

PART 1 –RECEIVING AND SAVING A PITR

Once you've received a notification email message and clicked the link within it, you will be using the PEAR Messaging application. The steps below describe how to receive and save a PITR.

Note: More detail on using the entire PEAR Messaging application is included in the next section of this handout

1. Click the link in the notification email message to view the new message in PEAR.

Note: The link may exceed 80 characters and therefore the text may wrap. If this happens, cut and paste the link in your browser or the link will not work. The Enterprise Application Login page displays.

2. Type your Enterprise ID and password, and click the Login button.

Note: If you are still logged on to the Parameter Editor, you will be automatically signed on to PEAR, and will not need to enter your Enterprise ID and password in this step. The message containing a PITR automatically opens in PEAR.

3. Click the attachment to open the PITR spreadsheet.
4. Click Open or Save when the File Download dialog box opens. The PITR spreadsheet opens in Excel in your browser.
5. Enter updated values in the PITR, or, if you are an approver, enter approval information.
6. From the Excel menu bar, click File>Save As. OR
Click the Back button on your web browser. A window displays "This document has been modified. Do you want to save changes?" Click the Yes button.
7. Select a local or network drive in the Save in

From: PearApplication@uillinois.edu Sent: Thu 8/11/2005 1:44 PM
To: alsarabi@uic.edu
Cc:
Subject: [PEAR] Message from PITR Application

You have a new protected message in the protected e-mail attachment repository. To view the new message, follow the link below:

<https://appserv3.admin.uillinois.edu/pear/jsp/showMessage.jsp?messageId=135884>

From Server: gw5.admin.uillinois.edu/64.22.176.75, Directory:
/var/gw/aita/messaging/Production/applications/PitrBuildApplication/gw5-1/scheduled

Step 1

PEAR Messaging Alpay Sarabi is logged in.

[Inbox](#) [New Message](#) [Sent Messages](#) [Unsent Messages](#) [Help on Message](#) [View](#) [About Pear](#) [Logout](#)

Message View [Printer friendly in new window](#)

Status: Sent
Date Sent: Sun Aug 21 15:57:34 CDT 2005
From: PITR Application
To: Alpay Sarabi
Subject: PITR Report Generation
Body: Here is the PITR Report requested for UIN XXXX XX XXXX

Attachments:
[PITR XXXXXXXX 1124657850999.xls](#) 24064 bytes

[Delete](#)

Step 3

Protected Email Attachment Application, Version 1.1 - A Reference Implementation of the OpenEAI Project (<1 second)

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Enterprise Application Login

Enter your EnterpriseID and password.

(Important: DO NOT include "@uillinois.edu", "@uic.edu", "@uiuc.edu" or "@uis.edu" when entering your EnterpriseID)

EnterpriseID:
Password:

[Click here to reset your enterprise password.](#)


ATTENTION: FIRST-TIME USERS of UI Enterprise applications! You must obtain your EnterpriseID and set up your Enterprise Password before you can use the applications.

Note: This is a one-time procedure; after setting up your Enterprise Password you do not need to follow these steps again when accessing UI enterprise applications.


Step 2

File Download

Do you want to open or save this file?

 Name: PITR XXXXXX 1124657850999.xls
Type: Microsoft Excel Worksheet, 23.5 KB
From: appserv3.admin.uillinois.edu

☒ Always ask before opening this type of file

 While files from the Internet can be useful, some files can potentially harm your computer. If you do not trust the source, do not open or save this file. [What's the risk?](#)

Step 4

PART 1 –RECEIVING AND SAVING A PITR

8. Rename the file in the File name field.
Note: Recommended naming convention:
Lastname_Firstname_YYYYMMDD-nn (nn =
version number of PITR)
9. Save the file as an Excel spreadsheet in the
Save as type field.
10. Click the **Save** button in the **Save As** window.
Your spreadsheet displays.
11. From the Excel menu bar, click **File>Page
Setup**. The Page Setup window displays.
12. Click the radio button for **Landscape**, and then
click the **OK** button.

Tip: Use the Print Preview option to view
format. If the PITR is 2 pages to print an one
page back to back copy - change the set up to
landscape and reduce percent to 75)
13. When you are ready to close the original
spreadsheet in PEAR, use the **Back** button to
return to the PEAR message.

Caution: If you click the Close button (X) in the
top right corner, you will close out of the PEAR
application.

Personnel Information Transmittal Report											
EXAMPLE - ACAD NEW HIRE											
View Date: April 12, 2004		Are there future dated job records?		Yes or No: NO		Banner ID: 010101010		Name: Doe, Jane		Home Org Code: 123456	
								Home Dept: Test Org			
MEMO: New Hire 50% appointment in Test dept and 50% appointment in Test1 dept.											
Employee Information											
	Last Name	First Name	Middle Name	E-Class	E-Class Desc	COA-Home Dept Code	COA-Home Dept Desc	COA & Org Check Distribution Code	COA & Org Check Distribution Desc	Employee Status	
Current	New	Doe	Jane		BA	Acad/Pro 12 mth Ben Elig		2-123456	Test	2-123456	Test
	Employees FTE	Benefit Category (Code & Description)	Leave Category (Code & Description)	Current Hire Date	First Work Day	Last Work Day	Termination Date	Termination Code	Termination Reason		
Current	New	0	M1-F1 Bi-Monthly All Benefits	Y3 - 12/12 mth 2 FH 25	1/3/2005	1/3/2005					
	VISA Expiration Date										
Current	New										
Job Information-Position No./Suffix:											
	Personnel Change Date	Position/Suffix	Job Status	Job Begin Date	Job End Date	Job Title	Job Change Reason Code	Job Change Reason Desc			
Current	New	1/7/2005	C987654	Active	1/3/2005	8/15/2005	Yst Specialist	HR001	New Hire		
	Job Types	Job FTE	Job Appt %	COA-Timesheet Org	Timesheet Org Title	Job Leave Category	Job E-Class	Job E-Class Desc			
Current	New	F	0.5	100	2-123456	Test	Y3	BA	Acad 12 mth Ben Elig		
Job Salary Information-Position No./Suffix:											
	Personnel Chg Date	Salary Group (CS Only)	Salary Table (CS Only)	Salary Grade (CS Only)	Salary Step (CS Only)	Hourly Rate (CS Only)	Permanent Shift (CS Only)				
Current	New	1/7/2005									
	Annual Salary	Assign Salary (Monthly Only)	Pay	Time Entry Method							
Current	New	12500	1041.67	12	P						
Job Labor Distribution: C-FOAPAL											
	Effective Date	Percent	Amount of Annual Salary	COA	Index	Fund	Org	Account	Program	Activity	Location
Current	New	1/3/2005	100	12500	2	123456	456789	789456	654321		
Job Service Dates & Anniversary Date Information											
	Effective Date	Contract Service Begin Date	Contract Service End Date	Salary Commitment (Monthly Only)	Anniversary Date (CS only)						
Current	New	1/3/2005	1/3/2005	8/15/2005	1041.67						
Leave of Absence Information-Position No./Suffix:											
	Leave Types	Leave Desc	Leave Begin Date	Leave End Date	Expected Return Date	Actual Return Date	Percent of Leave	Last Day of Work	Last Day in Pay Status		
Current	New										
Additional Job Information											
	Personnel Change Date	Position/Suffix	Job Status	Job Begin Date	Job End Date	Job Title	Job Change Reason Code	Job Change Reason Desc			
Current	New	1/3/2005	C987654	Active	1/3/2005	Yst Specialist	JE0001	Add Job			
	Job Types	Job FTE	Job Appt %	COA-Timesheet Org	Timesheet Org Title	Job Leave Category	Job E-Class	Job E-Class Desc			
Current	New		0.5	100	2-555555	TEST1	Y3	BA	Acad/Pro 12 mth		
Additional Job Salary Information											
	Personnel Chg Date	Salary Group (CS Only)	Salary Table (CS Only)	Salary Grade (CS Only)	Salary Step (CS Only)	Hourly Rate (CS Only)	Permanent Shift (CS Only)				
Current	New	1/3/2005									
	Annual Salary	Assign Salary (Monthly Only)	Pay	Time Entry Method							
Current	New	12500	1041.67	12	P						
Additional Job Labor Distribution: C-FOAPAL											
	Effective Date	Percent	Amount of Annual Salary	COA	Index	Fund	Org	Account	Program	Activity	Location
Current	New	1/3/2005	100	12500	2	123456	456789	789456	654321		
Additional Job Service Dates & Anniversary Date Information											
	Effective Date	Contract Service Begin Date	Contract Service End Date	Salary Commitment (Monthly Only)	Anniversary Date (CS only)						
Current	New	1/3/2005									
Additional Job Leave of Absence Information											
	Leave Types	Leave Desc	Leave Begin Date	Leave End Date	Expected Return Date	Actual Return Date	Percent of Leave	Last Day of Work	Last Day in Pay Status		
Current	New										
Approvals											
	Dept Approval Name	College/VC Approval Name	Home Dept Approval Name	Home College/VP Approval Name							
	Mr. Test Jr.	Mr. Test	Mr. Test	Mr. Test							
	Department	College	Dept	College							
	Phone	Phone	Phone	Phone							
	Email	Email	Email	Email							
	Date Approved	Date Approved	Date Approved	Date Approved							
	Approver Comments	Approver Comments	Approver Comments	Approver Comments							

Step 5