

# WebNow User Process Guide

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**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.

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**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.

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**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 with your User ID and password.	Go to <a href="https://portal.direct-access.us">https://portal.direct-access.us</a>
2	Proceed to the CG Member Info Report located in the Self Service for Commands PAGELET, and select the option for “Member Info Report”.	
3	<p>Type the members Employee ID in the block marked “Empl ID”. Then press either the “Tab” or “Enter” Key to bring up the member’s name.</p> <p><b>Note: The search capabilities in the new form are “extremely limited”. You are limited to Employee ID and Name searches only (using the proper format).</b></p> <p>To search by name, press the search icon to the right of the Empl ID box prior to entering any data.</p>	
4	<p>Once the name information has been displayed, press either the “Docs” or “SPO IPDR” links (located below the “Create Report” button) to launch WebNow.</p> <p>Using the “Docs” or “SPO IPDR” links are dependent on your authorized access. If neither are enabled, you may not have the proper Direct Access role to view WebNow documents (see <a href="#">Prerequisites for Using WebNow</a> on page 1).</p>	
5	After pressing one of the links, a new window should appear with the WebNow	WebNow may take a little while to load initially.

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	<p>Login Screen</p> <p>Enter your WebNow User Name and Password and press the “Connect” button.</p>	 <p>Note – Your User ID is your Employee ID</p>
6	<p>You should now see a screen that looks similar to the one below.</p> 	

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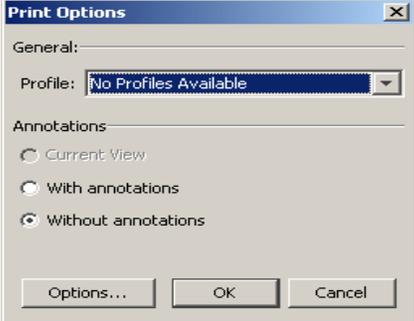
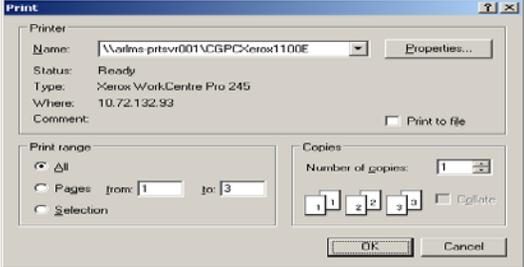
## Viewing WebNow Records

Step	Action	Details
1	To <b>view the contents</b> of a member's document, simply <b>“double-click” the document</b> on the grid list you want to view. (Default view is entire page).	Once opened, use the options provided on the <b>Page</b> toolbar (located at the bottom of the screen) to move between pages in your document.
2	To <b>enlarge the viewing size</b> of your document press the <b>“Fit Width” Button</b> on the tool bar ( <b>Green  button</b> ).	
3	To <b>close the document</b> and return to your document list, <b>press the “X” in the upper-most right hand corner</b> of the window.	Continue the process above to view the rest of the member's documents.
4	To <b>view a different member's records</b> , you must <b>go back to the Direct Access CG Member Info area and retrieve the next member's</b> information.	
5	Once <b>you have the next member's record up</b> in the CG Member Info Window, <b>press either the “Docs” or “SPO IPDR” link</b> and the list of records for the next member will appear in the WebNow window.	
6	Repeat process as often as needed.	

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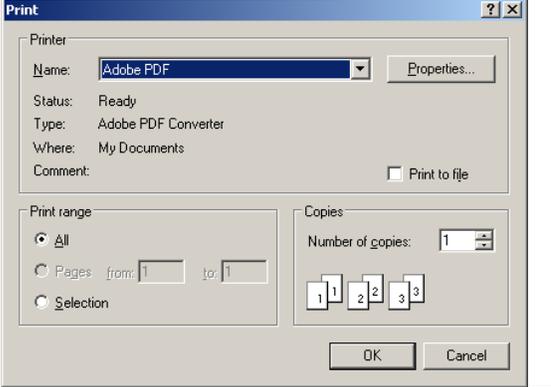
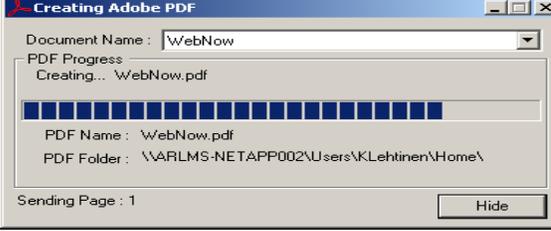
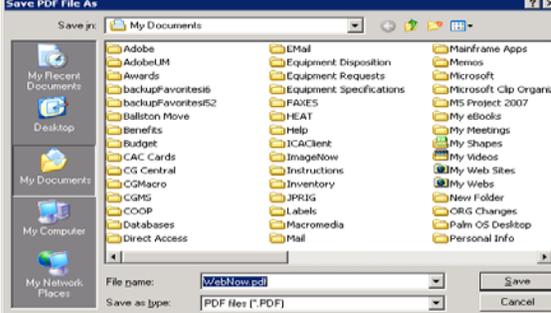
## Printing WebNow Records

Step	Action	Details
1	<p>To print a single document, simply select the document you want to print by <b>clicking on it once in the grid list</b>. (Note: Due to an incompatibility error between WebNow and the CG standard image, the print function no longer works properly - prints blank pages). See the Exporting WebNow records starting on Page 7).</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)

(Note: Due to an incompatibility error between WebNow and the CG standard image, the print function no longer works properly - prints blank pages). See the Exporting WebNow records starting on Page 7).

Step	Action	Details
1	<p>To save documents to a “pdf” formatted <b>Adobe file</b>, follow the instructions listed above for “Printing WebNow Records”.</p> <p>When the WebNow “Print Window” appears, <b>select the “Adobe PDF” option</b> 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> <p>Press “Save” button.</p>	
4	<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>	
5	<p>When completed you will get the “Save PDF File as” window.</p> <p><b>Change file name</b> to the Member’s EMPLID or Last Name (more meaningful) and Press “Save”. Your document will now appear on the screen. You can close it (as it’s already been saved).</p>	

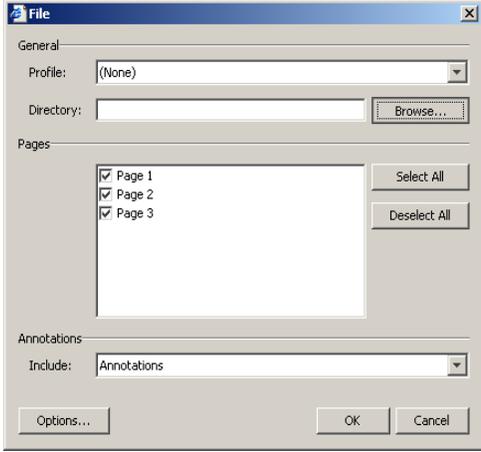
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## Exporting WebNow Records

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

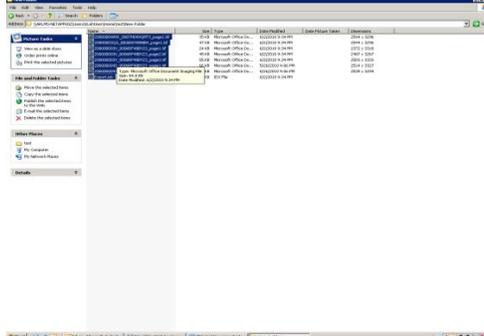
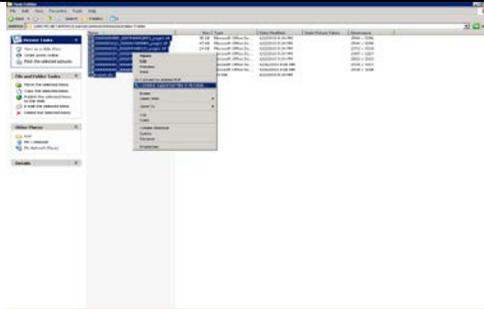
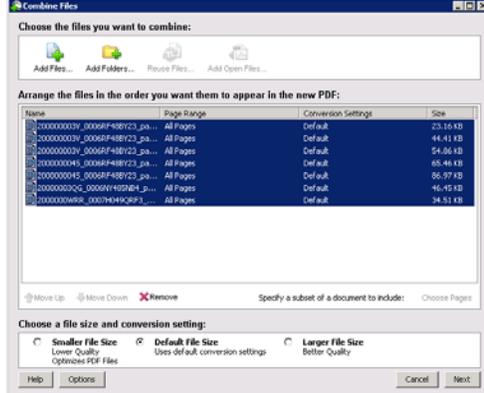
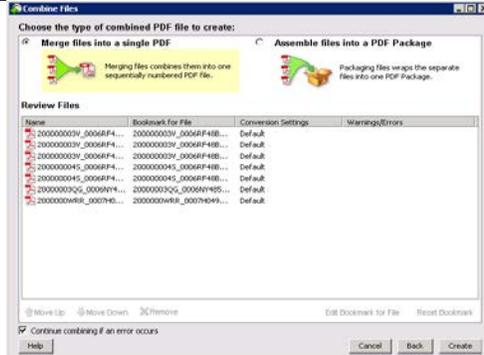
This process takes a few “extra steps”, but for large records it is often faster than Adobe printing and reduces the processing impact on the WebNow server

Step	Action	Diagram
1	<p><b>Select the document/documents</b> you want to export from the grid list.</p> <p>Then <b>press the “Export to File” button</b> 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, <b>select or create a folder to export your files</b>.</p> <p>To avoid confusion, it is <b>“highly suggested”</b> that the folder you select <b>“is empty”</b>.</p> <p>That way your “exported files” will not be mixed together with previous files in the folder.</p>	

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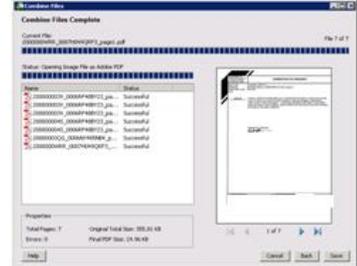
## Exporting WebNow Records, Continued

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>	