct command is used and a new key is specified then this value overrides the global value.

For example, if you have been working with rate 101, the id of this rate is remembered by the system. When a subsequent direct command or hot key is used to invoke the rate maintenance transaction (and no key information is entered in the direct command), rate 101 will automatically be displayed.

This feature saves the user from re-typing the same key when working with related sets of records.

Additionally, this information is saved across sessions. It is saved when a user exits the MEDS system. If the user exits via a standard PF key or via a specific PF Key to access another system. The navigational information is reinstated the next time the user signs on to MEDS.

protected, you may select a value from the active help window and have it automatically populated in the field. For example, suppose you are working on the following rate header maintenance screen:

```

      TRAN                ***** RATES SUBSYSTEM *****                *DATE
      PROGRAM            RATE HEADER MAINTENANCE                        *TIME

*ACTION                 : _ (A,B,C,D,M,N,P)
RATE                   : ?_
INTERIM                : _ (I-INTERIM, N-NON INTERIM)
EFFECTIVE DATE         : _ _ _ _
TEST ID                : _____
ENTRY STATUS           : _ (U-UNFINISHED, F-FINISHED)
DOCKET NUMBER         : _____
GL RECEIVABLE COMPONENT: _____
NORMALIZATION DAYS    : _____
MINIMUM PRORATION DAYS : _____
MAXIMUM PRORATION DAYS : _____
MINIMUM AMT CHARGED   : _____
OVER LENGTH OF SERVICE : _____

*Tran: _____ Act: _ Key: _____
ENTER-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Main Retn Quit          Text
MESSAGE LINE

```

Rate Header Maintenance Screen

And, suppose you don't know the id of the rate for electric residential service. If you put a "?" into that field and press ENTER, a window pops up with a list of values for the rate....

(continued from previous page)

```

TRAN          ***** RATES SUBSYSTEM *****          *DATE
PROGRAM       RATE HEADER MAINTENANCE                   *TIME

+-----+
*ACTION       : | POSITION CURSOR OR ENTER SCREEN VALUE TO SELECT |
RATE         : |          RATE CODE HELP          *DATE      |
INTERIM      : |          PROGRAM          *TIME      |
EFFECTIVE DATE : |
TEST ID      : | UTILITY RATE
ENTRY STATUS  : |   TYPE   CODE   RATE DEPARTMENT'S NAME
DOCKET NUMBER : |-----|
GL RECEIVABLE COMPONENT: | ELECT  201  RESIDENTIAL SERVICE
NORMALIZATION DAYS : |          251  GENERAL SERVICE
MINIMUM PRORATION DAYS : | GAS    256  RESIDENTIAL SERVICE
MAXIMUM PRORATION DAYS : | WATER  257  FIRE PROTECTION
MINIMUM AMT CHARGED : |          ***** END OF DATA *****
OVER LENGTH OF SERVICE : | RATE CODE: 201
                  | DIRECT COMMAND:
                  | ENTER-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8
                  | Help      Retn          Back  Fwr
+-----+

*Tran: _____ Act: _ Key: _____
ENTER-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help  Main Retn Quit          Text
MESSAGE LINE
    
```

Rate Code Field Help Screen

The dialogue of the field help window is identical to that of a standard browse. Please see the Browse Screens section below for more information.

To return to the maintenance screen without selecting a value, press PF3. To select a value, place the cursor on the value you want and press PF3 or ENTER. This will return you to the original screen with the selected value populated into the RATE field....

(continued from previous page)

For example, if you place the cursor on "201" and press ENTER, the maintenance screen looks like this:

TRAN PROGRAM	***** RATES SUBSYSTEM ***** RATE HEADER MAINTENANCE	*DATE *TIME
*ACTION	: _ (A,B,C,D,M,N,P)	
RATE	: 201 RESIDENTIAL SERVICE	
INTERIM	: _ (I-INTERIM, N-NON INTERIM)	
EFFECTIVE DATE	: _ _ _ _	
TEST ID	: _____	
ENTRY STATUS	: _ (U-UNFINISHED, F-FINISHED)	
DOCKET NUMBER	: _____	
GL RECEIVABLE COMPONENT:	_____	
NORMALIZATION DAYS	: _____	
MINIMUM PRORATION DAYS	: _____	
MAXIMUM PRORATION DAYS	: _____	
MINIMUM AMT CHARGED		
OVER LENGTH OF SERVICE	: _____	
*Tran: _____ Act: _ Key: _____		
ENTER-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---		
Help Main Retn Quit Text		
MESSAGE LINE		

Result of Field Help

Any attributes of the field help field that are displayed on the help screen (such as the description of a code) are included with the selected value on return from help. If the field for which you requested help is the key to the record, the full record will be displayed on return from the help screen.

Field help is also useful when a code is shown on a screen without its description and you are not certain what the code means. To find out, enter a "?" in the field and press ENTER or position the cursor on the field and press **PF1**. In the field help window you will find the code and its description. Press PF3 to return.

Field help is not available when the field is protected.

Complex Help

Sometimes when you ask for field help, you will get a menu of options instead of a list of information. This is sometimes referred to as "complex help". The options provide various means of accessing the information. For example, if you ask for field help at the test id field on the rate header maintenance screen, you could get a menu like this:

```

TRAN          ***** RATES SUBSYSTEM *****          *DATE
PROGRAM      RATE HEADER MAINTENANCE                    *TIME
-----+-----+-----+-----+-----+-----+-----+
*ACTION      | SELECT ACTIVE HELP SEQUENCE AND PRESS ENTER.
RATE        | TRAN          ***** RATES SUBSYSTEM *****          123
INTERIM     | PROGRAM      TEST ID HELP MENU          *TIME
EFFECTIV    |
TEST ID     | SELECTION
ENTRY ST    | NUMBER          TRANSACTION DESCRIPTION
DOCKET N    | -----
GL RECEI    |
NORMALIZ    |          1          TEST ID HELP IN ID SEQUENCE
MINIMUM     |          2          TEST ID HELP IN DESCRIPTION SEQUENCE
MAXIMUM     |
MINIMUM     | -----
OVER LEN    | CODE: 1
            | ENTER-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF
            | Help      Retn
-----+-----+-----+-----+-----+
*Tran: _____ Act: _ Key: _____
ENTER-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10---PF11---PF12---
Help Main Retn Quit      Text
MESSAGE LINE
    
```

Test Id Field Help Menu

Simply type the code for one of the options and press ENTER to see a list of test ids from which you can select a value.

Menu Screens

Menus provide a simple means of navigating through MEDS. They are especially helpful when you are not familiar with the transaction id's available in a subsystem. The following example is from a meter reading subsystem. The screen lists all of the transactions available to you at that point.

TRAN PROGRAM			*DATE *TIME
	***** METER READING SUBSYSTEM *****		
	MAIN MENU		
	Id	Tran	Description
	---	---	-----
	1	EM	Extract Control Maintenance
	2	MM	Meter Read Cycle Maintenance
	3	EE	Extract Control Audit Trail By Entry
	4	ET	Extract Control Audit Trail By Time
	5	ME	Mr Cycle Audit Trail By Entry
	6	MT	Mr Cycle Audit Trail By Time
	*Tran: _____ Act: _ Key: _____		
	ENTER-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---		
	Help Main Retn Quit		
	MESSAGE LINE		

Meter Reading Subsystem Menu

The content of a menu screen depends on the subsystem it serves. However, certain features are common to all MEDS menus:

- Transactions** Transactions are listed on the menu with a description of the transaction to the right. To select a transaction, enter its transaction code in the Code field and press ENTER.
- Direct Command** Near the bottom of the screen is the direct command line. Direct commands allow you to go directly to any transaction in MEDS without using menus. See the Direct Commands section above for more information.
- PF keys** Available PF keys are listed at the bottom of the screen. See the PF Keys section above for more information.

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Direct Command Near the bottom of the screen is the direct command line. Direct commands allow you to go directly to any transaction in MEDS without using menus. See the Direct Commands section above for more information.

PF keys Available PF keys are listed at the bottom of the screen. See the PF Keys section above for more information.

MEDS displays information starting at the value you specify. If you don't enter a value, the display begins with the first record in the data file. For example, if you ask to view user groups starting from the user group name "MARKET", the display shows:

TRAN		***** SECURITY SUBSYSTEM *****			*DATE
< 1	PROGRAM	USER GROUP ACCESS TO TRANS. GROUPS			*TIME
USER GROUP	USER GROUP DESCRIPTION	TRANS GROUP	TRANSACTION GROUP DESCRIPTION		

MARKET	MARKETING	SALESST	SALES STATISTICS		
		FORECAST	SALES FORECASTING		
		SALEHIST	SALES HISTORY INQUIRIES		
RATES	RATES	RATEMNT	RATE MAINTENANCE TRANSACTIONS		
		RATEINQ	RATE INQUIRY TRANSACTIONS		
		BILLINQ	BILLING INQUIRY TRANSACTIONS		
ETC.					
USER GROUP: MARKET__ TRANSACTION GROUP: _____					
*Tran: _____ Act: _ Key: _____					
ENTER-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---					
Help Main Retn Quit ACCES Back Fwrđ UGRP Left Rght					
MESSAGE LINE					

Sample Information Display Screen

MEDS displays as many lines of information on a screen as possible. The balance of the information in a browse session is available on subsequent screens. When the last record is reached, the following message is displayed:

******* End of data *******

If this message is not on the current screen, then there is at least one more screen of information to come. You can scroll through the information using PF7 and PF8.

Browse Dialogue Functionality

Displaying more detail

Some browse screens offer more information than can be fit onto a single screen. You can view this information in the following ways:

- Page to the left or right of the current one.
- Page forwards and backwards.
- You can request more detail for each line.

Paging

At the top of the browse screen in the previous example is the message:

1 >

This message indicates that there is another screen to the right of the current one. This screen provides additional information that could not be fit onto the first panel. You can access this additional panel by pressing PF11 (right). Once there, you can press PF10 (left) to return. Note that the example shown has only one screen to the right, but there can be any number.

The following diagram illustrates additional browse panels, both left / right and up / down. Each quadrant in the diagram represents a different panel.

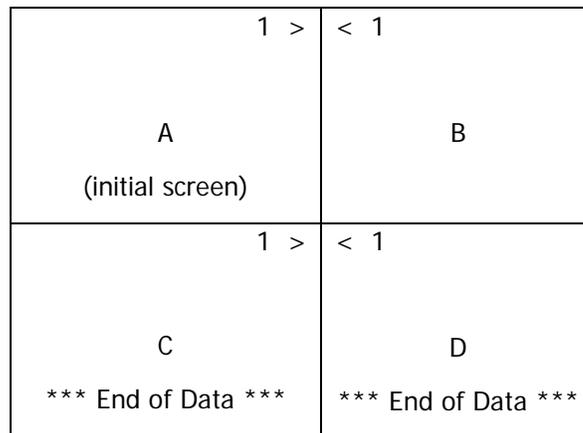


Diagram of Information Screens

If you press PF11 from the top left screen (screen A) you are moved one screen to the right (screen B). This screen indicates that there is one screen to the left and no more to the right. To display the one to the left again (screen A), press PF10.

If there are more than two horizontal panels, you can continue to press PF11 to move one screen to the right from your current position. In addition, browse panels provide a "wraparound" feature. If you're at the rightmost screen, pressing PF11 brings you to the first screen. If you're at the leftmost screen, pressing PF10 brings you to the last screen.

To see the forward screens of information (screens C or D) press ENTER or PF8.

To see previous screens of information press PF7. Note that you can only display previous screens that you have already scrolled through. The maximum number of panels that can be scrolled in the backwards direction is 20.

Display more detail for a line

Some browse screens provide for the display of additional detail for every line on the screen. This is typically done when a different degree of detail is required by different users. For example, the customer list below can be used in two ways.

- Condensed mode. One line per customer (with only one line of the customer's address).
- Expanded mode. Several lines per customer (with all of the lines of the customer's address).

The user can switch between these modes using a special field provided at the bottom of the screen. In this example the field is called "Show Address".

```

The following example shows the browse screen in condensed mode.
  TRAN          ***** CUSTOMER SUBSYSTEM *****      *DATE
PROGRAM          CUSTOMERS IN CUSTOMER NAME SEQUENCE      *TIME

          CUSTOMER NAME                                CUSTOMER ADDRESS
-----
DOE, ROGER                                999 MAIN STREET
DOEEEEEE, TOM                             999 BOUNDARY BLVD
DOEEEEEE, VIOLA                           999 OAKHILL DRIVE APT # 99
  ETC.

NAME: DOE, ROGER_____ SHOW ADDRESS: _
*Tran: _____ Act: _ Key: _____
ENTER-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11---PF12---
      Help Main Retn Quit          TRAN Back Fwrld      Left  Rght
MESSAGE LINE

```

Sample Browse Screen In Condensed Mode

(continued from previous page)

```

If you enter a character in the Show Address field, the display expands to show
all the address detail for each customer as follows:
  TRAN          ***** CUSTOMER SUBSYSTEM *****          *DATE
  PROGRAM          CUSTOMERS IN CUSTOMER NAME SEQUENCE          *TIME

          CUSTOMER NAME          CUSTOMER ADDRESS
-----
DOEEEEEE, ROGER          999 MAIN STREET
                          OAKHILLS, CA 99999
DOEEEEEE, TOM            99 BOUNDARY BLVD
                          RIVERSIDE, CA 94555
DOEEEEEE, VIOLA         9999 OAKHILL DRIVE APT # 99
                          BAYVIEW, CA 99999
ETC.

NAME: DOE, ROGER          SHOW ADDRESS: X
*Tran: _____ Act: _ Key: _____
ENTER-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Main Retn Quit          TRAN Back Fwrld          Left Rght
MESSAGE LINE

```

Sample Browse Screen In Expanded Mode

This detail expansion is effective for the duration of the browse screen. You can use the PF keys to move to any panel without loss of detail. To turn the expanded display off, enter a space in the Show Address field.

Cursor Sensitive Hot Keys

Cursor sensitive hot keys are only available on browse screens. They work identically to normal hot keys (as described above), but they have the additional feature of being sensitive to the data on which the cursor is positioned at the time the key is pressed.

For example, take the user group access to transaction group browse screen.

TRAN PROGRAM		***** SECURITY SUBSYSTEM *****		*DATE
		USER GROUP ACCESS TO TRANS. GROUPS		*TIME 1 >
USER GROUP	USER GROUP DESCRIPTION	TRANS GROUP	TRANSACTION GROUP DESCRIPTION	
MARKET	MARKETING	SALESST	SALES STATISTICS	
		FORECAST	SALES FORECASTING	
		SALEHIST	SALES HISTORY INQUIRIES	
RATES	RATES	RATEMNT	RATE MAINTENANCE TRANSACTIONS	
		RATEINQ	RATE INQUIRY TRANSACTIONS	
		BILLINQ	BILLING INQUIRY TRANSACTIONS	
ETC.				
USER GROUP: _____		TRANSACTION GROUP: _____		
*Tran: _____		Act: _ Key: _____		
ENTER-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---				
Help Main Retn Quit ACCES Back Fwrld UGRP				
MESSAGE LINE				

Sample Browse Screen With Cursor Sensitive Hot Keys

In the above example, PF6 and PF9 are defined as hot keys that invoke the access maintenance screen and the user group maintenance screen, respectively.

By placing the cursor on the first line and pressing PF9 the user group maintenance transaction will be invoked and the "MARKET" user group record will be displayed on the screen.

By placing the cursor on the third line and pressing PF6 the access maintenance transaction is invoked and displays the access record for the transaction group "SALEHIST" and the user group "MARKET".

Maintenance Screens

Maintenance screens are used to modify the contents of files within the MEDS system. Following is an example of a maintenance screen:

```

TRAN          ***** RATES SUBSYSTEM *****      *DATE
PROGRAM       RATE HEADER MAINTENANCE              *TIME

*ACTION       : _ (A,B,C,D,M,N,P)
RATE         : _____
INTERIM      : _ (I-INTERIM, N-NON INTERIM)
EFFECTIVE DATE : ___ ___ ___
TEST ID      : _____
ENTRY STATUS  : _ (U-UNFINISHED, F-FINISHED)
DOCKET NUMBER : _____
GL RECEIVABLE COMPONENT: _____
NORMALIZATION DAYS : _____
MINIMUM PRORATION DAYS : _____
MAXIMUM PRORATION DAYS : _____
MINIMUM AMT CHARGED
OVER LENGTH OF SERVICE : _____

*Tran: _____ Act: _ Key: _____
ENTER-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Main Retn Quit
MESSAGE LINE

```

Sample Maintenance Screen

Obviously, the contents of each maintenance screen depend on the file that is being maintained. However, certain features are common to all MEDS maintenance screens:

- Action** This lets you indicate the activity to perform. Please see the Action Code Functionality section below for more information.
- Key Field(s)** The key field(s) is(are) the line(s) following the Action field. It is used to uniquely identify the record being maintained.
- Protected Fields** If you can't move the cursor to a field with the Tab key, it's because you are prohibited from modifying the field.
- Direct Command** Near the bottom of the screen is the direct command line. Direct commands allow you to go directly to any transaction in MEDS without using menus. See the Direct Commands section above for more information.
- PF keys** Available PF keys are listed at the bottom of the screen. See the PF Keys section above for more information.

Action Code Functionality

Action codes are used to specify the activity you wish to perform. The commonly used action codes are listed below. However, not all action codes are necessarily available on every transaction, and some transactions include action codes not listed here. The valid actions for the maintenance screen are listed after the Action field.

A Add a new record

Usually you must specify the key value and the data fields of the record you're adding. In some systems, the new key will be provided for you. Also, some fields have default values and need not be entered. Alternatively, you can display (action "D") a record that is similar to the one you want to create, make the necessary changes, and change the action code to "A."

B Browse the records of the file

A browse screen for the file is displayed. Every field that is maintained on the transaction will be displayed on a horizontal plane. This screen works identically to a field help list, the only difference being that a browse could have many left / right panels, help lists typically only have one. It should be noted that if a record is selected on the browse screen, the entire record will be displayed upon return to the maintenance transaction.

C Clear the values on the screen

All data, except data in the key field(s), is cleared from the screen.

D Display a specific record

You must enter the key value of the record you wish to display.

M Modify a record

You must enter the key value of the record you wish to modify. When the system displays the record you can modify fields as required. Alternatively, if the record is already displayed, you can modify the fields and change the action code to "M".

N Display the next record

The record with the next highest key value is displayed. If there is no next record, MEDS displays a message to that effect.

P Purge a record

You must enter the key value of the record you wish to purge. The system then requires a confirmation before the record is physically deleted. Please see the Purge Confirmation section below for more information.

Multiline Maintenance Screens

The term "multiline" is used to describe the maintenance transaction used to update many records on a single screen. This type of maintenance transaction is only used under the following conditions:

- There exists a "parent / child" type of relationship between two entities. For example, a service agreement can have many service points linked to it. The service agreement entity can be viewed as the parent, and the service point entity as the child. When a multiline transaction is used to maintain this relationship, you could link several service points to a service agreement using a single ENTER.
- There are a limited number of attributes (fields) on the child entity. If there are too many attributes, a multiline screen becomes impractical - the screens are either too cluttered or it requires too many horizontal panels.

At the top of a multiline screen, MEDS always displays key information to identify the parent entity. The rest of the screen is used to display the lines for the children linked to the parent. Each line of a multiline maintenance screen includes a key field to uniquely identify the child record. The child's key field also serves to sequence the records within the multiline relationship.

The following pages provide an example of the basic multiline functionality.

Following is an example of a multiline maintenance screen. This example shows the list of service points that are listed on a service agreement. In this case the parent entity is Service Agreement, the child entity is Service Point. What follows is a general description of multiline editing and applies to all types of multiline maintenance screens.

```

TRAN          ***** SERVICE AGREEMENT SUBSYSTEM ***** *DATE
PROGRAM       SERVICE AGREEMENT/SERVICE POINT MAINTENANCE *TIME

*ACTION       : _ (A,B,C,D,M,N,P)
SERVICE AGREEMENT : 33482354 RESIDENTIAL ELECTRICAL SERVICE
START SCROLL FROM SP : _____

          SERVICE POINT   SP TYPE
*CMD (A,M,P)  NUMBER      CODE   SP TYPE DESCRIPTION
-----
-            20273301     AC     ACTUAL
-            20273302     SV     SURVEY
-            20273306     MT     METERING
-            _____
-            _____
-            _____
-            _____
-            _____
-            _____
-            _____
-            _____
*Tran: _____ Act: _ Key: _____
ENTER-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11---PF12---
      Help Main Retn Quit                Back FwrD
MESSAGE LINE

```

Sample Multiline Maintenance Screen

Obviously, the contents of each multiline maintenance screen depend on the files that are being maintained. However, certain features are common to all MEDS multiline screens:

- Action** This lets you indicate the activity to perform. Please see the Action Code Functionality section below for more information.
- Key Of Parent** The key field is the line following the Action field. It is used to uniquely identify the parent entity being maintained.
- Direct Command** Near the bottom of the screen is the direct command line. Direct commands allow you to go directly to any transaction in MEDS without using menus. See the Direct Commands section above for more information.
- PF keys** Available PF keys are listed at the bottom of the screen. See the PF Keys section above for more information.

Action Code Functionality

Action codes are used to specify the activity you wish to perform. The commonly used actions codes are listed below. However, not all action codes are necessarily available on every transaction, and some transactions include action codes not listed here. The valid actions for the maintenance screen are listed after the Action field.

- C** **Clear the screen**

All data related to the child entity, i.e., all of the multiline information, is cleared from the screen. The key to the parent entity is kept.
- D** **Display the children linked to the parent entity**

You must enter the key of the parent entity. You can request a starting scroll position.
- M** **Modify the parent / child relationship**

You must use this action if you're going to do any line editing - adding, modifying or purging lines.
- N** **Display the children linked to the next parent**

You can request a starting scroll position.
- P** **Purge all of the children linked to the parent**

You must enter the key of the parent entity whose children you wish to delete.

PF Key Functionality

The PF keys on a multiline document behave identically to those described above under Browse Screens. If there are more children linked to the parent than can be displayed on the screen, use PF7 and PF8 to page backwards and forwards through the lines of the multiline relationship. If there are more horizontal panels for the lines, use PF10 and PF11 to display the additional information for these lines available to the left and right of the current screen.

Line Functionality

Line Commands

Associated with each line is a line command. For most editing, you do not need to use a line command (you can add, modify and purge a line without using one). A line command is only required to eliminate ambiguity during a move or a copy.

The following are valid line commands. However, not all line commands are necessarily valid on every multiline transaction. Field help is available on the line command listing the line commands that are valid for the individual screen.

- A** **Add** a new line with the specified key
- M** **Modify** the key of the current line
- R** **Remove** the current line from the relationship

Line Maintenance

The following describes how you modify the multiline relationship. This discussion uses the above Service Agreement / Service Point screen as a point of reference. The following topics will be discussed:

- Add a new line
- Modify an existing line
- Purge an existing line
- Copy / Move an existing line

Note that you can edit more than one line at a time.

To Add a New Line

- Enter "M" in the Action field in the header.
- Position the cursor on the first unused line on the screen. If there are no unused lines on the current screen, use PF8 to scroll forward to the end of the lines or use the "C" action to clear the lines on the screen.
- Enter the secondary key value (i.e., a service point number).
- Press ENTER (you do not need a line command).

After the new line has been added, the position of the new line in the relationship is determined by the value of the secondary key field (in alphanumeric sequence). Sometimes, this can cause the scroll session to reposition starting from the key of the newly added line.

Modify An Existing Line

- Enter "M" in the Action field in the header.
- Enter any modifications to the line. You can modify anything except the key of the line. Modifying the key is discussed below under Copying / Moving An Existing Line.

- Press ENTER (you do not need a line command).

Remove (Purge) An Existing Line

- Enter "M" in the Action field in the header.
- Erase the key of the line (alternatively, you can enter "R" (remove) in the line command column).
- Press ENTER (you do not need a line command).

Copy / Move An Existing Line

In the previous examples of multiline editing, the keys to the child lines have not been modified. If you modify the child's key, you must enter a line command indicating whether the line is to be (A)dded or (M)odified (i.e., copied or moved). If you don't enter a line command, MEDS interrupts the editing process to ask for a line command.

Copy An Existing Line

To add a new line that is similar to an existing line within this relationship:

- Enter "M" in the Action field in the header.
- Type the new service point number over the "copy from" key.
- Enter "A" in the line command for that service point.
- You can also modify any of the details of this line before it is copied, and these modifications are applied only to the new line.
- Press ENTER.

Moreable Fields

Some fields can accommodate a lot of information, although only a small portion of the field is commonly used. In addition, some fields have multiple occurrences, but under most circumstances, only a small number of such occurrences are used. To avoid screen clutter MEDS displays a limited amount of the information in these fields. These are known as "**moreable**" fields.

A moreable field is marked with a "+" on the screen. The "+" indicator is changed to a ">" when there is more information than is displayed on the screen.

In order to display or change the additional information / occurrences in a moreable field you must replace the "+" or ">" with an "M". This will cause a moreable window to pop-up. In this window you can see all of the information associated with the field(s). When you have completed editing the additional data for this field, press PF3. MEDS will return to the maintenance screen.

There may be a number of moreable fields on one maintenance screen. If several of these fields are marked with an "M", MEDS executes each moreable request sequentially, popping up windows in which you can view and change the moreable data.

It is important to remember that the action code must be "M" if you wish to make permanent modifications to any fields on the maintenance screen, including the moreable fields.

For example, the following screen has 10 lines of comment, although there is only enough space for 3 of these lines on the screen. The third comment line is followed by the moreable indicator.

(continued from previous page)

The screen now looks like this:

```

TRAN                                ***** RATES SUBSYSTEM *****          *DATE
PROGRAM                             MASTER RATE MAINTENANCE                *TIME

+-----+
| *ACTION                               |                                     |
| RATE                                 |          RATES SUBSYSTEM          |
| UTILITY TYPE                         | PROGRAM   RATE COMMENTS ADDITIONAL INFO |
| RATE DEPT NAME                       |                                     |
| REGULATORY NAME                     | THIS IS AN EXAMPLE OF HOW MULTIPLE COMMENT LINES CAN |
| NOTES                                | BE ASSOCIATED WITH AN ENTITY EVEN THOUGH THERE IS NOT |
| NBR OF FINAL BILLS                  | ENOUGH SPACE TO FIT ALL OF THE LINES ON THE _____ |
| MINIMUM REFUND AMOUNT              | MAINTENANCE SCREEN. REMEMBER TO USE THE "M" ACTION TO |
| OBSOLETE DATE                      | ENSURE THAT THE COMMENTS ARE MADE PERMANENT. _____ |
| MAY BE USED ON SA                   | _____ |
| LOW USAGE LIMIT                     | _____ |
| HIGH USAGE LIMIT                    | _____ |
| IGNORE TAX EXEMPTION                | _____ |
| ANNUAL CHARGE DATE                 | _____ |
| COMMENTS                            | ENTER-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9 |
|                                     | Help      Retn |
+-----+

*Tran: _____ Act: _ Key: _____
ENTER-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Main Retn Quit          TEXT
MESSAGE LINE
    
```

Use PF3 to exit from the moreable window and the screen now appears as follows:

```

TRAN                                ***** RATES SUBSYSTEM *****          *DATE
PROGRAM                             MASTER RATE MAINTENANCE                *TIME

*ACTION                               : M (A,B,C,D,M,N,P)
RATE                                 : 211 GENERAL SERVICE
UTILITY TYPE                         : E ELECTRICAL
RATE DEPT NAME                       : RESIDENTIAL SERVICE_____
REGULATORY NAME                     : RESIDENTIAL SERVICE_____
NOTES                                : _____
NBR OF FINAL BILLS                  : _____
MINIMUM REFUND AMOUNT:              : _____
OBSOLETE DATE                      : _____
MAY BE USED ON SA                   : _ (Y,N)
LOW USAGE LIMIT                     : _____
HIGH USAGE LIMIT                    : _____
IGNORE TAX EXEMPTIONS:              : _ (Y,N)
ANNUAL CHARGE DATE                 : _____
COMMENTS                            : THIS IS AN EXAMPLE OF HOW MULTIPLE COMMENT LINES CAN
                                     : BE ASSOCIATED WITH AN ENTITY EVEN THOUGH THERE IS NOT
                                     : ENOUGH SPACE TO FIT ALL OF THE LINES ON THE _____ >

*Tran: _____ Act: _ Key: _____
ENTER-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11--PF12---
      Help Main Retn Quit          TEXT
MESSAGE LINE
    
```

Notice that the moreable indicator has changed to a ">" sign to indicate that there is more information in the additional comment lines.

Audit Trails

Many entities within the system maintain a complete history of every modification made to the data. This history is referred to as an audit trail. An entity's audit trail can be displayed by using an audit trail list.

The following is an example of an audit trail in entry sequence.

***** RATES SUBSYSTEM *****							*DATE
TRAN PROGRAM							*TIME
RATE AUDIT TRAIL BY ENTRY							2 >
RATE	LINE ID	ACTION	USER ID	DATE	TIME	PROGRAM	
211	44	ADDED	SPLRW	1991-10-21	13:46:123	CRTRTEF	
211	44	MODIFIED	SPLRW	1991-10-21	13:52:011	CRTRTEF	
256	52	ADDED	SPLMC	1991-10-25	10:12:111	CRTRTEF	
257	13	ADDED	SPLRW	1991-09-12	17:57:547	CRTRTEF	
257	13	PURGED	SPLMC	1991-10-25	13:00:001	CRTRTEF	
ETC.							
RATE:211 DATE:_____ TIME:_____							
*Tran: _____ Act: _ Key: _____							
ENTER-PF1---PF2---PF3---PF4---PF5---PF6---PF7---PF8---PF9---PF10--PF11---PF12---							
Help Main Retn Quit Back Fwrd Left Rght							
MESSAGE LINE							

Sample Audit Trail Screen

The sample screen above is the Rate Audit by Entry. This screen lists every addition, modification or delete made in the Rate file. You can see the type of action taken, the Id of the user who performed the action, the date and time of the action and the program that made the change.

At the top of the screen is the notation "2 more >", which indicates that there are additional screens. The additional screens display every field on the rate record as it was at the time of update, thereby providing a record of exactly what changes were made with each modification. The fields Rate, Line Id and Action are repeated on each of the screens. The Line Id field is provided to identify each line when moving between horizontal panels.

An audit trail list by time gives you the same information that is displayed when you list the audit trail in entry sequence, except that the data is in chronological order. For more information about the functionality associated with "browse screens", see the Browse Screens section above.

Workflow (Review List)

MEDS includes a mechanism whereby a user can be notified that an entity requires review. This mechanism is the Workflow (Review List).

Typically, Workflow entries are issued from maintenance screens or batch processes, and are triggered by specific conditions existing in the data. For example, an online screen may issue a Workflow entry once a record has reached a certain status and requires some kind of authorization by a different user. A batch process could issue Workflow entries as opposed to an error report, etc.

Workflow is accessible to all users from the main menu.

For further information refer to the Workflow Tracking Guide.

Glossary of Terms

Direct command	A means of navigating quickly through the system when you are thoroughly familiar with MEDS.
Global information	MEDS keeps track of the latest value of all key fields. This global information is used as the default value in certain fields when you transfer to a new screen.
Help	You can get help when you are not sure what to do next or what to enter in a field. Global help provides descriptive text about a screen. Field help provides descriptive text about a field or a list of values that may be entered into a field.
Key field	A key field is one that uniquely identifies a record. For example, Service Agreement Number is the key field on a Service Agreement record, and Person Number is the key field on a person record.
Moreable field	A moreable field is one that can contain more information than is initially displayed. A moreable field is indicated by a "+". When you change the "+" to an "M", you can enter more data in the window that appears. The indicator then changes to a ">", which means that there is more data than is displayed on the screen.
Protected field	A field that is protected is one that cannot be modified. You cannot move the cursor to a protected field using the Tab key, but you can use the arrows.
Multiline relationship	A multiline relationship is one where a single entity has an unlimited number of entities associated with it. Some examples of multiline relationships are Special editing facilities that let you work with multiline relationships.