

Work Force Information System (WFIS)

User Reference Manual

Version 3.0
February 2002



U.S. Department of Energy

Office of Worker and Community Transition

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Title Page

Document Name: Work Force Information System (WFIS)
User Reference Manual

Publication Date: February 2002

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Office of Worker and Community Transition

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Change Control

The following information will be used to control and track modifications made to this document.

1. Revision Date: June 1998
Author: SAIC
Section(s): 1.0, 7.0, 10.0, 11.0, 12, 13, Appendix A, C, D, E, F, and G
Page Number(s): N/A
Summary of Change(s):
Chapter 1: Replaced entire section with the exception of section 1. 4
Chapter 7: Updated text and screen captures to reflect overall modification of the Work Force Restructuring module (e.g., information now captured at the site level, fields added or replaced, attachment of text document removed)
Chapter 9: Minor changes due to new Work Force Restructuring terminology
Chapter 10: New screen captures depicting new field names
Chapter 12: Updated screen captures and changes to narrative, etc.
Chapter 13: New screen capture for the Work Force Restructuring Report (Export feature)
Appendix A: Complete new section
Appendix C: Deleted
Appendix D: Renamed Appendix C; Report samples added.
Appendix E: Renamed Appendix D; New Work Force Restructuring field names, data elements added; also, order of modules adjusted to reflect the order in which they appear in the application.
Appendix F: Renamed Appendix E; New Work Force Restructuring field names, data elements added; notes added to provide clarification, and order adjusted.
Appendix G: Deleted
Table of Contents: Updated
2. Revision Date: November 1998
Chapters 1 and 2 have been replaced.
Chapter 3: "Logging On, Database Access, and Exiting" has been added
Chapter 4: "Populating The WFIS Database" has been added.
Chapter 5: "Guidance On Working With Specific Modules" replaces previous chapters 3,4, 5, 6, 7, and 8.
Original chapters 9,10, 11, 12 and 13 have been replaced by the following new chapters:
Chapter 6: "Using the Status Window and The Approval Process"
Chapter 7: "Upload Processing"
Chapter 8: "WFIS Reporting"
Table of Contents: Updated
3. Revision Date: January 1999 (Version 2.0a)
Chapter 1: Deleted reference to Chapter 8, and updated footer
C, D, and E: Updated footer

4. Revision Date: February 1999 (Version 2.0b)
Chapter 2: Updated Section 2.4.3 "Minimizing the Screen for Security Purposes"
Chapter 4: Updated Section 4.5 "Submitting Your Data"
Updated all document footers

5. Revision Date: February 2002 (Version 3.0)
Revised by: M. A. Stiffman, OWCT
Chapter 3: Moderate editing; some graphics updated
Chapter 4: Minor editing
Chapter 5: Redesignated as Chapter 6; updated to include BA module and associated graphics; substantial editing re: other modules
Chapter 6: Redesignated as Chapter 5; substantial editing; some graphics added.
Chapter 7: Eliminated (was "Upload Processing")
Chapter 8: Omitted pending revision (WFIS Reporting)
All appendices eliminated. All footers updated.
Entire document converted to MS Word format and combined in one file

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1.0 INTRODUCTION

1.1 What is WFIS?

The Work Force Information System (WFIS) is the Department of Energy's "corporate" level mechanism for recording, storing and accessing compensation and benefits, skill mix, and other information about employees of contractors who operate the Department's production, environmental clean-up, research and other facilities.

The system accepts and maintains data aggregated by contractor. Information on individual employees is not part of the system. WFIS is operated by the Department's Office of Worker and Community Transition (OWCT), which also coordinated its design and development.

At present WFIS maintains data about contractor employees in four areas; these are:

- compensation and benefits (C&B);
- equal employment opportunity (EEO);
- collective bargaining agreements (BA); and
- work force restructuring (WFR).

Each of these areas is termed a "module," and each module has its own peculiarities as to the data to be submitted, the frequency of such submissions, and like matters.

1.2 Who This Manual Is Written For

The audience for this Manual is WFIS users - - those contractor and Federal employees who will be directly engaged in the implementation of WFIS through their computer workstations. It is designed to assist users in the "hands on" operation of WFIS, including data entry, data submission and approval, and report generation.

A companion volume, the WFIS Handbook, deals with WFIS policy, and covers matters such as the definition of each module's data fields, and when these data are to be submitted. It also includes examples of forms for assembling data prior to entering them in the system, and certain codes that may be needed for data entry.

1.3 Assumptions About Users and Limitations of This Manual

Users are assumed to be familiar with Windows conventions – (e.g., mouse use; use of drop-down menus and toolbars) and to have substantial experience in navigating the Windows environment and using Windows applications. This Manual addresses these matters only as they immediately relate to WFIS operation.

Users are also assumed to have access to network engineering expertise to assist in system installation and to troubleshoot connectivity problems as they may arise. This

Manual is not a technical guide in these areas. For information about installation, see Section 2.3.

Users who wish to generate customized reports from the database are assumed to have expertise in the use of query tools (or have access to such expertise). This Manual does not provide support in this area. Information on the database structure and the entity relationships are available, however, from the WFIS Program Administrator.

Finally, users are assumed to have substantial knowledge of the subject matter of the modules they will be working with, particularly the underlying principles and the terminology. WFIS is merely a means of collecting and storing data. This manual is not a substitute for training in the subject areas or practical experience.

1.4 About the Illustrations in this Manual

Although WFIS consists of a number of independent modules, most menus, toolbar icons, and dialogue boxes are essentially the same in each. The description of basic WFIS operations will be illustrated using the Equal Employment Opportunity (EEO) module. Major differences between the EEO and other modules will be described as necessary.

1.5 How This Manual Is Organized

This chapter defines WFIS, its purpose and the users of the system. It also lists the assumptions made by WFIS developers. The following summarizes the contents of the remaining sections of the manual.

Chapter 2

Provides a system overview. It describes how WFIS works and how to get help. In addition, it provides information about system security, including the issuance and use of User Ids and passwords.

Chapter 3

Provides instruction on launching WFIS, logging on, selecting a module, creating and retrieving records, and exiting.

Chapter 4

Deals with the data collection and storage function of the application. Steps common to all modules for entering, validating, submitting and approving data are described.

Chapter 5

Describes how to track the status of contractors' data submissions and how these techniques are used in the approval process. It also addresses the more general issue of how to find records in the WFIS database.

Chapter 6

Discusses cursor movement, data formats, and other such characteristics of the various modules which affect data entry, validation and submission.

2.0 SYSTEM OVERVIEW

2.1 How WFIS Works

2.1.1 System Architecture

WFIS is designed around current computer and communications technology. From a technical standpoint, it is a client/server application with client workstations located across the Department's complex of offices and facilities and a relational database server located at DOE Headquarters. It employs Microsoft SQL Server (MSSQLS) as its Relational Data Base Management System (RDBMS) and an application written with PowerBuilder as its user interface (or, as it is called, its "front end").

Operating within this overall architecture, WFIS consists of a number of independent modules which share a common set of reference tables, user identification protocols, security mechanisms, data entry techniques and other such operating conventions. The relational database for all modules resides on the WFIS server, which is maintained by the Office of Worker and Community Transition.

2.1.2 The WFIS Cycle

Data are entered into WFIS by contractor employees using computer workstations at their desks. These data are transmitted to, and stored in, a database at DOE Headquarters. As part of this process, WFIS performs various validity checks to ensure a basic level of data quality. The data are then reviewed by Federal employees at the Department's Operations and Field Offices. This review involves working with contractor employees to resolve questions about possible errors, omissions and the like, to eventually result in Federal approval of the data.

Once approved, these data are available to DOE Headquarters and Field personnel, and to the contractors themselves, for the purpose of producing reports and analyses required by regulation or statute, and for responding to ad hoc requests by the Congress or senior level Administration officials. The System has a number of standard reports built in, and it is designed to allow the generation of customized special reports using commonly available software.

2.1.3 WFIS as a Windows Application

The WFIS front end is a Windows application designed to run under Microsoft Windows 95, 98 or NT operating systems. As such, it adheres to "standard" Windows conventions as much as practicable. Cursor control conventions (the use of Enter, Tab and Shift | Tab, and the arrow keys), dialogue boxes, "grayed" menu items, drop-down lists, and toolbar icons are all employed in the same manner as off-the-shelf Windows applications such as word processors and spreadsheets.

As with most computer applications, WFIS encompasses commonly performed operations such as opening and closing files, entering data, and saving data. WFIS differs from most off-the-shelf applications, however, in that it is more highly structured and involves a variety of "customized" operations. To assist the user in understanding WFIS, this manual will occasionally make reference to these similarities and differences.

2.1.4 Database Integrity and Privacy

WFIS includes a scheme designed to ensure the integrity and privacy of the data. Each contractor has unlimited access to its own data, but its personnel cannot access the data of any other contractor. DOE Field and Headquarters personnel are able to view the data entered by contractors, but they are barred from changing these data.

2.2 Getting Help

The current version of WFIS does not have an online Help capability. Selecting **H**elp will display only an information box about WFIS.

If you need assistance, call the WFIS Program Administrator from 8:00 a.m. to 5:00 p.m. Eastern time. As of the publication date of this manual, the phone number is (202) 586-5057. Outside of normal business hours, leave a message and your call will be returned by close of business the following day. You may also Email requests for assistance to: wfis@hq.doe.gov. Please include your name and phone number in your message.

2.3 Installing WFIS

Detailed instructions for installing WFIS can be downloaded from the WFIS FTP site, <ftp://wfis.wt.doe.gov> using either a Web browser or an FTP utility (log on anonymously). These instructions are written for an assumed “standard” operating environment. The exact way in which WFIS will be installed for a particular user will depend upon the user’s workstation hardware and the software/communications environment and protocols of the user’s facility.

2.4 Your Access to the Database and Other Security Considerations

2.4.1 Database Access - The Functions You Are Allowed To Perform

The functions you can perform as a WFIS user are largely determined by the database privileges you are granted by the WFIS Program Administrator working in conjunction with the Department’s Field/Operations Office WFIS Points of Contact and, if applicable, your company. The underlying principle guiding the assignment of database privileges is to ensure the integrity and privacy of the data.

There are two basic types of privileges: the right to enter or edit data in the database; and the right to view data once it has been entered. Viewing data includes examining the data using WFIS data windows, generating standard reports which are a part of WFIS, or extracting data from the WFIS database and generating custom reports.

These privileges - or rights, as they are also called - depend upon your role in the WFIS environment. The system for establishing rights is flexible to allow for roles which fall outside the usual scheme of things. Your privileges will be assigned as part of setting up your User ID and Password (see Section 2.4.2). They can also be altered as necessary.

Contractor Employees

If you are a WFIS user who is an employee of a contractor you will usually have the right to enter and edit your contractor's data for all WFIS modules, and you will have the right to view these data.

These privileges can be extended to allow you to work with the data of other contractors, as in the case of brother-sister or parent-child companies or in the case where your company acts as a "service bureau" for another. Such arrangements must be agreed by all parties.

Should your company so specify, your data entry and/or your viewing privileges could be restricted, extending only to certain modules.

Departmental Field/Operations Office Personnel

If you have the responsibility for reviewing and accepting WFIS data on behalf of the Department - called "approving" in WFIS terminology - you have the right to affect the database by posting "flags" in records, thereby designating them as having been approved. As an Approver, however, you cannot otherwise alter the database.

Unless otherwise allowed, you can approve only the data for contractors which report to your Field/Operations Office. This right can be modified, however, to allow you to approve data of contractors who report to other Offices. Such arrangements must be agreed by all parties.

Normally, your right to approve extends to data of all modules. Should your supervisor so direct, this privilege could be restricted to only certain modules.

You and other Field personnel responsible for working with WFIS data - whether or not Approvers - usually will have the right to view all records in the database, regardless of contractor or module. But should your supervisor(s) so specify, this privilege could be restricted to only certain modules or companies.

In certain cases your responsibilities may include entering and editing data in the database. For example, certain modules may require data to be aggregated across contractors, and this aggregated data would have to be entered by Departmental Field personnel. In addition, you may be selected to assist in populating the database by entering historical data. In these situations, you will be assigned database privileges similar to that of a contractor employee. For some, these privileges will be temporary; for others, they may be permanent. If you enter or edit data, however, you cannot approve the same; someone else will have to be your Approver.

Departmental Headquarters Personnel

If you are Departmental Headquarters employee you will usually have the right to view all records in the database, regardless of contractor or module. This right could be restricted, however, to limit your view to certain contractors or modules.

Headquarters personnel usually do not have the right to enter or edit data, including posting flags to designate approved data. However, you may be selected to assist in populating the database by entering historical data. In this situation, you will be assigned database privileges similar to that of a contractor employee.

WFIS System Officers

This group includes the WFIS Program Manager, Program Administrator, Data Base Administrator, and certain other individuals responsible for the development, operation and maintenance of WFIS. All persons of this group have unlimited privileges to view, update or otherwise affect the database.

2.4.2 Your User ID and Password

You will be assigned a User ID and an initial password by the WFIS Program Administrator (PA). The PA will transmit this information to your DOE Field/Operations Office WFIS Point of Contact, who will pass it on to you.

As a general rule, your User ID will consist of the first eight letters of your last name followed by the first letter of your first name. This may vary slightly, however, to take care of duplicates and other situations.

Your initial password will be exactly the same as your User ID. After your initial successful log on, you may change your password at any time. To do this, choose File | Options from the menu of any Main Module Window (See Section 3.2 and Figure 3-1a) and follow the instructions.

The password you choose can consist of any alphanumeric value up to 255 characters, but it must begin with an alphabetic character. You will be asked to enter your new password and then asked to reenter it. This is to ensure that you have not inadvertently miskeyed the password you had intended.

2.4.3 Minimizing the Screen for Security Purposes

WFIS uses the Windows minimization feature to assist in maintaining the privacy of your data.

This protection is afforded by the fact that when an application is minimized, its active screen and functionality are not available to a user. Only certain Windows control functions (e.g., Restore, Close) can be called up.

WFIS takes advantage of this feature by preventing a minimized module from being restored until the user re-enters his/her password.

Therefore, should you have to leave your workstation in the middle of a job:

- minimize the module you are working on by clicking the outermost minimization button on the screen (the minus sign in the upper right-hand corner);
- also minimize any other open modules (it is unlikely that you will have more than one open at a time, but it is possible); and then
- minimize the Module Selection Bar (illustrated in Section 3.2).

With all open modules and the entire application minimized, no one but yourself can gain access to your data. Only you can successfully restore.

To restore a module:

- click on its button on the Windows Task Bar and enter your password in the dialogue box which comes up; and then
- click the OK button or hit Enter.

The Module Selection Bar is restored in the same way. You do not have to restore the Module Selection Bar unless you plan to use a module you have not yet opened.

A WFIS module can be closed when minimized. To do this, click its button on the Windows Task Bar and then click the Exit button in the dialogue box which comes up. Do not enter any password in the dialogue box. NOTE: When a module is closed in this manner, data on the screen that have not been previously saved will be lost.

Following the same general steps, the entire WFIS application can be closed when modules and the Module Selection Bar are minimized. This feature allows someone else to close your workstation for you while maintaining the privacy of your data. The full protocol for closing the entire application is set out in Section 3.5.

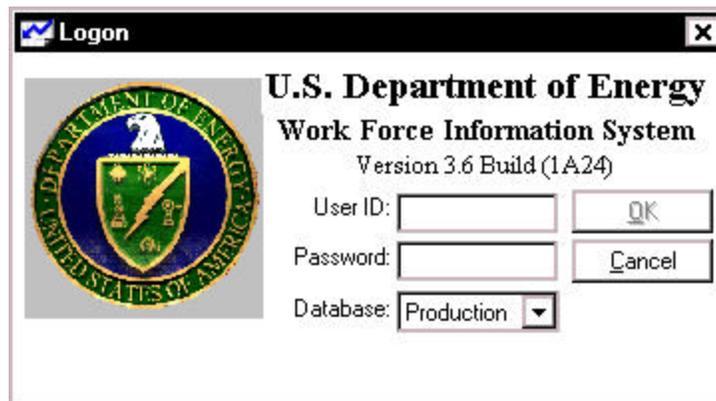
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3.0 LOGGING ON, DATABASE ACCESS AND EXITING

3.1 Launching WFIS and Logging On

WFIS is a Windows application and can be launched like any other application. Double clicking on a Windows desktop icon is the most common way to do this. The manner in which you will launch WFIS will depend on how you and your network engineer have set up your workstation.

Once you have launched WFIS you will have to log on to gain access to the application. The screen below will appear.



Enter your User ID where indicated, tab down, and enter your password. (See Section 2.4.2 for information about your User ID and your password.)

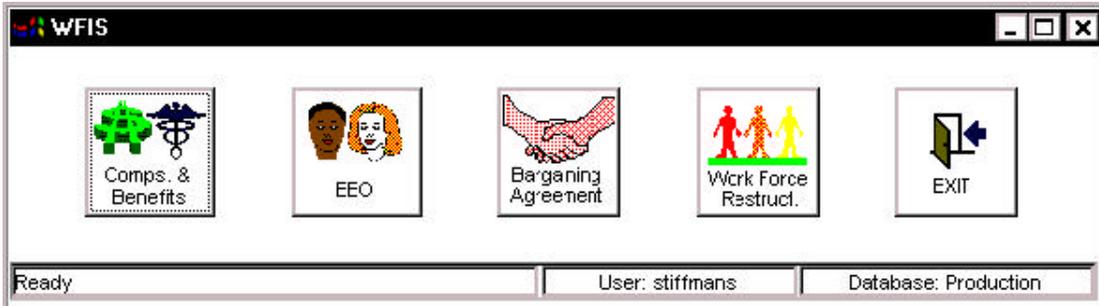
Tab down again and you will be positioned on the database selection drop-down list. From this drop-down list, select the "Test" or "Production" database by clicking or entering "T" or "P". (Usually you will want to access the Production database.)

Then click on the OK button or hit Enter.

At this point a dialogue box will appear stating which database, Production or Test, you have selected and asking you to confirm your choice. If you click on YES, the Module Selection Bar will appear. If you click on NO, you are sent back to the previous screen to reselect the database.

3.2 Selecting a Module - The Main Module Window

The first step in WFIS is to select the module you wish to affect. After successfully logging on as described in Section 3.1, Launching WFIS and Logging On, you will see the Module Selection Bar as shown below.



Click the button corresponding to the module you wish to access, and the Main Module Window for the module you selected will appear.

This Main Module Window is illustrated in Figure 3-1 and 3-1a which also describe the window's menu and toolbar icon functions. The Main Module Window is identical for each module, with the exception of the name of the module which appears in the window title bar.

3.3 Creating a Record in the WFIS Data Base

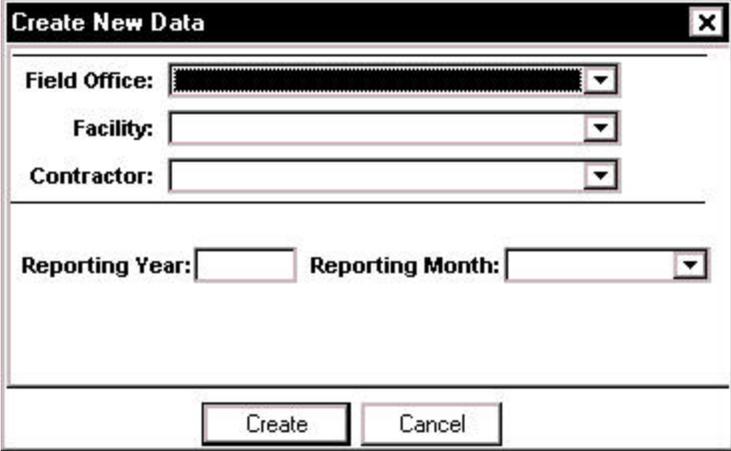
As with most applications such as word processors and spreadsheets, creating a record in the database is one of the most often used WFIS functions.

WFIS differs from word processors and spreadsheets, however, in the manner and time at which records are "named." With most commercially available programs, you have complete control over the name of your documents, and you usually name them right before doing your initial "save."

In contrast to this, WFIS names its records in accordance with highly structured nomenclature, called a record "key," and it requires this key to be entered before proceeding with data entry. In the following description, you will learn the elements which make up this key.

3.3.1 Entering the Key

To enter a new record in the database, click File | New on the Main Module Window menu, or click the New icon on the toolbar. The following dialogue box will appear which displays the components of the record key.



The image shows a dialog box titled "Create New Data" with a close button (X) in the top right corner. The dialog contains the following fields:

- Field Office:** A drop-down menu.
- Facility:** A drop-down menu.
- Contractor:** A drop-down menu.
- Reporting Year:** A text input field.
- Reporting Month:** A drop-down menu.

At the bottom of the dialog are two buttons: "Create" and "Cancel".

From the drop-down lists, select the Field Office, Facility, and Contractor (your company).

In certain modules you will also have to select a Contract Number. The fields to be completed will be apparent from the layout of the dialogue box.

Enter a Reporting Year and select a Reporting Month from the drop-down list. For some modules, you need to enter only the year; in others the Reporting Month drop-down list displays a combination of month and corresponding fiscal year quarter. These requirements will be apparent from the layout and drop-down lists of the dialogue box.

The following should be noted when completing this dialogue box:

- The drop-down lists in this dialogue box will display only those values which are allowed by your database privileges. For most contractor employees this means that the Field Office, Facility, and Contractor drop-down lists will have only one item listed. For WFIS users with broader database privileges, these lists will be more extensive.
- If you cannot find your company on the Contractor drop-down list, contact your Departmental WFIS Point-of-Contact, who will arrange for the contractor look-up table in the database to be updated. You will not be able to enter this information on the screen; it must be selected from the drop-down list. Do the same if your facility does not appear on the Facility drop-down list. (It is unlikely that your Field Office will be missing.)
- You can move from field to field by using Tab (backwards: use Shift | Tab), or just click on a field.

After completing the fields in the dialogue box, click on the Create button (or tab to Create and hit Enter). The XXXXX Data Window (where XXXXX is the name of the module) will then appear, and you can begin entering data. See Figure 3-2.

3.3.2 Entering Data and Saving a Record

A full description of the Data Window and data entering conventions is covered in Chapter 4. In general, however, data entry for WFIS is similar to that of off-the-shelf applications. Figures 3-2 and 3-4 are illustrations of the Data Window

When you have completed your data entry, save the record by clicking on File | Save or by clicking the Save icon on the toolbar.

Once you made your initial save, the record is created using the key you have chosen. The date created and User ID of the creator is stored in the record.

As with a word processor or spreadsheet, you may save your data at any point during data entry. This means that you may save the record even if you have entered no data and all the fields are blank.

Further, when you save your data, the Data Window remains on the screen until you close it.

For instructions on how to close the Data Window and other windows, WFIS Modules and the entire WFIS application, see Section 3.5.

3.4 Retrieving Records

The steps involved in retrieving records from the WFIS database are somewhat different from those used to create records.

Creating records focuses on a single purpose - that is, populating the database. Further, only one group of WFIS users are involved in this task - persons who are employees of contractors and who have the authority to add data to the database.

In contrast, records are retrieved for a number of reasons and by a variety of WFIS users.

- Contractor employees will very often need to retrieve records to complete their data entry work.

This could include editing previously entered data, completing data fields previously left blank, and checking the record for logical errors (called "validating" the data).

In addition, contractors may just wish to view their data - for example, to see how certain data elements were reported in a previous time period.

- Departmental Field personnel need to retrieve records in order to review and approve contractors' data submissions. This task involves retrieving four to five records, each from a different contractor.

To make this work less tedious and less subject to error when entering record keys, WFIS makes it possible to retrieve a group of records with just a few keystrokes and mouse clicks.

- Users at Headquarters also need to retrieve data, often as a preliminary step in performing analyses or in order to answer inquiries. This work also requires that groups of records be available quickly.

3.4.1 Retrieving One Record

To retrieve just one record, begin by specifying its key. Starting in the Main Module Window, click on File | Open or click the Open icon. A dialogue box will appear. Note that this dialogue box is almost identical to the one used to create a record; the only difference is that this dialogue box has an Open button rather than a Create Button.

Complete the fields as in the above example as you would when creating a record. When finished, click on the Open button (or Tab to the Open button and hit Enter).

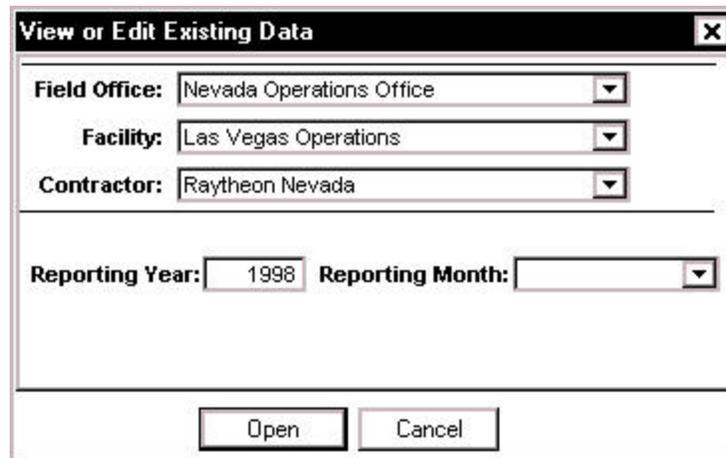
At this point a new window appears; it is the Status Window, which is illustrated in Figure 3-3. Note that the body of this window displays a single line composed of the key fields you have just entered, and a series of dates.

Click any place on this line and the Data Window will appear displaying the record you just selected. See Figure 3-4.

Chapter 6 addresses the other WFIS functions performed using the Status Window, including the use of the aforementioned series of dates.

3.4.2 Retrieving A Group of Records

To retrieve a group of records, proceed as with selecting a single record, but leave one or more of the fields of the dialogue box blank. WFIS interprets a blank field as a request for all values of that field.



The screenshot shows a dialog box titled "View or Edit Existing Data". It contains the following fields:

- Field Office:** Nevada Operations Office (dropdown menu)
- Facility:** Las Vegas Operations (dropdown menu)
- Contractor:** Raytheon Nevada (dropdown menu)
- Reporting Year:** 1998 (text box)
- Reporting Month:** (blank dropdown menu)

At the bottom of the dialog box are two buttons: "Open" and "Cancel".

For example, if you leave the Reporting Month field blank, as in the above dialogue box, WFIS will retrieve records for each of the months for the Field Office, Facility, Contractor, Reporting Year combination you have designated. The Status Window will contain a line item for each record. See Figure 3-5.

By clicking on a specific line in the Status Window, you bring up its corresponding Data Window. When you are finished working with that record, close its Data Window. This will then "uncover" the Status Window, which will still have the list of records you saw earlier. You can then retrieve another record by clicking on its line in the Status Window.

The following things should be remembered when retrieving a group of records:

- By reducing the size of the Data Window, and with judicious placement of the Status Window, you can open more than one record, and you can switch among them using the "Window" function on their menus.
- You can leave more than one field blank in the dialogue box.

In fact, you could leave them all blank, and if you had appropriate database privileges, you could retrieve all of the records which make up the module's database.

- Users who are contractor personnel usually have restricted database privileges which allow them to create and retrieve only their own company's data.

Therefore, if you are a contractor employee and you leave all of the dialogue box fields blank, the list of "all" records you will see in the Status Window will consist of records for just your company.

- DOE personnel, both Field and Headquarters, can view the records pertaining to any contractor. For example, to look at the records for all contractors which report to a particular Field/Operations Office and for particular year/quarter, you would leave the Facility and Contractor fields blank.

3.5 About Closing and Exiting

WFIS uses standard Windows techniques, and this means that there is a multiplicity and hierarchy of windows. When you go to close, you need to make sure you are closing the window you wish to close. Figures 3-1 and 3-2 are illustrations of the Data Window and the Main Module Window and Data Window which may be helpful in understanding the following.

3.5.1 Closing the Data Window and other “Child” Windows

To close the Data Window, do any of the following:

- from the Data Window menu, click on File | Close;
- click the Control Menu Box for the Data Window (in that window’s upper left hand corner) and click on Close; or
- click the Close button for the Data Window (the “X” in that window’s upper right-hand corner).

Be careful not to click the Close button for the “parent” Main Module Window, as that will initiate exiting the entire module, not just the Data Window.

Also, do not click on the Close icon on the toolbar as this also initiates exiting the module.

These conventions and caveats apply to all “child” windows of a module, the Data Window, the Status Window and other windows that will be addressed later in this Manual.

3.5.2 Exiting a Module

Closing the entire module is called “exiting.” You may exit a module in four ways from whatever window(s) that may be displayed. You may either:

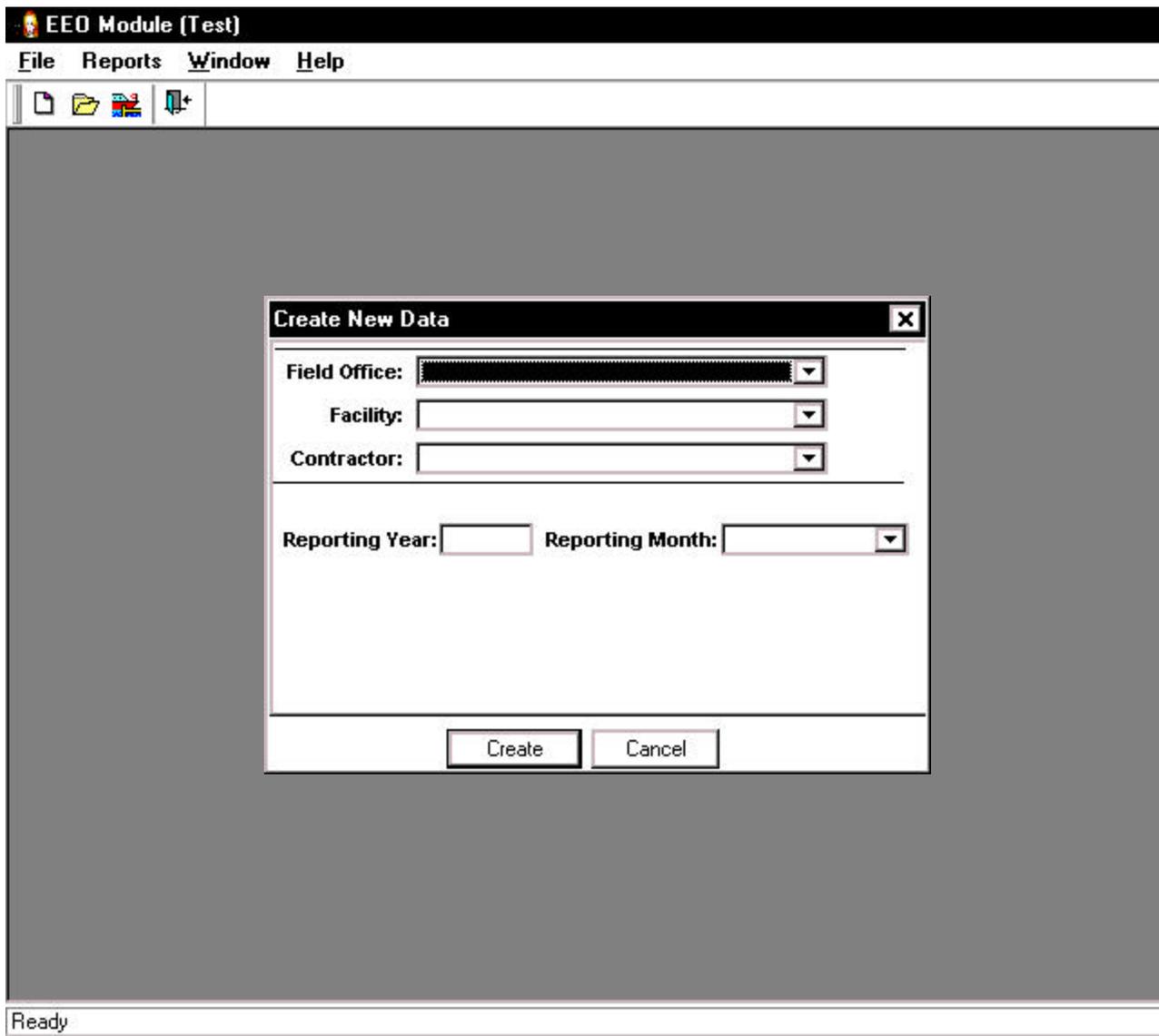
- click on File | Exit on the Main Module Window;
- click on the Close icon on the toolbar - it appears on the Main Module Window toolbar and on the toolbars of all “child” windows;
- click the Control Menu Box for the Main Module Window (in that window’s upper left-hand corner) and click on Close; or

- click the Close button for the Main Module Window (the “X” in that window’s upper right-hand corner).

3.5.3 Exiting WFIS

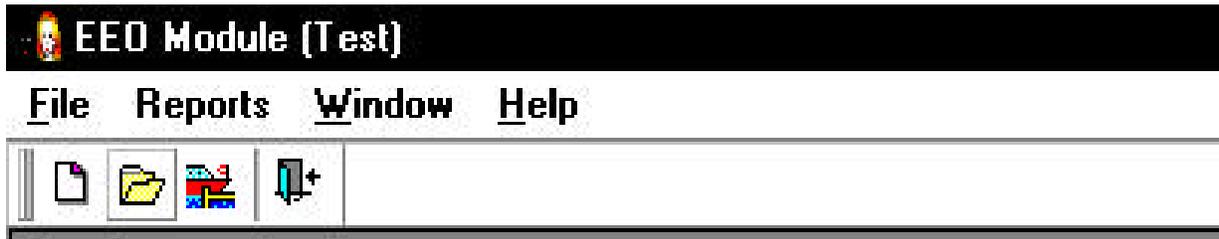
To exit WFIS, first close all modules. This will uncover the Module Selection Bar (see Section 3.2). From here you exit in one of three ways: click on the Control Menu box and click Close, or click on the Close button, or click on the Exit button.

Figure 3-1: Main Module Window with “Create New Data” Dialogue Box Activated



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Figure 3-1a: Main Module Window- Drop-Down Lists and Toolbar Icons



File Open:	initiates retrieval of an existing record in the database
File Print Setup:	allows selection and setup of an available printer
File Options:	allows the user to: change password, adjust position of toolbar, adjust certain windows settings
File Import:	initiates the Upload Module – currently inactive
File Exit:	closes the module
Reports:	initiates Reports function for the module
Window:	allows user to cascade, tile or layer multiple windows
Help About:	notes the number of the current version of WFIS; contextual help for WFIS is not provided

Going from left to right, the toolbar icons correspond to the following menu selections:

File | New File | Open File | Import File | Exit

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Figure 3-2: Data Window

EEO Module (Test)

File Operations Window Help

EEO MODULE Data [New]

Field Office Nevada Operations Office **Facility** Las Vegas Operations
Contractor Raytheon Nevada **Reporting Period** Dec/FYQtr1 1999
Facility Total

EEO Category	Total		Black		Hispanic		Nat. Am/Alk.		Asian/Pac. Isl.		Other	
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
TOTAL	0	0										
OFFICIALS & MANAGERS	0	0										
PROFESSIONALS	0	0										
TECHNICIANS	0	0										
OFFICE AND CLERICAL	0	0										
CRAFTSMEN - skilled	0	0										
OPERATIVES - semi-skilled	0	0										
LABORERS - unskilled	0	0										
SERVICE WORKERS	0	0										
OJT WHITE COLLAR	0	0										
OJT BLUE COLLAR	0	0										
APPRENTICES	0	0										

Ready

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Figure 3-2a: Data Window - Menu



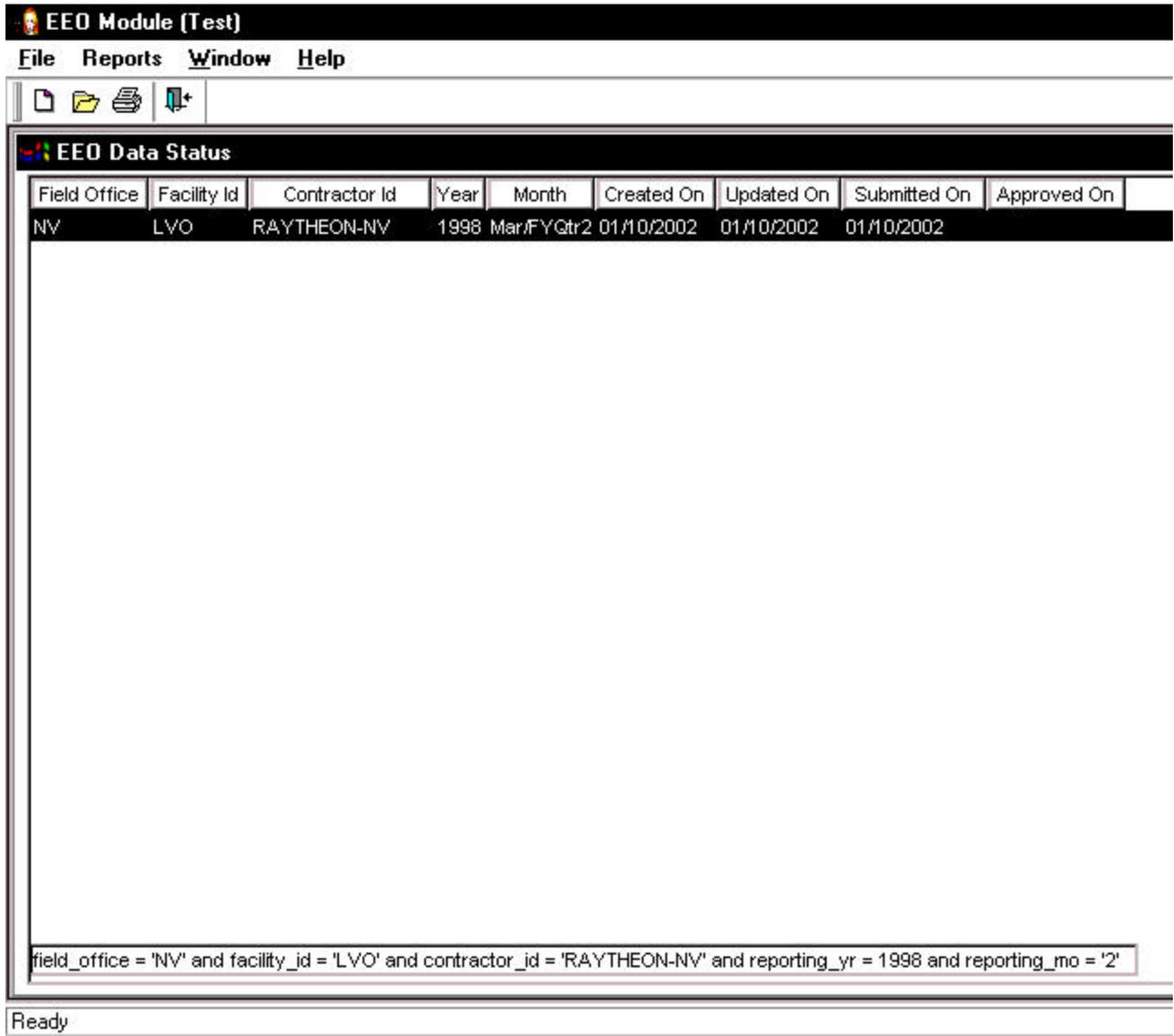
File New:	initiates creation of a new record in the database
File Open:	initiates retrieval of an existing record in the database
File Close:	closes the active record window
File Save:	saves the data posted to the active record window
File Print:	displays and allows printing of a record in the image of the "standard" paper form from which data is keyed into the system
File Print Stp:	allows selection and setup of an available printer
File Options:	allows the user to: change password, adjust position of toolbar, adjust certain windows settings
File Exit:	closes the module
Ops Validate:	checks the data for "logical" errors
Ops Submit:	flags the record as having been submitted to the Department for approval; checks the data for "logical" errors before allowing this flag to be set
Ops Unsubmit:	removes the submit flag; needed if data requires revision after it has been submitted
Ops Approve:	flags the record as having been reviewed and then accepted by the Department
Ops Unapprv:	removes the approve flag; needed if data requires revision after approval
Window:	allows user to cascade, tile or layer multiple windows
Help About:	notes the number of the current version of WFIS; contextual help is not provided

Going from left to right, the toolbar icons correspond to the following menu selections:

File | New File | Open File | Save File | Print Ops | Validate Ops | Submit
Ops | Unsubmit Ops | Approve Ops |Unapprove File | Exit

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Figure 3-3: Status Window – Individual Record



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Figure 3-4: View of a Retrieved Record

EEO Module (Test)

File Operations Window Help

EEO MODULE Data [Submitted]

Field Office Nevada Operations Office Facility Las Vegas Operations

Contractor Raytheon Nevada Reporting Period Mar.FYQtr2 1998

Facility Total 1667

EEO Category	Total		Black		Hispanic		Nat. Am/Alk.		Asian/Pac. Isl.		Other	
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
TOTAL	1,139	528	129	83	90	46	17	5	31	12	872	382
OFFICIALS & MANAGERS	240	46	10	2	11	2	2	0	4	0	213	42
PROFESSIONALS	143	266	30	31	18	22	6	2	16	7	73	204
TECHNICIANS	179	37	9	1	11	6	3	2	6	0	150	28
OFFICE AND CLERICAL	15	130	3	33	0	11	0	1	0	5	12	80
CRAFTSMEN - skilled	388	9	20	0	43	0	5	0	4	0	316	9
OPERATIVES - semi-skilled	74	8	9	1	3	1	1	0	0	0	61	6
LABORERS - unskilled	40	3	18	2	2	0	0	0	1	0	19	1
SERVICE WORKERS	60	29	30	13	2	4	0	0	0	0	28	12
OJT WHITE COLLAR	0	0	0	0	0	0	0	0	0	0	0	0
OJT BLUE COLLAR	0	0	0	0	0	0	0	0	0	0	0	0
APPRENTICES	0	0	0	0	0	0	0	0	0	0	0	0

Ready

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Figure 3-5: Status Window – Multiple Records

The screenshot shows a software window titled "EEO Module (Test)". The menu bar includes "File", "Reports", "Window", and "Help". Below the menu bar is a toolbar with icons for file operations. The main area is titled "EEO Data Status" and contains a table with the following data:

Field Office	Facility Id	Contractor Id	Year	Month	Created On	Updated On	Submitted On	Approved On
NV	LVO	RAYTHEON-NV	1998	Sep/FYQtr4	01/11/2002	01/11/2002		
NV	LVO	RAYTHEON-NV	1998	Jun/FYQtr3	01/11/2002	01/11/2002	01/11/2002	
NV	LVO	RAYTHEON-NV	1998	Mar/FYQtr2	01/10/2002	01/11/2002	01/10/2002	01/11/2002
NV	LVO	RAYTHEON-NV	1998	Dec/FYQtr1	01/11/2002	01/11/2002	01/11/2002	01/11/2002

At the bottom of the window, a status bar displays the filter criteria: "field_office = 'NV' and facility_id = 'LVO' and contractor_id = 'RAYTHEON-NV' and reporting_yr = 1998". The status bar also shows the word "Ready".

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4.0 POPULATING THE WFIS DATABASE

4.1 The WFIS Data Input Cycle

WFIS serves two major functions. First, it is a vehicle for collecting and storing contractor work force data. In addition, it provides a means of reporting those data through a set of standard reports. As noted earlier, the WFIS database can also be used with commonly available query tools to generate analyses and reports other than those available through WFIS.

This section deals with the data collection and storage function, i.e., populating the database.

With WFIS, there are four steps involved in populating the database. These are:

- entering: contractors enter their data into the WFIS database;
- validating: this step checks for logical errors in the input data to ensure internal consistency and suitability for review and analysis;
- submitting: with this step contractors inform the Department that their data are available for review; and
- approving: by which the Department accepts the data from the contractors.

The first three of these steps is usually done by contractor employees (but see Section 2.4.1 as to others who might perform these tasks), while the last is exclusively the responsibility of the Department.

All of this work is performed using the Data Window. In those parts of the following text which describe specific actions, it is assumed that you are already in the Data Window.

4.2 The Data Window in General

Each WFIS module has a Data Window which is used in entering, validating, submitting and approving data. This window consists of one or more highly formatted screens which can be thought of as an electronic "data submission form." The Data Window can also be regarded as a stylized spreadsheet in that most of the data are posted to a grid of numeric cells.

While the body of these windows/forms is different for each module, the menu and toolbar icons are the same for all, and they all conform to the same conventions regarding cursor movement, mouse use, and the like.

To assist in reviewing your input, examining errors and for audit trail purposes, the Data Window has a print function which allows you to produce an image of the input screen(s) in a highly readable form.

4.2.1 The Data Window Menu and Toolbar

The Data Window menu and toolbar are illustrated in Figures 3-2 and 3-2a (go back to Chapter 3 and take a look). Many of the menu and toolbar functions have been addressed previously (for example, File | New and File | Exit - see Sections 3.3 and 3.5), and many functions are similar to those in other Windows applications.

Certain functions, however, are specific to WFIS; this includes all of the “Operations” menu/toolbar selections and the Print function. Functions such as these will be explained in the following sections.

4.2.2 Cursor Use and Keying Conventions

The various WFIS Data Windows are somewhat like spreadsheets as they consist primarily of rows and columns of cells in which you enter numeric data. This similarity extends to matters such as cursor movement, mouse use and keystrokes.

- The “Enter” key moves the cursor to the next cell to the right. At the end of a row, the cursor jumps to the beginning of the next row.
- Tab and Shift | Tab move the cursor one cell to the right or left, respectively.
- The Up and Down Arrow keys move the cursor up and down a column.
- You can jump to any cell by clicking on it.
- When you go to a cell containing data (click, tab or up/down arrow), the cell is highlighted and all of the existing data will be replaced as you rekey. But if, before you start to key, you hit a left/right arrow key or click in the cell, the cursor positions itself within the cell and allows the in-cell editing of the existing data.

There is one significant difference from spreadsheets in these regards: the Right and Left Arrow keys cannot be used to move the cursor from cell to cell. Rather, they are used only to position the cursor within a cell.

4.2.3 The Data Window Print Function

At any time that you are in the Data Window you can print an image of the record being displayed. The printed image resembles the paper form which you would use to assemble data prior to keying.

To print a record, click on File | Print or the Print icon in the active Data Window. A Print Form Window will appear displaying the data's print image. See Figure 4-1. To initiate printing, click the Print button in the Print Form Window. The Print Form Window has a Printer Setup function which you can use to adjust the printing process.

As an alternative to printing a hard copy, you can examine the data on the screen in its print image. The Print Form Window is smaller than the entire print image, but scroll bars are provided. You can increase the size of this window in the usual Windows

manner, and you can use the Zoom Level function to shrink the image itself. A Page Control function is provided for multi-page images.

4.3 Entering Data, Saving Data and Format Editing

Data is entered in the Data Window in the conventional manner. You can skip around or enter data serially.

All fields, however, must eventually be posted with data. If the amount in a field is zero, then you must enter zero; a blank field is not equivalent to zero. To WFIS, a blank field means you forgot to make an entry. WFIS does not, however, check for blank fields until you try to validate your work. Therefore, you can leave fields blank during data entry - but you will not be finished until all blanks are filled in.

At any time you can pause and save your data. When you save your data, the database will be populated with whatever is displayed in the Data Window. No edit checks are performed. This allows you to save incomplete records or tentative data prior to validation.

WFIS does not, however, allow you to enter just anything in the Data Window (as you could, for example, with a word processor).

- As you enter data, WFIS checks to see if you are adhering to the correct data format for the cell in question. For example, certain cells require positive integers (whole numbers). Thus, a negative number or an alphanumeric entry will not be allowed. If a date is required, an entry other than a date is not allowed.
- For the most part, a cell's format will be apparent from the title of the cell. For example, employee headcounts have to be in integers.
- If you have made an entry in a field which violates its format criteria, WFIS will not allow you to proceed until you have entered data in the correct format. If you get "trapped" in a cell because you do not know its correct format, first highlight and then delete its contents, leaving it blank. The cell is now as if you never made the entry to begin with. You can then go forward with the rest of your work.

4.4 Validating Your Data

After you have entered your data, you need to see if it conforms to certain logical constraints. In WFIS, such testing is called validation. Examples of these tests include:

- a "beginning date" field must have an earlier date than an "ending date" field;
- the sum of the cells which are components of a summary cell must equal the amount in that summary cell; and
- the dollars paid and the hours worked must be entered into their respective cells for a given class of pay (you cannot have dollars without hours, and vice versa).

In addition, as mentioned previously, blank cells are not valid; all cells are tested for this condition.

To validate a record, click on Operations | Validate or the Validate icon. WFIS will run a validation routine corresponding to the module in which you are currently working. Some modules have extensive testing; others have only a little.

As a first step, the validation routine checks for blank cells. If you have any, you get a message informing you of the same. You must then go back and correct this condition.

If there are no blank cells, the balance of the validation tests are performed. If your data fails any of these tests, you will get a dialogue box which informs you of that and presents a button which, when clicked, displays a box with a list of error messages. See Figure 4-2. You can print these messages by clicking on the print button of the error message box. You will then have to go back and correct the record before proceeding to submit.

Keep in mind that you can save your data at any time, regardless of whether it contains errors. And you do not have to perform all of your corrections at one time. You can validate over and over again until you eliminate all errors.

If you do not have any errors, you will get a dialogue box saying that the validation was successful.

4.5 Submitting Your Data - and Unsubmitting

Once you have validated a record successfully (that is, no errors are encountered), you can then submit it to the Department.

Submitting the data electronically is equivalent to submitting a paper form or report. The data are being turned over to the Department to satisfy some contractual or administrative requirement. Consequently, after submitting a record, you will no longer be able to change the data in the Data Window; none of the keys will respond.

Knowing, however, that submitted data may have to be subsequently revised, WFIS also has an "unsubmit" function.

- This function can be exercised only by a Field/Operations Office WFIS Point of Contact, but then only upon a contractor's request.
- The responsibility for this function is shared in this way to ensure that contractors do not unsubmit data which may have already reviewed and approved. But it also reserves a contractor's right to control what it submits.
- Under ordinary circumstances an unsubmit will be initiated because a contractor and a Point of Contact agree that the data need to be revised.

To submit a record, click on Operations | Submit or the Submit icon.

- Nothing very much happens on the screen, except that the title bar in the Data Window now indicates that the data are now submitted and the Submit icon is grayed out. In the database, the record is flagged with a submit date.
- In addition, hidden from you, the Submit function runs the validation routine again before allowing the record to be flagged as submitted. This is a safety device which prevents you from submitting erroneous data (for example, in case someone made an incorrect entry after you validated earlier).
- If the record fails this hidden validation test, you will need to go back and correct the record before submitting again.

To unsubmit, click on Operations | Unsubmit or the Unsubmit icon (can be done only by a Point of Contact). This will change the legend in the Data Window title bar, and for those who can enter data (e.g., contractor employees), the keyboard will then come alive.

4.6 Approving a Data Submission - and Unapproving

As mentioned previously, approving data is exclusively the responsibility of the Department. When a submission is approved, it means that the data are available for official reporting and analysis, requiring no caveats as to their condition.

Due to unforeseen circumstances, however, it may be necessary to “unapprove” data. Since approval carries with it a substantial implication of finality, unapproving is severely restricted. A record can only be unapproved by the WFIS Program Manager or Program Administrator, and only after consultation with the Headquarters office which has the Department’s corporate responsibility for collecting and reporting the data.

To approve, click on Operations | Approve or the Approve icon (can be done only by a Point of Contact). The Data Window’s title bar will now indicate the record has been approved. Unapprove is performed by the WFIS Program Manager or Program Administrator in a similar fashion.

Keep in mind that this section assumes that you are in the Data Window displaying the record you wish to approve. How you get to this point, the steps that make up the whole “approval process,” is addressed in Chapter 5, “Using The Status Window and the Approval Process”.

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Figure 4-1: Print Form Window

U.S. DEPARTMENT OF ENERGY
REPORT OF CONTRACTOR EMPLOYMENT
 Image of input form -- Data are now: Approved.

FIELD/OPERATIONS OFFICE: Nevada Operations Office FACILITY ID: _____

CONTRACTOR: Raytheon Nevada REPORT PERIOD: _____

CONTRACTOR/FACILITY TOTAL: 1667	TOTAL EMPLOYMENT		BLACK		HISPANIC	
	MALE	FEMALE	MALE	FEMALE	MALE	FEMALE
TOTAL	1,139	528	129	83	90	4
OFFICIALS & MANAGERS	240	46	10	2	11	
PROFESSIONALS	143	266	30	31	18	2
TECHNICIANS	179	37	9	1	11	

Figure 4-2: Validation Errors Dialogue Box

Validation Errors for EEO

Printer Setup... Print Page Control Zoom Level 100

Black Male column does not add up
 Hispanic Male column does not add up
 Nat. Am/Alk. Female column does not add up
 Other Male column does not add up
 Facility Total is not correct

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5.0 USING THE STATUS WINDOW AND THE APPROVAL PROCESS

In WFIS terminology, the “status” of a record refers to whether it has been saved to the database; if saved, whether it has been submitted; and if submitted, whether approved. A record's status plays an important part in the overall operation of the system.

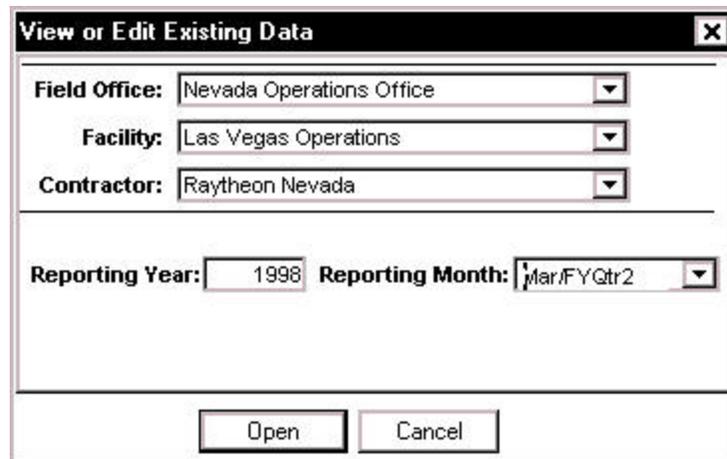
- Departmental Field/Operations personnel need to keep track of which contractors' submissions have been tendered and which of these they have approved.
- Headquarters personnel would like to know when the data they need will be available.
- Contractors may need to demonstrate that they have met their reporting obligations.

The Status Window is the mechanism used to address these matters.

More generally, the Status Window provides a way to probe the WFIS database en masse and see what records are out there. It is, therefore, useful in locating records when their key fields are only partially known, including records “misplaced” because their key fields were inadvertently entered incorrectly.

5.1 Calling Up the Status Window

As explained in Section 3.4, the Status Window is called up when you retrieve records using the View or Edit Existing Data dialogue box. It cannot be called up in any other way. By way of example, the following dialogue box brings up the Status Window shown in Figure 5-1. (This example is the same one used Section 3.4.1)



The image shows a screenshot of a software dialog box titled "View or Edit Existing Data". The dialog box contains several input fields and buttons. The fields are: "Field Office" with a dropdown menu showing "Nevada Operations Office"; "Facility" with a dropdown menu showing "Las Vegas Operations"; "Contractor" with a dropdown menu showing "Raytheon Nevada"; "Reporting Year" with a text input field containing "1998"; and "Reporting Month" with a dropdown menu showing "Mar/FYQtr2". At the bottom of the dialog box are two buttons: "Open" and "Cancel".

Should you wish, you can print the body of the Status Window by clicking on File | Print or the Print icon. All of the entries in the window will print out, including those which are beyond the boundaries of the display (i.e., viewable only by scrolling).

5.2 A Closer Look at the Status Window

5.2.1 Status Screen Fields

Each row in the body of the Status Window represents a record in the database. The first several columns displayed are the record's "key," a group of fields which uniquely identifies the record. Several date fields are also displayed. And for some modules, several special use fields are also displayed.

A record's key is established when you first create a record. In fact, the act of completing the Create New Data dialogue box (see Section 3.3.1) is nothing more than designating the record's key.

For every record, the Field Office, Facility Id and the Contractor fields are part of its key. Other fields which make up the key vary by module, as follows:

- C&B: Contract Number and Reporting Year;
- EEO: Reporting Year and Reporting Month;
- BA: Union, Local, and Beginning and Ending Dates of the agreement; and
- WFR: Reporting Year and Month.

The date fields in the Status Window track the progress of the record throughout the WFIS cycle (see Section 2.1.2). They are:

- Created: the date on which the record was first saved;
- Updated: the date on which the record was last updated - this changes each time the data in the record are changed;
- Submitted: the date on which the record was submitted; if subsequently unsubmitted, the date at which it was last submitted; and
- Approved: the date on which the record was approved; if subsequently unapproved, the date it was last approved.

Because the BA record has three segments, each segment has its own Submitted and Approved date fields.

5.2.2 Order of Display

When the records are retrieved, the rows are sorted in a nested manner, most generally by Field Office; then by Facility Id and by Contractor Id; and then by the other fields which make up the key. The sort order is ascending within each nested level. Note the order of records in Figure 5-2.

Each column heading is a “button.” If you click on a column heading, the rows will be sorted according to the values in that column. For example, if you click on the Created On column, the list will be sorted in the order of those dates; a second click will change the order from ascending to descending. Once you have sorted the rows by clicking on the column buttons, you can never get back to the original nested sort order; to do this you need to close the Status Screen and query the database again.

At the very bottom of the window, there is an inset display in small type which shows the key fields you entered in the View or Edit Existing Data dialogue box. You might refer to this display if the record or group of records in the body of the window is not what you expected. By doing this, you can see what you (inadvertently) requested.

5.3 The Approval Process

The approval process consists of the steps performed by Departmental Field/Operations Offices in reviewing and officially accepting contractors' WFIS data submissions. Contractor employees need to be aware of this routine so they can work with the Department to resolve problems with their submissions. Headquarters' personnel may also find knowledge of this process helpful in performing their work.

As mentioned previously, with the exception of certain WFIS managers, only Field/Operations Office personnel have the right to flag database records as “Approved.” Further, the scope of this privilege for an individual Field/Operations Office is limited to the records submitted by the contractors which it supervises.

The process consists of three steps: 1) using the Status Window to determine the status of contractors' responses to a data submission requirement; 2) reviewing contractors' submissions using the Data Window, and, if warranted, discussing possible revisions with contractors; and 3) flagging the record “Approved” in the database.

The following instructions are written as if the audience were Field/Operations Office personnel. Further, they assume that you have launched WFIS and have accessed the module corresponding to the data submissions you wish to review (and approve).

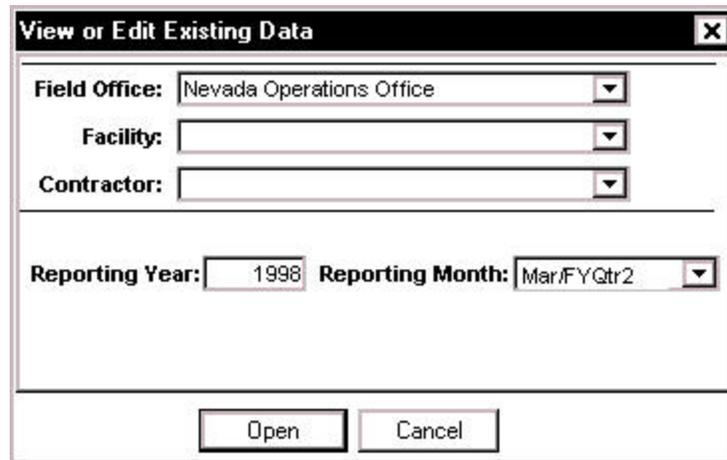
5.3.1 Seeing What's Out There

The first step is to determine which contractors have made a submission and which have yet to do so. This is done with the aid of the Status Window.

Starting in the Main Module Window, click on File | Open, or click the Open icon.

Complete the View or Edit Existing Data dialogue box, keeping in mind how to retrieve multiple records (see Section 3.4.2). That is, select your Office from the drop-down list and, depending on the scope of your review, select or key in entries for the other fields - or leave those fields blank.

For example, if you wish to look at the EEO data of all of your contractors for a particular quarter, leave the Facility and Contractor fields blank but fill in the Year and Month fields. The dialogue box would look like this:



The resulting Status Window, Figure 5-2, lists all the EEO records in the database posted by your contractors pertaining to the Year and Month in question.

From this window, you will be able to tell which of your contractors have submitted their data for your approval. They are the records with a date in the Submitted On column.

If the only date displayed is in the Created On column, the contractor has saved the data (which may or may not be complete) but has not yet turned it over to the Department. Such records are “grayed out” and cannot be viewed by Field/Operations Office personnel.

Keep in mind that the Status Window can only display what is in the database. It does not tell you which contractors should be submitting EEO data but have not yet even created a record. To identify such contractors, you will need to consult your Office files to see who has a WFIS reporting obligation but has not yet responded. (Most likely you will know who is missing just by scanning the entries on the screen.)

Several other things to remember in connection with retrieving records:

- Usually, you should select your Office when completing the dialogue box. If you leave the Office drop-down list blank, you will retrieve all records which otherwise satisfy your selection criteria across all Operations/Field Offices. While you will be able to view each of these records, you can only approve contractors who report to your Office. The extraneous records only serve to clutter up your screen.
- C&B, EEO and WFR submissions are tied to fixed dates. For example, EEO data are submitted quarterly. When retrieving such records for approval, be careful when completing the date fields of the dialogue box.

- BA records are not submitted in satisfaction of a fixed schedule and no date field is provided in the dialogue box. Possibly the best way to retrieve BA records is to select a Facility, but leave the Contractor, Union and Local fields blank. As most facilities have one or two contractors, and most (but not all) contractors have no more than three BAs, the resulting Status Window will usually have only three to six rows. This is not an overly long list to work with.

With the knowledge you have gained from the Status Window, you can now:

- proceed to review records that have been submitted;
- follow up with those contractors who have entered data in the database but have not completed their work to see if they have any problems; and
- contact those contractors who are absent from the database and remind them of their responsibility.

If you so wish, you can print out the Status Screen (click on File | Print or the Print icon) and retrieve the records at a later time.

5.3.2 Reviewing Contractors' Submissions

To review a record you need to retrieve it from the database so that it appears in the Data Window. This allows you to view the record and, if you need, to print a copy of the input image. The printed image will probably be useful in examining the data away from your workstation.

To display a record in the Data Window, you click on its corresponding row in the Status Window (see Section 3.4). If you subsequently close the Data Window, it uncovers the Status Window which is then active again.

If the Status Window contains multiple records (as recommended in the previous section), you can display any of those records in the Data Window by selecting and clicking on the row/record you want to look at.

5.3.3 Flagging the Record as Approved

When you are satisfied that the data are acceptable and should be approved, click on Ops | Approve or the Approve icon in the Data Window. Figure 5-3 displays the Data Window after the record has been approved. Note the legend "Approved" in title bar of the inner Window.

5.3.4 You Cannot Revise a Contractor's Submission

In conducting your review, you might conclude that the data should be revised. You will not be able to do this yourself; the data fields in the Data Window will not respond to your cursor or keystrokes. This is because the right to edit data is limited to the employees of the company to whom the data belong.

You need to first Unsubmit the record, and then have the contractor make the change. The contractor would then Submit the record again. Note that while only the contractor can change the data, both you and the contractor can view the record in the Data Window at the same time as you go over the problem together.

5.4 Locating Records in General

Section 5.3.1 (above) describes how to retrieve multiple records from the WFIS database as part of the review and approval process. This method can be applied more generally to access the database en masse for other purposes. The ability to retrieve records in this fashion is not a comprehensive query tool, but it does have its purposes. Some examples are:

- When you have only a fuzzy idea as to all of a record's key fields, you can generate a list in the Status Window consisting of all records with the key fields you do know, and then scan the list for the one you are seeking.
- If you want to compare data submissions - say, comparing all companies' second quarter submissions for a given year - you can generate a list in the Status Window which will allow you to do so.

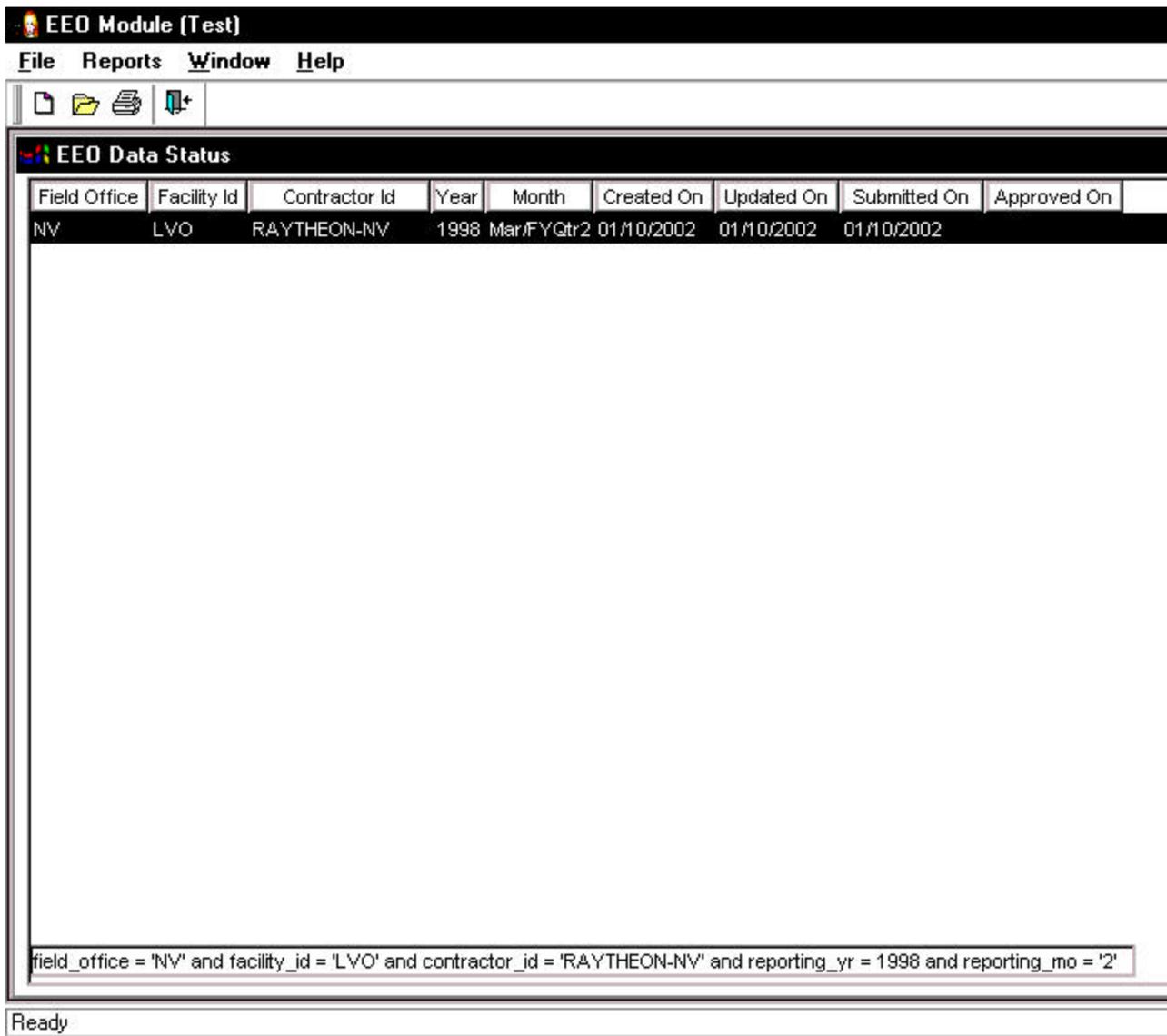
This capability is particularly important in locating records that have been "misplaced," that is, when key fields have been inadvertently and unknowingly entered incorrectly. For example, if a Field/Operations Office reminds a contractor to submit its data, but the contractor says that it has already done so, a misplaced record may be at the root of the problem. The following approach is suggested:

- As most of the key fields are selected from drop-down lists, the date fields are the most likely sources of error.
- Therefore, you should retrieve all of the contractor's records for the module in question, and then sort the entries in Status Window by year or month (see Section 5.2.2). This will allow you to easily inspect the database for date outliers or discontinuities.

Contractors, as well as Federal personnel, can similarly examine the database, although on a more limited basis; they can retrieve and view only their own companies' records (see Section 2.4). Notwithstanding that limitation, the procedure is quite useful.

- In the above "misplaced" record example, a contractor could perform the search just as well as Field/Operations Office personnel.
- Multiple record retrieval can be used to easily examine data on year to year or quarter to quarter basis.

Figure 5-1: Status Window – Individual Record



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Figure 5-2: Status Window – All Facilities Reporting to the NV Ops Office - Qtr2, 1998

EEO Module (Test)

File Reports Window Help

EEO Data Status

Field Office	Facility Id	Contractor Id	Year	Month	Created On	Updated On	Submitted On	Approved On
NV	AMADOR	EGG-NV	1998	Mar/FYQtr2	02/06/2002	02/06/2002	02/06/2002	
NV	LAO	BNI-LAO	1998	Mar/FYQtr2	02/06/2002	02/06/2002		
NV	LVO	BNI-LVO	1998	Mar/FYQtr2	02/06/2002	02/06/2002		
NV	LVO	RAYTHEON-NV	1998	Mar/FYQtr2	01/10/2002	02/06/2002	01/10/2002	
NV	LVO	WACK-NV	1998	Mar/FYQtr2	02/06/2002	02/06/2002	02/06/2002	02/06/2002
NV	PACIFIC	RAYTHEON-NV	1998	Mar/FYQtr2	02/06/2002	02/06/2002		

field_office = 'NV' and reporting_yr = 1998 and reporting_mo = '2'

Ready

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Figure 5-3: Data Window After Record Has Been Approved

EEO Module (Test)

File Operations Window Help

EEO MODULE Data [Approved]

Field Office Nevada Operations Office Facility Las Vegas Operations

Contractor Raytheon Nevada Reporting Period Mar.FYQtr2 1998

Facility Total 1667

EEO Category	Total		Black		Hispanic		Nat. Am/Alk.		Asian/Pac. Isl.		Other	
	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
TOTAL	1,139	528	129	83	90	46	17	5	31	12	872	382
OFFICIALS & MANAGERS	240	46	10	2	11	2	2	0	4	0	213	42
PROFESSIONALS	143	266	30	31	18	22	6	2	16	7	73	204
TECHNICIANS	179	37	9	1	11	6	3	2	6	0	150	28
OFFICE AND CLERICAL	15	130	3	33	0	11	0	1	0	5	12	80
CRAFTSMEN - skilled	388	9	20	0	43	0	5	0	4	0	316	9
OPERATIVES - semi-skilled	74	8	9	1	3	1	1	0	0	0	61	6
LABORERS - unskilled	40	3	18	2	2	0	0	0	1	0	19	1
SERVICE WORKERS	60	29	30	13	2	4	0	0	0	0	28	12
OJT WHITE COLLAR	0	0	0	0	0	0	0	0	0	0	0	0
OJT BLUE COLLAR	0	0	0	0	0	0	0	0	0	0	0	0
APPRENTICES	0	0	0	0	0	0	0	0	0	0	0	0

Ready

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6.0 GUIDANCE FOR SPECIFIC MODULES

6.1 Compensation and Benefits

The Compensation and Benefits (C&B) module presents a complex Data Window consisting of eight pages. Figures 6-1 and 6-2 illustrate two of these pages.

6.1.1 Moving Around in the Data Window

Cursor movement generally follows the conventions described in Chapter 4, but the following should be noted:

- Clicking a page “tab” will take you to that page and will position the cursor in the first cell of that page.
- When you are in the last cell of a page (that is, the last row and right-most column), hitting Enter or Tab will take you to the first cell on the next page. But if you are in the first cell of a page, Shift | Tab will not take you back to the last cell of the previous page; it takes you to the first cell of the previous page.
- The Comments and Methodology pages are text entry boxes. Cursor movement on these pages follows most text editing conventions (e.g., Enter starts a new row). Tab and Shift | Tab, however, take you to the following/previous page.

6.1.2 Data Formats

Most cells must be positive integers (whole numbers, not less than zero), this includes:

- all cells on the Counts, Pay, Legal and Benefits pages;
- the cells on the Hours page with the exception of the Average Hours Per Week cell; and
- the Number of Health Plans and Retiree/Enrollee cells of the Health Plans page.

A few cells require a positive number with two decimal place precision; these are:

- the Average Hours Per Week cell on the Hours page; and
- the Contribution section of the Health Plans page.

The Comments and Methodology pages accept free form text.

6.1.3 Validation

Validation is complex and involves numerous logical tests; for example:

- the Gross Payroll cell must equal the sum of its subcategory cells, and the same goes for Annual Base Pay; (the subcategory cells which make up these sums are apparent from the way the row titles are indented - see Figure 6-1);

- for many of the subcategory cells which make up the Annual Base Pay, there must be an entry in the corresponding cell on the Hours page;
- the Federal or State Unemployment Tax cells cannot both be zero; one must be greater than zero; and
- if the Retiree cell on the Counts page is zero, then all of the Retiree Health Benefits cells on the Benefits page must also be zero.

Validation complexity is compounded by the fact that certain data are collected on more than one category of employees and many tests must be performed on each category.

6.1.4 Other Guidance - Data Input

A non-zero entry in certain cells (for example, Pay - Miscellaneous Compensation) requires you to make an explanatory entry on the Comments page. The program takes you directly to the Comments page and you cannot leave it without making some type of entry. To go back to the cell that sent you, use the mouse and click on the page.

Filling the cells serially on a page is probably the best way to proceed. Skipping around on a page will likely confuse you.

6.2 Equal Employment Opportunity

The Data Window of the Equal Employment Opportunity (EEO) module presents a matrix having 12 rows and 12 columns. The EEO Data Window appears in many of the figures used in this manual.

6.2.1 Moving Around in the Data Window / Data Formats

Cursor movement follows the conventions described in Chapter 4. All cells must be integers, not less than zero.

6.2.2 Validation

Columns must sum correctly; that is, the sum of the rows in each race/gender column must equal the Total row for that column.

The Facility Total must equal the sum of all cells.

6.2.3 Other Guidance - Data Input

The Total Male and Total Female columns (all the rows in these two columns) are grayed out and do not accept data input. The amounts in these cells are automatically generated from your input by summing the appropriate cells in each row.

Do not forget to complete the Facility Total field (on the left and above the matrix).

6.3 Bargaining Agreements

The Bargaining Agreement (BA) module presents a complex Data Window consisting of three major pages and a number of subpages. Figures 6-3, 6-4 and 6-5 illustrate the major pages. In Figure 6-4 you can see the tabs of the five subpages of the Report of Settlement page.

The complexity of the Data Window reflects an equally complex module whose structure affects entering, validating and submitting data. A number of features account for this complexity.

To begin with, BAs are not entered in WFIS at any set time interval (e.g., quarterly, annually). Rather, they are to be entered on or about the date a contractor and a union reach agreement on a contract. The period between successive BAs is governed by the period of performance, which varies from agreement to agreement.

Second, you cannot view previous BAs between the parties by simply clicking on a line in the Status Window. The BA Status Window displays only the most recent BA posted to the system. Previous BAs, however, are still retained in the database, and the module includes a special "History" function to view these records.

The Calendar Details page (Figure 6-3) "controls" the entire record. It is the page which is initially displayed each time you retrieve a BA record. Further, you cannot enter data on - or even view - the Report of Settlement page until you first complete the Starting Straight Pay and Benefits fields on this page.

The Report of Settlement and the Skill Mix pages must be submitted simultaneously with Calendar Details page. If the Calendar Details page is initially submitted by itself and you subsequently wish to submit the Report of Settlement or Skill Mix page, you must first "unsubmit" Calendar Details page, and then submit it again with the other page(s) (i.e., simultaneously).

6.3.1 Moving Around in the Data Window

Cursor movement generally follows the conventions described in Chapter 4, but the following should be noted:

- The Contract Summary field (on the Calendar Details page) and the Comments subpage are text entry boxes; they can accept any data. But do not use Tab and Shift | Tab in these fields, as they will take you to the following/previous field/page.
- Because of the complex format, use the mouse to go from page to page. Using Tab and Shift | Tab for this purpose does not work in the standard manner.
- You can use Tab and Shift | Tab to move among subpages on the Report of Settlement page, but using the mouse is recommended. If you do use Shift | Tab to go to a previous subpage, the cursor will return to the first cell on preceding page, not the last cell.

- Always use the mouse when going from field to field on the Skill Mix page. Tab, Shift | Tab and Enter will work, but you will be taken out of the page if you are not careful.

6.3.2 Data Formats

Wage and benefit data are captured with four decimal place precision.

- Starting Straight Pay and Benefits fields must be positive.
- Changes to wages and benefits (which are posted to the Report of Settlement subpages) can be either positive or negative. Negative changes are permitted because certain types of wages/benefits may decrease in exchange for increases in others.

Cells reporting the number of workers must be integers, not less than zero.

Two fields accept free text: the Contract Summary field on the Calendar Details page; and the Comments subpage of the Report of Settlement page.

6.3.3 Validation

There is only one true validation check: a comparison of the Number of Workers on the Calendar Details page with the number of workers accounted for on the Skill Mix page.

There are however, a number of “warnings,” most of which deal with the period of the BA (i.e., the number of years of the contract).

6.3.4 Other Guidance - Data Input

Most of the fields on the Calendar Details page are key fields (see Chapter 5) which you specify when you create the record. These fields are grayed out. The page, in fact, has very few fields you need to complete.

Although the Starting Straight Pay and Benefits fields “belong” to the Report of Settlement page, they are entered and are displayed on the Calendar Details page.

- As mentioned previously, you must enter these fields on the Calendar Details page in order to access the Report of Settlement page. If these fields are not completed, you will get a blank gray page when clicking on the Report of Settlement tab.
- On the other hand, if you submit the Calendar Details page without completing these fields, you will not be able to enter these data until the page is first unsubmitted (see the last paragraph in Section 6.3, above).

You cannot enter data on the Report of Settlement page itself. The settlement data are entered on the various subpages. The results of these entries are then displayed on the Report of Settlement page.

The following rules apply to the entries on the Report of Settlement subpages:

- All of the data are increases or decreases to the Starting hourly rates. They are not the wage or benefit that result from applying an increase or decrease.
- With the exception of the General Wage Increase/Decrease, all data are in dollars per hour, to four decimal places. Thus, if a Lump Sum is paid, its equivalent in dollars per hour must be determined before entering the field.
- The General Wage Increase/Decrease must be entered in percentage terms, to four decimal places. These percentages are entered in the second line of the subpage. The resulting increase/decrease in dollars per hour is calculated by WFIS and are displayed in the first row of the page. Although you can position the cursor in the first row, you will not be able to enter any data.
- You can enter a negative amount on the Lump Sum line, this to allow for an unlikely but possible contract provision. You will get a warning, but the record will pass validation.
- To post an entry to either the Other Wages or Other Benefits subpages, click the New button (at the bottom of the page) and a data entry line will be displayed; fill in the required data. To delete an entry, click on it and then hit the Delete button.
- To post an entry to the Skill Mix page, click the New Skill button and a data entry line will be displayed (see Figure 6-5). Select a job family from the COCS Family drop-down list and then use COCS Category drop-down list to select a specific job from within that family. Then enter number of workers. You can change both the family and the specific job if you make a mistake. You can delete the line entirely by clicking on the Delete Skill button.

6.3.5 Special Status Window Features and Functions

The Status Column: Active Contracts, Expired Contracts, and Placeholders

Every BA has a period of performance; it is like any other contract for services. When the contract period is over, the BA is said to have expired. Each time you bring up the Status Window in the BA module, WFIS compares “today’s date” with the period of performance for each record.

- If today’s date falls within a BA’s period of performance, “Active” is displayed in the “Status” column for that BA.
- If today’s date is later than ending date of the BA, “Expired” is displayed.
- If today’s date is earlier than the starting of the BA, “Placeholder” is displayed. A Placeholder occurs when you enter a BA in anticipation of its starting date (in order to avoid waiting until the first day of the BA to post it).

You can call up the Data Window of any record appearing in the Status Window regardless of the designation in the status column.

If a Placeholder is displayed, you will most likely see a second record. This would be the BA which the Placeholder will displace once you bring up the module after the starting date of the Placeholder. (This “old” BA will be supplanted by the “new” BA, whose status will no longer be Placeholder, but Active.)

The “History” Function

The “History” function allows you to access the database to view previous BAs between a contractor/union. It also allows you to view earlier versions of the current BA (see the paragraph on Versions, below)

- In the Status Window, click on the BA in question. Then click on File | History or the History icon (it looks like a little book).
- Another Status Window is displayed, this one displaying a line for every record pertaining to the BA (including the current one). Clicking on a line displays the Data Window for that version.

When using the “History” function, none of the fields in the various Data Windows can be changed, not even the fields in the latest version. This function only allows you to view the data.

The “Version” Function

If the terms of the BA are altered during the period of performance, but the BA is not considered a “new” contract, you can record the altered terms using the “Version” function. This capability has been built in primarily to capture COLA increases or increases/decreases negotiated under BA Reopener clauses.

- A “version” is initiated in the Status Window by clicking on the BA to be affected and then clicking on File | New Version or the Version icon (it looks like two sheets of paper).
- A new Data Window is displayed with all of the fields on the Calendar Details page filled in. Most fields are grayed out and cannot be altered as they were established when the original contract was entered in WFIS. The Settlement Date (for the new version) and the Number of Workers can be changed. The Version field – at the top right side of the Data Window – is increased by one (the original contract is Version 1, the first change is Version 2, etc.).
- At this point you can access the Report of Settlement page/subpages and alter the terms. You can also alter the Skill Mix page. The procedures for validating and submitting a BA are the same as with the initial entry.

When you have completed your work, the line which appears on the Status Window for the affected BA displays the new version number in the “Ver” (i.e., version) column.

The parties may decide that the changes to the BA are such that the result is an entirely new contract. In such a circumstance, you should not use the Version function. Rather, enter a new BA.

“Terminated Contracts”

In WFIS nomenclature, a BA is to be “Terminated” if one or both of the parties to the agreement cease to function at a facility. This happens when the Department changes contractors at a facility or when workers switch their union affiliation. BAs which are terminated need to be so tagged in the WFIS database so they do not continue to show up in the Status Window as Expired BAs.

- “Termination” is initiated in the Status Window by clicking on the BA to be affected and then clicking on the File | Terminate (or use the icon – it looks like a pair of scissors). “Terminated” will then be displayed in the Status column for that record.
- The next time you retrieve BAs, the record will not appear in the Status Window unless you specify that you want to retrieve terminated records. The View or Edit Existing Data dialogue box in the BA module allows such an option.

When you retrieve terminated BAs, the Status Window will display records for the “final” BAs - those that were in the Status Window at the time of termination. You can “reach back” and view previous BAs between the parties by using the History function.

6.4 Work Force Restructuring

The Work Force Restructuring (WFR) module Data Window displays a 15 row by 3 column matrix at the top of the page, followed by a 6 row by 1 column matrix further down. See Figure 6-6, which captures a portion of this window.

This module is somewhat different from the others in that:

- The data are entered by the Departmental Field/Operations Office personnel, not contractors.
- “Site” replaces Facility in the reporting hierarchy, and data are reported at the site level. A site may be one or an aggregation of facilities.
- “WFR Team” replaces Contractor in the reporting hierarchy. The WFR Team is the label the Field/Operations Office personnel use when entering these data.
- Field/Operations Office personnel are responsible for aggregating contractor data at the Team and/or Site level prior to input.

6.4.1 Moving Around in the Data Window / Data Formats

Cursor movement generally follows the conventions described in Chapter 4. All cells must be integers, not less than zero.

6.4.2 Validation

No validation tests are performed. The ratios which appear in the Cost/Recip column are examined manually to catch possible erroneous entries (i.e., ratios which differ from historical experience or which are in the extreme).

6.4.3 Other Guidance - Data Input

Data are entered only in Workers and Cost columns. The Cost/Recip column is grayed out; these ratios are calculated by WFIS.

Figure 6-1: Compensation and Benefits Module - First Screen of Pay Page

Comps and Benefits Module (Test)

File Operations Window Help

COMPS AND BENEFITS MODULE Data [Validated]

Field Office: Nevada Operations Office Facility Name: Las Vegas Operations
 Contractor: Raytheon Nevada Contract Number: AC05-94NV22464 Reporting Period: 1994

Counts Pay Legal Benefits Hours Plans Comments Methodology

Pay Category	Exempt	Bargaining Unit	Nonexempt Non-Bargaining Unit
Gross Payroll:	12,000	7,000	7,000
Annual Base Pay:	11,000	6,000	6,000
Straight-Time Pay Worked:	8,000	3,000	3,000
Vacation Pay:	1,000	1,000	1,000
Vacation Pay in Lieu:	0	0	0
Holiday Pay:	1,000	1,000	1,000
Holiday Pay in Lieu:	0	0	0
Sick Leave Pay:	1,000	1,000	1,000
Personal Leave Bank:	0	0	0
Personal Leave Pay:	0	0	0
Parental Leave:	0	0	0
Supplemental Pay:	0	0	0
Other Paid Leave Pay:	0	0	0
Overtime Pay - Straight Time Portion:	1,000	1,000	1,000

Ready

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Figure 6-2: Compensation and Benefits Module - First Screen of Benefits Page

Comps and Benefits Module (Test)

File Operations Window Help

COMPS AND BENEFITS MODULE Data [Validated]

Field Office: Nevada Operations Office Facility Name: Las Vegas Operations

Contractor: Raytheon Nevada Contract Number: A/C05-94NV22464 Reporting Period: 1994

Counts Pay Legal **Benefits** Hours Plans Comments Methodology

Medical Category	Total	Bargaining Unit
Life/Death Benefits		
Life Insurance:	250	250
Death Benefits:	0	0
Medical		
Insured Active Medical:	500	500
Self-Insured Active Medical:	0	0
Dental Active:	0	0
Vision/Prescription-Active:	0	0
Misc. Medical-Active	100	100
Insured Retiree Medical:	0	
Self-Insured Retiree Medical:	0	
Dental-Retiree:	0	

Ready

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Figure 6-3: Bargaining Agreements Module - Calendar Details Page

Bargaining Agreement Module (Test)

File Operations Window Help

BARGAINING AGREEMENT MODULE Data [Validated]

Field Office	Nevada Operations Office	Facility	Las Vegas Operations	Contract Status						
Contractor	Raytheon Nevada	Union	American Nurses Association							
Begin Date	01/01/1998	End Date	12/31/2002	Length	5	Local	1234A	Version	1	New

Settlement Date	02/13/2002	Number of Workers	15
Straight Pay		Benefits	
Starting	8.0000	3.0000	COLA Flag <input type="checkbox"/>
Ending	8.0000	3.0000	Reopener 0
Avg % Incr/Decr	0	0	Construction <input type="checkbox"/>

Contract Summary annual increases of 2.5% for two year

	Submitted On	Approved On
Calendar :		
Settlement Details :		
Skill Mix :		

Ready

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Figure 6-4: Bargaining Agreements Module - Report of Settlement Page

Bargaining Agreement Module (Test)

File Operations Window Help

BARGAINING AGREEMENT MODULE Data [Validated]

Field Office Nevada Operations Office **Facility** Las Vegas Operations **Contract Status**
Contractor Raytheon Nevada **Union** American Nurses Association
Begin Date 01/01/1998 **End Date** 12/31/2002 **Length** 5 **Local** 1234A **Version** 1 **New**

Start Strght Pay: \$8.0000 **Avg % Incr/Decr:** 1.0125% **Start Benfts:** \$3.0000 **Avg % Incr/Decr:** 0.0000%

Legend	Whole Contract	year1 1/1998	year2 1/1999	year3 1/2000	year4 1/2001	year5 1/2002
Wages						
Wage Base - Strt of Cntrct/Yr	8.0000	8.0000	8.2000	8.4050	8.4050	8.4050
General Wage Incr/Decr	.4050	.2000	.2050	0	0	0
General Wage Incr/Decr %		2.5000	2.5000	0	0	0
Other Wages Incr/Decr-see Tab						
Strght Pay - End Cntrct/For Yr	8.4050	8.2000	8.4050	8.4050	8.4050	8.4050
Lump Sum Payments		0	0	0	0	0
Othr Pymnts Not Affecting Base		0	0	0	0	0
Wages Paid for Year		8.2000	8.4050	8.4050	8.4050	8.4050
Cost of Wage Incr/Decr	.4050	.2000	.2050	0	0	0
Benefits						

Ready

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Figure 6-5: Bargaining Agreements Module - Skill Mix Page

Bargaining Agreement Module (Test)

File Operations Window Help

BARGAINING AGREEMENT MODULE Data [Validated]

Field Office Nevada Operations Office **Facility** Las Vegas Operations **Contract Status**
Contractor Raytheon Nevada **Union** American Nurses Association
Begin Date 01/01/1998 **End Date** 12/31/2002 **Length** 5 **Local** 1234A **Version** 1 Active

Calendar Details Report of Settlement **Skill Mix**

No. Workers Created 15 **No. Workers Specified** 15

COCS Family	COCS Category	No. Wrks
PROFESSIONAL ADMINISTRATIVE	PHYSICIAN ASST, NURSES, O	10
PROFESSIONAL ADMINISTRATIVE	COMMUNICATIONS SPECIALIST	2
SCIENTISTS	SOCIAL SCIENTISTS	1
GENERAL ADMINISTRATIVE	OFFICE CLERKS (SPECIALIZED)	2

Ready

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Figure 6-6: Work Force Restructuring Module - Partial Page

Work Force Restructuring Module (Test)

File Operations Window Help

WORK FORCE RESTRUCTURING MODULE Data [Submitted]

Field Office: Nevada Operations Office Site: Nevada Complex-Wide

Team: Nevada Test Site WFR Team Report Period: Sep 1998

Type: Defense

	WORKERS	COST	COST/RECIP
Positions Reduced Voluntarily			
Early Retirement:	450	\$24,550,000	\$54,556
Non-Retirement Voluntary Separation:	45	\$850,000	\$18,889
Net Positions Reduced Through Attrition:	0	\$0	
Involuntary Separation			
With Benefits - Non-Construction:	80	\$1,200,000	\$15,000
With Benefits - Construction:	0	\$0	
Without Benefits:	100	\$0	\$0
Remaining Affected Workers			
Workers Internally Placed Without Retraining:	90	\$0	\$0
Workers Internally Placed Through Retraining:	25	\$50,000	\$2,000
Transfers to Other Sites:	0	\$0	
Other Benefits Provided			
Displaced Worker Medical Benefits:	20	\$15,000	\$750
Relocation Assistance:	5	\$2,500	\$500
Outplacement:	235	\$180,000	\$766
Education Assistance:	0	\$0	
Other Separations			

Ready

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