

WebNow User Process Guide (Draft)

Introduction This process guide provides command personnel the information and procedures necessary to access, view, print, and export EI PDR documents using Direct Access (PeopleSoft) and WebNow.

Prerequisites for Using WebNow These items are required to access EI PDR records;

- A WebNow account with User ID and password
- A Direct Access (PeopleSoft) account with the role(s) for accessing WebNow
- Access to the Coast Guard's Data Network

Note - If you do not have the above access, see the WebNow Account Access and Deactivation Guide to obtain it.

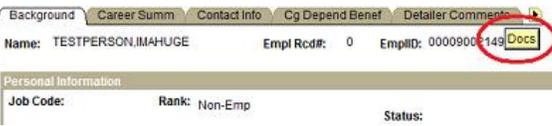
Discussion The purpose of a WebNow account is for “official business only” and with the exception of a few offices in PSC it is issued with “read-only” access.

Additionally due to the sensitivity of documents, EI-PDR viewing of certain documents (i.e. OERs, PRRBs, BCMRs, etc.) may be restricted.

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Accessing WebNow Documents

Step	Action	Details																																										
1	Login to Oracle PeopleSoft Enterprise (Direct Access) with your User ID and password.	Go to https://ep.direct-access.us/																																										
2	Proceed to the CG Member Info Search Page from the Enterprise Menu.	Go to Main Menu > Develop Workforce > Plan Careers > Use > CG Member Info																																										
3	Type the members Employee ID in the block marked “EmplID”, and press the “Search” button to bring up the members’ record in Direct Access.	 <p>CG Member Info</p> <p>Find an Existing Value</p> <p>EmplID: <input type="text" value="1234567"/></p> <p>Empl Rcd Nbr: <input type="text"/></p> <p>Job Family: <input type="text"/> <input type="button" value="Q"/></p> <p>Job Code: <input type="text"/> <input type="button" value="Q"/></p> <p><input type="button" value="Search"/> <input type="button" value="Clear"/> Basic Search</p>																																										
4	Press the yellow “Docs” button located in the upper-right corner of the page.	<p>Note – If the “Docs” button is not enabled (grey vice yellow), you do not have the proper roles in Direct Access to access WebNow. See Prerequisites for Using WebNow on page 1.</p>  <p>Main Menu > Develop Workforce > Plan Careers > Use ></p> <p>Background Career Summ Contact Info Cg Depend Benef Detaller Comments Docs</p> <p>Name: TESTPERSON.IMAHUGE Empl Rcd#: 0 EmplID: 0000900149</p> <p>Personal Information</p> <p>Job Code: Rank: Non-Emp Status:</p>																																										
5	After pressing the “DOCS” button, a new window should appear with the WebNow Login Screen	<p>WebNow may take a little while to load initially.</p>  <p>WebNow 6</p> <p>User Name: <input type="text"/></p> <p>Password: <input type="password"/></p> <p><input type="button" value="Connect"/></p>																																										
6	You should now see a screen that looks similar to the one below.	<p>Note – Your User ID is your Employee ID</p>  <p>webnow</p> <table border="1"> <thead> <tr> <th>EMPL ID</th> <th>NAME</th> <th>STATUS</th> <th>EMPLOYEE TYPE</th> <th>POSITION</th> <th>DEPARTMENT</th> <th>ORGANIZATION</th> </tr> </thead> <tbody> <tr> <td>0000000001</td> <td>TESTPERSON</td> <td>Active</td> <td>Full Time</td> <td>0000000001</td> <td>0000000001</td> <td>0000000001</td> </tr> <tr> <td>0000000002</td> <td>TESTPERSON</td> <td>Active</td> <td>Full Time</td> <td>0000000002</td> <td>0000000002</td> <td>0000000002</td> </tr> <tr> <td>0000000003</td> <td>TESTPERSON</td> <td>Active</td> <td>Full Time</td> <td>0000000003</td> <td>0000000003</td> <td>0000000003</td> </tr> <tr> <td>0000000004</td> <td>TESTPERSON</td> <td>Active</td> <td>Full Time</td> <td>0000000004</td> <td>0000000004</td> <td>0000000004</td> </tr> <tr> <td>0000000005</td> <td>TESTPERSON</td> <td>Active</td> <td>Full Time</td> <td>0000000005</td> <td>0000000005</td> <td>0000000005</td> </tr> </tbody> </table>	EMPL ID	NAME	STATUS	EMPLOYEE TYPE	POSITION	DEPARTMENT	ORGANIZATION	0000000001	TESTPERSON	Active	Full Time	0000000001	0000000001	0000000001	0000000002	TESTPERSON	Active	Full Time	0000000002	0000000002	0000000002	0000000003	TESTPERSON	Active	Full Time	0000000003	0000000003	0000000003	0000000004	TESTPERSON	Active	Full Time	0000000004	0000000004	0000000004	0000000005	TESTPERSON	Active	Full Time	0000000005	0000000005	0000000005
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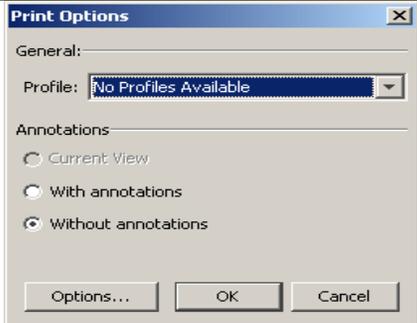
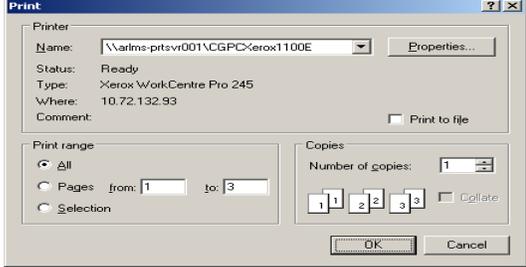
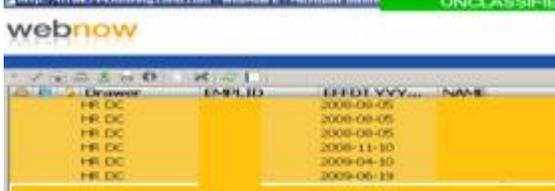
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Viewing WebNow Records

Step	Action	Details
1	To view the contents of a member's document, simply “double-click” the document on the grid list you want to view. (Default view is entire page).	Once opened, use the options provided on the Page toolbar (located at the bottom of the screen) to move between pages in your document.
2	To enlarge the viewing size of your document press the “Fit Width” Button on the tool bar (Green \leftrightarrow button).	
3	To close the document and return to your document list, press the “X” in the upper-most right hand corner of the window.	Continue the process above to view the rest of the member's documents.
4	To view a different member's records , you must go back to the Direct Access CG Member Info area and retrieve the next member's information.	
5	Once you have the next member's record up in the CG Member Info Window, press the “DOCS” button and the list of records for the next member will appear in the WebNow window.	 <p>The screenshot shows a navigation breadcrumb: Main Menu > Develop Workforce > Plan Careers > Use >. Below it are tabs: Background, Career Summ, Contact Info, Cg Depend Benef, and Detaller Comments. The 'Detaller Comments' tab is active. Below the tabs, the following information is displayed: Name: TESTPERSON.IMAHUGE, Empl Rcd#: 0, EmplID: 0000900149. A yellow button labeled 'DOCS' is circled in red. Below this is a section titled 'Personal Information' with fields for Job Code, Rank: Non-Emp, and Status.</p>
6	Repeat process as often as needed.	

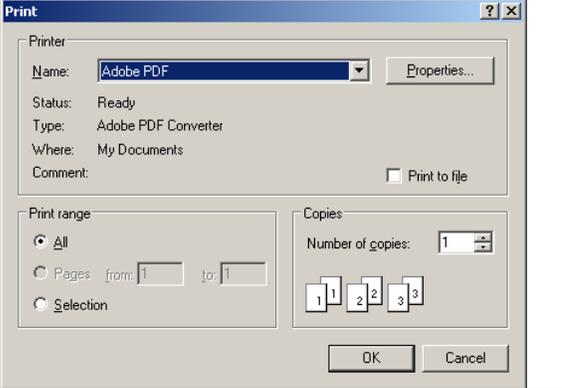
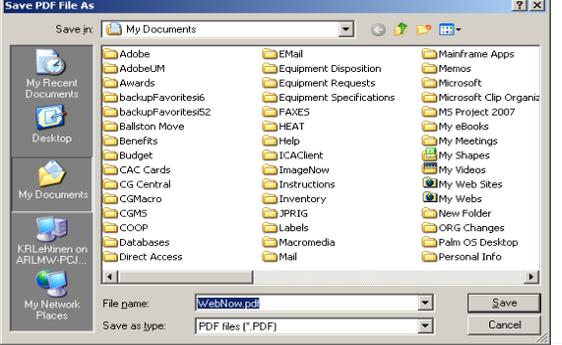
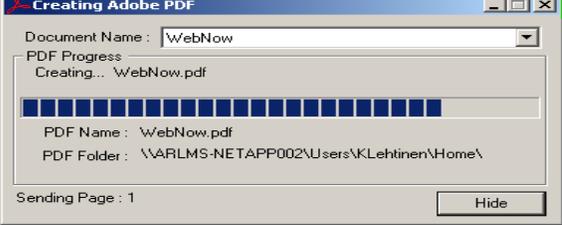
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Printing WebNow Records

Step	Action	Details
1	<p>To print a single document, simply select the document you want to print by clicking on it once in the grid list.</p>	
2	<p>Once you have the document “highlighted” press the “print” button (looks like a small printer) located on the button toolbar</p> <p>You will then get a print options window like the one on the right.</p>	
3	<p>If you want to print the document as it appeared in the system, press the “OK” button.</p>	<p>You can add “Options” and/or print “With annotations” to your documents as well.</p>
4	<p>You will then see what appears as a “Normal Windows” Print window. Select your printer and press “OK”.</p>	 <p>Your document will print to your selected printer.</p>
5	<p>To print all the documents in the Grid, simply; click the document at the top, then hold down your “shift key” and press the document at the bottom. All the documents should be highlighted (selected).</p>	
6	<p>Follow the same print process listed above and all highlighted documents will be printed.</p>	

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Saving Records as PDF Documents (Via Print Function)

Step	Action	Details
1	<p>To save documents to a “pdf” formatted Adobe file, follow the instructions listed above for “Printing WebNow Records”.</p> <p>When the WebNow “Print Window” appears, select the “Adobe PDF” option for printing (instead of an actual printer).</p>	
2	<p>Press “OK” button.</p>	
3	<p>Change the name and location for your file if desired.</p> <p><i>Note: Default name is “WebNow.pdf” and location is your Home directory</i></p>	
4	<p>Press “Save” button.</p>	
5	<p>You may see the following “Creating Adobe PDF” window during the process.</p> <p>If not, you should see a small “spinning red pinwheel” in the lower right-hand corner of your Windows taskbar.</p>	
6	<p>When completed you will get the “Save PDF File as” window.</p> <p>Change file name to the Member’s EMPLID or Last Name (more meaningful) and Press “Save”.</p> <p>Your document will now appear on the screen. You can close it (as it’s already been saved).</p>	

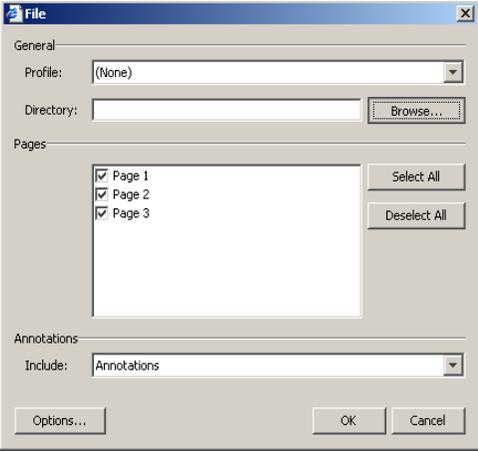
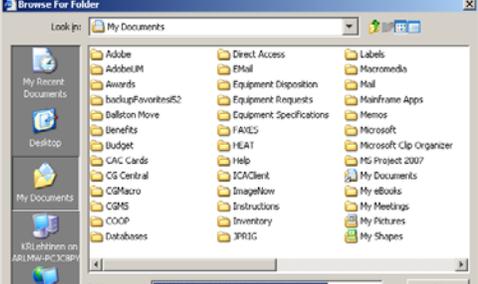
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Exporting WebNow Records

Another way to make electronic copies of WebNow documents is to export them.

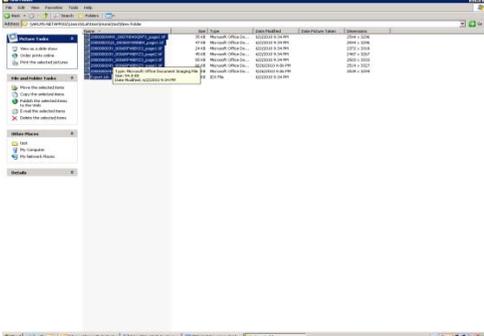
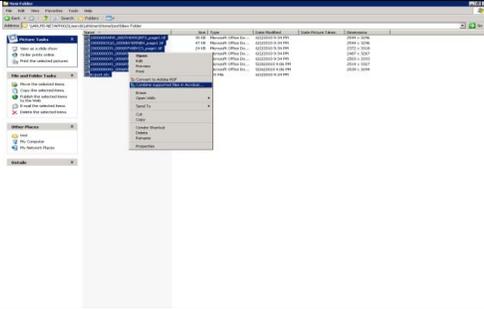
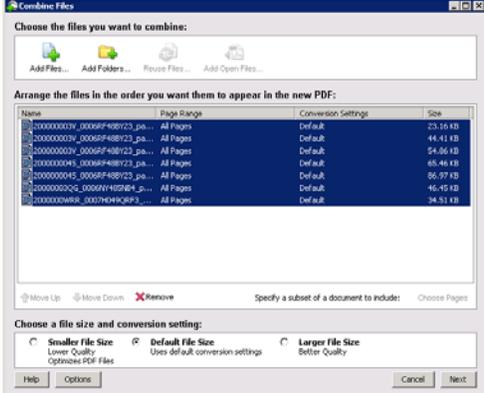
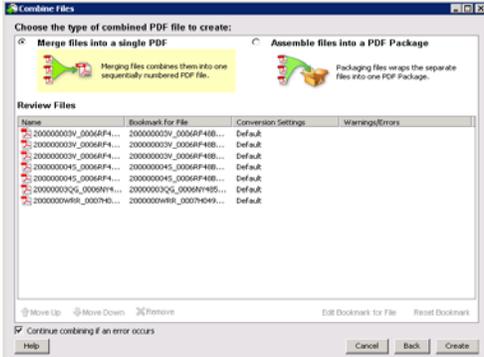
This process takes a few “extra steps”, but for large records it is often faster than Adobe printing and reduces the processing impact on the WebNow server

Step	Action	Diagram
1	<p>Select the document/documents you want to export from the grid list.</p> <p>Then press the “Export to File” button on the toolbar (located just to the left of the “Print” button).</p>	 <p><i>In this example only one document has been selected.</i></p>
2	<p>The following window will appear. The number of pages listed depends on the documents you selected above.</p> <p>You can export “some” or “all” of the pages of any document. <i>By default the window “selects all”</i>. You can de-select any pages you don’t want exported.</p> <p>You must designate a location for your files to be exported. You do this by pressing the Browse button on the right-hand side of the Directory field.</p>	
3	<p>When the folder menu appears, select or create a folder to export your files.</p> <p>To avoid confusion, it is “highly suggested” that the folder you select “is empty”.</p> <p>That way your “exported files” will not be mixed together with previous files in the folder.</p>	

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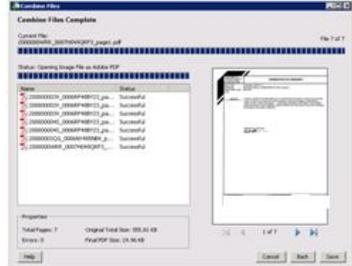
Exporting WebNow Records, Continued

Step	Action	Diagram
4	<p>When the export function completes the window will close. <i>You must then go to the folder where you exported your files.</i></p> <p>All files have been exported in TIF format and each TIF file represents one page of a document.</p> <p>To combine all of these files into one Adobe document proceed to step 5.</p>	
5	<p>Select “all the documents” you exported including the index file (Export.idx).</p> <p>Position your mouse pointer over highlighted area of files and “right click”.</p> <p>From the list of options select “Combine Supported Files in Acrobat”</p>	
6	<p>You should then see a window that looks like the one on the right.</p> <p>Accept Default settings and press “Next”.</p>	
7	<p>New window on right will appear.</p> <p>Accept settings to “Merge files into a single PDF” and press “Create” Button.</p>	

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Exporting WebNow Records, Continued

Step	Action	Diagram
8	<p>You will see the files being merged in the “Combine Files” window.</p> <p>When completed press the “Save” Button.</p>	
9	<p>The “Save As” Window will appear with a default name of Binder1.pdf (with your .pdf document in the background).</p> <p>Change name and save.</p>	