

CGBI EMAIL NOTIFICATION

The basics to subscribing to CGBI
readiness email notification service

CGBI Email Notification

- ☞ First-Time Users
- ☞ Edit Subscription Settings
- ☞ Canceling subscription

FIRST TIME USER SETUP

First time User Setup

☞ Select **Personal** view.

☞ Select **Configure My Personal Notifications** icon in the Compliance Tab.

The screenshot displays the 'Personal' view of the Coast Guard Business Intelligence system. The top navigation bar includes 'Enterprise', 'Unit', 'Personal', and 'Cubes/Reports'. The 'Personal' tab is selected and highlighted with a red box. Below the navigation bar, the 'My Readiness' section is visible, with 'Personal > My Readiness > Compliance' in the breadcrumb. The 'Compliance' tab is active, showing a list of items under 'Action Required' and 'Informational'. A red box highlights the 'Configure My Personal Notifications' icon in the top right corner of the Compliance tab. The 'My Cubes/Reports' section on the right lists various data sources like 'AOPS Cutter Resource Hours' and 'OPAR'. The footer shows 'data as of January 21, 2011' and a 'send feedback' link.

First Time User Setup

- Select **sign up now** in the **My Personal Notifications** section.

The screenshot shows the CGBI user setup interface. The main content area is titled "CGBI Profile" and includes the following sections:

- Information used to automatically log me into CGBI**
 - Active Directory**: Name: John Stone, Username: main\jstone, Email Address: John.M.Stone@uscg.mil
 - Direct Access**: Employee ID: 1046486
 - DEERS**: Electronic Data Interchange (EDI): 1013133847
- My CGBI Settings**
 - Default View**: the view that I will see when launching CGBI (Unit)
 - Default Unit**: the department that will be used on the Unit view (COMMANDANT (CG-0934) (008860))
 - Default Position**: my position that will be used on the Personal view (Regular - 00033643)
- My Personal Notifications**: I am not currently receiving notifications. [sign up now »](#)

First Time User Setup

- Select the email address to use for the subscription. Any valid email address that has been entered in Direct Access will appear in the drop down menu.

Enterprise Unit Personal Cubes/Reports

COAST GUARD BUSINESS INTELLIGENCE

notice | changes | my profile | toolbox | help

My Readiness Logged in as: John Stone Logout

Personal » My Readiness » Compliance

My Personal Notifications

Sign up to receive status changes and/or monthly notifications from CGBI on any or all of your compliance measures.

Which email address should we use?

Select one: jmstone97@gmail.com (home)

john.m.stone@uscg.mil (business)

jmstone97@gmail.com (home)

Save »

Which compliance measures do you want notified about?

How often should we notify you?

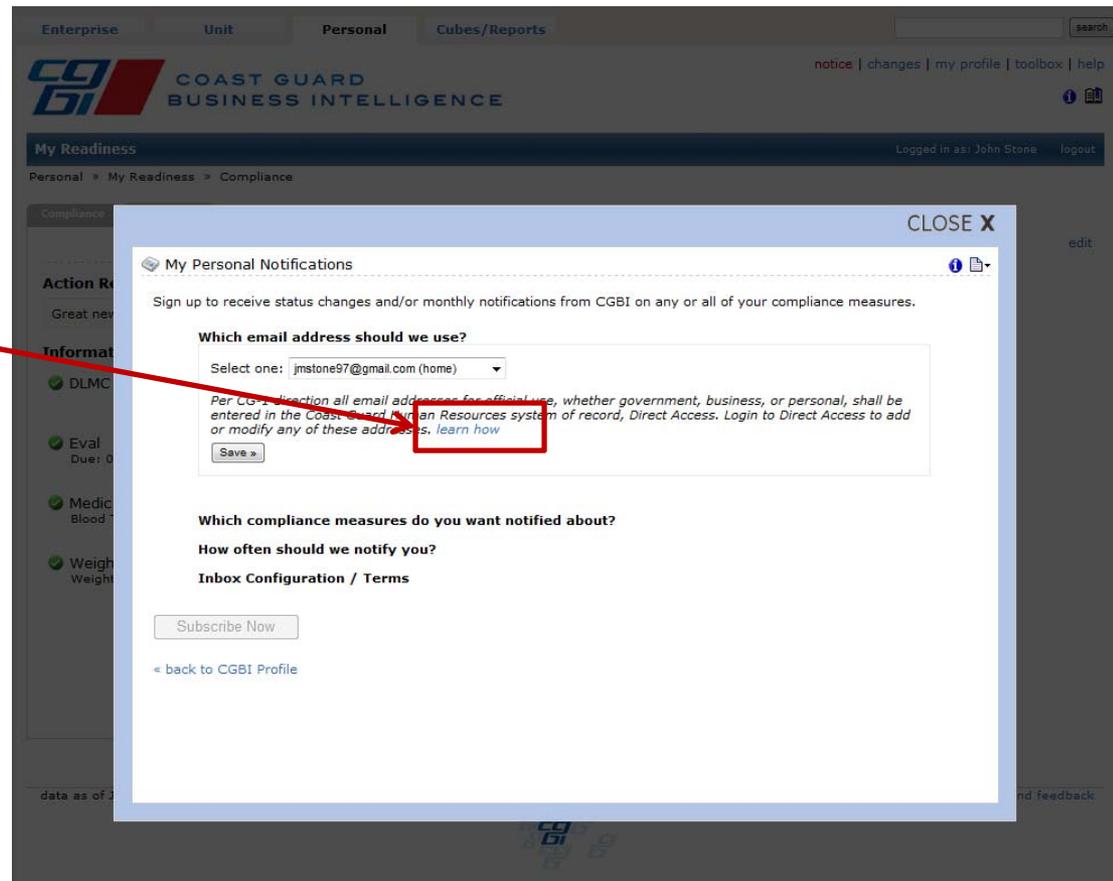
Inbox Configuration / Terms

Subscribe Now

< back to CGBI Profile

First Time User Setup

 Underneath the drop down menu is a message from CG-1. If the desired email address is not available in the drop down menu, you can provide a new or corrected email by selecting [learn how](#).



Enterprise Unit Personal Cubes/Reports

COAST GUARD BUSINESS INTELLIGENCE

notice | changes | my profile | toolbox | help

My Readiness Logged in as: John Stone Logout

Personal » My Readiness » Compliance

My Personal Notifications

Sign up to receive status changes and/or monthly notifications from CGBI on any or all of your compliance measures.

Which email address should we use?

Select one:

Per USCG Instruction all email addresses for official use, whether government, business, or personal, shall be entered in the Coast Guard Human Resources system of record, Direct Access. Login to Direct Access to add or modify any of these addresses. [learn how](#)

Save »

Which compliance measures do you want notified about?

How often should we notify you?

Inbox Configuration / Terms

Subscribe Now

[« back to CGBI Profile](#)

First Time User Setup

- When you select the **learn how** link, three steps to updating your email accounts in Direct Access appear.
- Step one, “Launch Direct Access”, is linked to the Direct Access sign in page.
- Follow steps 2 and 3 as shown.

Enterprise Unit Personal Cubes/Reports

COAST GUARD BUSINESS INTELLIGENCE

My Readiness

Personal » My Readiness » Compliance

My Personal Notifications

Sign up to receive status changes and/or monthly notifications from CGBI on any or all of your compliance measures.

Which email address should we use?

Select one:

Per CG-1 direction all email addresses for official use, whether government, business, or personal, shall be entered in the Coast Guard Human Resources system of record, Direct Access. Login to Direct Access to add or modify any of these addresses. [learn how](#)

1) Launch Direct Access
2) From the Employee section click "Tasks"
3) Add/Update your email addresses, be sure to click "Save"
Remember it will take at least 24 hours for CGBI to receive the updated email address data.

Save »

Which compliance measures do you want notified about?

How often should we notify you?

Inbox Configuration / Terms

Subscribe Now

« back to CGBI Profile

First Time User Setup

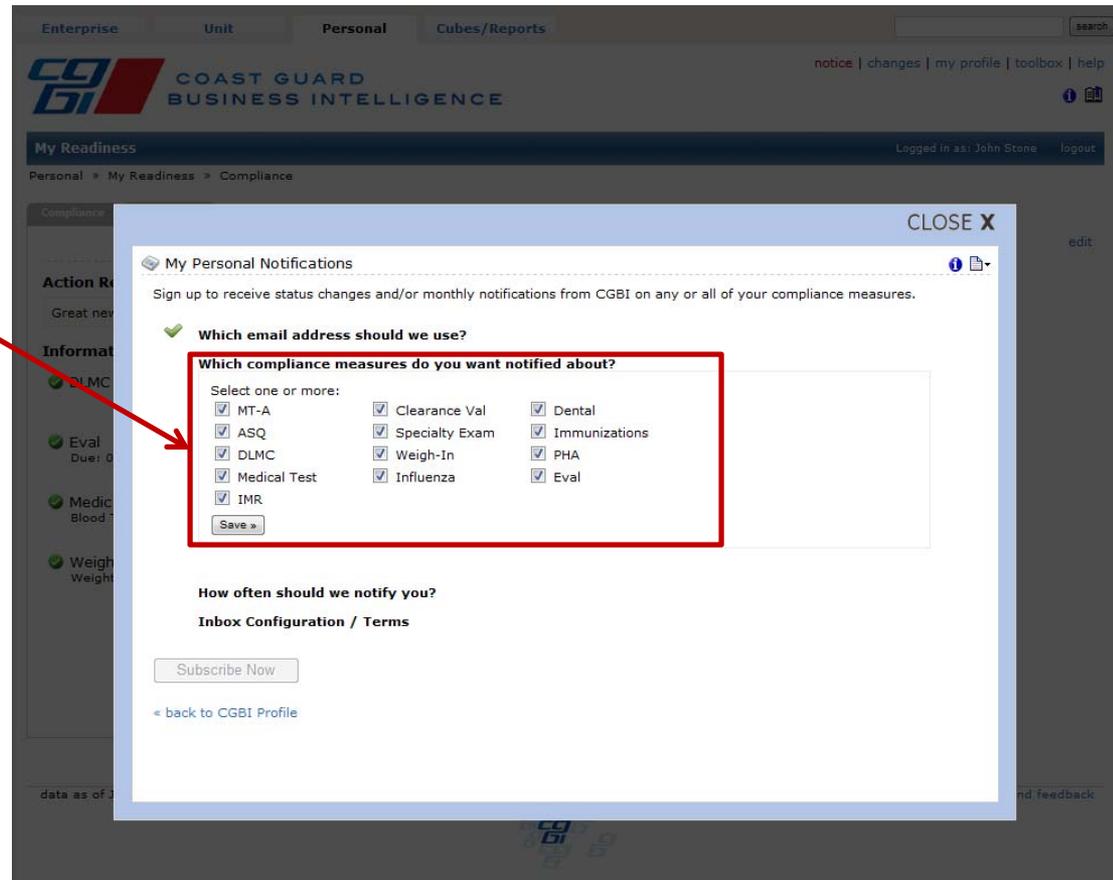
- Once the email address is selected from the drop down menu, click **Save**.

The screenshot shows the 'My Personal Notifications' setup form in the CGBI system. The form is titled 'My Personal Notifications' and includes a 'CLOSE X' button in the top right corner. The main heading is 'Sign up to receive status changes and/or monthly notifications from CGBI on any or all of your compliance measures.' Below this, there is a section titled 'Which email address should we use?' with a dropdown menu showing 'Select one: jmstone97@gmail.com (home)'. A red arrow points to the 'Save' button located below the dropdown. Below the email selection, there is a note: 'Per CG-1 direction all email addresses for official use, whether government, business, or personal, shall be entered in the Coast Guard Human Resources system of record, Direct Access. Login to Direct Access to add or modify any of these addresses. learn how'. Further down, there are sections for 'Which compliance measures do you want notified about?', 'How often should we notify you?', and 'Inbox Configuration / Terms'. At the bottom of the form, there is a 'Subscribe Now' button and a link to '< back to CGBI Profile'.

First Time User Setup

 Select any or all of the desired measures available for notification.

 Click **Save**



Enterprise Unit Personal Cubes/Reports

COAST GUARD BUSINESS INTELLIGENCE

My Readiness

Personal > My Readiness > Compliance

Logged in as: John Stone Logout

My Personal Notifications

Sign up to receive status changes and/or monthly notifications from CGBI on any or all of your compliance measures.

Which email address should we use?

Which compliance measures do you want notified about?

Select one or more:

<input checked="" type="checkbox"/> MT-A	<input checked="" type="checkbox"/> Clearance Val	<input checked="" type="checkbox"/> Dental
<input checked="" type="checkbox"/> ASQ	<input checked="" type="checkbox"/> Specialty Exam	<input checked="" type="checkbox"/> Immunizations
<input checked="" type="checkbox"/> DLMC	<input checked="" type="checkbox"/> Weigh-In	<input checked="" type="checkbox"/> PHA
<input checked="" type="checkbox"/> Medical Test	<input checked="" type="checkbox"/> Influenza	<input checked="" type="checkbox"/> Eval
<input checked="" type="checkbox"/> IMR		

Save »

How often should we notify you?

Inbox Configuration / Terms

Subscribe Now

< back to CGBI Profile

First Time User Setup

☞ Choose to sign up for individual status changes and/or a monthly summary email.

☞ If the Monthly Summary is selected, choose when you would like to receive the email.

☞ Click **Save**

The screenshot shows the 'My Personal Notifications' setup interface. At the top, it says 'Sign up to receive status changes and/or monthly notifications from CGBI on any or all of your compliance measures.' Below this, there are two checked options: 'Which email address should we use?' and 'Which compliance measures do you want notified about?'. The 'How often should we notify you?' section is highlighted with a red box and contains two options: 'Sign me up for Status Changes' and 'Sign me up for a Monthly Summary'. The 'Sign me up for a Monthly Summary' option is selected, and its sub-section 'When should we send the email?' is also highlighted with a red box, showing a dropdown menu set to '3rd Friday of each month.' Below the notification options is a 'Save »' button. At the bottom, there is an 'Inbox Configuration / Terms' section with a 'Subscribe Now' button and a link to '« back to CGBI Profile'.

First Time User Setup

CGBI will present the Terms and Conditions for subscribing to the service.

CGBI Click **Subscribe Now**

The screenshot shows the CGBI user interface. At the top, there are navigation tabs for 'Enterprise', 'Unit', 'Personal', and 'Cubes/Reports'. The main header displays the CGBI logo and 'COAST GUARD BUSINESS INTELLIGENCE'. Below this, there's a 'My Readiness' section with a breadcrumb trail: 'Personal > My Readiness > Compliance'. A modal window titled 'My Personal Notifications' is open, containing the following text:

Sign up to receive status changes and/or monthly notifications from CGBI on any or all of your compliance measures.

- ✓ Which email address should we use?
- ✓ Which compliance measures do you want notified about?
- ✓ How often should we notify you?

Inbox Configuration / Terms

Configure your inbox:
CGBI notification emails will be sent from **CGBI-Notifications@uscg.mil**. There is a possibility these emails will be considered spam/junk by your email provider. Be sure to take the necessary steps (creating filters/rules) to keep these notification emails from going to your spam/junk folder. CGBI cannot control how your email provider handles these email messages.

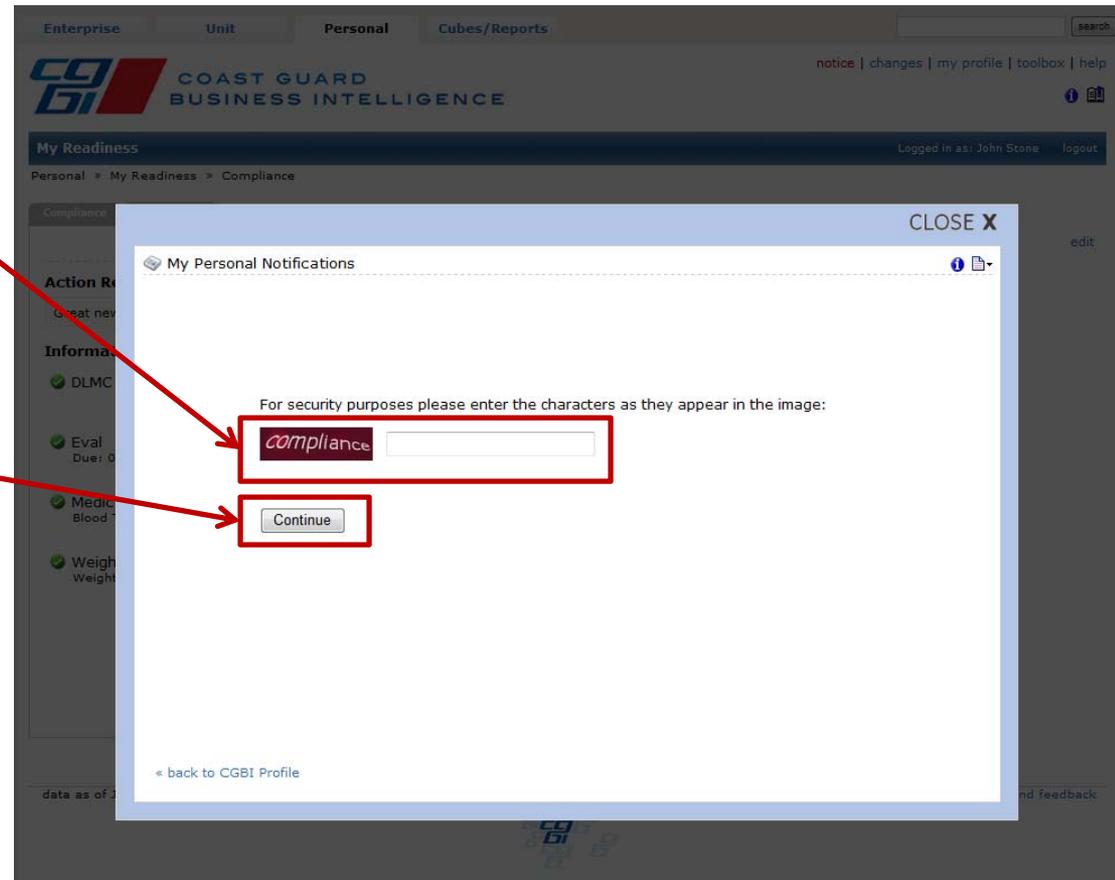
Terms & Conditions:
I consent to Coast Guard Business Intelligence (CGBI) sending my Compliance Information to my personal email address. I understand that CGBI will use my information in conformance with the Privacy Act, 5 U.S.C. Sec. 552(a). I further consent to sending this information outside the CGOne Network firewall and understand that the personal email accounts that reside on public servers do not have the same level of Information Assurance security as my official Coast Guard email account. I acknowledge and agree that the U.S. Coast Guard is not liable for any damages arising out of the dissemination of my Compliance Information once it leaves the CGOne Network.

At the bottom of the modal, there is a 'Subscribe Now' button highlighted with a red box. A red arrow points from the text 'Click **Subscribe Now**' to this button. There is also a 'Back to CGBI Profile' link at the bottom of the modal.

First Time User Setup

☞ A verification screen will appear requiring the user to type the characters as they appear in the image.

☞ Click **Continue**

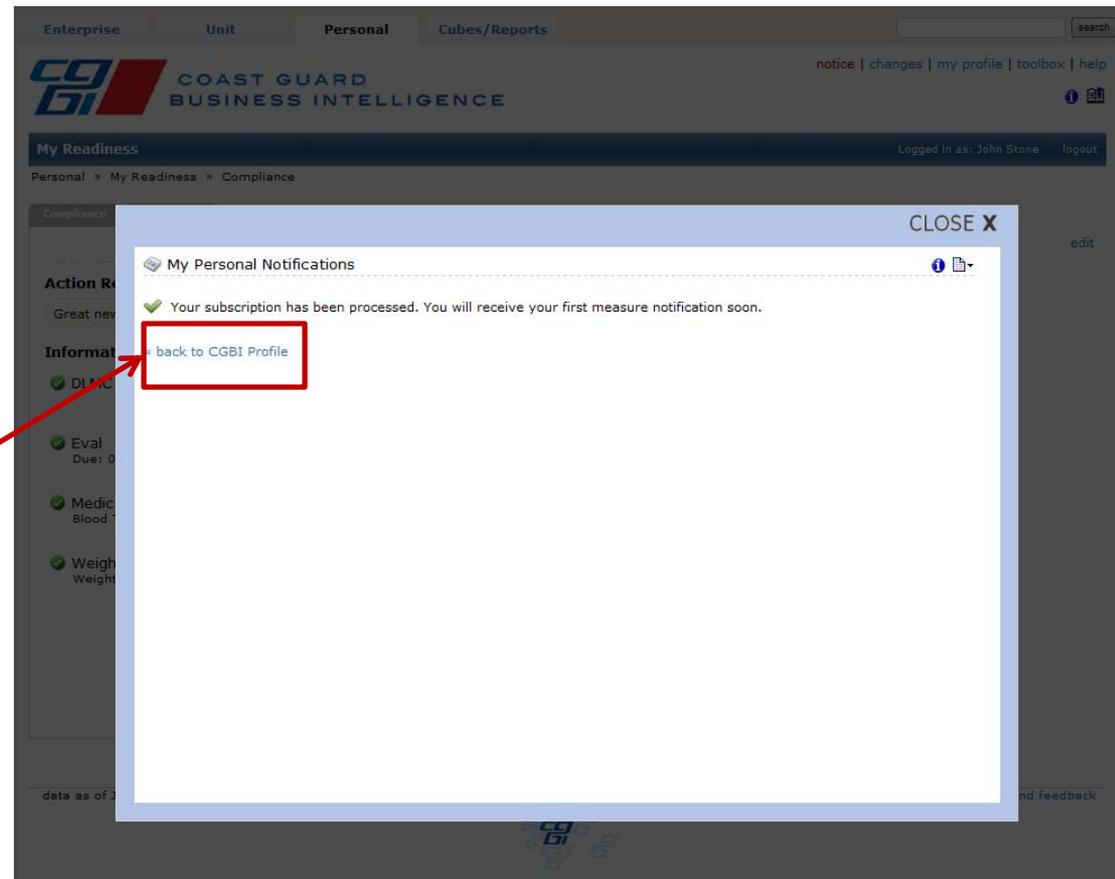


First Time User Setup

☞ A message will appear letting the user know that the subscription sign up is complete

☞ Select **back to CGBI Profile**

☞ [Return to Table of Contents](#)



EDIT SUBSCRIPTION SETTINGS

Edit Subscription Settings

☞ Select **Personal** view.

☞ Select **Configure My Personal Notifications** icon in the Compliance Tab.

The screenshot shows the 'My Readiness' page for a user named John Stone. The page is divided into several sections:

- Navigation:** Enterprise, Unit, **Personal** (highlighted), Cubes/Reports.
- Header:** COAST GUARD BUSINESS INTELLIGENCE, notice | changes | my profile | toolbox | help.
- My Readiness:** Logged in as: John Stone | logout.
- Compliance Tab:** Contains an 'Action Required' section with the message 'Great news, you have no action required at this time.' and an 'Informational' section with a 'show details' link. Below these are several items with status indicators (green checkmarks or minus signs):
 - DLMC
 - Eval (Due: 04/30/11)
 - Medical Test (Blood Type: ANEG)
 - Weigh-In (Weight: 192.0 lbs.)
 - Dental (Class: 2)
 - Immunizations (Next TD: 09/19/13)
 - PHA (Due: 06/30/11)
 - ASQ
 - IMR
 - Influenza (Next: 09/01/09)
 - Clearance Val (Current: Secret)
 - Specialty Exam
- My Cubes/Reports:** edit. Includes a list of items:
 - AOPS Cutter Resource Hours
 - AOPS Cutter Supplemental Data
 - CG Central Content Access 2006
 - CG Central Content Access 2007
 - CG Central Content Access 2008
 - People
 - People Basic
 - OPAR
- Footer:** data as of January 21, 2011 | send feedback.

Edit Subscription Settings

At any time after signing up for the service, you have the option to change your settings.

Select **edit my settings** in the **My Personal Notifications** section.

The screenshot displays the CGBI web application interface. At the top, there are navigation tabs for 'Enterprise', 'Unit', 'Personal', and 'Cubes/Reports'. The 'Personal' tab is selected. The main header includes the CGBI logo and the text 'COAST GUARD BUSINESS INTELLIGENCE'. Below the header, there is a 'My Readiness' section with a breadcrumb trail: 'Personal > My Readiness > Compliance'. The main content area is titled 'CGBI Profile' and shows the user's last login as 'January 20, 2011 at 3:10 PM EST'. There are three main sections: 'Information used to automatically log me into CGBI' (with fields for Name, Username, Email Address, Direct Access, and DEERS), 'My CGBI Settings' (with dropdown menus for Default View, Default Unit, and Default Position), and 'My Personal Notifications' (with a message about status change and monthly summary notifications). A red box highlights the 'edit my settings' link in the 'My Personal Notifications' section, and a red arrow points from the text in the slide to this link.

Edit Subscription Settings

- ❖ You will be presented with the four sections with green check marks next to each section.
- ❖ The title of each section is hyperlinked. Click which section to edit.

The screenshot displays the 'My Personal Notifications' settings page in the CGBI system. The page title is 'My Personal Notifications' and it includes a 'CLOSE X' button in the top right corner. The main content area contains the following sections, each with a green checkmark:

- Which email address should we use?
- Which compliance measures do you want notified about?
- How often should we notify you? (highlighted with a red box and arrow)
- Inbox Configuration / Terms

At the bottom of the settings area, there are two buttons: 'Update Subscription' and 'Unsubscribe'. A link for '< back to CGBI Profile' is also visible.

Edit Subscription Settings

For example, if you wanted to change when CGBI sends you your Monthly Summary, you would select ***How often should we notify you?***

Change to desired settings.

Enterprise Unit Personal Cubes/Reports

CGBI COAST GUARD BUSINESS INTELLIGENCE

notice | changes | my profile | toolbox | help

My Readiness Logged in as: John Stone Logout

Personal » My Readiness » Compliance

My Personal Notifications

Update your personal measure notifications. Your last email notification was sent on 01/21/2011 at 2:00:00 PM EST.

Which email address should we use?

Which compliance measures do you want notified about?

How often should we notify you?

Sign me up for Status Changes
For each measure you selected we will send an email when your measure status changes.
sample email »

Sign me up for a Monthly Summary
We will send a single monthly email containing the status for each measure you selected.
sample email »

When should we send the email?
4th Monday of each month.

Monday
Tuesday
Wednesday
Thursday
Friday
Saturday
Sunday

Save »

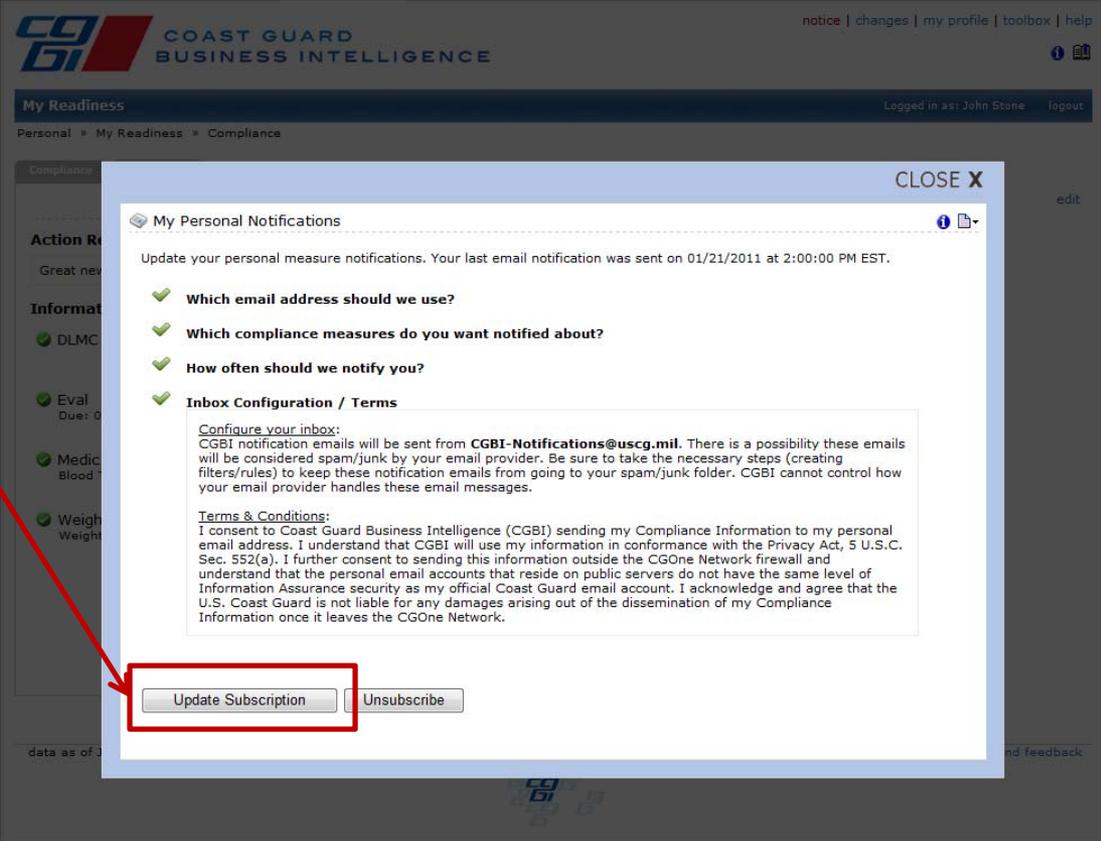
Inbox Configuration / Terms

Update Subscription Unsubscribe

« back to CGBI Profile

Edit Subscription Settings

 After completing the section(s) click **Update Subscription**



notice | changes | my profile | toolbox | help

COAST GUARD BUSINESS INTELLIGENCE

My Readiness Logged in as: John Stone [logout](#)

Personal > My Readiness > Compliance

Compliance

My Personal Notifications CLOSE X

Update your personal measure notifications. Your last email notification was sent on 01/21/2011 at 2:00:00 PM EST.

- ✓ Which email address should we use?
- ✓ Which compliance measures do you want notified about?
- ✓ How often should we notify you?
- ✓ **Inbox Configuration / Terms**

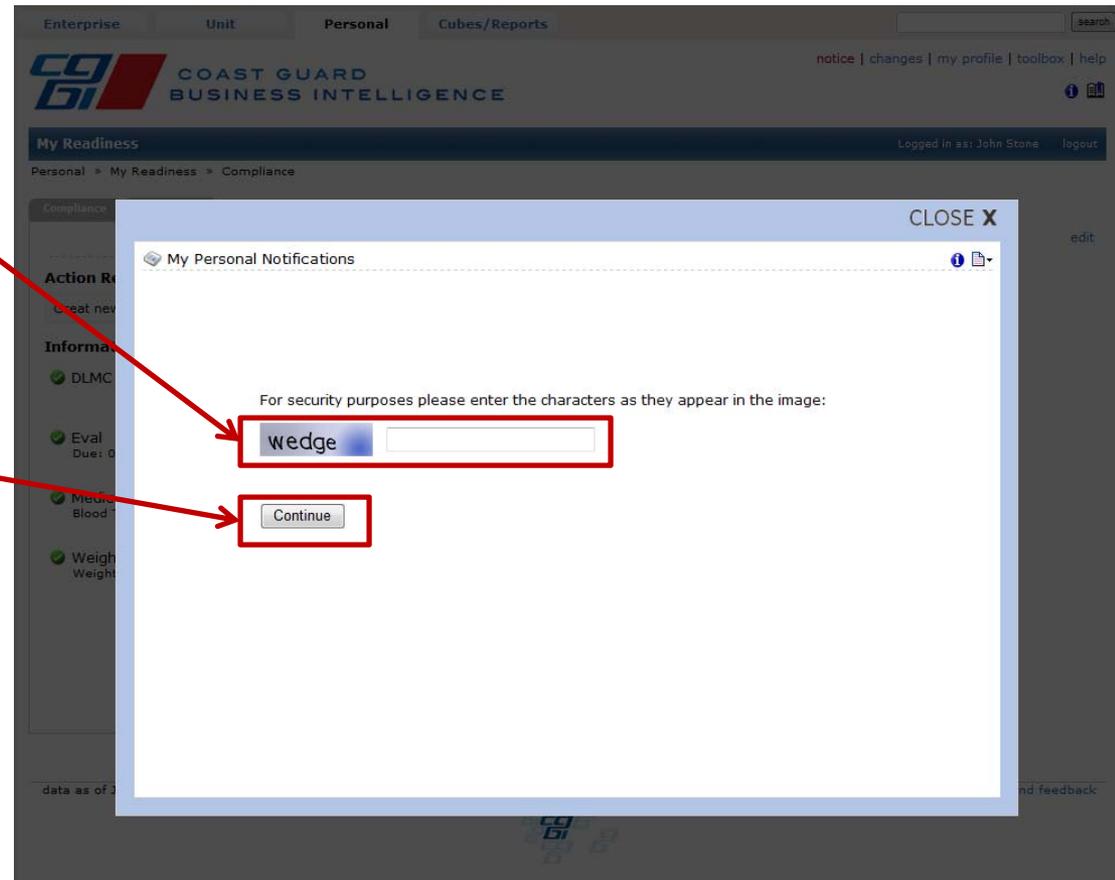
Configure your inbox:
CGBI notification emails will be sent from **CGBI-Notifications@uscg.mil**. There is a possibility these emails will be considered spam/junk by your email provider. Be sure to take the necessary steps (creating filters/rules) to keep these notification emails from going to your spam/junk folder. CGBI cannot control how your email provider handles these email messages.

Terms & Conditions:
I consent to Coast Guard Business Intelligence (CGBI) sending my Compliance Information to my personal email address. I understand that CGBI will use my information in conformance with the Privacy Act, 5 U.S.C. Sec. 552(a). I further consent to sending this information outside the CGOne Network firewall and understand that the personal email accounts that reside on public servers do not have the same level of Information Assurance security as my official Coast Guard email account. I acknowledge and agree that the U.S. Coast Guard is not liable for any damages arising out of the dissemination of my Compliance Information once it leaves the CGOne Network.

Edit Subscription Settings

☞ A verification screen will appear requiring the user to type the characters as they appear in the image.

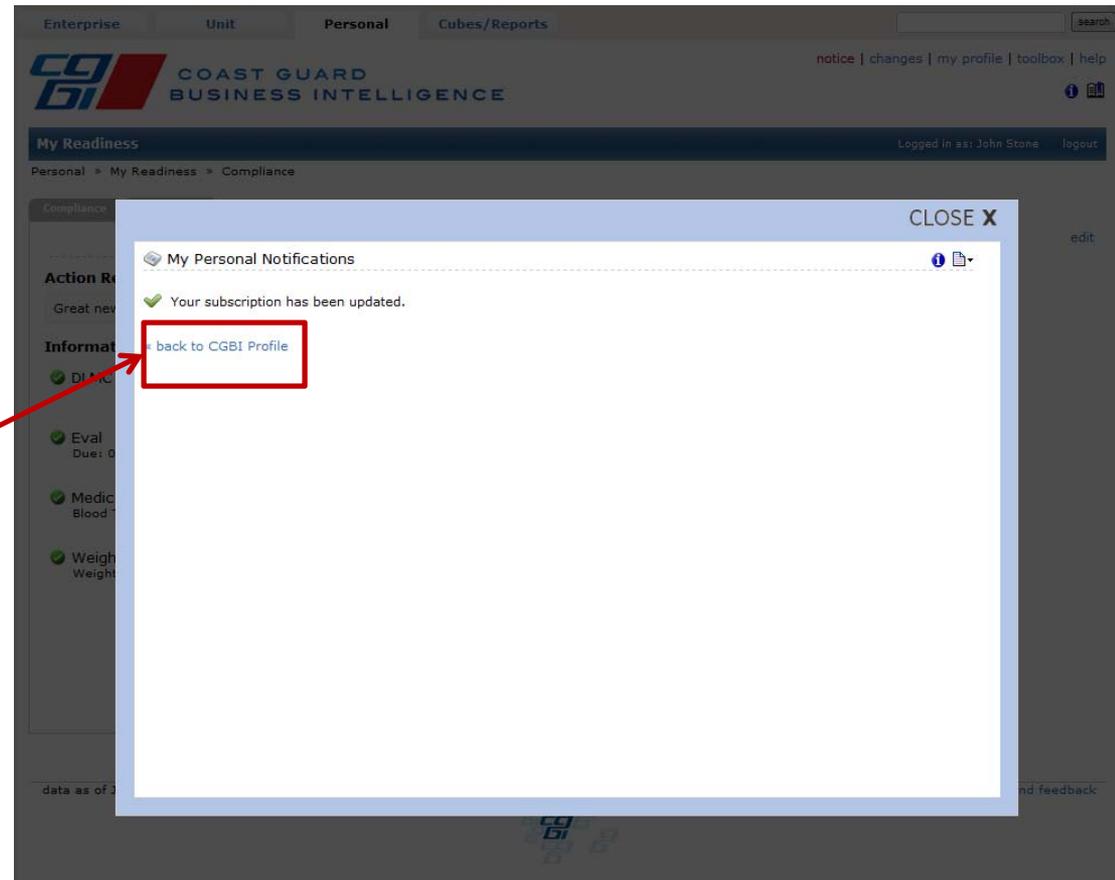
☞ Click **Continue**



Edit Subscription Settings

☞ A message will appear letting the user know that the subscription has been updated

☞ Click **back to CGBI Profile**



Edit Subscription Settings

Select **CLOSE** in the upper right corner of the screen to return to CGBI.

[Return to Table of Contents](#)

The screenshot displays the CGBI user interface. At the top, there are navigation tabs for 'Enterprise', 'Unit', 'Personal', and 'Cubes/Reports'. The main header includes the CGBI logo and the text 'COAST GUARD BUSINESS INTELLIGENCE'. Below the header, there is a 'My Readiness' section with a 'Logged in as: John Stone' indicator and a 'logout' link. The main content area is titled 'CGBI Profile' and shows 'Last login: January 20, 2011 at 3:10 PM EST'. It contains three sections: 'Information used to automatically log me into CGBI' with fields for Name, Username, Email Address, Direct Access, and DEERS; 'My CGBI Settings' with dropdown menus for Default View, Default Unit, and Default Position; and 'My Personal Notifications' with a status message and a link to 'edit my settings'. A red box highlights the 'CLOSE X' button in the top right corner of the settings panel, with a red arrow pointing to it from the text on the left.

CANCEL SUBSCRIPTION

Cancel Subscription

☞ Select **Personal** view.

☞ Select **Configure My Personal Notifications** icon in the Compliance Tab.

The screenshot shows the 'Personal' view of the Coast Guard Business Intelligence system. The top navigation bar includes 'Enterprise', 'Unit', 'Personal', and 'Cubes/Reports'. The 'Personal' view is selected. The main content area is titled 'My Readiness' and shows a 'Compliance' tab. The 'Action Required' section indicates that there are no actions required at this time. The 'Informational' section lists various items, including 'Dental', 'IMR', 'Eval', 'Immunizations', 'Influenza', 'Medical Test', 'PHA', 'Clearance Val', 'Weigh-In', 'ASQ', and 'Specialty Exam'. The 'My Cubes/Reports' section is visible on the right side of the page.

Cancel Subscription

At any time after signing up for the service, you have the option to change your settings.

Select **edit my settings** in the **My Personal Notifications** section.

The screenshot displays the CGBI user interface. At the top, there are navigation tabs for 'Enterprise', 'Unit', 'Personal', and 'Cubes/Reports'. The 'Personal' tab is selected. Below the navigation, the 'COAST GUARD BUSINESS INTELLIGENCE' logo is visible. The main content area shows a 'My Readiness' section with a breadcrumb trail: 'Personal > My Readiness > Compliance'. A modal window titled 'CGBI Profile' is open, showing user information and settings. The 'My Personal Notifications' section at the bottom of the modal contains the text: 'I am currently receiving both status change and monthly summary notices. Your last email notification was sent on 01/21/2011 at 2:00:00 PM EST.' A red box highlights the link 'edit my settings', which is pointed to by a red arrow from the text in the previous block.

Cancel Subscription

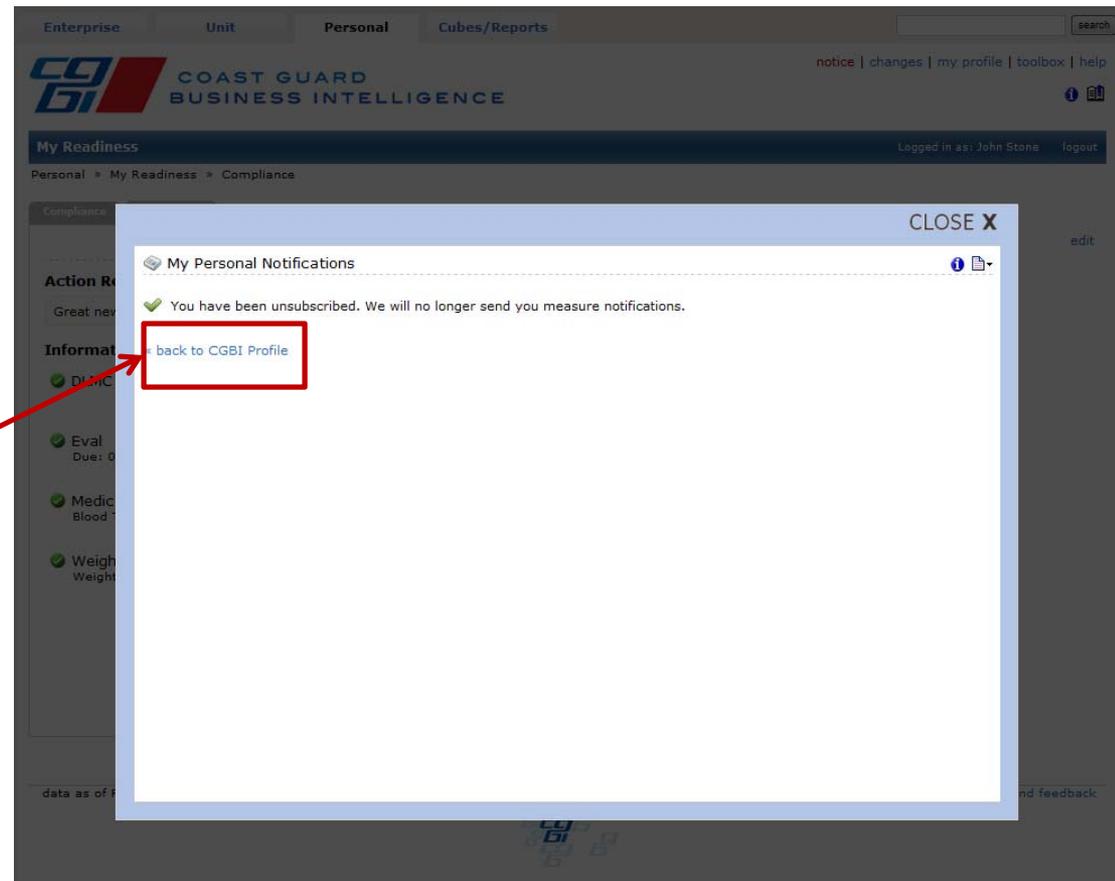
From the *My Personal Notifications* screen select *Unsubscribe*.

The screenshot displays the 'My Personal Notifications' configuration page. At the top, it says 'Update your personal measure notifications. Your last email notification was sent on 01/21/2011 at 2:00:00 PM EST.' Below this are four settings, each with a green checkmark: 'Which email address should we use?', 'Which compliance measures do you want notified about?', 'How often should we notify you?', and 'Inbox Configuration / Terms'. At the bottom of the settings are two buttons: 'Update Subscription' and 'Unsubscribe'. The 'Unsubscribe' button is highlighted with a red rectangular box, and a red arrow points from the text 'select *Unsubscribe*.' in the adjacent block to this button.

Cancel Subscription

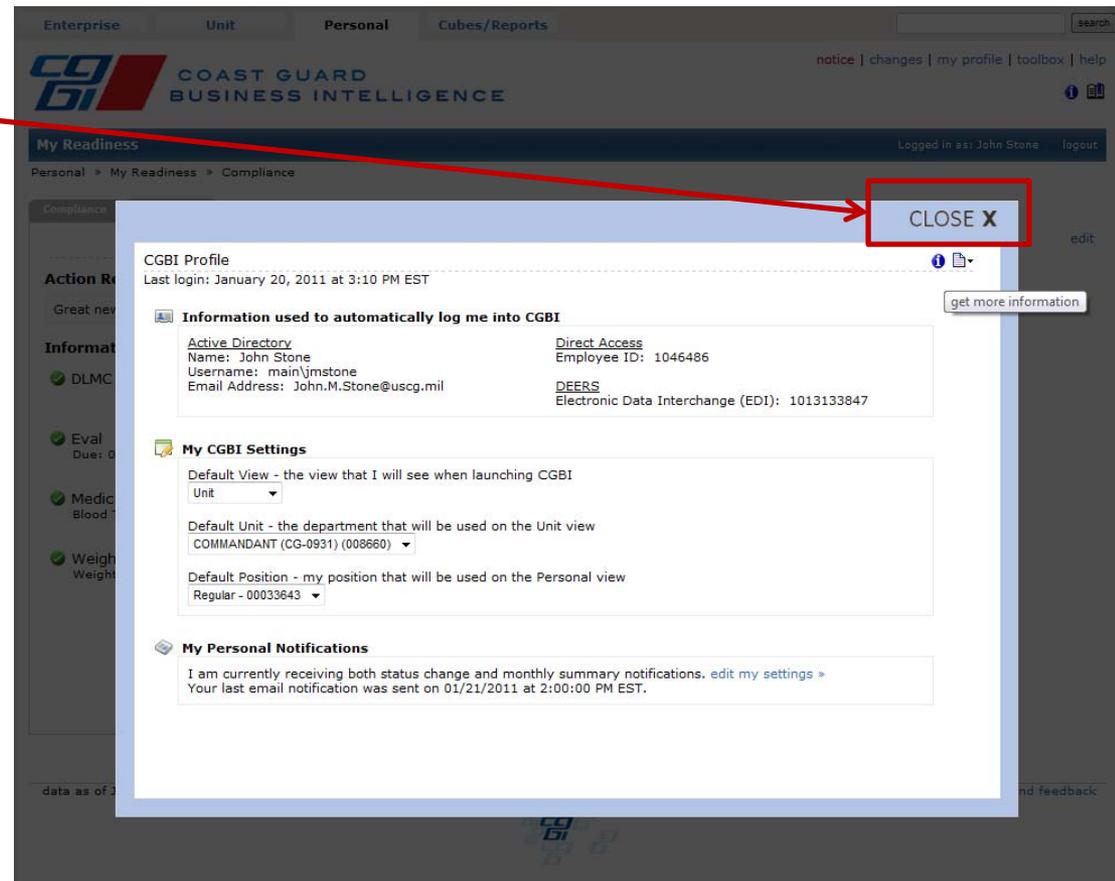
☞ A message will appear letting the user know that the subscription has been canceled.

☞ Click **back to CGBI Profile**



Cancel Subscription

- Select **CLOSE** in the upper right corner of the screen to return to CGBI.



The screenshot displays the CGBI user interface. At the top, there are navigation tabs for 'Enterprise', 'Unit', 'Personal', and 'Cubes/Reports'. The main header includes the CGBI logo and the text 'COAST GUARD BUSINESS INTELLIGENCE'. Below the header, there is a 'My Readiness' section with a 'Logged in as: John Stone' indicator and a 'logout' link. The main content area shows a 'CGBI Profile' section with a 'Last login: January 20, 2011 at 3:10 PM EST' timestamp. This section is divided into three sub-sections: 'Information used to automatically log me into CGBI', 'My CGBI Settings', and 'My Personal Notifications'. The 'Information used to automatically log me into CGBI' section contains two columns of data: 'Active Directory' (Name: John Stone, Username: main\jstone, Email Address: John.M.Stone@uscg.mil) and 'Direct Access' (Employee ID: 1046486, DEERS: Electronic Data Interchange (EDI): 1013133847). The 'My CGBI Settings' section includes three dropdown menus: 'Default View - the view that I will see when launching CGBI' (set to 'Unit'), 'Default Unit - the department that will be used on the Unit view' (set to 'COMMANDANT (CG-0931) (008660)'), and 'Default Position - my position that will be used on the Personal view' (set to 'Regular - 00033643'). The 'My Personal Notifications' section states: 'I am currently receiving both status change and monthly summary notifications. [edit my settings](#) + Your last email notification was sent on 01/21/2011 at 2:00:00 PM EST.' In the upper right corner of the profile section, there is a 'CLOSE X' button highlighted with a red box. A red arrow points from the text 'Select **CLOSE** in the upper right corner of the screen to return to CGBI.' to this button.

THANK YOU

If you have any trouble subscribing, please submit a trouble ticket with OSC Martinsburg.