PPC SPO Manual

Part X, Error Feedback,

Reports and Queries

Overview

Introduction

There are a number of reports that can be produced using the tools available in Direct Access. This part guides users through various processes.

Contents

This volume contains the following chapters

PPC SPO Manual

Part X, Error Feedback, Reports and Queries

Chapter 1, SPO Exception Report

Overview

Introduction

An application has been developed in Direct Access that integrates a number of JUMPS Exception Processes into one area. This reduces the effort needed to work exceptions and provide more timely exception information to the SPO. As part of the Direct Access application for the JUMPS Exception Process, we have developed a SPO Exception Report. This allows the SPOs to begin viewing information on exceptions, which need their attention in a more timely fashion. Here's an overview of the new process.

Stage	Description
1	The DA/JUMPS production cycle runs and exception data is loaded into DA. Exception data from the previous update cycle is marked as "inactive" and is no longer viewable by SPOs.
2	• PPC begins working exceptions through the DA Exception Punch Process application. If an exception needs the attention or further action by the SPO, PPC has a field they will set to indicate there is a SPO responsibility. Once that field is set showing a SPO responsibility, the SPO will be able to view it through their DA application. • PPC (MAS) will notify SPOs, by e-mail, when error feedback information is available in DA. Negative reports (e. g. No SPO responsibility errors) will also be provided. (Note: SPOs do not need to wait for e-mail notification to begin working errors. The information will be accessible by the SPO when PPC sets the responsibility field. E-mail notification will not be sent until all errors are worked by PPC.)
3	The SPO brings up the SPO Exception application and searches for exceptions in their area of responsibility that have been assigned to them by PPC. The page will show information about the exception and a Notes section, which details the action that needs to be taken by the SPO.
4	The SPO takes corrective action as described in the Notes section of the exception application and sets the responsibility field to "SPO Action Complete".

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Overview, Continued

Discussion

Transactions input by SPO's (through Direct Access) are processed by PPC to update the Automated Pay Master File (JUMPS). PPC batches the transmitted input from SPOs, and approximately weekly, performs an update cycle. A schedule of update cycles is provided by ALSPO message on an annual basis.

Each transaction input for an update cycle must pass through a series of edit checks to ensure that the transaction is valid. If the transaction fails an edit check, it will reject and be recorded in the JUMPS Exception Punch Process.

PPC (MAS) Exception Reporting Team (ERT) members will analyze each rejected transaction on the JUMPS Exception Punch Process to determine the cause of the error and necessary corrective action. The corrective action may consist of PPC (MAS):

- Recycling the transaction,
- Initiating action to resolve the invalid condition, or
- Reporting the error back to the SPO for appropriate corrective action.

The report returned to the SPO is accessible in DA (Administer Workforce > Administer Workforce (GBL) > Report > SPO Exceptions).

References

(a) E-Mail ALSPO F/05; SPO Exception Report

Contents

This chapter contains the following topics.

SPO Action

Introduction

The SPO is responsible for reviewing the SPO Exception Report and correcting invalid documents. SPOs will only be able to view current production cycle exceptions. Therefore, SPOs must take corrective action prior to the next update cycle.

Discussion

SPO's are required to take corrective action. Corrective action may consist of:

- Correcting the original transaction,
- Deleting the transaction, or
- Submitting additional transactions to allow processing of the original transaction.

Any allotments or pay entitlement starts, stops, or changes appearing on the JUMPS Exception Report which have not processed may lead to the member being overpaid or underpaid. Anytime the member's pay will reflect an overpayment/underpayment resulting from a transaction not processing, notify the member via his/her unit.

Procedure

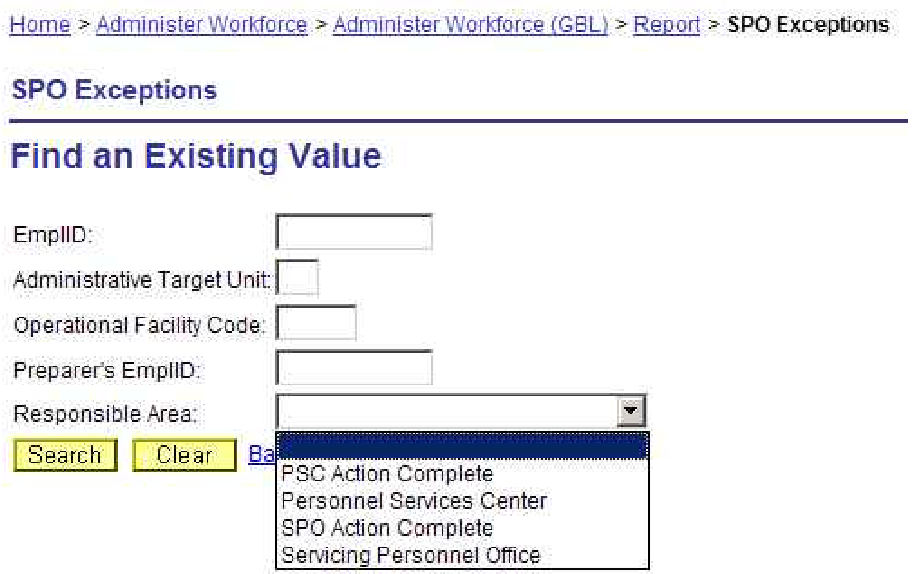
Introduction

Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

Procedure

The following outlines the Exception Report correction process.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select menu items in the following order:
Administer Workforce > Administer Workforce (GBL) > Report > SPO Exceptions</td></tr>
<tr><td>2</td><td>The Search Criteria Page will display.



You may view error reports by:

The member's employee ID number (EmplID)
The SPO's DD-OPFAC (District and/or OPFAC number)
The employee ID of the person who prepared the transaction
Responsible Area (Note: Only Servicing Personnel Office or SPO Action Complete will return any results for SPO users).

Complete at least one of the search criteria fields and click the Search button</td></tr>
</table>

Continued on next page

Procedure, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>
<table>
<tr><th>EmplID</th><th>Process Date</th><th>SEQUENCE NUMBER</th><th>Administrative Target Unit</th><th>Operational Facility Code</th><th>Preparer's EmplID</th><th>Responsible Area</th></tr>
<tr><td>1234567</td><td>06/15/2009</td><td>1</td><td>07</td><td>12345</td><td>7654321</td><td>SPO</td></tr>
<tr><td>9999999</td><td>06/15/2009</td><td>1</td><td>07</td><td>12345</td><td>7777777</td><td>SPO</td></tr>
<tr><td>9999999</td><td>06/15/2009</td><td>2</td><td>07</td><td>12345</td><td>7777777</td><td>SPO</td></tr>
</table>
Search Results Fields
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>EmplID</td><td>The member's employee ID number</td></tr>
<tr><td>Process Date</td><td>Date of the JUMPS update/compute cycle</td></tr>
<tr><td>Sequence Number</td><td>Number of records for this member in this process cycle.</td></tr>
<tr><td>Administrative Target Unit</td><td>The ATU/District of the SPO submitting the transaction</td></tr>
<tr><td>Operational Facility Code</td><td>The OPFAC of the unit where the SPO is located</td></tr>
<tr><td>Preparer's EmplID</td><td>The employee ID number of the person who submitted the transaction.</td></tr>
<tr><td>Responsible Area</td><td>SPO for "Servicing Personnel Office", indicating an item that the SPO needs to take action on.
SAC for "SPO Action Complete, indicating that the SPO has reviewed the item and taken action.</td></tr>
</table>
</td></tr>
<tr><td>4</td><td>View the error information and take action as described in the PPC Notes section to correct the error. After corrective action has been completed, set the Responsible Area field to "SPO Action Complete" and click the Save button.</td></tr>
</table>

Continued on next page

Procedure, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4 cont.</td><td>


SPO Exception Page Fields:

<table>
<tr><th colspan="2">JUMPS Exception Data Section</th></tr>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>EmplID</td><td>The member's employee ID number</td></tr>
<tr><td>SSN</td><td>The member's social security number</td></tr>
<tr><td>ANAME</td><td>First five letters of the member's last name</td></tr>
<tr><td>Key Mod</td><td>Key Mode. For system/PPC use only.</td></tr>
<tr><td>Dist</td><td>District Code</td></tr>
<tr><td>OPFAC</td><td>Operational Facility Code</td></tr>
<tr><td>PAT</td><td>Personnel Action Transmittal</td></tr>
<tr><td>Prep Date</td><td>Date of the transmittal</td></tr>
<tr><td>Exc Rel</td><td>Exception Release Code. For system/PPC use only.</td></tr>
<tr><td>Comp FL</td><td>Compute Flag. For system/PPC use only.</td></tr>
<tr><td>Form Code</td><td>Code describing the JUMPS transaction form type:
L25B Officer Personnel Change transaction
L30B Rough Order transaction
L45B Advance Authorization transaction
L61B Entry into the CG (Enlistment Contract) transaction (DD Fm 4/1)
L62B Discharge to Immediately Reenlist transaction (DD Form 4/1)
L63B Leave Reporting transaction (CG-2519)</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Procedure, Continued

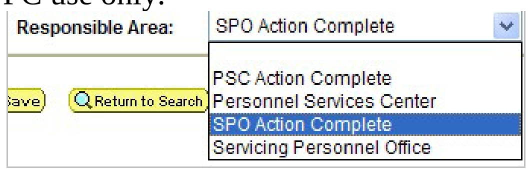
Procedure (continued)

Step	Action	
4 cont.	**JUMPS Exception Data Section (continued)**	
	Field	**Description**
	Form Code (cont.)	L64B BAQ Dependency/Emergency Data transaction (CG-4170A) L65B Active Duty Initial Information transaction L66B Officer Uniform Allowance transaction L67B Personnel Action transaction L68B PCS Departing, PCS Reporting, RELAD, and Retirement transactions L6AB NJP and Court Martial transactions L6BB Family Separation Housing (FSH)/Allowance transaction L6DB Allotment Authorization transaction L6EB Tax Information transaction L6FB Statement of Intent transaction L6GB Payment Option Election transaction L6HB Military Payroll Money List (offline payments of advance pay to a mbr) L6KB Clothing and Small Stores Checkage Transaction
	Effdt	Effective Date
	Efftm	Effective Time
	TY Entry	Type of Entry: • Blank = Original • “C” = Correction • “D” = Deletion
	Action Code	JUMPS Action Code. Refer to Part IX of this manual for a listing of action codes.
	Peoplesoft Information Section	
	Preparer’s EmplID	Employee ID number of the person submitting the transaction
	Preparer’s Name	Name of the person submitting the transaction
	Description	Description of the transaction type
	PPC Information Section	
	PPC Notes	Action required by your SPO prior to the next update cycle. Explanatory remarks keyed in by the PPC (MAS), Error Reporting Team (ERT).

Continued on next page

Procedure, Continued

Procedure (continued)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4
cont.</td><td>
<table>
<tr><th colspan="2">PPC Information Section (continued)</th></tr>
<tr><td>Responsible Area</td><td>A drop-down menu showing the responsible party for the exception.
• SPO for "Servicing Personnel Office", indicating an item that the SP to take action on.
• SAC for "SPO Action Complete, indicating that the SPO has reviewe item and taken action.
Note: There are other options on this menu. However, only "Servicing Personnel Office" or "SPO Action Complete" can be selected. The oth options are for PPC use only.

</td></tr>
<tr><td>Exception Cycles</td><td>Number of cycles this error has been reported</td></tr>
</table>
</td></tr>
<tr><td>5</td><td>Utilize the  buttons to return to the search page, view the next error report or view the previous error report.</td></tr>
</table>

PPC SPO Manual

Part X, Error Feedback, Reports and Queries

Chapter 2, Reports and Queries

Overview

Introduction This section provides the procedures for Direct Access Reports and Queries

Topics The following topics are covered in this section

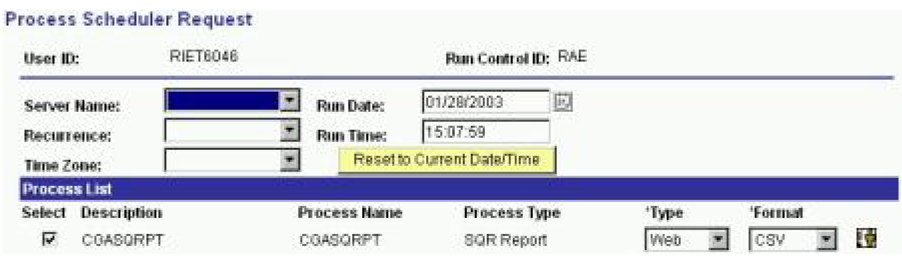
Using Process Scheduler's Web Delivery Option

Introduction

Most reports use the Process Scheduler to run and deliver the report. The report procedures used to discuss using the email option to deliver the report to your email address. However, with the transition to *MyPortalDirect*, the email option was removed from the menu. This change was made to prevent personally identifiable information (PII) from being transmitted outside the Coast Gaud Data Network via email. All reports are now delivered via the reports server.

Procedure

Follow these steps to use Process Scheduler's Web delivery option.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Access the Process Scheduler for the report you want to run and complete the run control page per that report's instructions. Then, click the Run button to access the Process Scheduler Request page.


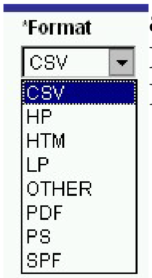
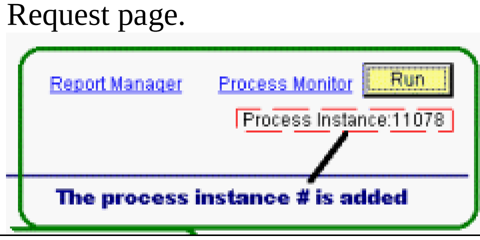
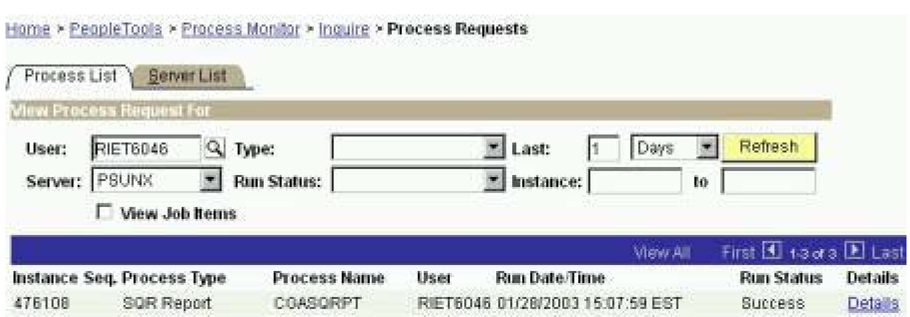
Note: The server name field can be left blank. It most cases, the system will select the appropriate server. Check the documentation for the report/process you are running. If the Server Name has to be set, the documentation will provide guidance.</td></tr>
<tr><td>2</td><td>Select Web from the Process Type drop down menu.

</td></tr>
</table>

Continued on next page

Using Process Scheduler's Web Delivery Option, Continued

Procedure **(continued)**

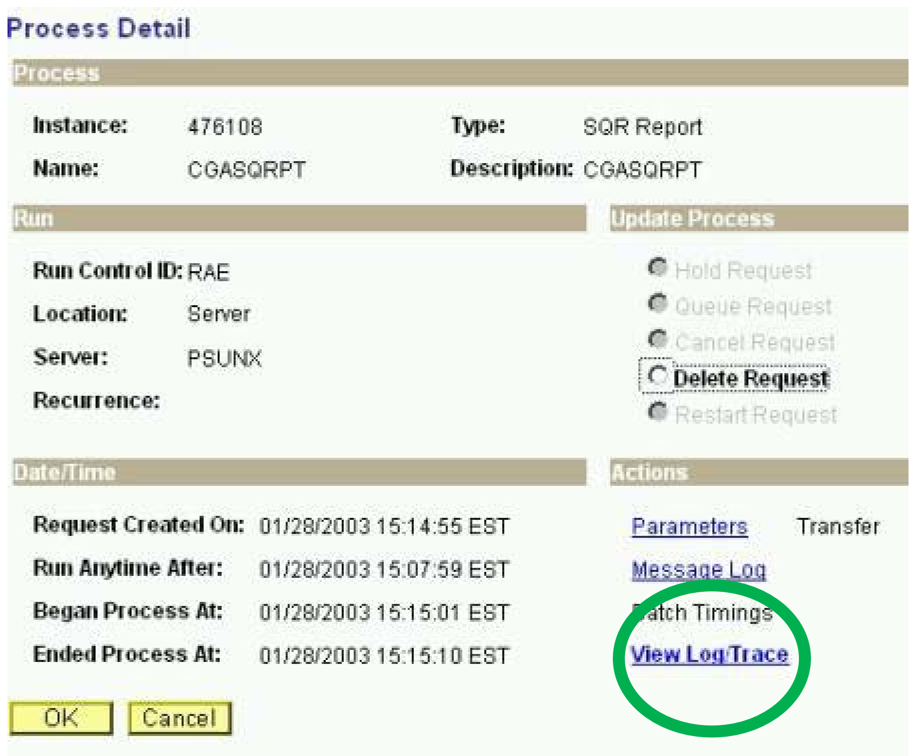
Step	Action
3	Select the file format. Not all file formats are supported by all reports, CSV and PDF are the most reliable. CSV = Readable by MS Excel, text editors, other spreadsheet programs and database applications. HTM = Web page PDF = Adobe Acrobat 
4	Click the OK button to launch the process and return to the Process Scheduler Request page.
5	Click the Process Monitor link in the upper right-hand corner of the Process Scheduler Request page. 
6	The Process Monitor page will display. Click the Refresh button periodically until the Run Status shows "*Success*" and the Details link is active. It could take some time for the status to change if you are running a large report or the system is heavily loaded.  Note: You can exit at this time and return later to view your report. Open the process monitor from the Direct Access People Tools > Inquire > Process Requests menu path to return to this point.

Continued on next page

Using Process Scheduler's Web Delivery Option, Continued

Procedure **(continued)**

Step	Action
7	Click the Details link. The Process Detail Page will display. Click the View Log/Trace link.



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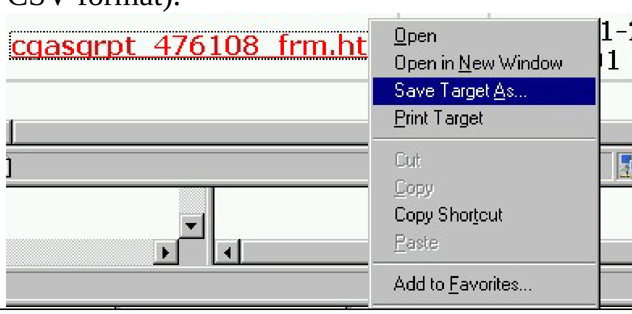
Using Process Scheduler's Web Delivery Option, Continued

Procedure **(continued)**

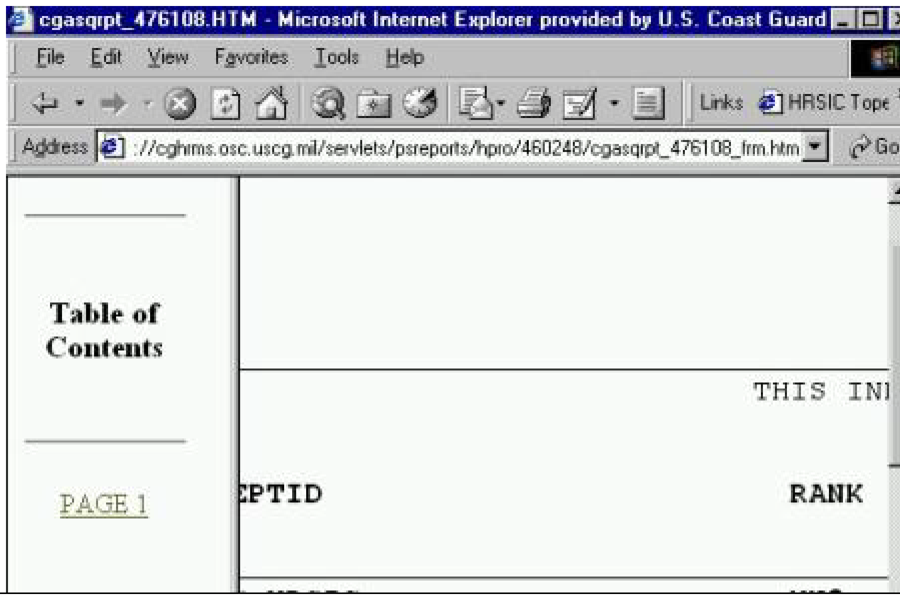
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>The Report Log Viewer page will open in a new window. Access your report by clicking the link with the report name and number in it (In the example below, cgasqrpt_476108_frm.htm is the link to the report).


Note: You can also right mouse click and save the report (advisable if you selected the CSV format).

</td></tr>
</table>

Continued on next page

Using Process Scheduler's Web Delivery Option, Continued

Procedure **(continued)**

Step	Action
9	Your report will open and display in the web browser. TIP Bookmark the report page and you can view it later (within 5 days) without having to run the report again. 

ASQ Status Report

Introduction

Unit Commanding Officers, SPOs, Assignment Officers (dxr), CGPSC(rpm), and MLC and HQ analysts access Screening Questionnaire data via a query to identify members who indicate they are not available for recall, so that appropriate follow-up can be made. The same query also identifies Ready Reservists that have not answered the questionnaire.

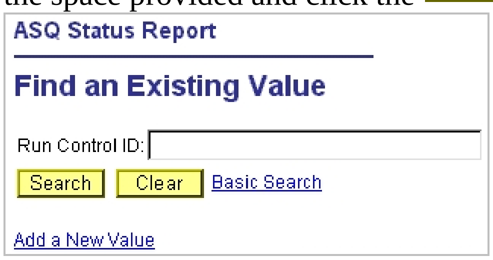
Commands also have the ability to monitor their unit's ASQ compliance through the Coast Guard Business Intelligence (CGBI) system.

Click on the 'CG Analytics' tab and select "ASQ" from the Analyst Scorecard section.

Unit commanders can then drill down to their unit and personnel to view individuals ASQ compliance.

Procedure

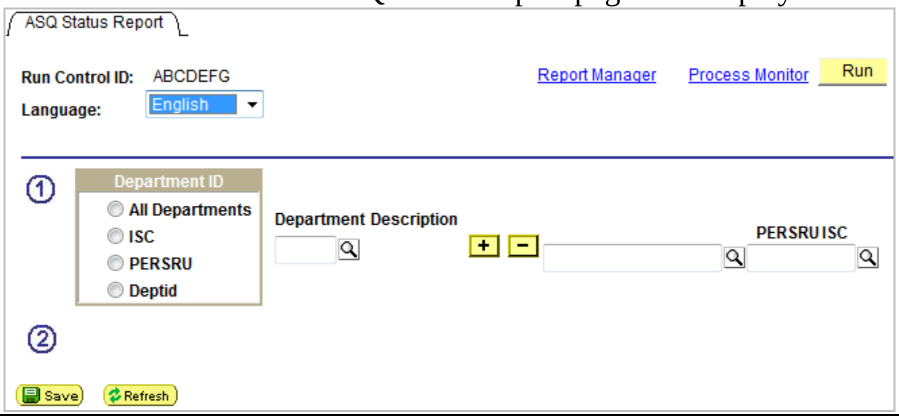
Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

Step	Action
1	Select menu items in the following: Enterprise/Main Menu > Administer Workforce > Administer Workforce (GBL) > Report > **ASQ Status Report**
2	If the Run Control ID is known (e. g. The process has been used before.), enter it in the space provided and click the Search button.  Or, click the **Add a New Value** link to create a new Run Control ID. Enter a Run Control ID and click the Add button. The Run Control ID can be any name to identify this report in the future. Save the report requests and run them again by selecting the Run Control ID created in this step.

Continued on next page

ASQ Status Report, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>The Run Control for the ASQ Status Report page will display:

</td></tr>
<tr><td>4</td><td>Select Unit Relationship type (ISC or PERSRU) or select Deptid to report on an individual department ID number.
<table>
<tr><th>Relationship Type</th><th>Will Report ASQ Status of all reservists assigned to units</th></tr>
<tr><td>All Departments</td><td>in all departments of the USCG.</td></tr>
<tr><td>ISC (district)</td><td>in that district's area of responsibility.</td></tr>
<tr><td>PERSRU (SPO)</td><td>in that SPO's area of responsibility.</td></tr>
<tr><td>Deptid</td><td>to the Department ID number entered.

Note: The report <u>will not</u> include members assigned to sub-departments. If this option is selected, the user will need to add the sub-department ID numbers by clicking the + in the department ID field.</td></tr>
</table></td></tr>
</table>

Continued on next page

ASQ Status Report, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Enter the department ID number for the district, SPO or department to report on. If the Deptid unit relationship was selected in the previous step, there will be a [+] available to insert additional department ID numbers to include in the report.

Sample of Department Descriptions:
<table>
<tr><th>Department</th><th>Description</th></tr>
<tr><td>000001</td><td>CGC GALLATIN</td></tr>
<tr><td>000002</td><td>CG AVTRACEN MOBILE</td></tr>
<tr><td>000003</td><td>CGC VIGILANT</td></tr>
<tr><td>000004</td><td>CG AVIATION LOGISTICS CENTER</td></tr>
<tr><td>000005</td><td>CG STA YANKEETOWN</td></tr>
<tr><td>000006</td><td>CG STA CURTIS BAY</td></tr>
<tr><td>000007</td><td>CG STA GLOUCESTER</td></tr>
<tr><td>000008</td><td>CG STA CASTLE HILL</td></tr>
<tr><td>000010</td><td>CG STA GULFPORT</td></tr>
</table>

ISC (district) Department ID Numbers:
<table>
<tr><th>Department</th><th>Description</th></tr>
<tr><td>008073</td><td>D7 PLNG & FRCE RDNESS DIV (DX)</td></tr>
<tr><td>008144</td><td>D1 PLNG & FORCE READINESS (DX)</td></tr>
<tr><td>008149</td><td>D5 PLNG & FORCE READINESS (DX)</td></tr>
<tr><td>008176</td><td>D8 PLNG & FORCE READINESS (DX)</td></tr>
<tr><td>008194</td><td>D9 PLNG & FORCE READINESS (DX)</td></tr>
<tr><td>008210</td><td>D11 PLNG&FORCE READINESS (DX)</td></tr>
<tr><td>008233</td><td>D13 PLNG&FORCE READINESS (DX)</td></tr>
<tr><td>008249</td><td>D14 PLNG&FORCE READINESS (DX)</td></tr>
<tr><td>008267</td><td>D17 PLNG&FORCE READINESS (DX)</td></tr>
<tr><td>036178</td><td>RESERVE MGMT BR (DG-13)</td></tr>
</table>
Note: Use the button to perform a lookup of valid ISC, PERSRU or department ID numbers. The lookup will not locate sub-department ID numbers.</td></tr>
<tr><td>6</td><td>Click the Run button.

</td></tr>
</table>

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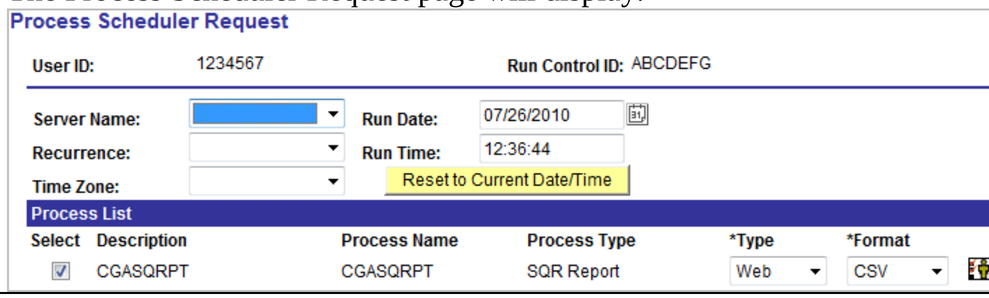
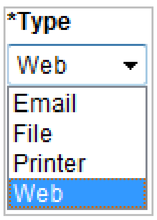
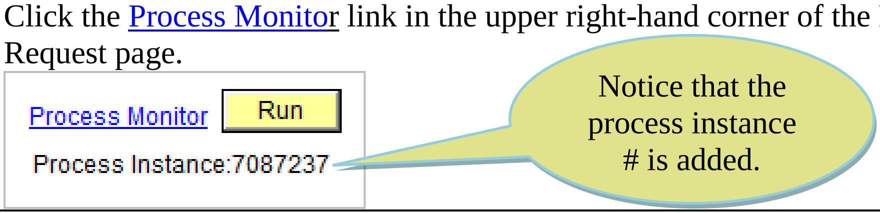
ASQ Status Report, Continued

Procedure **(continued)**

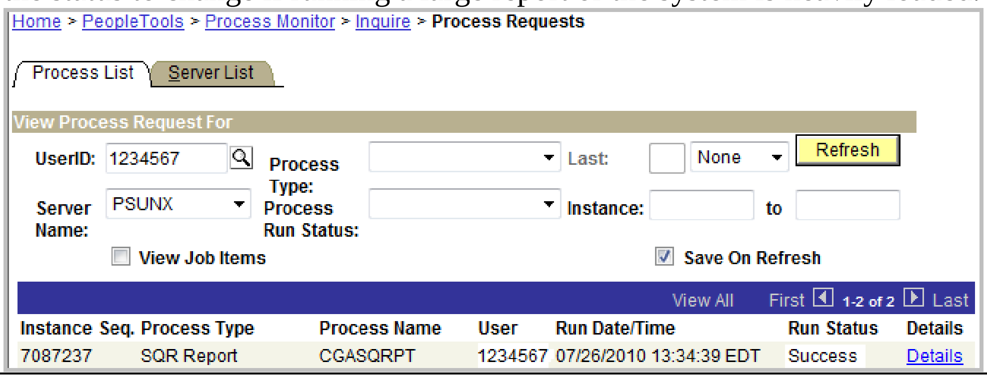
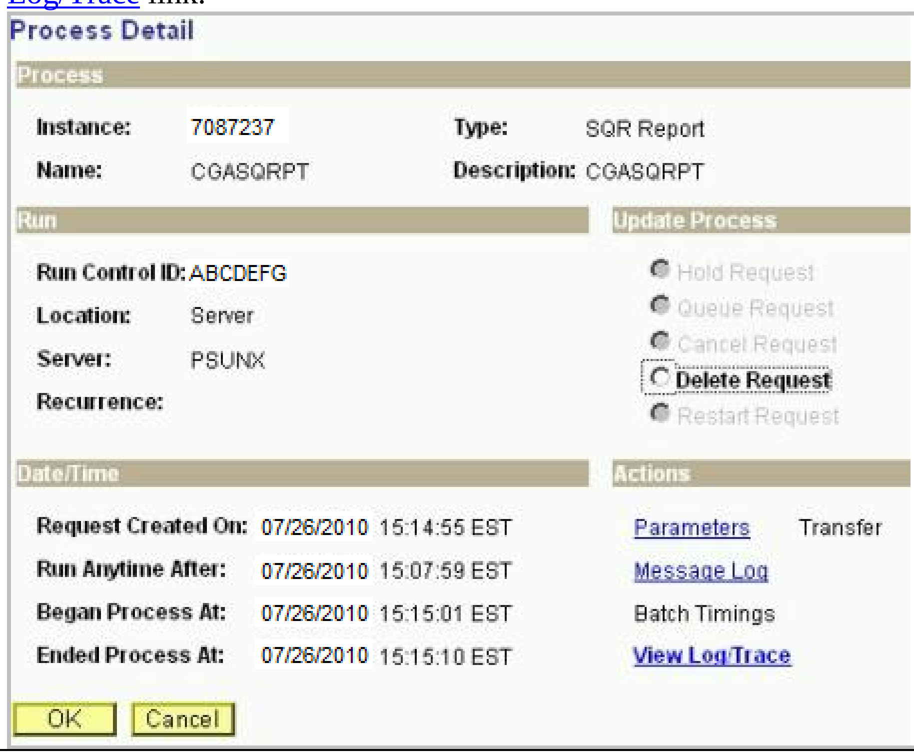
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>The Process Scheduler Request page will display.

</td></tr>
<tr><td>8</td><td>Select Web from the Process Type drop-down menu.


Note: The Email option is obsolete.</td></tr>
<tr><td>9</td><td>Select the file format CSV (Readable by MS Excel, text editors, other spreadsheet programs and database applications.) CSV is currently the only working file format. Recent changes to the report included the addition of several columns of occupational data. The PDF and HTM file formats cannot accommodate the additional data.</td></tr>
<tr><td>10</td><td>Click the OK button to launch the process and return to the Process Scheduler Request page.</td></tr>
<tr><td>11</td><td>Click the Process Monitor link in the upper right-hand corner of the Process Scheduler Request page.

</td></tr>
</table>

Continued on next page

ASQ Status Report, Continued

Procedure **(continued)**

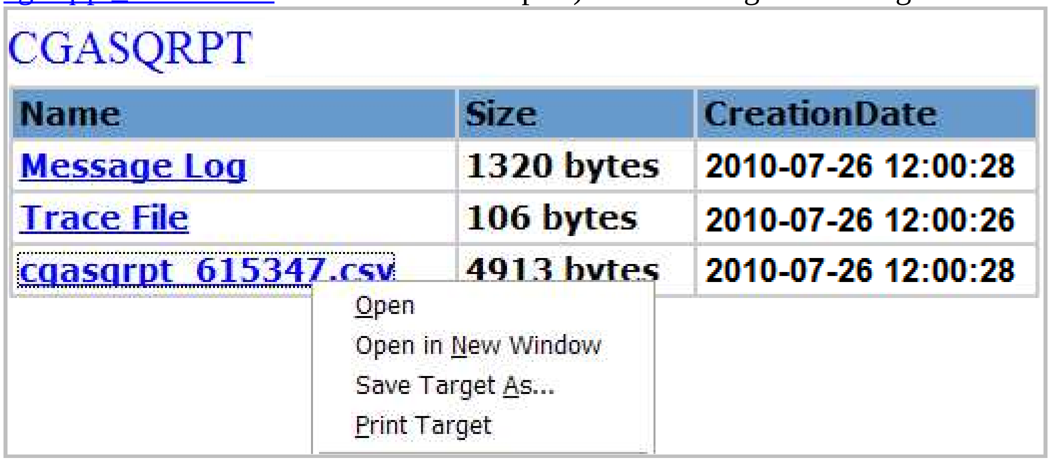
Step	Action
12	The Process Monitor page will display. Click the Refresh button periodically until the **Run Status** shows "*Success*" and the Details link is active. It could take some time for the status to change if running a large report or the system is heavily loaded. 
13	Click the Details link. The Process Detail Page will display. Click the View Log/Trace link. 

Continued on next page

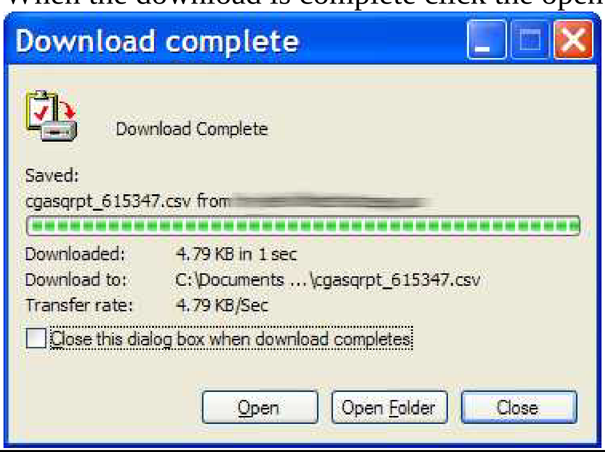
ASQ Status Report, Continued

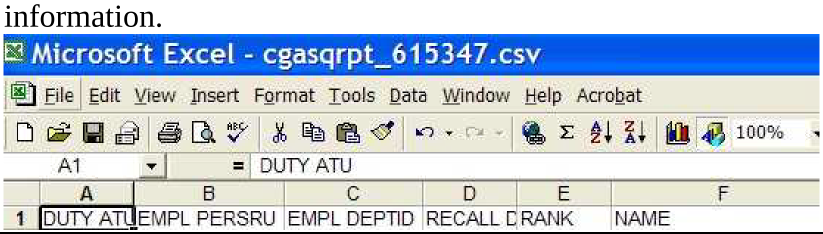
Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>14</td><td>The Report Log Viewer page will open in a new window. Access the report by right-clicking the link with the report name and number in it (In the example below, cgasqrpt_615427.csv is the link to the report) and selecting "Save Target As..."



Note: When right mouse clicking and selecting "Save Target As" the user will be asked to select a location on the system to save the file to.</td></tr>
<tr><td>15</td><td>When the download is complete click the open button:


</td></tr>
<tr><td>16</td><td>The report will open in MS Excel. Adjust the column widths to view all of the information.


</td></tr>
</table>

Active Duty 6th or 10th Anniversary Query

Introduction

This report allows the user to query the system to show members who are within 90 days of their 6th or 10th year anniversary of active duty date.

Before you begin

Set Internet Explorer to Allow Pop-ups from the Direct Access site.

Usage

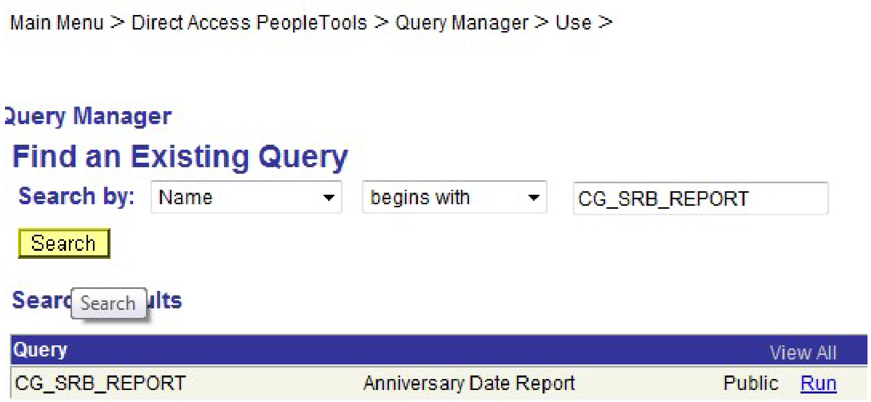
Per 3-C-11.2, CG Personnel Manual, COMDTINST M1000.6(series), an Administrative Remarks, CG-3307, entry is required for personnel within 3 months prior to their 6 or 10 year active duty anniversary date. These members may reenlist before their 6th or 10th anniversary (regardless of their expiration of enlistment date) in order to be eligible for a Zone "A" or "B" Selective Reenlistment Bonus. Run this report monthly to identify members within the area of responsibility who need to be counseled on Selective Reenlistment Bonus eligibility.

Continued on next page

Active Duty 6th or 10th Anniversary Query, Continued

Procedure

Start Internet Explorer, sign into MyPortalDirect and follow these steps to complete this procedure.

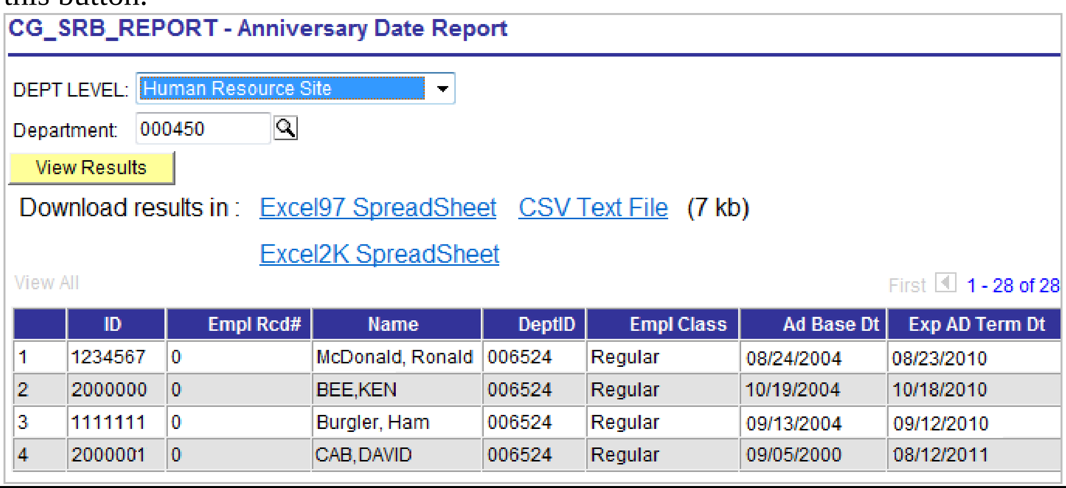
Step	Action
1	Select menu items in the following order: Enterprise/Main Menu > Direct Access People Tools > Query Manager > Use > **Query Manager** • The Find an Existing Query page will display, with defaults set to: Search By: Name, Begins With, and a third blank box to enter the name of the query. The first two defaults are fine to find this report. Use the third box to enter the query name: **CG_SRB_REPORT** • After entering the name of the query, click the yellow **Search** button. Hitting Enter will NOT return the query, but rather a message indicating the user must click the Search button. After clicking Search, the report will show up under Search Results.  • Click Run to begin running the report.
2	There are two blank fields waiting to be entered: • DEPT LEVEL • Department 

Continued on next page

Active Duty 6th or 10th Anniversary Query, Continued

Procedure **(continued)**

Step	Action
2	The DEPT LEVEL is a drop-down list. It contains 6 entries: • **Human Resource Site - Okay to choose** • **Integrated Support Command - Okay to choose** • Own Unit Only - Should NOT be chosen • SWE Testing Unit - Should NOT be chosen • Training Quota Mgmt Center - Should NOT be chosen • Unit Relationship - Should NOT be chosen **Note:** The user may choose EITHER **Human Resource Site** OR **Integrated Support Command**. Click the magnifying glass beside the Department window to "lookup" the Department ID number. This will open the Department Lookup page. Enter the desired department or click on the yellow Lookup button and pick the department from the list provided. Either way, the user must click on the desired department before returning to the CG_SRB_REPORT - Anniversary Date Report page.
3	Click the yellow **View Results** button. The query results will appear directly below this button.



CG_SRB_REPORT - Anniversary Date Report

DEPT LEVEL: Human Resource Site

Department: 000450

View Results

Download results in : Excel97 SpreadSheet CSV Text File (7 kb)

Excel2K SpreadSheet

View All First 1 - 28 of 28

	ID	Empl Rcd#	Name	DeptID	Empl Class	Ad Base Dt	Exp AD Term Dt
1	1234567	0	McDonald, Ronald	006524	Regular	08/24/2004	08/23/2010
2	2000000	0	BEE,KEN	006524	Regular	10/19/2004	10/18/2010
3	1111111	0	Burgler, Ham	006524	Regular	09/13/2004	09/12/2010
4	2000001	0	CAB,DAVID	006524	Regular	09/05/2000	08/12/2011

Continued on next page

Active Duty 6th or 10th Anniversary Query, Continued

Procedure **(continued)**

Step	Action
4	The query results will display. Use the Download results in: Excel Spreadsheet or CSV Text File links to save a copy of the query to the local system. **Note:** For best results, click on the CSV Text File link and select the **Save** option from the resulting dialog box. Then, open the file with MS Excel.

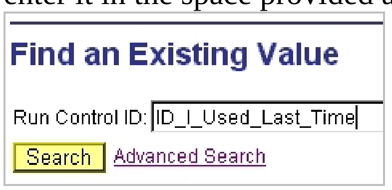
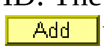
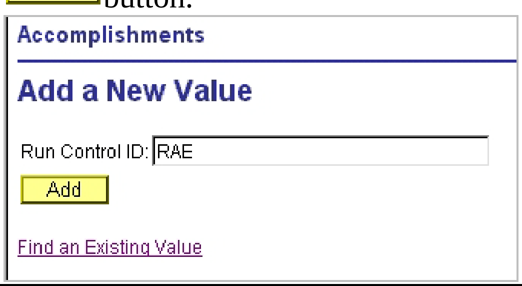
Accomplishment Report

Introduction

This section provides procedures for running an accomplishment report in Direct Access. This report provides a listing of a member's awards, degrees, ASVAB scores, foreign language skills, professional memberships, licenses and certifications. Reports can be run for all personnel at a department, and for all departments associated with a PERSRU or ISC. The member classification (regular active duty, drilling SELRES, IRR, etc.) can also be defined when requesting the report.

Procedure

Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

Step	Action
1	Select menu items in the following order: Enterprise/Main Menu > Develop Workforce > Manage Competencies (GBL) > Report > **Accomplishments**
2	If the **Run Control ID** is known (e. g. The user has performed this process before), enter it in the space provided and click the  button.  **Creating the Run Control ID**: If the user has not run this report before, click the ***Add a New Value*** link (near the bottom of the page) and create a new Run Control ID. The ID can be any name to identify the report (no spaces are permitted). Click the  button. 

Continued on next page

Accomplishment Report, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>
Selecting the Department or Relationship criteria:

Select the All Departments, ISC, SPO (PERSRU) or Deptid radio button.

<table>
<tr><th>Relationship Type</th><th>Will include rosters…</th></tr>
<tr><td>All Departments</td><td>for all departments of the USCG.</td></tr>
<tr><td>ISC (district)</td><td>for all units associated with that district's area of responsibility.</td></tr>
<tr><td>PERSRU (SPO)</td><td>for all units associated with that SPO's area of responsibility.</td></tr>
<tr><td>Deptid</td><td>for the Department ID number entered.

Note: The report <u>will not</u> include members assigned to sub-departments. If this option is selected, the user will need to add the sub-department ID numbers by clicking the in the department ID field.</td></tr>
</table>

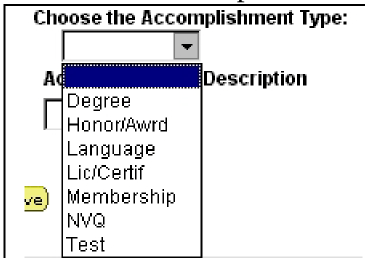
Important: The user must use the icon to search for the department ID number. Do not enter a department ID number directly in the DeptID field. The report will only run when a master Department ID number is selected. If a Sub-Department ID number is entered, the report status will show as an error in the Process Monitor, and will not provide any results.
Error Message: Error online 393: (SQR 3722) Could not set up Cursor.

Edits have been put in place in Direct Access so that only the master ID's are listed when running a report. If a user needs a list of the sub-departments at their unit, they can do a search within the airport terminal.
</td></tr>
</table>

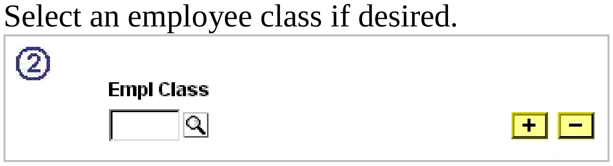
Continued on next page

Accomplishment Report, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Choose the accomplishment type by clicking on the and selecting from the list.
<table>
<tr><td rowspan="7">

*NVQ is not used</td><th>Type</th><th>Description</th></tr>
<tr><td>Degree</td><td>Educational accomplishment</td></tr>
<tr><td>Honor/Awrd</td><td>Awards</td></tr>
<tr><td>Language</td><td>Foreign language skill</td></tr>
<tr><td>Licenses/Cert</td><td>Licenses & Certifications</td></tr>
<tr><td>Membership</td><td>Professional memberships</td></tr>
<tr><td>Test</td><td>ASVAB test results</td></tr>
</table></td></tr>
<tr><td>5</td><td>Complete the accomplishment description if desired. Click the to lookup description codes.
• This field may be left blank to include all codes.
• Use the + or − buttons to add/remove codes to report on.
Example multiple award code entry:

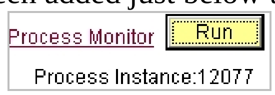
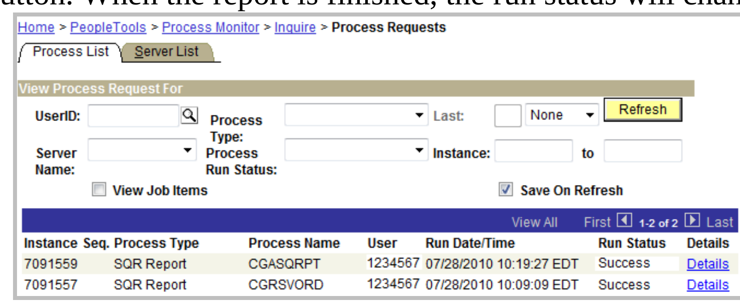
</td></tr>
<tr><td>6</td><td>Select an employee class if desired.


Select one or more employee classes for the roster or leave this field blank for all classes. Use the icon to lookup available classes.
<table>
<tr><th>Employee Classification</th><th>Description</th></tr>
<tr><td>Regular</td><td>Regular</td></tr>
<tr><td>SELRES</td><td>Selected Reserve</td></tr>
<tr><td>IRR</td><td>Inactive Ready Reserve</td></tr>
<tr><td>ASL</td><td>Active Standby Reserve</td></tr>
<tr><td>ISL</td><td>Inactive Standby Reserve</td></tr>
<tr><td>IRR (ASP)</td><td>Inactive Ready Reserve (ASP)</td></tr>
</table>
Use the + or − buttons to add/remove employee classes.</td></tr>
</table>

Continued on next page

Accomplishment Report, Continued

Procedure **(continued)**

Step	Action
7	• Click the Run button and complete the Process Scheduler Request page. • You may leave the Server Name drop-down blank. • Click the **Type** drop down menu and select **Web**. • Click the **Format** drop-down menu and select **PDF** or **CSV**. • Click OK to continue. This will return to the report setup page. Note that a ***Process Instance Number*** has been added just below the Run button.  The Process Instance number is used in the ***Process Monitor*** to identify the request.
8	Click the Process Monitor link. The report will show a run status of "Queued" as it processes. The user may wait for the page to update automatically or press the **Refresh** button. When the report is finished, the run status will change to "Success."  Click the ***Details*** link to view additional information if the status shows as "error".
9	Please see the Using Process Scheduler's Web Delivery Option topic on page 3 to view the report.
10	To use this report's criteria in the future, click the Save button. If the user exits without saving, the report will still run and be delivered via email.

Begin Service Report

Introduction

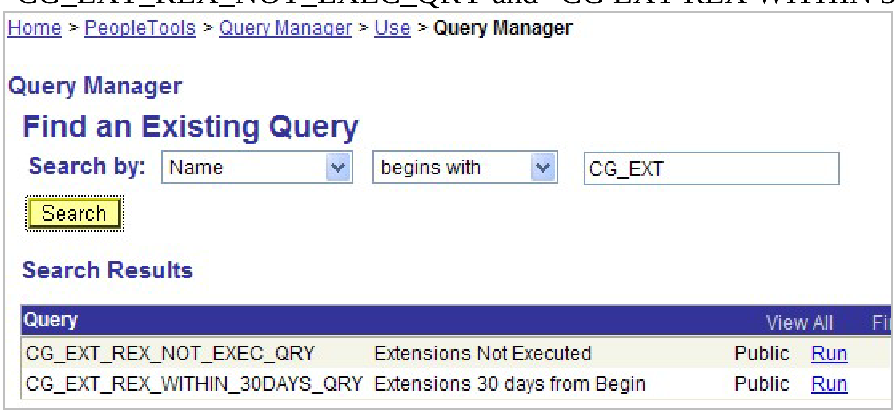
This section provides the procedure to run a Begin Service Report for field units serviced by the SPO or for just one unit. Use the output of this report to determine which members need a Begin Extension of Enlistment (P198) or Begin Re-extension of Enlistment (P199) transaction submitted.

Discussion

There are two versions of this report. One report will show extensions/re-extensions with effective (begin) dates coming up within the next 30 days (from the current date). The other will allow the user to select a date range to identify unexecuted extensions/re-extensions for any range of dates.

Procedure

Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

Step	Action
1	Select menu items in the following order: Enterprise/Main Menu > Direct Access People Tools > Query Manager > Use > **Query Manager**
2	A search page will appear. Enter the search criteria as described below. Search by Name, select "**begins with**" and enter "**CG_EXT**" in the third block. Click the Search button. The ***Search Results*** should include "CG_EXT_REX_NOT_EXEC_QRY and "CG EXT REX WITHIN 30DAYS QRY".  Click the Run link for the appropriate report needed. Select: • CG_EXT_REX_NOT_EXEC_QRY -- to specify the date range to search for. • CG EXT REX WITHIN 30DAYS QRY - to see unexecuted extensions/re-extensions with begin dates in the next 30 days (from the current date). The Query input page will open in a new window

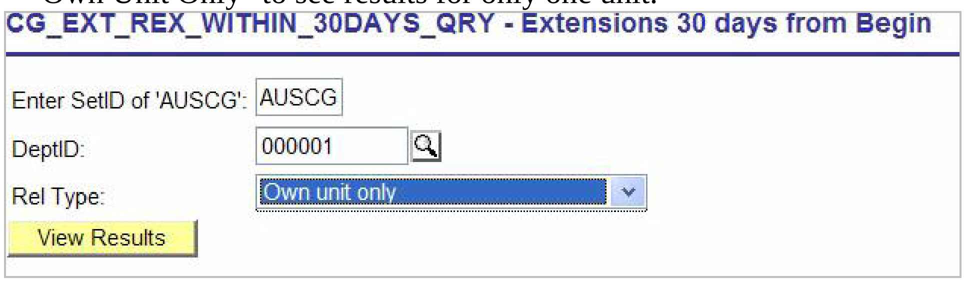
Continued on next page

Begin Service Report, Continued

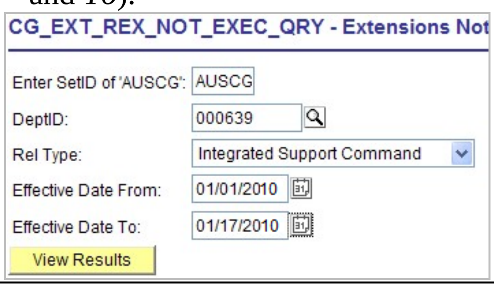
Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>

- Enter “AUSCG” in the “Enter SITID of ‘AUSCG’” block.
- Enter the DEPTID or click on the search icon for a valid list of departments.
- Select “Human Resource Site” for the Rel Type for all units served by the SPO (provided that a valid SPO department ID was entered in the Dept ID field) or select "Own Unit Only" to see results for only one unit.



- If selecting CG_EXT_REX_NOT_EXEC_QRY, enter the Effective Dates (*From* and *To*).



</td></tr>
<tr><td>4</td><td>

Click the View Results button to run the report

The report provides the following information:

Field	Description
ID	Employee ID
Name	Name in Last,First,MI format
Job Title	Rating
Contract #	Number of contract (001=first extension, 002= second extension,etc.)
Eff Date	The date the extension will begin
Type	Extension (in this case submit a Begin Extension of Enlistment (P198) transaction on the member) Re-Extension (in this case submit a Begin Re-extension of Enlistment (P199) transaction on the member)
DeptID	Member's currently assigned department ID number
Dept	Name of unit

</td></tr>
</table>

Continued on next page

Procedure **(continued)**

Step	Action
5	Download the results in MS Excel format by clicking the link above the query results. 
6	Repeat step 3 above to run the report for additional departments. Close the report window when finished. It will return to the Query Manager search page.
7	Sign out of the system or use the menu links to access another item.

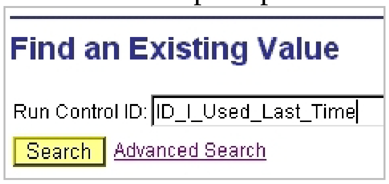
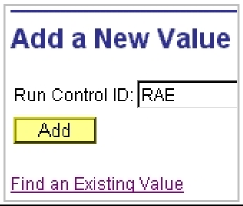
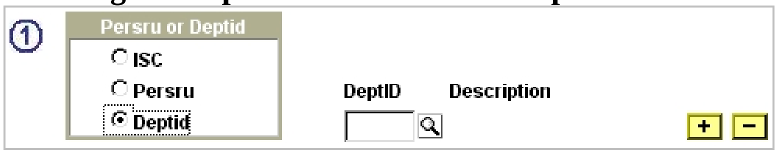
Competency/Qualifications Report

Introduction

This section provides procedures for running a competency report in Direct Access. Use this procedure to obtain a listing of a member's qualifications. Reports can be run for all personnel at a department, and for all departments associated with a SPO or ISC. The member classification (regular active duty, drilling SELRES, IRR, etc.) can also be defined when requesting the report.

Procedure

Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure

Step	Action
1	Select menu items in the following order: Enterprise/Main Menu > Develop Workforce > Manage Competencies (GBL) > Report > **Competencies**
2	If the **Run Control ID** is known (e. g. The user has performed this process before), enter it in the space provided and click the  button.  **Creating the Run Control ID**: If the user has not run this report before, click the ***Add a New Value*** link (near the bottom of the page) and create a new Run Control ID. The ID can be any name to identify the report (no spaces are permitted). Click the  button. 
3	**Selecting the Department or Relationship criteria:**  Select the ISC, SPO (PERSRU) or Deptid radio button and lookup and select a department ID number.

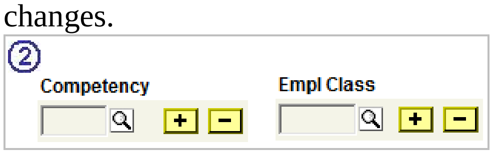
Continued on next page

Competency/Qualifications Report, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3
cont.</td><td>
<table>
<tr><th>Relationship Type</th><th>Will include rosters…</th></tr>
<tr><td>ISC (district)</td><td>for all units associated with that district's area of responsibility.</td></tr>
<tr><td>PERSRU/SPO</td><td>for all units associated with that SPO's area of responsibility.</td></tr>
<tr><td>Deptid</td><td>for the Department ID number entered. Use the + or − buttons to add/remove department IDs.

Note: The report <u>will not</u> include members assigned to sub-departments. If this option is selected, the user will need to add the sub-department ID numbers by clicking the + in the department ID field.</td></tr>
</table>
Important: The user must use the icon to search for the department ID number. Do not enter a department ID number directly in the DeptID field. The report will only run when a master Department ID number is selected. If a Sub-Department ID number is entered, the report status will show as an error in the Process Monitor, and will not provide any results.
Error Message: Error online 393: (SQR 3722) Could not set up Cursor.

Edits have been put in place in Direct Access so that only the master ID’s are listed when running a report. If a user needs a list of the sub-departments at their unit, they can do a search within the airport terminal.
</td></tr>
<tr><td>4</td><td>
Enter the competency code to report on. Click the to lookup competency codes (complete listing of DA competency codes). This link will open an Excel spreadsheet, which can be saved to the local directory. If saving the file, remember to check back here periodically for updates. The revision date is listed in the first cell of the spreadsheet. There's also a link in the file to COMDT (CG-1B1) for questions or changes.


• This field may be left blank to include all codes.
• Use the + or − buttons to add/remove codes to report on.
Example showing entry of multiple competencies to report on:


</td></tr>
</table>

Continued on next page

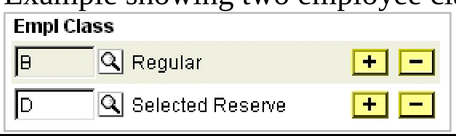
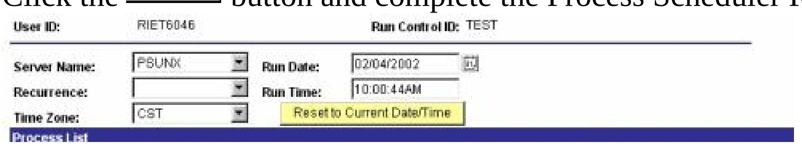
Competency/Qualifications Report, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Select an employee class if desired.


Select one or more employee classes for the roster or leave this field blank for all classes. Use the icon to lookup available classes.


Employee Classification Description	
Regular	Regular
SELRES	Selected Reserve
IRR	Inactive Ready Reserve
ASL	Active Standby Reserve
ISL	Inactive Standby Reserve
IRR (ASP)	Inactive Ready Reserve (ASP)

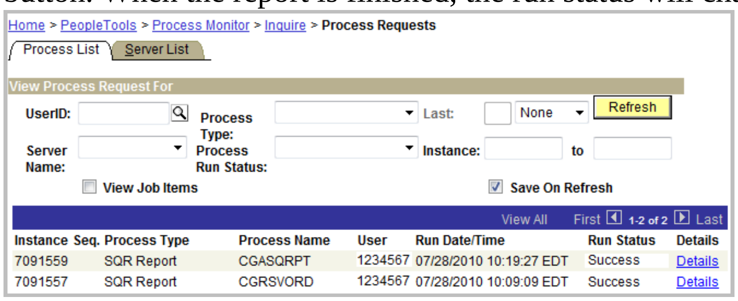
Use the + or − buttons to add/remove employee classes.
Example showing two employee classes to report on:

</td></tr>
<tr><td>6</td><td>Click the Run button and complete the Process Scheduler Request page.


• You may leave the Server Name drop-down menu blank.
• Click the Type drop-down menu and select Web.
• Click the Format drop-down menu and select PDF (for Adobe Acrobat (.PDF) format) or CSV (for comma delimited format).</td></tr>
</table>

Continued on next page

Competency/Qualifications Report, Continued

Procedure **(continued)**

Step	Action
6 cont.	• Click  to continue. This will return to the report setup page. Note that a ***Process Instance Number*** has been added just below the Run button.  The Process Instance number is used in the ***Process Monitor*** to identify the request.
7	Click the Process Monitor link. The report will show a run status of "Queued" as it processes. Either wait for the page to update automatically or press the **Refresh** button. When the report is finished, the run status will change to "Success."  Click the ***Details*** link to view additional information if the status shows as "error".
8	Please see the Using Process Scheduler's Web Delivery Option topic on page 3 to view the report.
9	To use this report's criteria in the future, click the  button. If the user exits without saving, the report will still run and be delivered via email.

ID Family Members/Dependents by Birth Date

Introduction

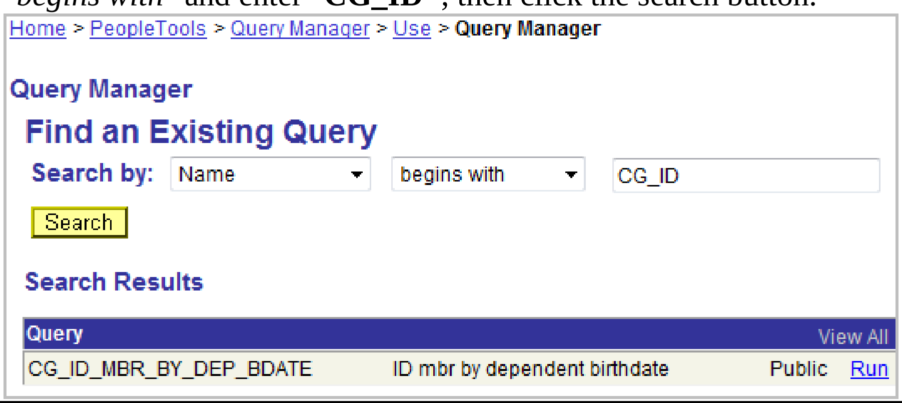
The ID Family Members/Dependents by Birth Date query provides a listing of family members/dependents with a date of birth occurring before a date specified. The query can be run by department ID, unit relationship, HRS/PERSRU relationship or ISC relationship. Use this query to identify members' dependent children who are over the age of 21. Children over the age of 21 cannot be listed as "BAH Eligible" unless they meet the criteria for student status or are incapacitated. Consult chapter 3-F of the U. S. Coast Guard Pay Manual for more information.

Before you begin

Set Internet Explorer to Allow Pop-ups from the Direct Access site.

Procedure

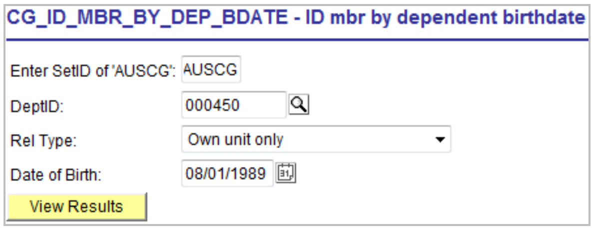
Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

Step	Action
1	Select menu items in the following order: Enterprise/Main Menu > Direct Access PeopleTools > Query Manager > Use > **Query Manager**
2	The Find an Existing Query page will display. Click in the blank field to the right of "*begins with*" and enter "**CG_ID**", then click the search button. 
3	Click the Run link in the search results section.

Continued on next page

ID Family Members/Dependents by Birth Date, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>The Query page will display in a new window. Enter the criteria and click the View Results button.


<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Enter SetID of 'AUSCG'</td><td>Enter AUSCG, this selects Active units. Do not leave blank and do not enter anything else.</td></tr>
<tr><td>DeptID</td><td>Enter the Department ID number. Use the lookup icon to search for the ID if necessary.
Note: Enter the ISC or PERSRU department ID number to show all units in the AOR.</td></tr>
<tr><td>Rel Type</td><td>Select the Relationship Type from the drop-down list:
<u>Human Resource Site</u> -- Will return results for all units in the HRS/PERSRU's AOR.
<u>Integrated Support Command</u> -- Will return results for all units in the ISC's AOR.
<u>Own Unit Only</u> -- Will return results for the department ID number entered.
<u>Unit Relationship</u> -- If a unit relationship has been setup, will return results for the unit ID entered and related units.
Note: Relationship Types are administered through the following menu: Home > Develop Workforce > Plan Successions (GBL) > Setup > Dept Relationships
If the "Own Unit Only" relationship type does not provide any results, use the Dept Relationships maintenance menu and setup the Own Unit Only relationship, this is not established in the system for all units. It has to be setup at least once.</td></tr>
<tr><td>Date of Birth</td><td>Enter a date. The query will return all family members/dependents with a birth date earlier than specified.</td></tr>
</table></td></tr>
<tr><td>5</td><td>The query results will display. Use the Download results in: Excel Spreadsheet or CSV Text File links to save a copy of the query to the local system.
Note: For best results, click on the CSV Text File link and select the Save option from the resulting dialog box. Then, open the file with MS Excel.</td></tr>
</table>

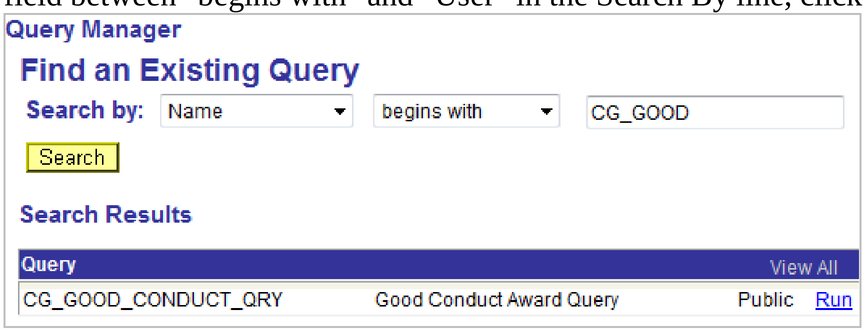
Last Good Conduct Award Query

Introduction

The Good Conduct Award Query identifies personnel by departments, who have a Good Conduct Award (CGSD award code) which was issued within a specified range of dates. The department and date ranges are entered by the user at the time the query is run. This query can be used to identify personnel who are due their second or subsequent Good Conduct Award. Personnel who have not yet received their first award will not be listed. Units should manually track the first Good Conduct Award due dates for these members.

Procedure

Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

Step	Action
1	Select menu items in the following order: Enterprise/Main Menu > Direct Access PeopleTools > Query Manager > Use > **Query Manager**
2	The Query search list will display. Enter all or part of the query name -- *CG_Good_Conduct_QRY* (note the use of underscores (__) in place of spaces), in the field between "begins with" and "User" in the Search By line, click the Search button.  Click on the Run to the right of GOOD CONDUCT QRY in the search results list to launch the query.

Continued on next page

Last Good Conduct Award Query, Continued

Procedure

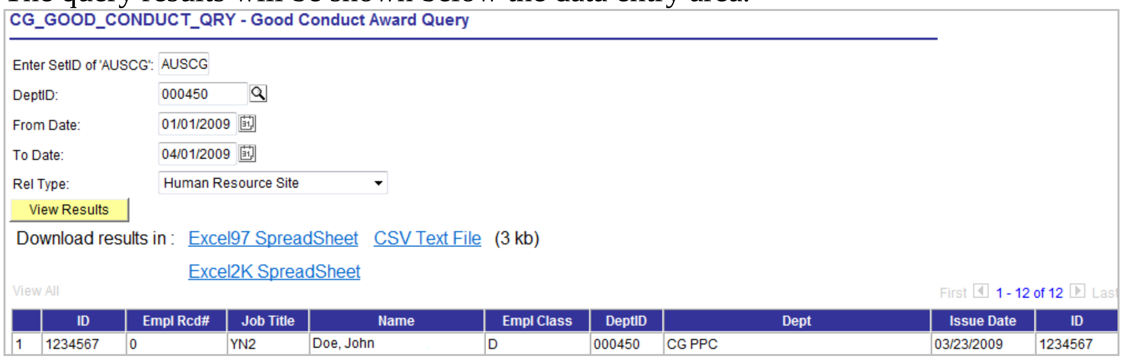
Step	Action
3	Enter the query criteria.

Field	Description/Entry
Enter SetID of ‘AUSCG’	Enter AUSCG.
DeptID	The department ID number. Use the to lookup the department ID if necessary.
From Date	The date range to begin from. Awards with a date on or before this date will not be listed in the query results. Dates are entered using all numbers in MM/DD/YYYY format.
To Date	The date range to end at. Awards with a date on or after this date will not listed in the query results. Dates are entered using all number in MM/DD/YYYY format.
Rel Type	Click the to display available choices. There are several options but only these two will return any results: • ***Human Resource Site***, will include results for all units for which a PERSRU is responsible for. • ***Integrated Support Command***, will include results for all units in the ISC's area of responsibility.

Continued on next page

ID Family Members/Dependents by Birth Date, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Click the View Results button to run the query.</td></tr>
<tr><td>5</td><td>The query results will be shown below the data entry area.

</td></tr>
<tr><td>6</td><td>The user may download the results in MS Excel format by clicking the link above the query results.</td></tr>
<tr><td>7</td><td>Repeat steps 3 and 4 to run additional queries or use the menu to exit the application.</td></tr>
</table>

Help Desk Notes

Role -- CGSSCMD
Owner -- Team East COMDT (CG-634)
Production -- Release 4
Known Issues -- The Own Unit Only option seems a better choice to get results for one unit, but the correct way to do this is to choose Unit Relationship.

Leave Delete Report

Introduction

This section provides the procedure for running the Leave Delete Report.

Background

A review of member leave deletions was conducted by PPC's Financial Account Review branch (FAR) at the request of PPC's Operations Division to determine if deletions to previously posted annual leave transactions were being submitted properly, and to identify any potential abuse. The audit revealed there were personnel assigned to a SPO who had deleted leave on their own account, then adding the leave back into their account. The audit also revealed the SPOs are not keeping sufficient leave records to verify the proper/improper deletion of leave. It was also found that in a majority of cases where leave is charged as excess at the time of separation either previously reported leave is deleted or the endorsements are changed to bring the leave balance to zero. Of the 3,457 deleted leave documents, 404 were on YN accounts. This was a greater number of deletion/submission than any other rate. This fact is notable because the YN rate is not the largest and one would assume because YNs are the most knowledgeable in this field, they would have the least number of deletions.

Description

The report includes the following information

Field	Description
EMPLID	Member's employee ID number
DEPTID	Department ID for the member's unit
BEGIN DATE	Start date on the original leave transaction
END DATE	End date on the original leave transaction
DELETE DATE	Date the transaction was deleted
OPRID	The user ID of the person who deleted the transaction
OPERATOR NAME	The name of the person who deleted the transaction (Last, First)
JAG PROC DT	Date the delete transaction audit record was created

Continued on next page

Leave Delete Report, Continued

Procedure

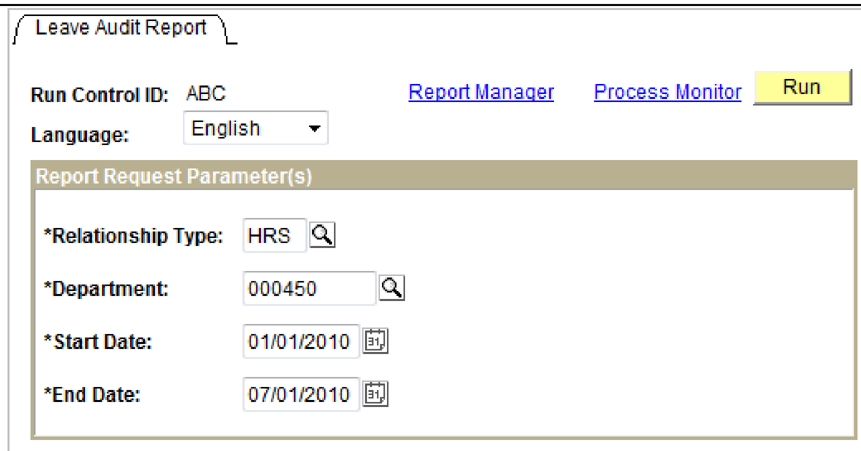
Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

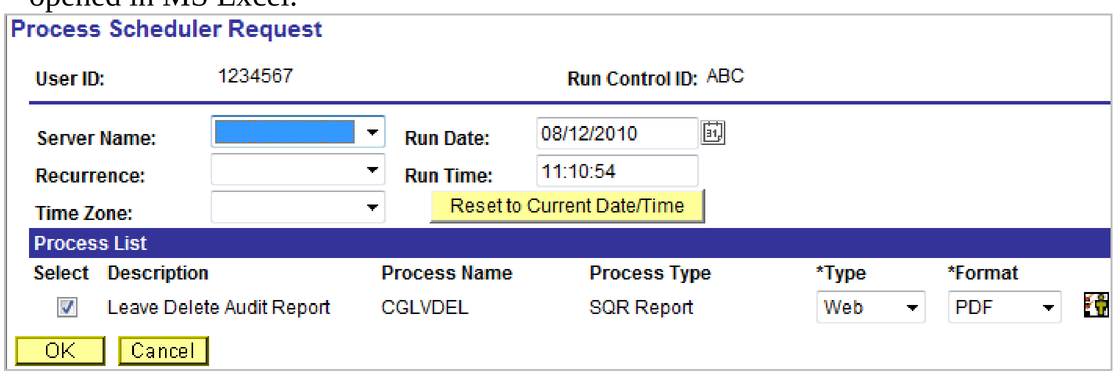
Step	Action
1	From the Enterprise or Main menu, select menu items in the following order: Administer Workforce > Monitor Absence (GBL) > Report > Leave Delete Audit Report 
2	The Run Control ID Entry Page will open. • If this process has been used before, enter the initials (or other ID used to create the control) in the Run Control ID block and click the Search button. • If this is the first time using this process, click the Add a New Value link. 1. Enter initials in the Run Control ID block. 2. Click the Add button.
3	Report Setup Page will open. • Select Unit Relationship type (ISC or HRS-SPO) to report on. HRS — Human Resource Site ISC — Integrated Support Command SELF — Own unit only SWE — SWE Testing Unit TQC — Training Quota Mgmt Center UNIT — Unit Relationship (Note: Other values (Self, SWE, TQC & Unit) are not valid for this report) • Enter the Department ID number of the ISC or HRS site to report on. • Enter a Start Date. Leave deleted before this date will not be included in the report. • Enter an End Date. Leave deleted after this date will not be included in the report.

Continued on next page

Leave Delete Report, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>

Click the Run button to begin processing.</td></tr>
<tr><td>5</td><td>The process scheduler request page will open.
Set the Type to Web (to access the report online (See Using Process Scheduler Web Option for more information).
Set the Format to PDF (for an Adobe Acrobat file) or CSV for a file that can be opened in MS Excel.

</td></tr>
<tr><td>6</td><td>Click OK to run the report.</td></tr>
<tr><td>7</td><td>Retrieve the report from the Report Server if using the Process Scheduler Web Option. (See page X-2-3).</td></tr>
</table>

PCS Orders Query

Introduction

This section provides procedures for running the PCS Orders query. The query returns a list of all PCS orders issued, updated or cancelled within a range of dates specified by the user.

Before you begin

Set Internet Explorer to Allow Pop-ups from the Direct Access site.

Query Date Fields

The PCS Orders Query includes the following data fields.

	EMPLID	NAME	PYGD	RATE	EMPL CLASS	ACTION	ACTION REASON	ACTION DATE	DUTY TYPE	ASGN WF STATUS	DEPAR DEP

Second half of query header:

DEPARTING DEPT NAME	EST DEPART DATE	REPORTING DEPTID	REPORTING DEPT NAME	BUSN EMAIL ADDRESS

<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>Emplid</td><td>Employee ID number</td></tr>
<tr><td>Name</td><td>Name</td></tr>
<tr><td>PYGD</td><td>Pay grade</td></tr>
<tr><td>Rate</td><td>Rate or rank</td></tr>
<tr><td>Empl Class</td><td>Employee classification (Regular, SELRES, IRR, etc.)</td></tr>
<tr><td>Action</td><td>Type of orders (e. g. "Transfer" for normal PCS)</td></tr>
<tr><td>Action Reason</td><td>Reason for orders (e. g. "DPT" for normal PCS, "EXT" for a tour extension)</td></tr>
<tr><td>Action Date</td><td>Date the orders were last updated</td></tr>
<tr><td>Duty Type</td><td>Normally blank. However "Act Duty" may appear.</td></tr>
<tr><td>Asgn WF</td><td>
<table>
<tr><th>Status</th><th>Meaning</th></tr>
<tr><td>Apvd Mtual</td><td>An approved mutual exchange of station.</td></tr>
<tr><td>Apvd Std</td><td>An approved set of regular orders.</td></tr>
<tr><td>Apvd Unlat</td><td>An approved order for a unilateral.</td></tr>
<tr><td>Cancel</td><td>Canceled orders</td></tr>
<tr><td>Enroute</td><td>Enroute (based on estimated departure date)</td></tr>
<tr><td>Finished</td><td>The member has departed the old unit and has reported into the new unit (Departing & Reporting Endorsements have processed).</td></tr>
<tr><td>Proposed</td><td>Orders in a proposed status</td></tr>
<tr><td>Ready</td><td>Indicates the orders have been worked (member specific changes have been made to the orders) and the orders are now 'Ready' for the member to travel</td></tr>
<tr><td>X Ord/Tono</td><td>Cancel the orders but keep the TONO active.</td></tr>
</table>
</td></tr>
</table>

Continued on next page

PCS Orders Query, Continued

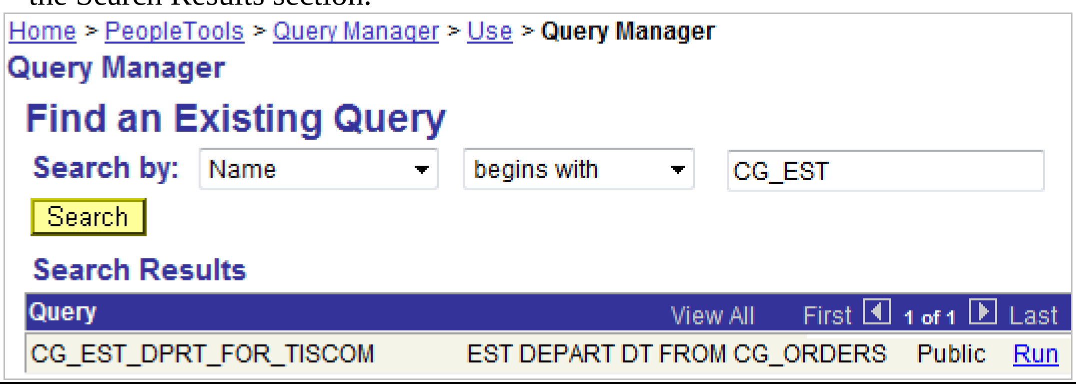
Query Date Fields **(continued)**

Field	Description
Departin DEPTID	ID number for the department the member is departing from
Departing DEPT Name	Name of the unit the member is departing from
Est Depart Date	Estimated departure date
Reporting DEPTID	Department ID number the member is ordered to
Reporting DEPT Name	Name of the unit the member is ordered to
Busn email address	Member's primary DA e-mail address.

Procedure Start Internet Explorer, sign into Direct Access and follow these steps to run this query.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select menu items in the following order:
Enterprise/Main Menu > Direct Access PeopleTools > Query Manager > Use > Query Manager</td></tr>
<tr><td>2</td><td>The Query Manager page will display.

Enter "CG_EST" in the field (to the right of "begins with) and click "search".
Click Run at the end of the line for the "CG_EST_DPRT_FOR_TISCOM" query in the Search Results section.

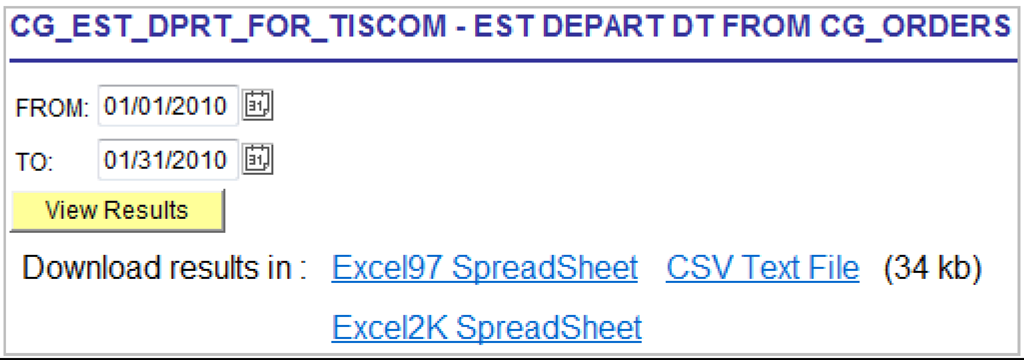


</td></tr>
</table>

Continued on next page

Pending PCS Orders Query, Continued

Procedure **(continued)**

Step	Action
3	The Query dialog will open in a new window. **Note**: Make sure to set the internet browser to allow "pop-ups" from this web site. • Enter a date range in the **FROM** and **TO** fields. The dates represent the dates the orders were last modified by the Assignment Officer (e.g. Approved or Cancelled) or the SPO (e.g. Departing Endorsement or Reporting Endorsement completed). • Click the **View Results** button. 
4	The query results will display. Select one of the "**Download results in...**" links to save the results. Close the query window or enter a new date range and execute another query.

Personnel Data Information File Report

Introduction

This section provides procedures for generating a Personnel Data Information File (PDIF) supplement for an individual member. The PDIF supplement shows the member's ASVAB test results, competencies, awards, education data, foreign language skills, and training.

Batch Printing or PDIF by Department

No batch printing or PDIF by department functionality is available at this time. We hope to add the capability to produce PDIFs for members by department, SPO or ISC in a future update to the program. The requirement in PPCINST M1000.2(series), Personnel and Pay Procedures Manual, page 5-C-6 for PERSRUs to provide units with PDIFs on a quarterly basis is suspended until batch printing is offered in Direct Access. Members may review their PDIF data using Direct Access Self-Service . SPOs should still provide PDIFs (on an individual basis) to members who do not have access to Direct Access. PDIFs should be sent within five working days of PCS reporting and upon request of the unit.

Most PDIF data is available on the other competency reports (which are offered by department capability).

- Accomplishment (Awards, Educations, ASVAB, etc.)
- Competency/Qualifications Report
- Training (school completion) Reports

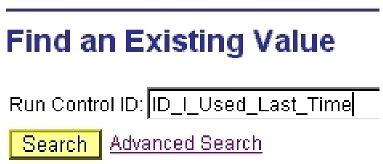
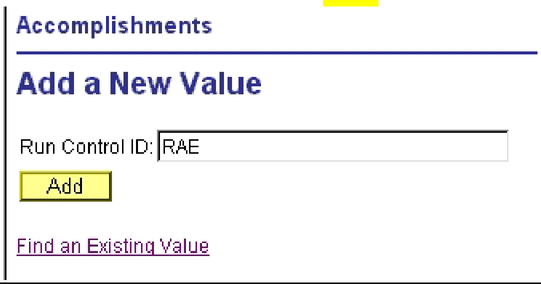
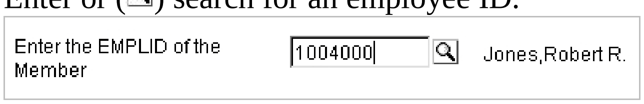
The Unit Recall Roster provides a listing of home addresses, phone numbers and email addresses for unit members.

Continued on next page

Personnel Data Information File Report, Continued

Procedure

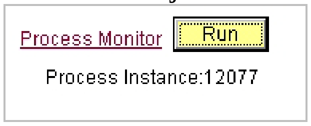
Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

Step	Action
1	From the Enterprise or Main menu, select the links: Develop Workforce > Manage Competencies (GBL) > Report > **PDIF**
2	**Finding the Run Control ID:** If the Run Control ID is known (e. g. This process has been used before), enter it in the space provided and click the Search button.  **Creating the Run Control ID**: If this report has not been run before, click the ***Add a New Value*** link (near the bottom of the page) and create a new Run Control ID. The ID can be any name wanted to identify the report by (no spaces are permitted). Click the Add button. Or, click the Add a New Value link to create a new Run Control ID. Enter a Run Control ID and click the Add button. 
3	Enter or ( ) search for an employee ID.  When choosing a member from the search results, please be sure it is the person that actually needs a data change. Verify the employee ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure to select the correct Employee Classification.

Continued on next page

Personnel Data Information File Report, Continued

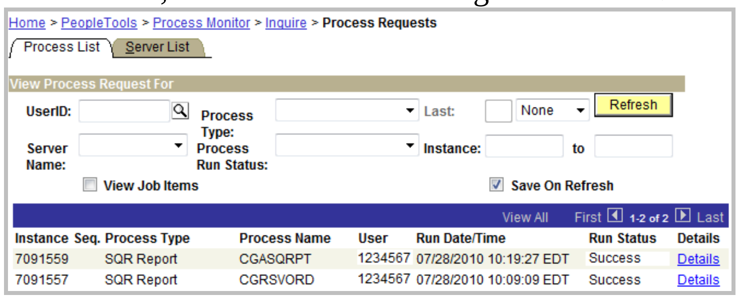
Procedure **(continued)**

Step	Action
4	Click the Run button and complete the Process Scheduler Request page.  • You may leave the Server Name drop-down blank. Click OK to continue. This will return the user to the report setup page. Note that a ***Process Instance Number*** has been added just below the Run button.  The Process Instance number is used in the **Process Monitor** to identify the request.

Continued on next page

Personnel Data Information File Report, Continued

Procedure **(continued)**

Step	Action
5	Click the ***Process Monitor*** link. The report will show a run status of "Queued" as it processes. Wait for the page to update automatically or press the **Refresh** button. When the report is finished, the run status will change to "Success."  Click the ***Details*** link to view additional information if the status shows as "error".
6	Please see the Using Process Scheduler's Web Delivery Option topic on page X-2-3 to view the report.
7	To save this report's criteria to use again, click the  button. If exiting without saving, the report will still run and be delivered via email.

Physical Characteristics Query

Introduction

This query is intended to provide departments with CG weight standard related details for everyone at their command. This is information that has been entered by the SPO using the Personal Data/Physical Characteristics page. Access to this query is limited to users with the Command User role.

Before you begin

Set Internet Explorer to Allow Pop-ups from the Direct Access site.

Procedure

Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

Step	Action
1	Select menu items in the following order: Enterprise/Main Menu > Direct Access PeopleTools > Query Manager > Use > **Query Manager**
2	The Find an Existing Query page will display. Click in the blank field to the right of "*begins with*" and enter "**CG_PHYS_**", then click the search button. 
3	Click the Run link in the search results section for the **CG_PHYS_CHAR_BY_ISC_HRS** query.

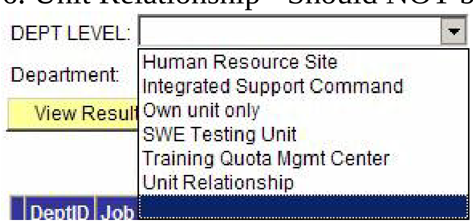
Continued on next page

Physical Characteristics Query, Continued

Procedure (cont'd)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>
The Query page will display in a new window. Enter the criteria and click the View Results button.
Enter the criteria for the query.

There are two blank fields waiting to be entered:
1. DEPT LEVEL and
2. Department

The DEPT LEVEL is a drop-down list. It contains 6 entries:
1. Human Resource Site - Okay to choose
2. Integrated Support Command - Okay to choose
3. Own Unit Only - Should NOT be chosen
4. SWE Testing Unit - Should NOT be chosen
5. Training Quota Mgmt Center - Should NOT be chosen
6. Unit Relationship - Should NOT be chosen


If the CG_PHYS_CHAR query was selected, enter the following:
<table>
<tr><th>Criteria</th><th>Description/Enter</th></tr>
<tr><td>Enter SetID of 'AUSCG'</td><td>Enter AUSCG, this selects Active units. Do not leave blank and do not enter anything else.</td></tr>
<tr><td>DeptID</td><td>Enter the Department ID number.

Use the lookup icon to search for the ID if necessary. This query is intended to be run by department, which will also include sub-departments.</td></tr>
</table>
</td></tr>
</table>

Continued on next page

Physical Characteristics Query, Continued

Procedure (cont'd)

Step	Action
5	The query results will display.

Field	Description
DeptID	ID for the member's assigned department or sub-department
Job Title	Rate/Rank
Name	Member's name (Last,First MI)
EMPLID	Member's Employee ID number
Empl Class	Employee Clarification (Regular or Reserve)
Height	Member's height in inches
Weight	Member's weight in pounds
Wgt Dt	Date the member was weighed
Maximum Allowable	The member's Maximum Allowable Weight per COMDTINST M1020.8 (series)
ID	Member's Employee ID number
Frame Size	*Member's body frame size (wrist measurement).* No longer required
Overweight	Y = Yes, N = No
Weight Ov	The number of pounds overweight
Description	Reason Weighed
Body Fat Pct	The member's body fat percentage
Max Body Fat Pct	The maximum allowable body fat percentage for the member as listed in COMDTINST M1020.8 (series)

Continued on next page

Physical Characteristics Query, Continued

Procedure (cont'd)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5
(cont.)</td><td>If the CG_PHYS_CHAR query was selected, the following fields will display:
<table>
<tr><th>Field</th><th>Description</th></tr>
<tr><td>DeptID</td><td>ID for the member's assigned department or sub-department</td></tr>
<tr><td>Descr</td><td>Description of the department ID</td></tr>
<tr><td>DOB Mnth</td><td>Date of birth - Month</td></tr>
<tr><td>Job Title</td><td>Rank/Rate</td></tr>
<tr><td>Name</td><td>Member's name (Last,First MI)</td></tr>
<tr><td>Empl Class</td><td>Employee Clarification (Regular or Reserve)</td></tr>
<tr><td>Frame Size</td><td>Member's body frame size (wrist measurement). No longer required</td></tr>
<tr><td>Height</td><td>Member's height in inches</td></tr>
<tr><td>Weight</td><td>Member's weight in pounds</td></tr>
<tr><td>Wgt Dt</td><td>Date the member was weighed</td></tr>
<tr><td>Weight Ov</td><td>The number of pounds overweight</td></tr>
<tr><td>Description</td><td>Reason Weighed</td></tr>
<tr><td>Maximum Allowable</td><td>The member's Maximum Allowable Weight per COMDTINST M1020.8 (series)</td></tr>
<tr><td>Body Fat Pct</td><td>The member's body fat percentage</td></tr>
<tr><td>Max Bdy Fat Pct</td><td>The maximum allowable body fat percentage for the member as listed in COMDTINST M1020.8 (series)</td></tr>
</table></td></tr>
<tr><td>6</td><td>Use the Download results in: Excel Spreadsheet or CSV Text File links to save a copy of the query to the local system.

Note: For best results, click on the CSV Text File link and select the Save option from the resulting dialog box. Then open the file with MS Excel.</td></tr>
<tr><td>7</td><td>Repeat Step 4 (above) to run the query for another department ID or close the window and return to the Query Manager page to select another query to run or to access another menu item.</td></tr>
</table>

Accessing/Printing Unit Members PDEs

Introduction

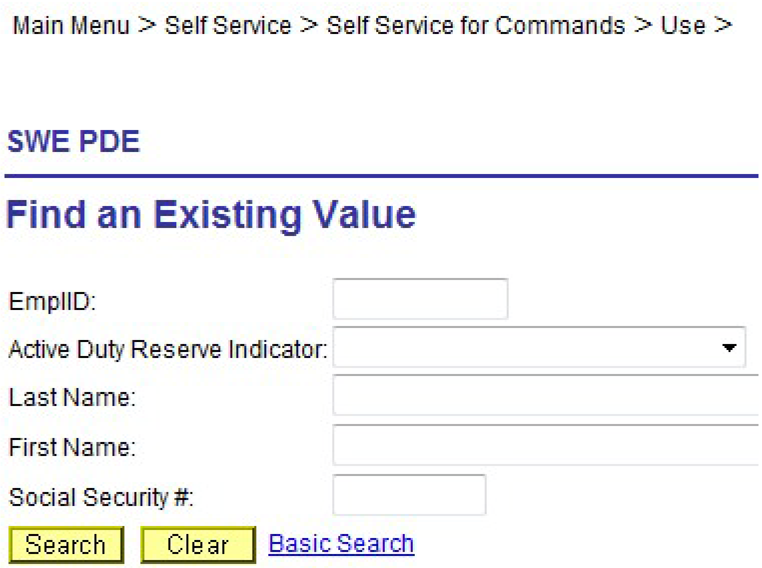
Field units now have the capability to view/print PDEs for their enlisted members. Once PPC (ADV) creates PDEs for a SWE cycle, the unit may follow the below steps. This process is available to DA users with "Self Service for Commands" access level and may be used on a For Official Use Only (FOUO) basis. The first method is to access a single PDE for an individual. The second is to run a report containing PDEs for members of a department or an entire command. Questions on these processes may be mailed to PPC-DG-ADV in MS Outlook Global.

Before you begin

See the View SWE Personal Data Extract topic for an explanation of the data fields on the PDE.

Accessing a PDE for an Individual Procedure

Follow the DA menu items: Enterprise/Main Menu>Self Service>Self Service for Commands>Use>SWE PDE. The below screen will appear:



Complete any of the search options to bring up the members online PDE. See the View SWE Personal Data Extract topic for an explanation of the data fields on the PDE.

This page left blank intentionally.

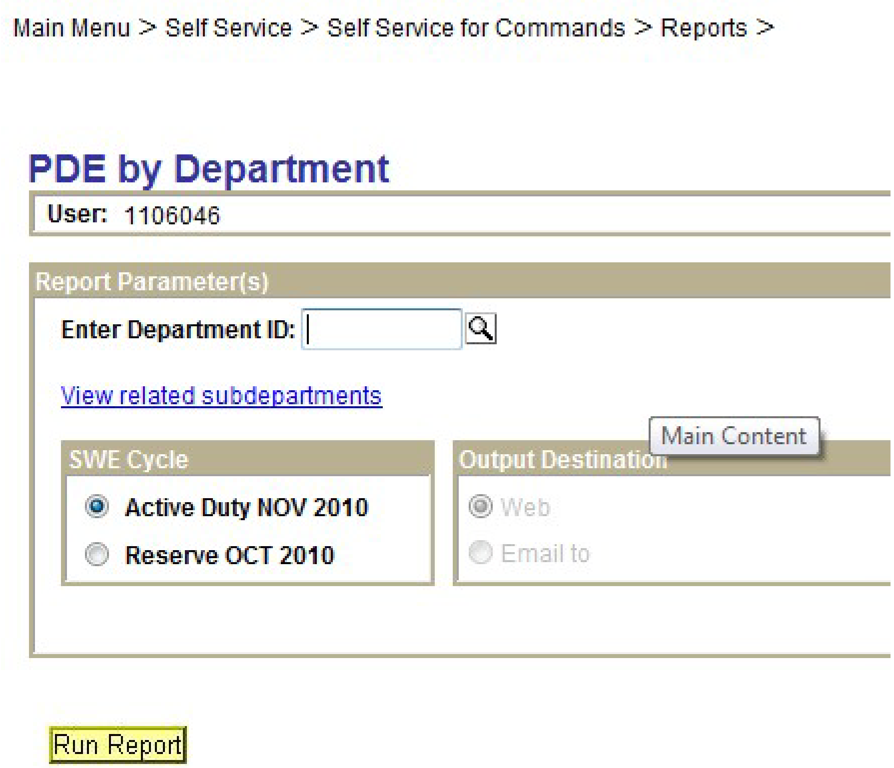
Printing SWE PDEs by Department

Introduction

PPC (ADV) will continue to print and mail PDEs to units for each SWE cycle. Eventually units may be given the option to receive printed PDEs from PPC or print their own.

Procedure

To print PDEs, follow the steps below.

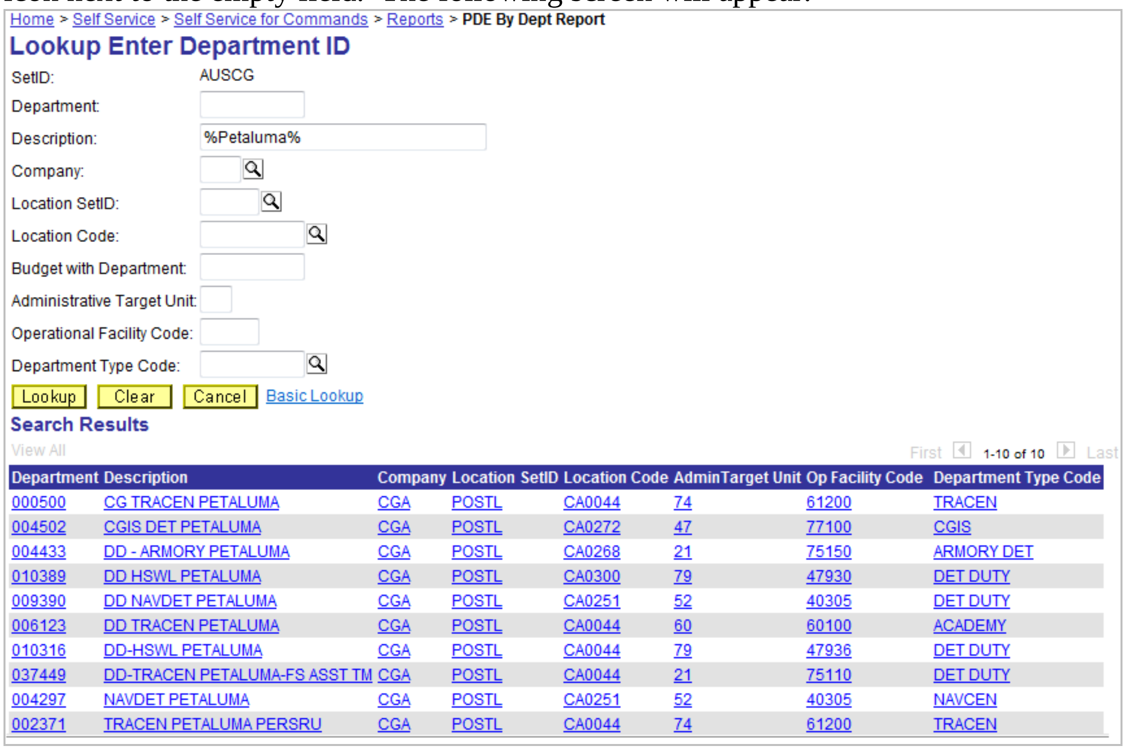
Step	Action
1	Log into DA, then access these menu items: Enterprise/Main Menu >Self Service>Self Service for Commands>Reports>PDE by Department. The following screen will appear:  **Note:** The box titled “SWE Cycle” will show which SWE PDEs are currently available. Only PDEs for the current SWE cycle will be available. Review the SWE Announcement message for PDE availability date.
2	The output destination will default to web and cannot be changed.

Continued on next page

Printing SWE PDEs by Department, Continued

Procedure **(continued)**

Step	Action
3	Enter Department ID field. This program uses department IDs rather than OPFACs. A unit has only one OPFAC but may have numerous departments with their own number. Each member is assigned to a department within a unit. Each unit also has a main or master department which will include all its sub-departments. So the main department ID may be selected to print all PDEs for the command, or individual departments may be selected. If the department ID is known, type it in the “Enter Department ID” field shown on the above screen shot. If unknown, click the lookup icon next to the empty field. The following screen will appear:


Home > Self Service > Self Service for Commands > Reports > PDE By Dept Report

Lookup Enter Department ID

SetID: AUSCG
Department:
Description: %Petaluma%
Company:
Location SetID:
Location Code:
Budget with Department:
Administrative Target Unit:
Operational Facility Code:
Department Type Code:

Lookup Clear Cancel Basic Lookup

Search Results

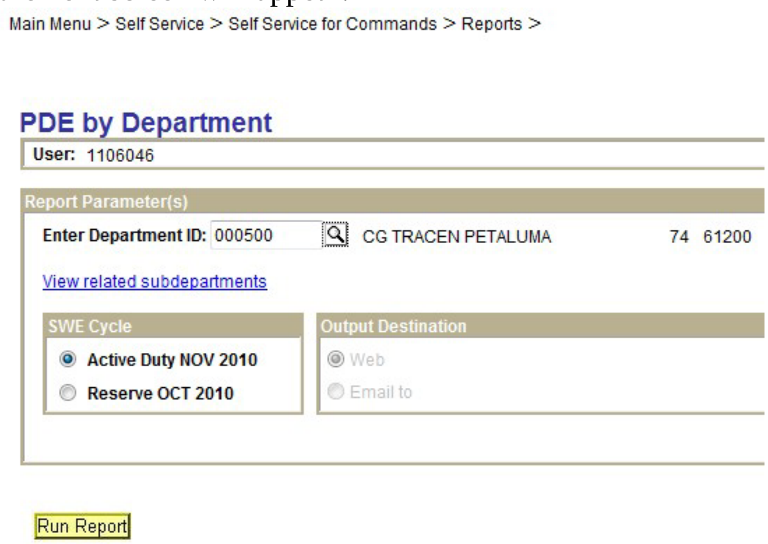
View All First 1-10 of 10 Last

Department	Description	Company	Location SetID	Location Code	AdminTarget Unit	Op Facility Code	Department Type Code
000500	CG TRACEN PETALUMA	CGA	POSTL	CA0044	74	61200	TRACEN
004502	CGIS DET PETALUMA	CGA	POSTL	CA0272	47	77100	CGIS
004433	DD - ARMORY PETALUMA	CGA	POSTL	CA0268	21	75150	ARMORY DET
010389	DD HSWL PETALUMA	CGA	POSTL	CA0300	79	47930	DET DUTY
009390	DD NAVDET PETALUMA	CGA	POSTL	CA0251	52	40305	DET DUTY
006123	DD TRACEN PETALUMA	CGA	POSTL	CA0044	60	60100	ACADEMY
010316	DD-HSWL PETALUMA	CGA	POSTL	CA0044	79	47936	DET DUTY
037449	DD-TRACEN PETALUMA-FS ASST TM	CGA	POSTL	CA0044	21	75110	DET DUTY
004297	NAVDET PETALUMA	CGA	POSTL	CA0251	52	40305	NAVCEN
002371	TRACEN PETALUMA PERSRU	CGA	POSTL	CA0044	74	61200	TRACEN

Continued on next page

Printing SWE PDEs by Department, Continued

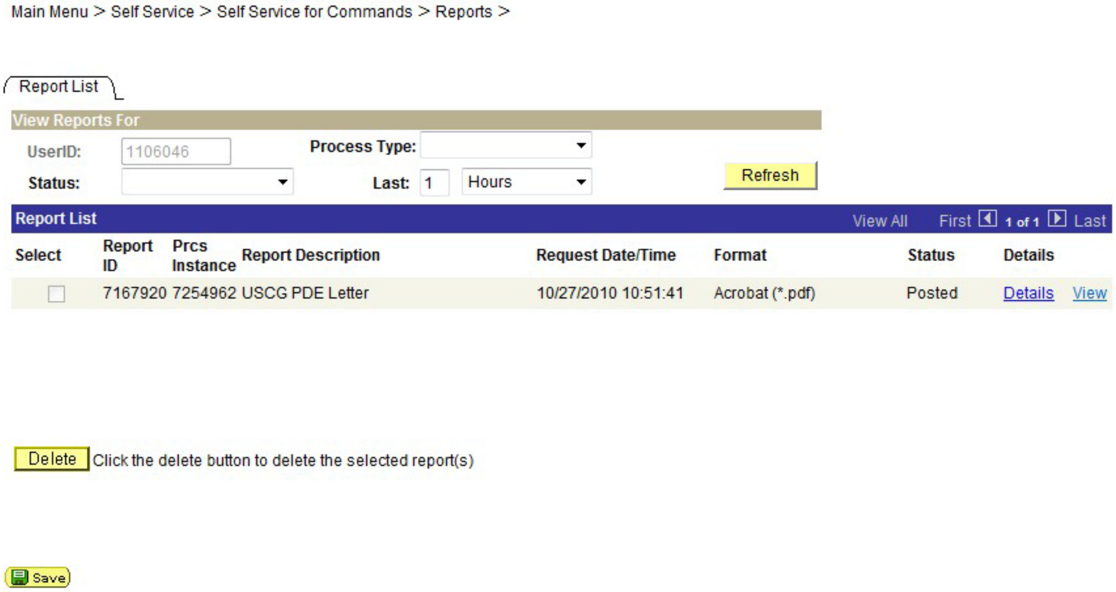
Procedure **(continued)**

Step	Action
4	This screen allows the user to look up the department ID. The above example shows a search being done using the “description” field by typing part of a name of a unit with a % on each end. This will search for any unit with these letters in it. The user may then select a department ID from the list provided at the bottom. In this example “CG TRACEN PETALUMA” is the parent command for the other TRACEN Petaluma departments. Selecting the parent command will print PDEs for all sub-departments, or each sub-department may be selected individually. A search for department IDs can also be done using the OFPAC or any other field. Click on the department ID link and the next screen will appear: 
5	If the screen shows the correct department, click the yellow “Run Report” button at the bottom left. The next screen will appear.

Continued on next page

Printing SWE PDEs by Department, Continued

Procedure **(continued)**

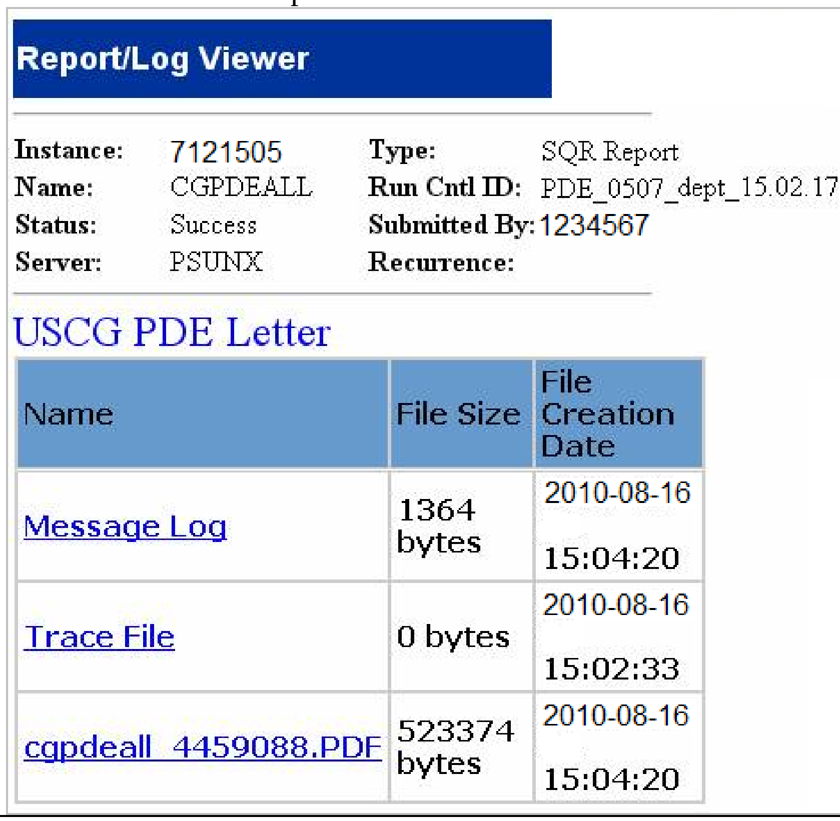
Step	Action
5	 1. Click OK to dismiss the message. 2. Allow the process to run for few minutes 3. Click the Refresh button to check the status. The status will change to Posted and a View link will appear when the process is completed. 4. Click the View link to view the report.

Continued on next page

Printing SWE PDEs by Department, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>The next screen will open in new window:



Report/Log Viewer

Instance:	7121505	**Type:**	SQR Report
Name:	CGPDEALL	**Run Cntl ID:**	PDE_0507_dept_15.02.17
Status:	Success	**Submitted By:**	1234567
Server:	PSUNX	**Recurrence:**	

USCG PDE Letter

Name	File Size	File Creation Date
Message Log	1364 bytes	2010-08-16 15:04:20
Trace File	0 bytes	2010-08-16 15:02:33
cgpdeall_4459088.PDF	523374 bytes	2010-08-16 15:04:20

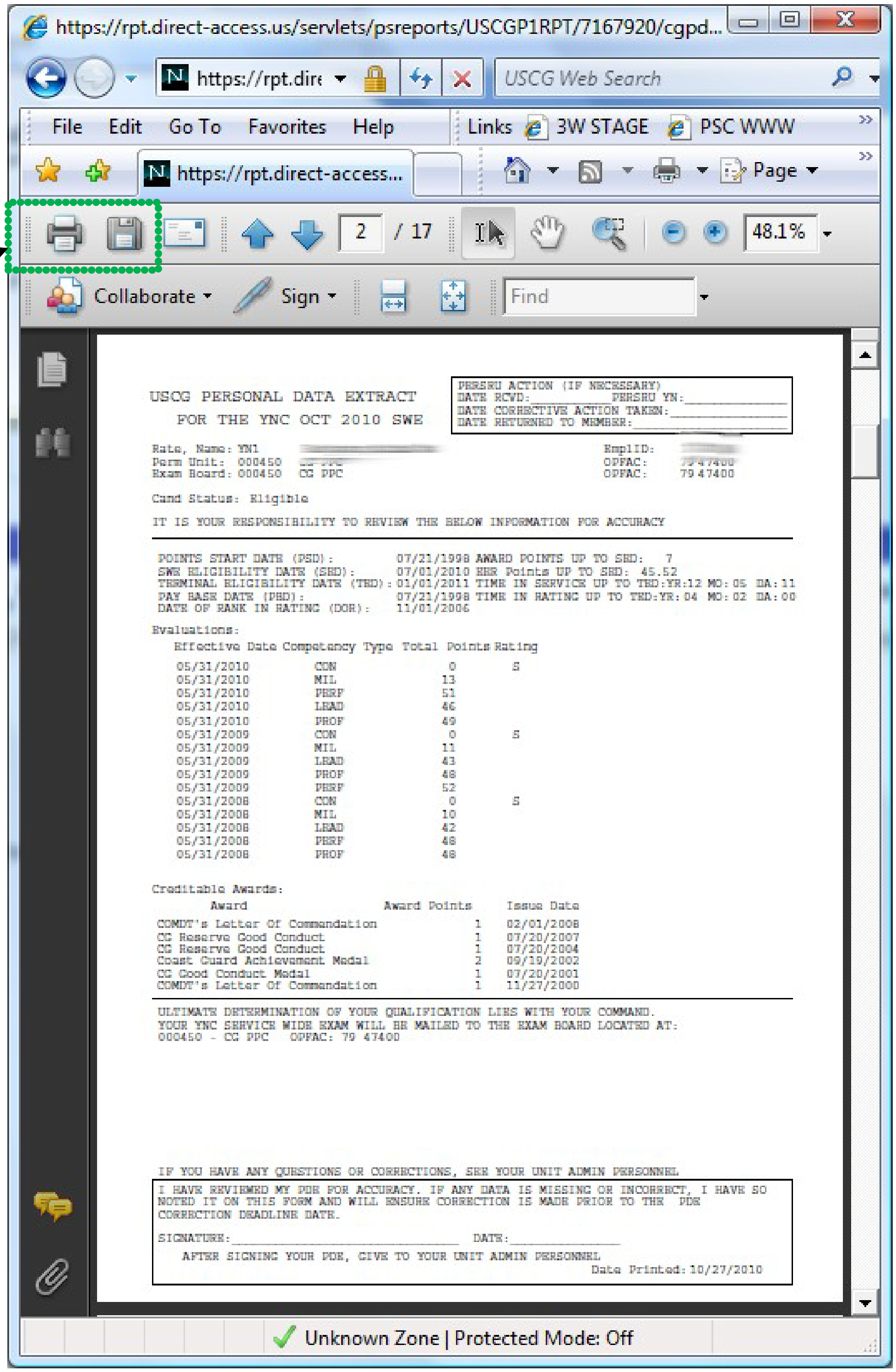
</td></tr>
<tr><td>7</td><td>Click on the link “cgpdeall….PDF” to open the file containing the PDEs. After the Adobe file opens, save and print the PDEs.</td></tr>
</table>

Continued on next page

Printing SWE PDEs by Department, Continued

Example SWE-PDE window:

Use these buttons/ icons to **Print** or **Save** PDF files.



Recall Roster

Introduction

The Recall Roster lists the home addresses, phone numbers and email addresses for regular, reserve and civilian personnel assigned to the unit. This query provides results for an individual unit. A similar query, which will provide results for all units within an ISCs or PERSRU(SPO)s area of responsibility is also available. See Recall Roster By ISC/HRS for more information.

Questions

Why doesn't the report list all unit personnel?
Only those members with at least one phone number (business, home, cell, etc.) entered in the system will appear on the report. If the member hasn't listed any contact numbers, they will not appear on the report.

Why are some personnel listed multiple times?
Each person will be listed once for each type of phone number (business, home, cell, etc.) and e-mail address they have entered in the system.

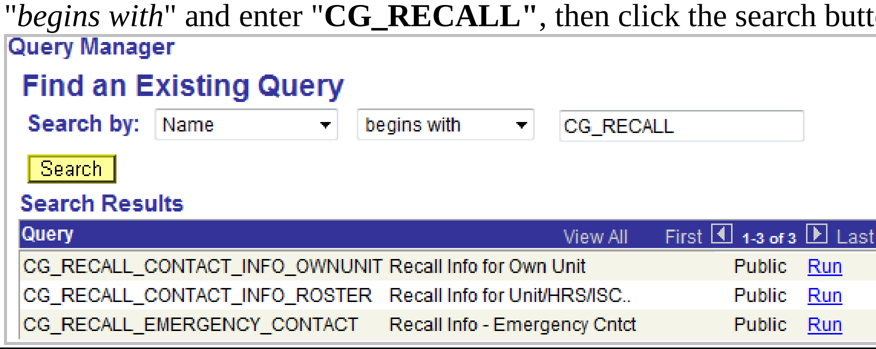
Before you begin

Set Internet Explorer to Allow Pop-ups from the Direct Access site.

Procedure

Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

Step	Action
1	Select menu items in the following order: Enterprise Menu/Main Menu > Direct Access PeopleTools > Query Manager > Use > **Query Manager**
2	The Find an Existing Query page will display. Click in the blank field to the right of "*begins with*" and enter "**CG_RECALL**", then click the search button.



Continued on next page

Recall Roster, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Click the Run link in the search results section for the CG_RECALL_CONTACT_INFO_OWNUNIT query.</td></tr>
<tr><td>4</td><td>The Query page will display in a new window. Enter the criteria and click the View Results button.
<table>
<tr><th>Criteria</th><th>Description/Enter</th></tr>
<tr><td>Enter SetID of 'AUSCG'</td><td>Enter AUSCG, this selects Active units. Do not leave blank and do not enter anything else.</td></tr>
<tr><td>DeptID</td><td>Enter the Department ID number.

Use the lookup icon to search for the ID if necessary.</td></tr>
</table></td></tr>
<tr><td>5</td><td>The query results will display. Use the Download results in: Excel Spreadsheet or CSV Text File links to save a copy of the query to the local system.

Note: For best results, click on the CSV Text File link and select the Save option from the resulting dialog box. Then, open the file with MS Excel.</td></tr>
</table>

Recall Roster by ISC/HRS

Introduction

The Recall Roster lists civilian, active duty and reserve members' home addresses, phone numbers and email addresses for units within an Integrated Support Command's or Servicing Personnel Office's area of responsibility. This query provides results by ISC/PERSRU(SPO). A similar roster, which provides results for an individual unit is also available, see Recall Roster.

Why doesn't the report list all unit personnel?
Only those members with at least one phone number (business, home, cell, etc.) entered in the system will appear on the report. If the member hasn't listed any contact numbers, they will not appear on the report.

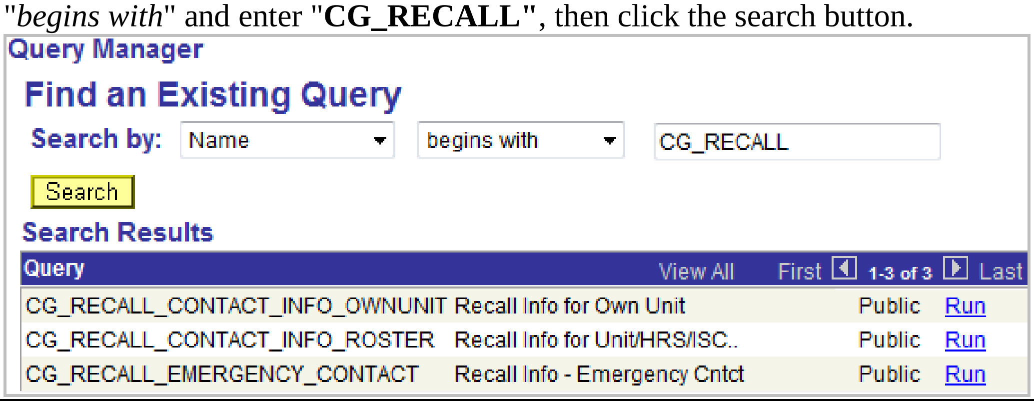
Why are some personnel listed multiple times?
Each person will be listed once for each type of phone number (business, home, cell, etc.) and e-mail address they have entered in the system.

Before you begin

Set Internet Explorer to Allow Pop-ups from the Direct Access site.

Procedure

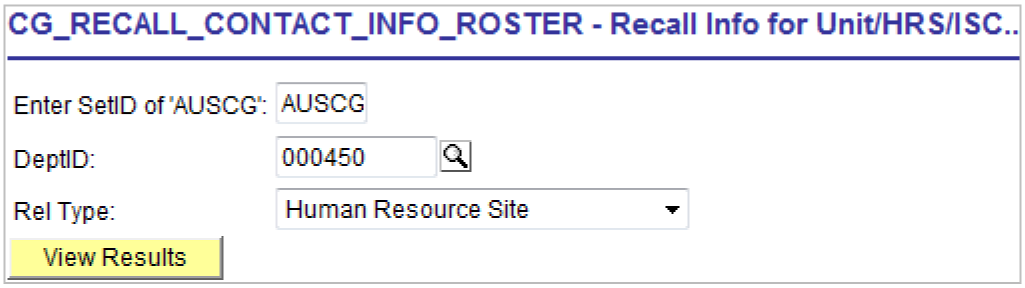
Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select menu items in the following order:
Enterprise/Main Menu > Direct Access PeopleTools > Query Manager > Use > Query Manager</td></tr>
<tr><td>2</td><td>The Find an Existing Query page will display. Click in the blank field to the right of "begins with" and enter "CG_RECALL", then click the search button.

</td></tr>
</table>

Continued on next page

Recall Roster By ISC/HRS, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>Select CG_RECALL_CONTACT_INFO_ROSTER and click the Run link in the search results section.</td></tr>
<tr><td>4</td><td>The Query page will display in a new window. Enter the criteria and click the View Results button.


<table>
<tr><th>Criteria</th><th>Description/Enter</th></tr>
<tr><td>Enter SetID of 'AUSCG'</td><td>Enter AUSCG, this selects Active units. Do not leave blank and do not enter anything else.</td></tr>
<tr><td>DeptID</td><td>Enter the ISC's or PERSRU's department ID number. Use the lookup icon to search for the ID if necessary.</td></tr>
<tr><td>Rel Type</td><td>Select the Relationship Type from the drop-down list.

Human Resource Site -- Will return results for all units in the HRS/PERSRU's AOR.
Integrated Support Command -- Will return results for all units in the ISC's AOR.
Other Relationship Types are not used in this procedure.</td></tr>
</table></td></tr>
<tr><td>5</td><td>The query results will display. Use the Download results in: Excel Spreadsheet or CSV Text File links to save a copy of the query to the local system.

Note: For best results, click on the CSV Text File link and select the Save option from the resulting dialog box. Then, open the file with MS Excel.</td></tr>
</table>

Request Courses Completed by ISC or SPO

Introduction

This section provides the procedure for running the Request Courses Completed by ISC or SPO query.

Description

This query provides a list of all personnel at a unit or for all units within an ISC's or SPO's area of responsibility and shows course begins and end dates for up to five course completions.

The following data fields are included:

EMPLID	NAME	RATE	PYGD	ATU	OPFAC	DEPTID	DEPT NAME	EMPL CLASS	COURSE	COURSE 1 TITLE	COURSE 1 START DATE	COURSE 1 COMPL DATE	COURSE	COURSE 2 TITLE	COURSE 2 START DATE

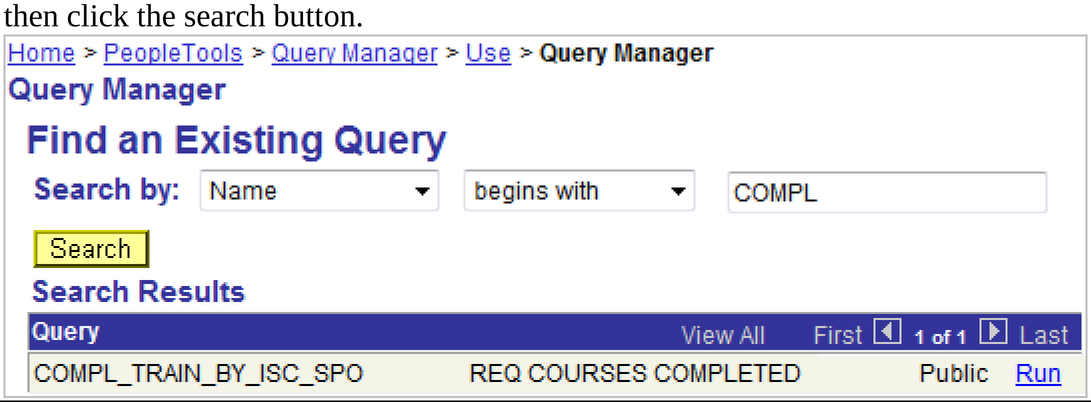
(data fields cont'd)

COURSE 2 COMPL DATE	COURSE	COURSE 3 TITLE	COURSE 3 START DATE	COURSE 3 COMPL DATE	COURSE	COURSE 4 TITLE	COURSE 4 START DATE	COURSE 4 COMPL DATE	COURSE	COURSE 5 TITLE	COURSE 5 START DATE	COURSE 5 COMPL DATE

Procedure

Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

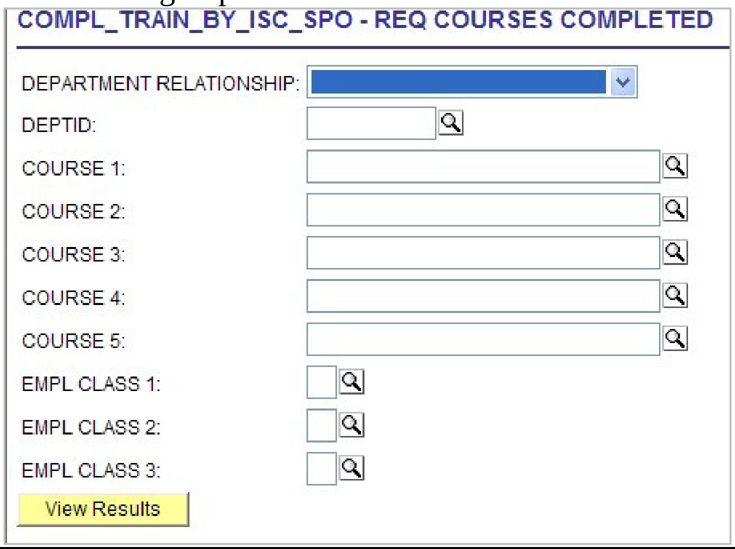
Step	Action
1	Select menu items in the following order: Enterprise Main/Menu > Direct Access PeopleTools > Query Manager > Use > **Query Manager**
2	The Query Manager page will display. Click in the blank field to the right of "*begins with*" and enter all or part of the query title "***COMPL_TRAIN_BY_ISC_SPO***"and then click the search button.



Continued on next page

Request Courses Completed by ISC or SPO, Continued

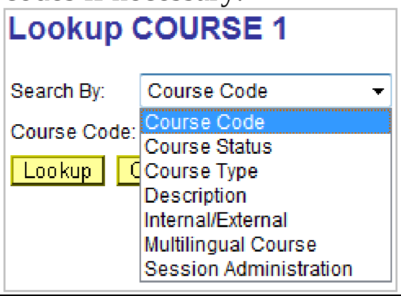
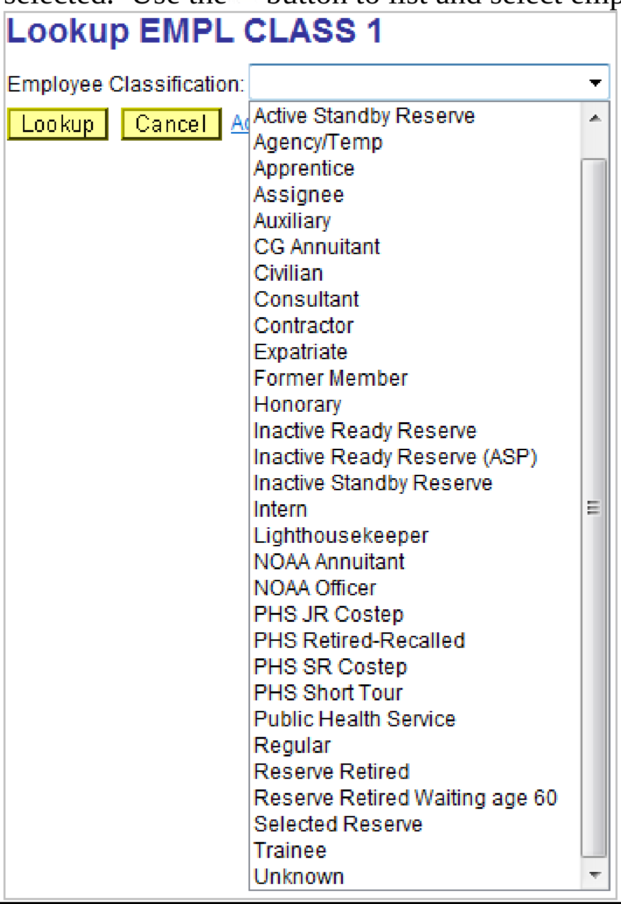
Procedure **(continued)**

Step	Action
3	Click the Run link for the COMPL_TRAIN_BY_ISC_SPO query.
4	The query page will open in a new window. Enter the search criteria as described in the following steps. 
5	Click the drop-down arrow in the **Department Relationship** field and select a relationship type. • **Human Resource Site**--Will return results for all units in the HRS/PERSRU's AOR. • **Integrated Support Command** -- Will return results for all units in the ISC's AOR. • **Own Unit Only** -- Will return results for the department ID number entered. • **Unit Relationship** -- If a unit relationship has been setup, will return results for the unit ID entered and related units. **Note**: Relationship Types are administered through the following menu: Home > Develop Workforce > Plan Successions (GBL) > Setup > **Dept Relationships** If the "Own Unit Only" relationship type does not provide any results, use the Dept Relationships maintenance menu and setup the Own Unit Only relationship. This is not established in the system for all units. It has to be setup at least once.
6	Enter the Department ID number in the **DEPID** field. Use the lookup icon to search for the ID if necessary.

Continued on next page

Request Courses Completed by ISC or SPO, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>Enter the course code (up to five may be entered). Use the button to search for codes if necessary.

</td></tr>
<tr><td>8</td><td>Select the Employee Class to report on. Up to three employee classes may be selected. Use the button to list and select employee classes.

</td></tr>
</table>

Continued on next page

Request Courses Completed by ISC or SPO, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9</td><td>Click the View Results button.</td></tr>
<tr><td>10</td><td>The query will run and the results will be shown in the lower portion of the window. Note that all personnel meeting the unit and employee class criteria specified will be listed, even if they have not completed all the courses entered. The course information will be shown to the right of the member's identifying data if the member has completed any of the courses requested.
<table>
<tr><th>RATE</th><th>PYGD</th><th>ATU</th><th>OPFAC</th><th>DEPTID</th><th>DEPT NAME</th><th>EMPL CLASS</th><th>COURSE</th><th>COURSE 1 TITLE</th><th>COURSE 1 START DATE</th><th>COURSE 1 COMPL DATE</th></tr>
<tr><td>ET1</td><td>E6</td><td>20</td><td>11407</td><td>000001</td><td>CGC GALLATIN</td><td>Regular</td><td>400469</td><td>CR/HRA SEXUAL HARASSMENT PREV</td><td>02/04/2010</td><td>02/05/2010</td></tr>
</table>
</td></tr>
<tr><td>11</td><td>The query results will display. Use the Download results in: Excel Spreadsheet or CSV Text File links to save a copy of the query to the local system.

Note: For best results, click on the CSV Text File link and select the Save option from the resulting dialog box. Then, open the file with MS Excel.</td></tr>
</table>

Reserve Orders Accounting Information Query

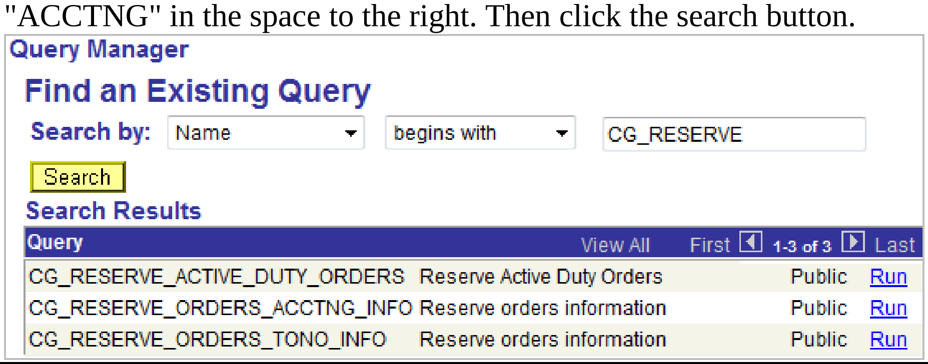
Introduction

The Reserve Orders Accounting Information query allows the user to query the system for details on a specific accounting string. The query will display the following information about the accounting string:

Field	Description
ID	Member's Employee ID Number
Empl Rcd#	Employee Record Number
Name	Member's Name
Seq Nbr	Order Sequence Number
Est Depart Dt	Orders begin date
Est Report Dt	Orders termination date
Duty Type	Reserve Duty Type
Duty Payment	Payment Type
PE	Program Element Code
Budget Dept	Department ID of unit funding orders
ASGN WF Stat	Status of orders
DeptID	Department ID of unit where member for active duty
TONO	Travel Order Number
Acct Line	Accounting string

Procedure

Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

Step	Action
1	Select menu items in the following order: Enterprise Main/Menu > Direct Access PeopleTools > Query Manager > Use > **Query Manager**
2	The Find an Existing Query page will display. Click in the blank field to the right of "*begins with*" and enter "**CG_RESERVE_ORDERS**", then click the search button. The user may also change the "*begins with*" entry to "*contains*" and type "ACCTNG" in the space to the right. Then click the search button. 

Continued on next page

Reserve Orders Accounting Information Query, Continued

Procedure **(continued)**

Step	Action
3	Click the Run link for the CG_RESERVE_ORDERS_ACCTNG_INFO query.
4	The Query page will display in a new window. Enter the accounting string and click the **View Results** button. 
5	The query results will display. Use the Download results in: Excel Spreadsheet or CSV Text File links to save a copy of the query to the local system. **Note:** For best results, click on the CSV Text File link and select the **Save** option from the resulting dialog box. Then, open the file with MS Excel.

Reserve Orders Information Report

Introduction

The Reserve Orders Information Report allows the user to query the system for information on reserve orders that have been issued.

Usage

This report can be used for many purposes. Here are some suggestions:

- Identify participants in a contingency operation,
- List orders in an "enroute" status after the orders termination date (indicating a need for the SPO to complete RELAD transactions), and
- Obtain a member's reserve active duty history.

Criteria

The report must meet the following data entry requirements.

At least one field must be populated with a valid value.

- Field ‘Include TONO/Accounting Line(s) must have a value of either Yes or No.
- If using either Estimated or Actual Dates, both Report and Depart Dates must be populated.
  - The date values will determine which set of Reserve Active Duty Orders were valid for that period.
  - i.e. Actual Dates Entered 1-JUN-2010 1-JUL-2010
    - The returned set will be all Reserve Active Duty Orders that:
    - Start on or before 1-JUN-2010 and end on or after 1-JUL-2010
    - Start on or after 1-JUN-2010 and end on or before 1-JUL-2010
    - Start on or before 1-JUN-2010 and end on or before 1-JUL-2010
    - Start on or after 1-JUN-2010 and end on or after 1-JUL-2010

Procedure

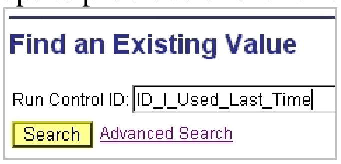
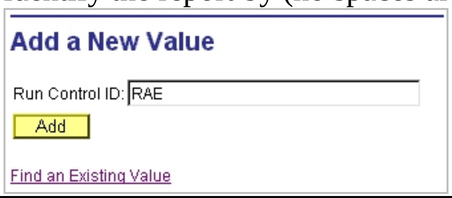
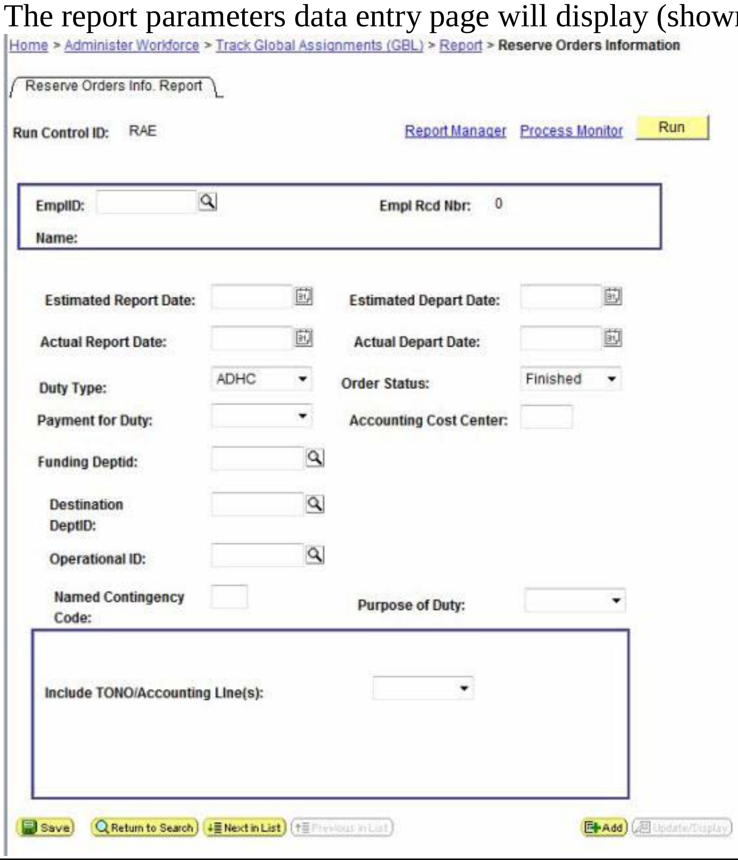
Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

Step	Action
1	Select menu items in the following order: Enterprise/Main Menu > Administer Workforce >Track Global Assignments (GBL) > Report > **Reserve Orders Information**

Continued on next page

Reserve Orders Information Report, Continued

Procedure **(continued)**

Step	Action
2	If the Run Control ID is known (e. g. The process has been used before), enter it in the space provided and click the Search button.  If this report has not been run before, click the ***Add a New Value*** link (near the bottom of the page) and create a new Run Control ID. The ID can be any name wanted to identify the report by (no spaces are permitted). Click the Add button. 
3	The report parameters data entry page will display (shown below): 

Continued on next page

Reserve Orders Information Report, Continued

Procedure **(continued)**

Step	Action
4	Enter the criteria for this report. Refer to the table below for guidance on completing the available fields.

Field	Use to	OK to leave blank?	Enter
EmplID	Limit the report results to an individual member.	Yes	The member's employee ID number
Estimated Depart Date	Used in conjunction with Estimated Depart Date	Yes	Reserve Orders Estimated Begin Date.
Estimated Report Date	Used in conjunction with Estimated Report Date	Yes	Reserve Orders Estimated End Date.
Actual Report Date	Used in conjunction with Actual Depart Date	Yes	Reserve Order Actual Begin Date
Actual Depart Date	Used in conjunction with Actual Report Date	Yes	Reserve Order Actual End Date
Duty Type	Limit the report results to show only orders for a specified duty type (ADT, Title 10, ADOS-AC, etc.)	Yes	Selection from drop-down menu
Order Status	Limit the report results to show only orders in the status specified	Yes	Selection from drop-down menu
Payment for Duty	Limit the report results to show only orders with payment type specified	Yes	Selection from drop-down menu
Accounting Cost Center	Limit the report results to show only orders chargeable to the cost center specified.	Yes	The five digit cost center code.

Continued on next page

Reserve Orders Information Report, Continued

Procedure **(continued)**

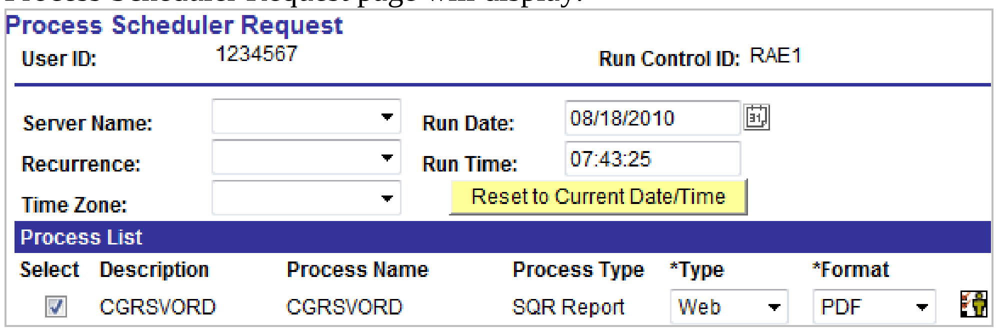
Step	Action
4	(continued from previous page)

Field	Use to	OK to leave blank?	Enter
Funding Deptid	Limit the report results to show only orders chargeable to/funded by the department ID specified.	Yes	The funding unit's department ID number from Search box.
Destination Deptid	Limit the report results to show only orders for members reporting to the department ID specified.	Yes	The unit's department ID number from Search box.
Operational ID	Limit the report results to show only orders issued for the operational ID specified.	Yes	The Operational ID for the Contingency Code from Search box.
Named Contingency Cpde	Limit the report results to show only orders with the Contingency Code specified.	Yes	The Contingency Code specified by DoD.
Purpose of Duty	Limit the report results to show only orders with the purpose code specified.	Yes	Selection from the drop-down menu
Include TONO/Accounting Line(s)	Limit the number of lines returned for each Reserve Active Duty Order.	No	Will determine if applicable Accounting Lines are returned or not. Yes – Return Accounting Lines No - Do Not return Accounting Lines
Note: If "Yes" is selected, the Travel Order Nbr and Accounting line fields will appear.			
Travel Order Nbr	Limit the report results to show only orders with the specific Travel Order Number.	Yes	The specific Travel Order Number selected from the Search box.
Accounting Line	Limit the report results to show only orders with the specific Accounting Line.	Yes	The specific Accounting Line selected from the Search box.

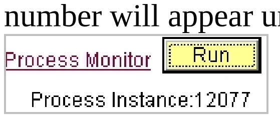
Continued on next page

Reserve Orders Information Report, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>Click the Run button to begin processing.</td></tr>
<tr><td>6</td><td>The Process Scheduler Request page will display.


Follow the Using Process Scheduler Web Option instructions to receive the report in Microsoft Excel or CSV file format.</td></tr>
<tr><td>7</td><td>Change the *Type field to "Web". Set the *Format field to "PDF" or “CSV”.

Click OK to continue. This will return to the Process Scheduler Request page.
Click OK on the Process Scheduler Request page.</td></tr>
<tr><td>8</td><td>The Reserve Orders Information Report page will display again. A "Process Instance" number will appear under the Process Monitor link.

</td></tr>
<tr><td>9</td><td>Please see the Using Process Scheduler's Web Delivery Option topic on page X-2-3 to view the report.</td></tr>
<tr><td>10</td><td>Repeat steps 4 through 6 to run the report with different parameters if desired.</td></tr>
</table>

This page left blank intentionally.

Reserve Orders TONO Information Query

Introduction

The Reserve Orders TONO Information query allows the user to query the system for details on a specific travel order document number. The query will display the following information about the TONO number:

Field	Description
ID	Member's Employee ID Number
Empl Rcd#	Employee Record Number
Name	Member's Name
Seq Nbr	Order Sequence Number
Est Depart Dt	Orders begin date
Est Report Dt	Orders termination date
Duty Type	Reserve Duty Type
Duty Payment	Payment Type
PE	Program Element Code
Budget Dept	Department ID of unit funding orders
ASGN WF Stat	Status of orders
DeptID	Department ID of unit where member for active duty
TONO	Travel Order Number
Acctg Line	Accounting string

Procedure

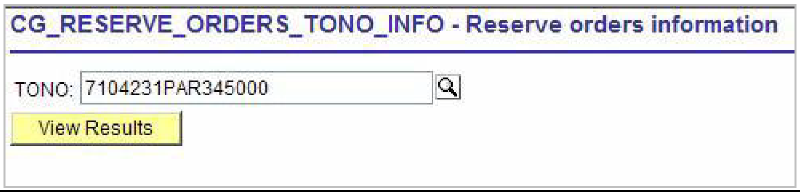
Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

Step	Action
1	Select menu items in the following order: Enterprise Main/Menu > Direct Access PeopleTools > Query Manager > Use > **Query Manager**
2	The Find an Existing Query page will display. Click in the blank field to the right of "*begins with*" and enter "**CG_RESERVE_ORDERS**", then click the search button. Also, the user can change the "*begins with*" entry to "*contains*" and type "TONO" in the space to the right, then click the search button. 

Continued on next page

Reserve Orders TONO Information Query, Continued

Procedure **(continued)**

Step	Action
3	Click the Run link in the search results section.
4	The Query page will display in a new window. Enter the TONO number and click the **View Results** button. 
5	The query results will display. Use the Download results in: Excel Spreadsheet or CSV Text File links to save a copy of the query to the local system. **Note:** For best results, click on the CSV Text File link and select the **Save** option from the resulting dialog box. Then open the file with MS Excel.

Senior Enlisted Academy Course Completion Query

Introduction

This section provides the procedure for running the Senior Enlisted Academy Course Completion Query.

Description

CG-Wide Senior Enlisted Academy Course Completion Queries are available for both active and reserve component members. There is also a query for (both active and reserve) for all units in an ISC's or SPO's area of responsibility. The queries return a list of **all members in pay grades E7, E8, or E9**. If the member has completed one or more of the following senior enlisted courses, the course completion date will be shown in the appropriate column.

- USCG CPO ACADEMY
- USCG RESERVE CPO ACADEMY
- USAF SEN NCO ACADEMY
- USN SEN NCO ACADEMY
- US ARMY SGT MAJ ACADEMY

The results include the course completion date. If the course title/completion dates are blank, the member has not attended a senior enlisted academy.

The following data fields are included

	EMPLID	NAME	RATE	PYGD	DATE OF RANK	ATU	OPFAC	DEPTID	DEPT NAME	EMPL CLASS

(data fields cont'd)

CPO ACADEMY	COMPL DATE	CPO ACADEMY RESERVE	COMPL DATE	USAF SEN NCO ACADEMY	COMPL DATE	USN SEN NCO ACADEMY	COMPL DATE	ARMY SGT MAJ ACADEMY	COMPL DATE

The course completion date is shown to the right of the course title:

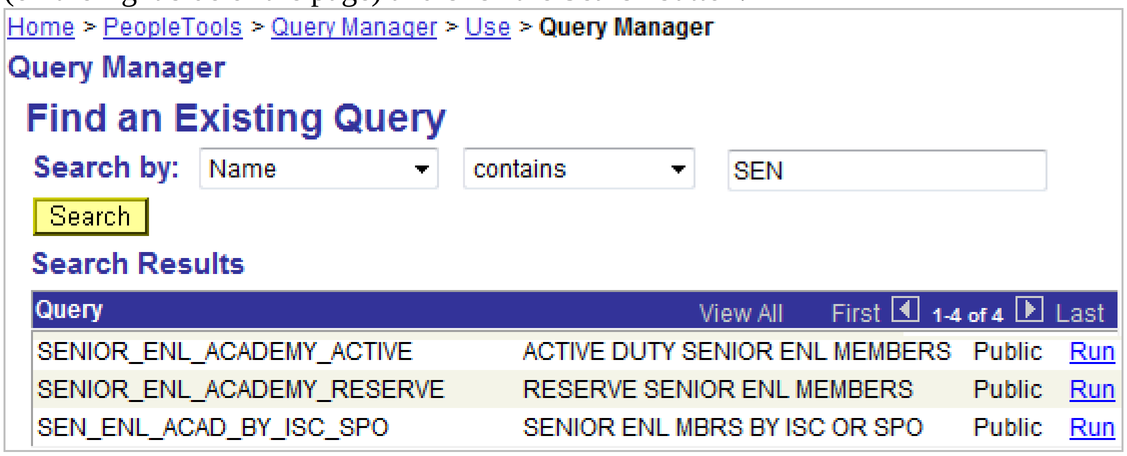
EMPL CLASS	CPO ACADEMY	COMPL DATE
SELRES		
SELRES		
SELRES		
SELRES	CPO ACADEMY	06/30/2010

Continued on next page

Senior Enlisted Academy Course Completion Query, Continued

Procedure

Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select menu items in the following order: Enterprise Main/Menu > Direct Access PeopleTools > Query Manager > Use > Query Manager</td></tr>
<tr><td>2</td><td>The Query Manager page will display. Enter all or part of the query title in the text box (on the right side of the page) and click the Search button.


<table>
<tr><th>Select…</th><th>For a list of</th></tr>
<tr><td>SENIOR_ENL_ACADEMY_ACTIVE</td><td>Active Duty graduates of a Senior Enlisted Academy</td></tr>
<tr><td>SENIOR_ENL_ACADEMY_RESERVE</td><td>Reserve graduates of a Senior Enlisted Academy</td></tr>
<tr><td>SEN_ENL_ACAD_BY_ISC_SPO</td><td>Active AND Reserve graduates of a Senior Enlisted Academy at a unit or all units within a selected ISC/SPO's area.</td></tr>
</table></td></tr>
<tr><td>3</td><td>Click the Run link for the query to execute. The Active and Reserve queries will run and the results will display in a new window.</td></tr>
</table>

Continued on next page

Senior Enlisted Academy Course Completion Query, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>
If selecting the SEN_ENL_ACAD_BY_ISC_SPO query, the user will need to select a relationship type and provide the department ID number for the unit, ISC or SPO (HRS Relationship type).

<table>
<tr><th>Criteria</th><th>Description/Enter</th></tr>
<tr><td>DEPT Rel Type</td><td>
Click the drop-down arrow in the Department Relationship field and select a relationship type.

• Human Resource Site--Will return results for all units in the HRS/PERSRU's AOR.
• Integrated Support Command -- Will return results for all units in the ISC's AOR.
• Own Unit Only -- Will return results for the department ID number entered.
• Unit Relationship -- If a unit relationship has been setup, will return results for the unit ID entered and related units.
Note: Relationship Types are administered through the following menu:
Home > Develop Workforce > Plan Successions (GBL) > Setup > Dept Relationships

If the "Own Unit Only" relationship type does not provide any results, use the Dept Relationships maintenance menu and setup the Own Unit Only relationship. This is not established in the system for all units. It has to be setup at least once.
</td></tr>
<tr><td>REQ DEPTID</td><td>Enter the Department ID number.
Use the lookup icon to search for the ID if necessary.</td></tr>
</table>

After setting the criteria, hit the View Results button.
</td></tr>
</table>

Continued on next page

Senior Enlisted Academy Course Completion Query, Continued

Procedure **(continued)**

Step	Action
5	The query results will display. Use the Download results in: Excel Spreadsheet or CSV Text File links to save a copy of the query to the local system. **Note:** For best results, click on the CSV Text File link and select the **Save** option from the resulting dialog box. Then open the file with MS Excel.

SPO Exception Report

Introduction

An application has been developed in Direct Access that integrates a number of JUMPS Exception Processes into one area. This reduces the effort needed to work exceptions and provide more timely exception information to the SPO. As part of the Direct Access application for the JUMPS Exception Process, we have developed a SPO Exception Page. This allows the SPOs to begin viewing information on exceptions, which need their attention in a more timely fashion.

Process

Here's an overview of the process:

Stage	Description
1	The DA/JUMPS production cycle runs and exception data is loaded into DA. Exception data from the previous update cycle is marked as "inactive" and is no longer viewable by SPOs.
2	PPC begins working exceptions through the DA Exception Punch Process application. If an exception needs the attention or further action by the SPO, PPC has a field they will set to indicate there is a SPO responsibility. Once that field is set showing a SPO responsibility, the SPO will be able to view it through their DA application. PPC (MAS) will notify SPOs by e-mail, when error feedback information is available in DA. Negative reports (e. g. No SPO responsibility errors) will also be provided. **Note:** SPOs do not need to wait for e-mail notification to begin working errors. The information will be accessible by the SPO when PPC sets the responsibly field. E-mail notification will not be sent until all errors are worked by PPC.
3	The SPO brings up the SPO Exception application and searches for exceptions in their area of responsibility that have been assigned to them by PPC. The page will show information about the exception and a Notes section, which details the action that needs to be taken by the SPO.
4	The SPO takes corrective action as described in the Notes section of the exception application and sets the responsibility field to "SPO Action Complete".

Continued on next page

SPO Exception Report, Continued

Description

Transactions input by SPOs (through the Direct Access system) are processed by PPC to update the pay system (JUMPS). PPC batches the transmitted input from SPOs, and approximately weekly, performs an update cycle. A schedule of update cycles is provided by ALSPO message on an annual basis.

Each transaction input for an update cycle must pass through a series of edit checks to ensure that the transaction is valid. If the transaction fails an edit check, it will reject and be recorded in the JUMPS Exception Punch Process.

PPC (MAS) Exception Reporting Team (ERT) members will analyze each rejected transaction on the JUMPS Exception Punch Process to determine the cause of the error and necessary corrective action. The corrective action may consist of PPC (MAS):

- Recycling the transaction,
- Initiating action to resolve the invalid condition, or
- Reporting the error back to the SPO for appropriate corrective action.

See instructions below for accessing the report in DA.

SPO Action

The SPO is responsible for reviewing the SPO Exceptions Report and correcting invalid documents. SPOs will only be able to view current production cycle exceptions. Therefore, SPOs must take corrective action prior to the next update cycle.

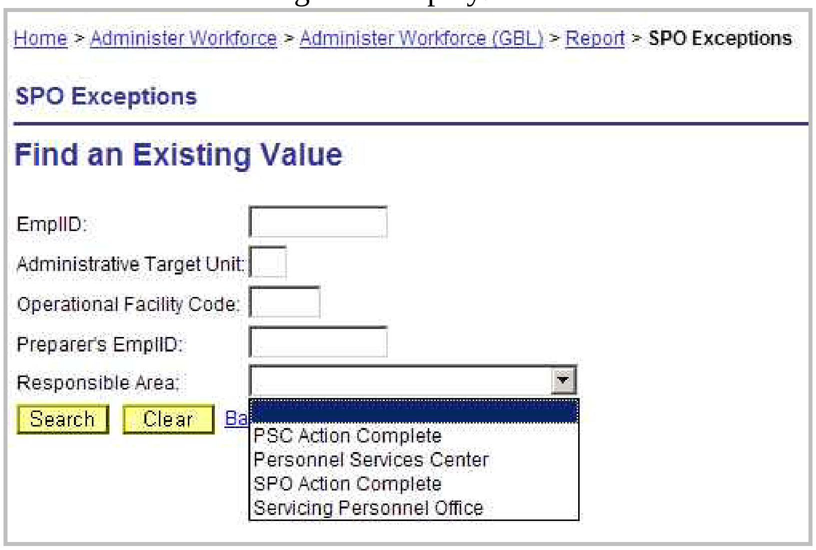
Corrective action may consist of:
- Correcting the original transaction,
- Deleting the transaction, or
- Submitting additional transactions to allow processing of the original transaction.

Any allotments or pay entitlement starts, stops, or changes appearing on the JUMPS Exception Report which have not processed may lead to the member being overpaid or underpaid. Anytime the member's pay will reflect an overpayment/underpayment resulting from a transaction not processing, notify the member via his/her unit.

Continued on next page

SPO Exception Report, Continued

Procedure Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

Step	Action
1	From the Enterprise Menu, select menu items in the following order: Administer Workforce > Administer Workforce (GBL) > Report > **SPO Exceptions**
2	The Search Criteria Page will display.  Error reports are viewable by: • The member's employee ID number (EmpliD) • The SPO's OPFAC (District and/or OPFAC number) • The employee ID of the person who prepared the transaction • Responsible Area (**Note:** Only ***Servicing Personnel Office*** or ***SPO Action Complete*** will return any results for SPO users). Complete at least one of the search criteria fields and click the Search button

Continued on next page

SPO Exception Report, Continued

Procedure **(continued)**

Step	Action
3	Select the error record to view from the search results.

EmplID	Process Date	SEQUENCE NUMBER	Administrative Target Unit	Operational Facility Code	Preparer's EmplID	Responsible Area
1234567	08/12/2010	1	79	47913	7654321	SPO
1111111	08/12/2010	1	79	47925	1111112	SPO
2222222	08/12/2010	1	79	47915	3333333	SPO

When choosing a member from the search results, please be sure it is the person that actually needs a data change. Verify the employee ID before making any changes. Also, since one member can have multiple records if they're both a Regular or Reserve Member and an Auxiliary Member or Civilian Employee, please be sure to select the correct Employee Classification.

Search Results Fields

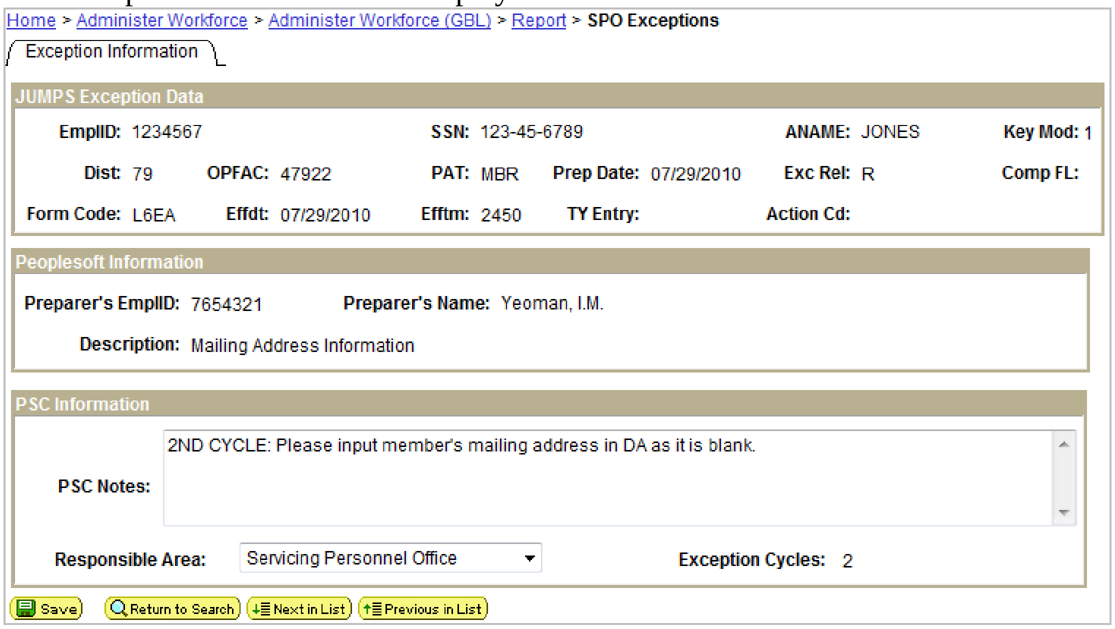
Field	Description
EmplID	The member's employee ID number
Process Date	Date of the JUMPS update/compute cycle
Sequence Num	Number of records for this member in this process cycle
Administrative Target Unit	The ATU/District of the SPO submitting the transaction
Operational Facility Code	The OPFAC of the unit where the SPO is located
Preparer's EmplID	The employee ID number of the person who submitted the transaction.
Responsible Area	• SPO for "Servicing Personnel Office", indicating an item that the SPO needs to take action on. • SAC for "SPO Action Complete, indicating that the SPO has reviewed the item and taken action.

Continued on next page

SPO Exception Report, Continued

Procedure **(continued)**

Step	Action
4	The Exception Information will display.



Home > Administer Workforce > Administer Workforce (GBL) > Report > **SPO Exceptions**

Exception Information

JUMPS Exception Data

EmplID: 1234567 **SSN:** 123-45-6789 **ANAME:** JONES **Key Mod:** 1

Dist: 79 **OPFAC:** 47922 **PAT:** MBR **Prep Date:** 07/29/2010 **Exc Rel:** R **Comp FL:**

Form Code: L6EA **Effdt:** 07/29/2010 **Efftm:** 2450 **TY Entry:** **Action Cd:**

Peoplesoft Information

Preparer's EmplID: 7654321 **Preparer's Name:** Yeoman, I.M.

Description: Mailing Address Information

PSC Information

PSC Notes: 2ND CYCLE: Please input member's mailing address in DA as it is blank.

Responsible Area: Servicing Personnel Office **Exception Cycles:** 2

Save | Return to Search | Next in List | Previous in List

JUMPS Exception Data Fields	
EmplID	The member's employee ID number
SSN	The member's social security number
ANAME	First five letters of the member's last name
Key Mod	Key Mode. For system/PPC use only.
Dist	District Code
OPFAC	Operational Facility Code
PAT	Personnel Actions Transmittal.
Prep Date	Date of the transmittal
Exc Rel	Exception Release Code. For system use only/or for PPC use only.
Comp FL	Compute Flag. For system use only/or for PPC only.

Continued on next page

SPO Exception Report, Continued

Procedure **(continued)**

Step	Action
4 cont.	Field/Descriptions cont.

JUMPS Exception Data Fields (continued)	
Form Code	Code describing the JUMPS transaction form type: L25B Officer Personnel Change transaction L30B Rough Order transaction L45B Advance Authorization transaction L61B Entry into the Coast Guard (Enlistment Contract) transaction (DD Form 4/1) L62B Discharge to Immediately Reenlist transaction (DD Fm 4/1) L63B Leave Reporting transaction (CG-2519) L64B BAQ Dependency/Emergency Data transaction (CG-4170A) L65B Active Duty Initial Information transaction L66B Officer Uniform Allowance transaction L67B Personnel Action transaction L68B PCS Departing, PCS Reporting, RELAD, and Retirement transactions L6AB NJP and Court Martial transactions L6BB Family Separation - Housing (FSH) and Family Separation Allowance (FSA) transaction L6DB Allotment Authorization transaction L6EB Tax Information transaction L6FB Statement of Intent transaction L6GB Payment Option Election transaction L6HB Military Payroll Money List (offline payments of advance pay to a member) L6KB Clothing and Small Stores Checkage Transaction
Effdt	Effective Date
Efftm	Effective Time
TY Entry	Type of entry: Blank = Original "C" = Correction "D' = Deletion
Action Code	JUMPS Action Code. Refer to Part IX of this manual for a listing of Action Codes.

Continued on next page

SPO Exception Report, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4
cont.</td><td>
<table>
<tr><th colspan="2">PeopleSoft Information Fields</th></tr>
<tr><td>Preparer's EmplID</td><td>Employee ID Number of the person submitting the transaction</td></tr>
<tr><td>Description</td><td>Description of the transaction type</td></tr>
<tr><th colspan="2">PPC Information Fields</th></tr>
<tr><td>PPC Notes</td><td>Action required by the SPO prior to the next update cycle. Explanatory remarks keyed in by the PPC (MAS), Exception Reporting Team (ERT).</td></tr>
<tr><td>Responsible Area</td><td>A drop-down menu showing the status of the error record.
• SPO for "Servicing Personnel Office", indicating an item that the SPO needs to take action on.
• SAC for "SPO Action Complete, indicating that the SPO has reviewed the item and taken action.
Note: There are other options on this menu. However, only "Servicing Personnel Office" or "SPO Action Complete" can be selected. The other options are for PPC use only.</td></tr>
<tr><td>Exception Cycles</td><td>Number of cycles this error has been reported</td></tr>
</table>
</td></tr>
<tr><td>5</td><td>View the error information and take action as described in the PPC Notes section to correct the error. After corrective action has been completed, set the Responsible Area field to "SPO Action Complete" and click the Save button.

Utilize the Return to Search Next in List Previous in List buttons to return to the search page, view the next error report or view the previous error report.</td></tr>
</table>

Travel Charge Card Report

Introduction

The Travel Charge Card Report provides government travel charge card coordinators and unit administrators ('Command Users' - those with the CGSSCMD user role) with access to view the travel charge card account balances (including amounts past due), credit limits and other details for all members and employees at a unit/department.

Access

Command Users have access to this report. This report may also be accessed by users with the stand-alone **'CGCCAOPC'** role. The **'CGCCAOPC'** role also permits access to the Credit Card Data and Business Expenses page to users who do not need full Command User access. The **'CGCCVW'** role is for users who only need access to the Business Expenses and Credit Card Data pages and not the Travel Charge Card Report.

Procedure

Please see the Travel Charge Card Command Area Coordinators User Guide (PDF) for the procedure for running this report. The guide can be accessed from the DA online help (http://www.uscg.mil/ppc/ps) by selecting the Travel Charge Card folder in the table of contents.

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Run Training by Department Queries

Introduction:

This section will explain the process of running training queries. The queries provide listings of members' training history, correspondence course completions and the status of requested training.

Description

There are four training queries:

1. **Class A and C School** - Shows completed, cancelled, missed, requested and pending (enrolled) formal Class "A" and "C" school course status.
2. **Correspond Crs** - Shows Coast Guard Institute correspondence courses completed.
3. **Other** - Shows unit (non-Class "A" or "C" School) training completed. *Example* -- Civil Rights/Sexual Harassment Prevention training.
4. **CG_TRNG_1540_LIST** - For a given date range, displays all scheduled Class "A"/"C" session dates and locations.

All users should review the Electronic Training Request Interactive Tutorial to familiarize themselves with the terminology and new navigation involved. Information on the tutorial and other general navigation information is located on the training page.

Access (Roles)

The user must be a Training Officer or PERSRU/HRS user to access these queries.

Before You Begin

Be sure to take the Electronic Training Request interactive tutorial before using the system.

Please understand these queries only return results for the people assigned to the department ID number entered in the query request. For smaller units, like cutters and stations, this is not an issue as these units only have one department ID number. However, larger units (Groups, Air Stations, ISCs, Districts, headquarters units, etc.) will have several department ID numbers, the parent department ID and sub-department IDs for divisions, branches and detachments. Large departments will need to run the queries for each sub-department ID associated with the unit's OPFAC (Operational Facility Code) number.

Continued on next page

Run Training by Department Queries, Continued

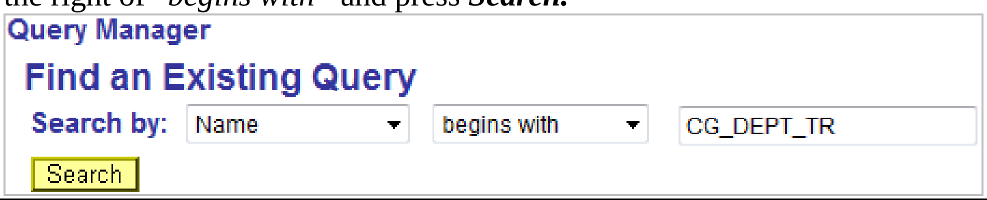
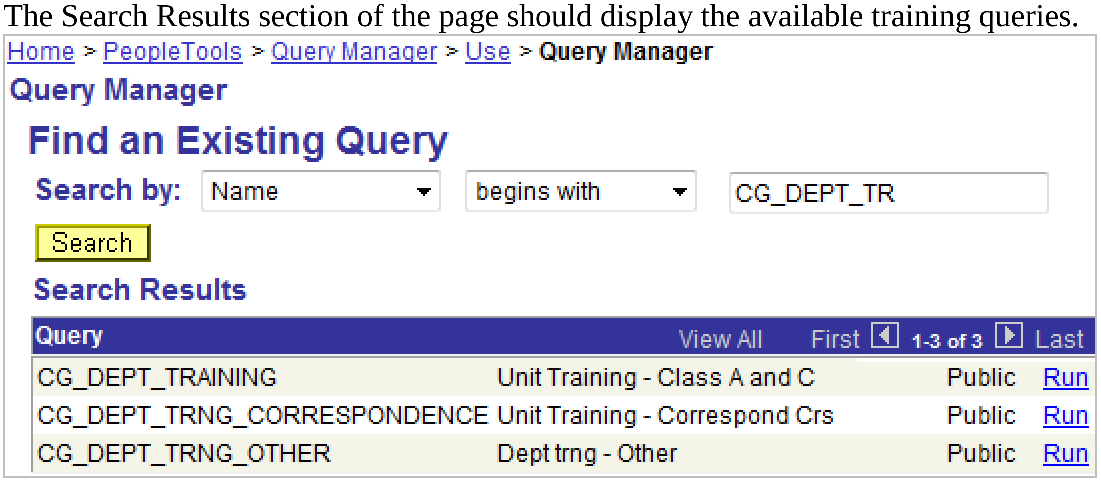
Changes/ Corrections/ Cancellations

Electronic training requests cannot be modified or deleted by the training officer after they are submitted.

The training officer, who needs to modify any piece of the ETR, or withdraw it altogether must contact the course scheduler. The course scheduler should be listed in the "course description" block of the ETR. If this information is missing for Class "C" schools, the training officer should use the POC list on TQC's website (USCG Training Quota Management Center (TQC). If the POC can't be determined (<5% of the time), an email or phone call to TQC should resolve the issue (there are links and phone numbers on TQC's web site). Contact CGPSC (epm) (202-267-1027) for Class "A" school changes.

Procedure

Follow these steps to run a training query.

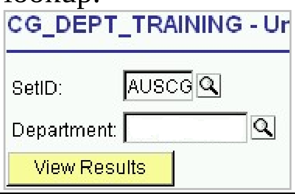
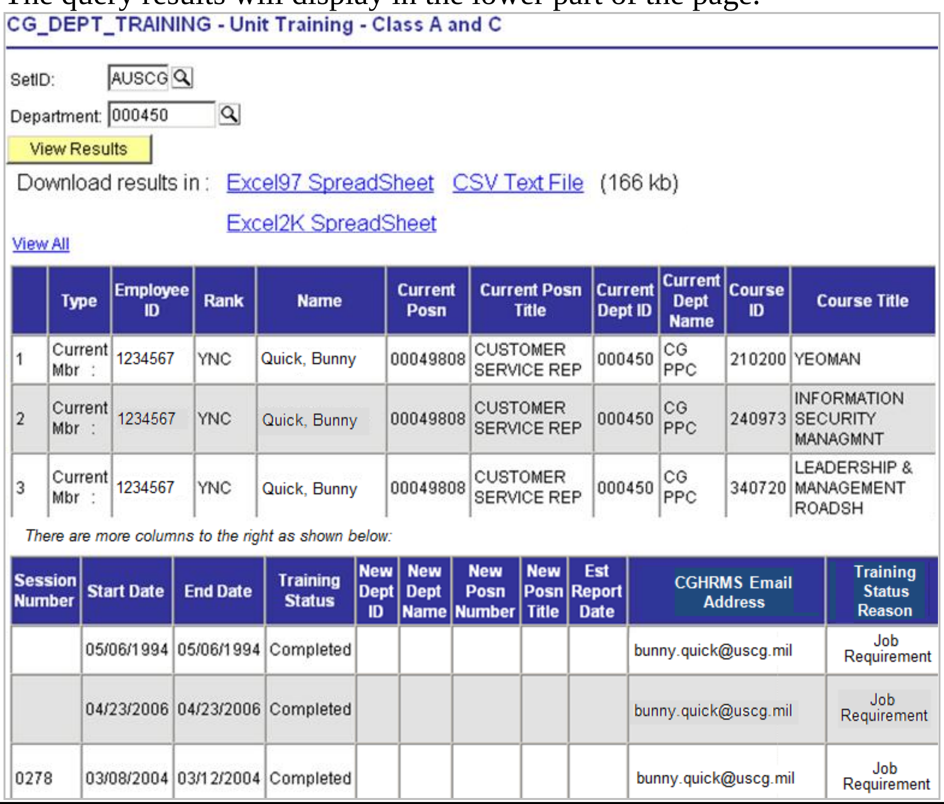
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Sign into MyPortalDirect and select the following from the Enterprise or Main menu:
Direct Access PeopleTools > Query Manager > Use > Query Manager</td></tr>
<tr><td>2</td><td>The Query Manager search page will display.
Enter CG_DEPT_TR or CG_TRN_1540 (for the 1540 listing) in the blank field to the right of "begins with" and press Search.

</td></tr>
<tr><td>3</td><td>The Search Results section of the page should display the available training queries.


Click on the word Run to the right of the name of the query to run.</td></tr>
</table>

Continued on next page

Run Training by Department Queries, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>The query request page will display in a new window (the Query Manager page will remain open).
Enter AUSCG as the Set ID (always use ALL CAPS) and enter a department ID number. If the department ID number is unknown, click the button to perform a lookup.

</td></tr>
<tr><td>5</td><td>Click the View Results button to run the query.</td></tr>
<tr><td>6</td><td>The query results will display in the lower part of the page.

CG_DEPT_TRAINING - Unit Training - Class A and C
SetID: AUSCG
Department: 000450
View Results
Download results in : Excel97 SpreadSheet CSV Text File (166 kb)
Excel2K SpreadSheet
View All</td></tr>
</table>

	Type	Employee ID	Rank	Name	Current Posn	Current Posn Title	Current Dept ID	Current Dept Name	Course ID	Course Title
1	Current Mbr :	1234567	YNC	Quick, Bunny	00049808	CUSTOMER SERVICE REP	000450	CG PPC	210200	YEOMAN
2	Current Mbr :	1234567	YNC	Quick, Bunny	00049808	CUSTOMER SERVICE REP	000450	CG PPC	240973	INFORMATION SECURITY MANAGMNT
3	Current Mbr :	1234567	YNC	Quick, Bunny	00049808	CUSTOMER SERVICE REP	000450	CG PPC	340720	LEADERSHIP & MANAGEMENT ROADSH

There are more columns to the right as shown below:

Session Number	Start Date	End Date	Training Status	New Dept ID	New Dept Name	New Posn Number	New Posn Title	Est Report Date	CGHRMS Email Address	Training Status Reason
	05/06/1994	05/06/1994	Completed						bunny.quick@uscg.mil	Job Requirement
	04/23/2006	04/23/2006	Completed						bunny.quick@uscg.mil	Job Requirement
0278	03/08/2004	03/12/2004	Completed						bunny.quick@uscg.mil	Job Requirement

Continued on next page

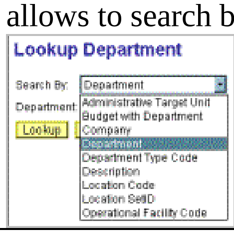
Run Training by Department Queries, Continued

Procedure **(continued)**

Step	Action
7	The **Training Status** field could be completed, request, enrolled, etc. The **New Dept ID** field indicates the "ordered into" department. The **Est Report Date** field shows the estimated report date for the new department. The **Training Status Reason** field shows the status reason (e.g., denied and the reason, session full - reapply, etc.). To download a query to Excel, press the ***An Excel Spreadsheet*** link.
8	To run another query, close the current window (the Query Manager page will still be displayed), select the query from the list, enter any requested criteria, and press the ***View Results*** button. To perform another function, choose the item from the menu.

Looking Up Department ID Numbers

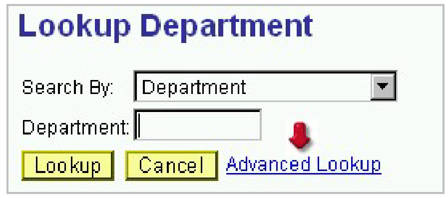
To look up Department ID Numbers perform the following steps

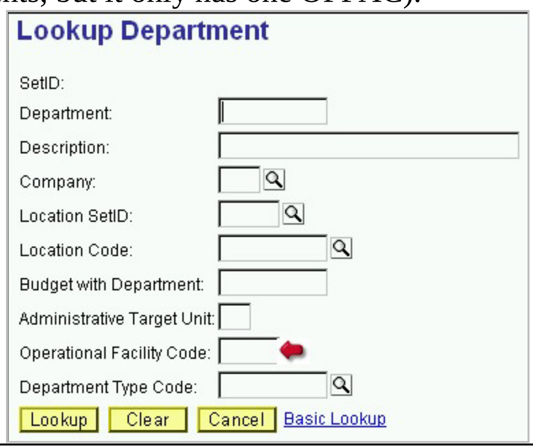
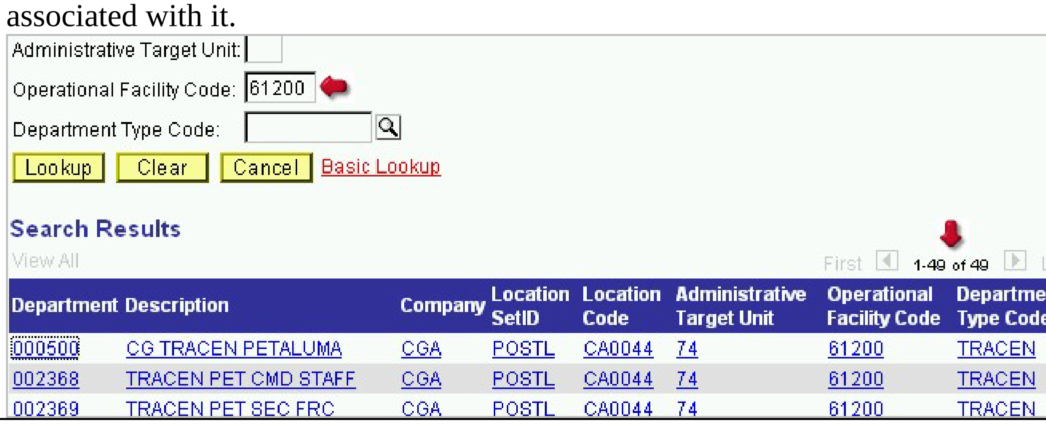
Step	Action
1	If the department ID is unknown, click the magnifying glass. (Note: The user must enter AUSCG in the SetID field, before clicking the button.) A simple department lookup allows to search by pre-set options available in the drop-down list. 
2	Select the option desired. On Department, the user may enter all or part of the department number and press Lookup. Any available departments with the numbers entered will return on a list.
3	If the location is known (but no part of the department number), select the ***Advanced Search*** link. This will allow the user to search for departments using a greater range of criteria. It’s suggested that the user 1- does a search of key words in the description of the department (e.g., %Baltimore) or 2- searches by department type (e.g., unit, group, STA, etc.). Remember that use of the % symbol will return any department with a description that contains "Baltimore". Review and select the department needed from the list or continue to run new search criteria until finding the appropriate department.

Continued on next page

Run Training by Department Queries, Continued

Looking Up Department ID Numbers **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>To ensure that to get a list of all the sub departments associated with a parent department use the Advanced Search link ....


...and search by the parent department's Operational Facility Code (OPFAC) number (a unit may have many sub departments, but it only has one OPFAC).

</td></tr>
<tr><td>5</td><td>Click the Lookup button. If the unit has multiple department ID numbers they will all be listed based on the OPFAC number entered.
Example: The OPFAC for TRACEN Petaluma (61200) has 49 department ID numbers associated with it.

</td></tr>
<tr><td>6</td><td>Print the lookup results for easy access and return to Step 4 (above) to complete the query request.</td></tr>
</table>

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Unit Roster

Introduction

The Unit Roster, delivered via a report in CSV (MS Excel spreadsheet format), provides a listing of all personnel (including civilians and PHS Officers) and positions at a department. The roster includes:

Field	Description
EmplID	Employee's ID Number
Rank	Rank/Rate
Grade	Paygrade
Member Name	Name (Last, First M)
Employee Class	Member Type (Regular/Reserve/Civilian/PHS)
DeptID	Department ID Number
Dept Name	Name of Department
ATU	Administrative Target Unit (District/Area)
OPFAC	Operational Facility Code
Exp Loss Dt	Date mbr is expected to be discharged/retired (N/A for civilians & PHS)
Exp AD Term Dt	Expected Active Duty Termination date (N/A for civilians & PHS)
Rotate Dt	Rotation date (N/A for civilians)
Birthdate	Date of birth (N/A for civilians)
AD Base Dt	Active Duty Base Date (N/A for civilians & PHS)
Date of Rank	Effective date of rank (N/A for civilians)
Report Date	Date reported to current department ID (N/A for civilians)
Trning Rate	Reserve Training Rating (Reserve Only)
Anniv Date	Reserve Anniversary Date (Reserve Only)
Cost Center	Cost Center (for contingency operations)
Sea Pay Prem Dt	Date Career Sea Pay Premium started (N/A for civilians & PHS)
BAH/BAQ	Basic Allowance for Housing entitlement (N/A for civilians & PHS)
RES Screen Dt	Date of last Reserve Annual Screening Questionnaire (Reserve Only)
CUM Sea Time	Cumulative Sea Time (N/A for civilians & PHS)
Mar Stat	Marital Status (N/A for civilians)
Ethnic Group	Ethnic Group (N/A for civilians)
Last Good Con Dt	Date of last Good Conduct Award (N/A for civilians & PHS)
Position Nbr	Position number (BCN)
Posn Entry Dt	Date entered current position
Gender	Male/Female
POSNSEN	Position Sensitivity (N/A for civilians) Examples: Moderate, Critical, Non-Critical, Moderate, Low Risk
POSNCLRNC	Position Security Clearance Requirement (N/A for civilians) Example: None, Secret
MBRCLRNC	Member Security Clearance (N/A for civilians)
CITZN	Member Citizenship (N/A for civilians)

Continued on next page

Unit Roster, Continued

Introduction Continued

Field	Description
Leave Balance	Leave Balance (as of the most recent JUMPS end-month compute, e. g. Doesn't reflect leave that has not yet processed through JUMPS). (N/A for civilians & PHS)
Obligation	Shows reason for obligated service if member has extended or obligated for a reason other than their own request at normal end of enlistment. Examples: TA = Tuition Assistance PG SCHOOL = Post Graduate School CSRB = Critical Skills Retention Bonus
Effdt	Date member incurred obligated service (blank if Obligation field is blank)
Duration	Number of months obligated service (0 if Obligation field is blank)

FYI

The Unit Roster can be requested in a CSV file. CSV files can be imported into a spreadsheet or local database application.

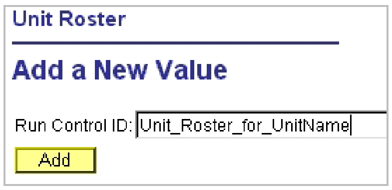
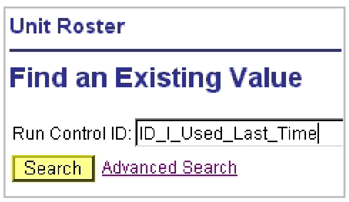
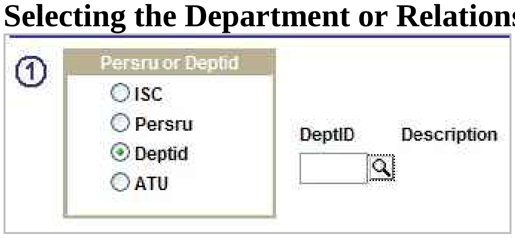
Note

The CSV format is the only working file format. Recent changes to the report included the addition of several columns of occupational data. The PDF and HTM file formats cannot accommodate the additional data.

Continued on next page

Unit Roster, Continued

Procedure Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

Step	Action
1	From the Enterprise or Main menu, select menu items in the following order: Administer Workforce > Administer Workforce (GBL) > Report > **Unit Roster**
2	**Finding or Creating the Run Control ID**: If this report has not been run before, click the ***Add a New Value*** link (near the bottom of the page) and create a new Run Control ID. The ID can be any name wanted to identify the report by (no spaces are permitted). Click the Add button.  If the Run Control ID is known, enter all or part of it and click the Search button.  Select the Run Control ID from the search results.
3	**Selecting the Department or Relationship criteria:**  Select the ISC, PERSRU (SPO), Deptid, or ATU radio button and enter the department ID or ATU number (if that option was selected) number. Use the icon to search for the department ID/ATU if necessary. • ***ISC***, will include rosters for all units associated with ISC department number entered. • ***PERSRU***, will include rosters for all units associated with SPO department number entered. • ***Deptid***, will produce a roster for each department number entered. Use the + or − buttons to add/remove department IDs. • **ATU** will produce a roster for all units with that ATU prefix (Example: ATU 01 for First Coast Guard District)

Continued on next page

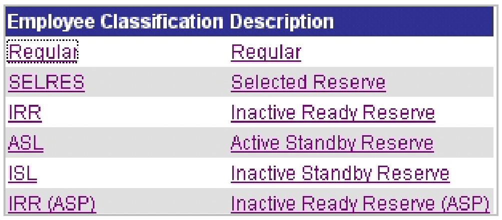
Unit Roster, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>

Selecting the Employee Class:

The user may select one or more employee classes for the roster **or leave this field blank for all classes**. Use the icon to lookup available classes.


<table>
<tr><th>Employee Classification</th><th>Description</th></tr>
<tr><td>Regular</td><td>Regular</td></tr>
<tr><td>SELRES</td><td>Selected Reserve</td></tr>
<tr><td>IRR</td><td>Inactive Ready Reserve</td></tr>
<tr><td>ASL</td><td>Active Standby Reserve</td></tr>
<tr><td>ISL</td><td>Inactive Standby Reserve</td></tr>
<tr><td>IRR (ASP)</td><td>Inactive Ready Reserve (ASP)</td></tr>
</table>

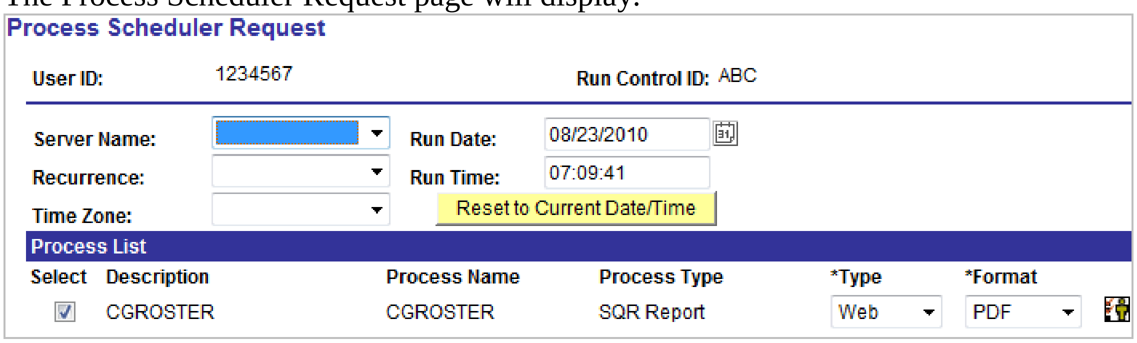
IRR, IRR(ASP), ASL, ISL reservists will be listed under the ISC responsible for the area in which their members reside.

Use the + or − buttons to add/remove employee classes.

Note: Civilians and PHS members will appear only if the user leaves the employee class option as blank.

</td></tr>
<tr><td>5</td><td>Click the Run button and complete the Process Scheduler Request page.</td></tr>
<tr><td>6</td><td>

The Process Scheduler Request page will display.



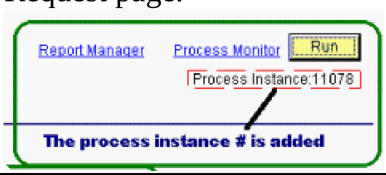
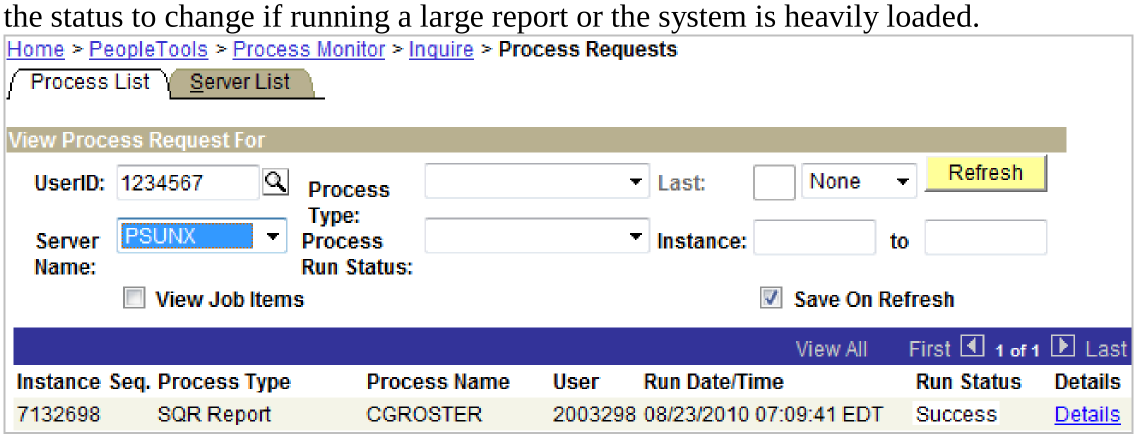
</td></tr>
<tr><td>7</td><td>Select **Web** from the Type drop down menu.</td></tr>
</table>

Continued on next page

Unit Roster, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>Select the file format. Not all file formats are supported by all reports, CSV is the most reliable.

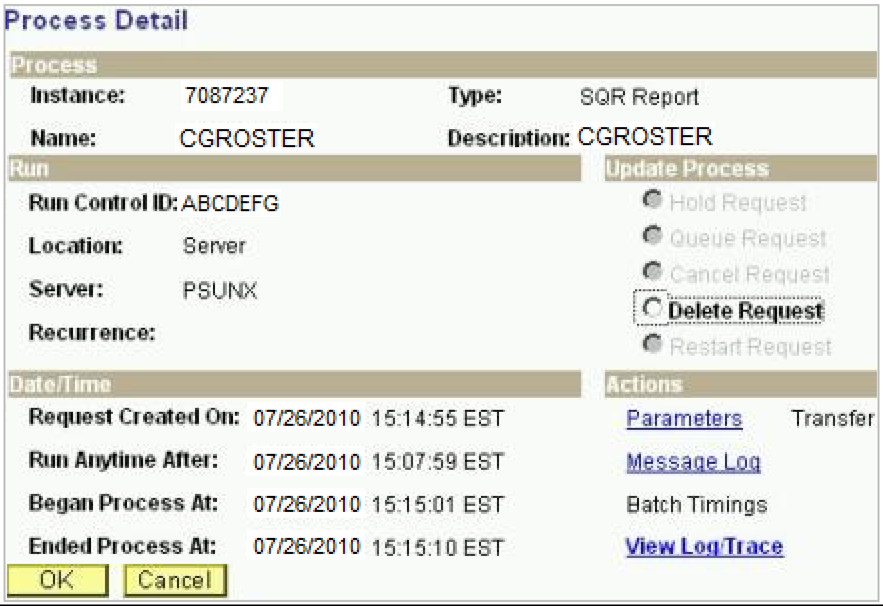
Note: The CSV format is the only working file format. Recent changes to the report included the addition of several columns of occupational data. The PDF and HTM file formats cannot accommodate the additional data.</td></tr>
<tr><td>9</td><td>Click the OK button to launch the process and return to the Process Scheduler Request page.</td></tr>
<tr><td>10</td><td>Click the Process Monitor link in the upper right-hand corner of the Process Scheduler Request page.

</td></tr>
<tr><td>11</td><td>The Process Monitor page will display. Click the Refresh button periodically until the Run Status shows "Success" and the Details link is active. It could take some time for the status to change if running a large report or the system is heavily loaded.

</td></tr>
</table>

Continued on next page

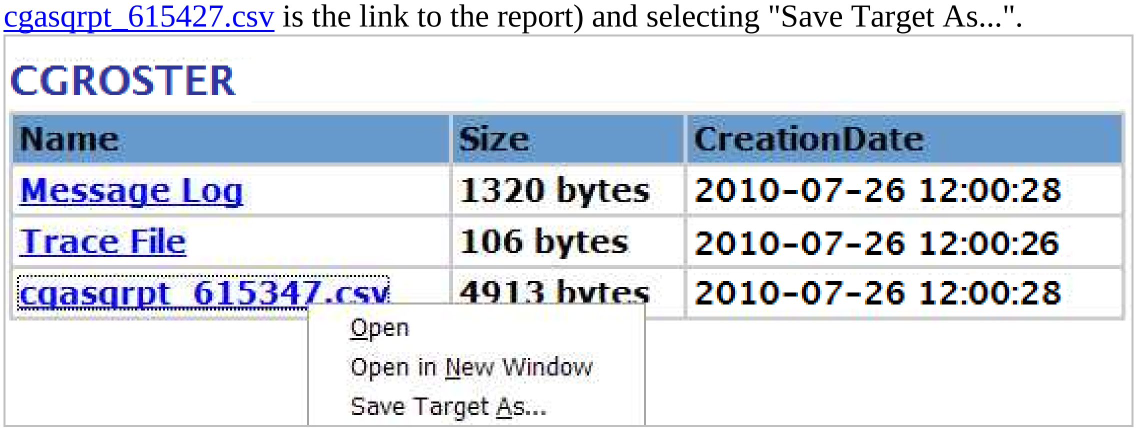
Unit Roster, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>12</td><td>Click the Details link. The Process Detail Page will display. Click the View Log/Trace link.



</td></tr>
<tr><td>13</td><td>The Report Log Viewer page will open in a new window. Access the report by right-clicking the link with the report name and number in it (In the example below, cgasqrpt_615427.csv is the link to the report) and selecting "Save Target As...".

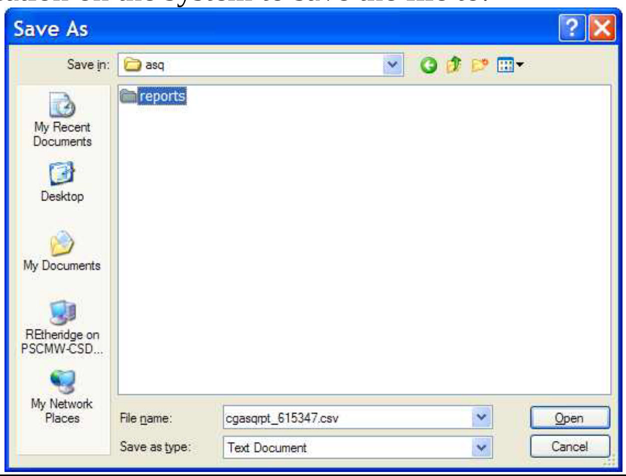
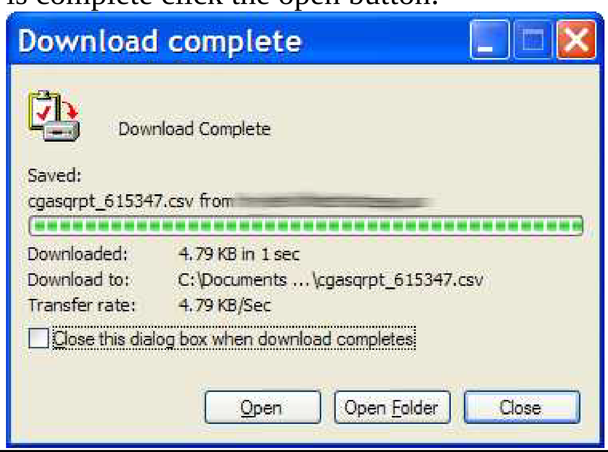


</td></tr>
</table>

Continued on next page

Unit Roster, Continued

Procedure **(continued)**

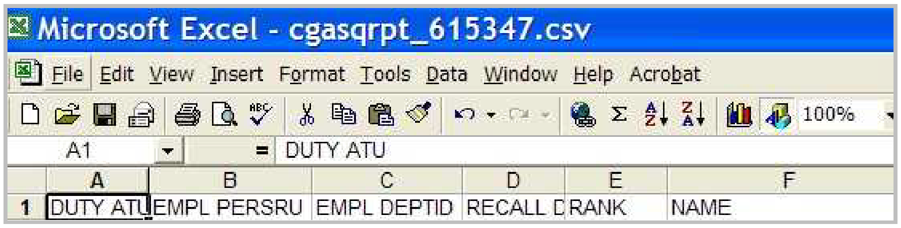
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>13</td><td>Note: When the user right mouse clicks and selects "Save Target As" they will be asked to select a location on the system to save the file to:

</td></tr>
<tr><td>14</td><td>When the download is complete click the open button:

</td></tr>
</table>

Continued on next page

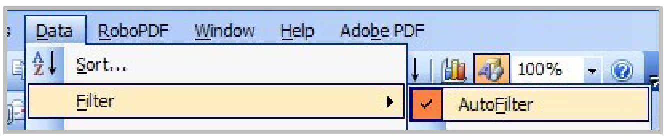
Unit Roster, Continued

Procedure **(continued)**

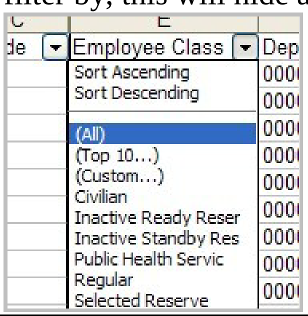
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>15</td><td>
The report will open in MS Excel. Adjust the column widths to view all of the information.



The user can quickly filter the roster by selecting Data | Filter | Auto Filter from the Excel menu.



This will add a drop-down button in the column heading row. Select the data element to filter by, this will hide any rows that do not meet the filter criteria.



</td></tr>
</table>

User Role Query

Introduction

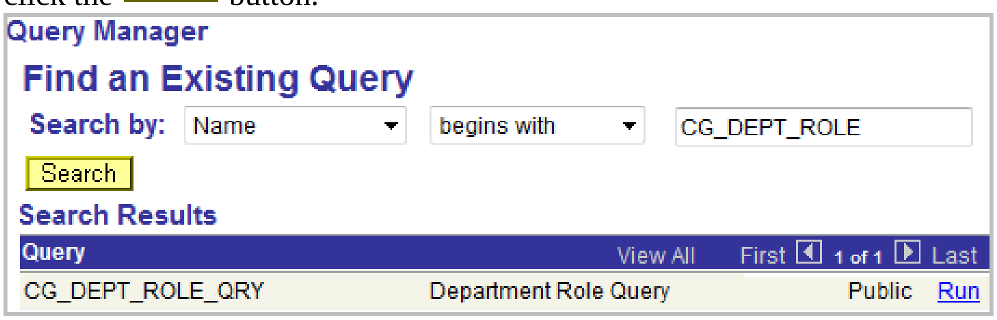
This query provides a report of all Direct Access users at a department. The report shows the user's name, operator ID and the modules the user is authorized to access.

If wanting to remove command access, or any other role from a user's account, complete the Revocation of Access Authority section of the user's original CG7421B (User Application) form and fax to the PPC at the number listed on the form. Please specify which roles should be removed from the account if the member has multiple roles assigned. If the original form cannot be located, complete a new one.

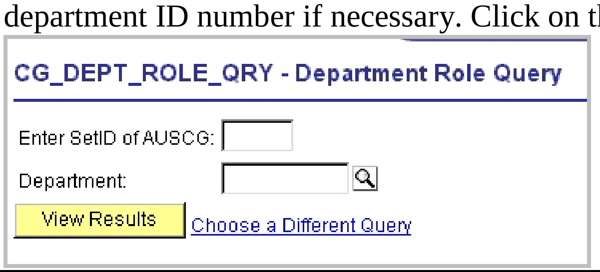
Procedure

Start Internet Explorer, sign into Direct Access and follow these steps to complete this procedure.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select menu items in the following order: Enterprise/Main Menu > Direct Access PeopleTools > Query Manager > Use > Query Manager</td></tr>
<tr><td>2</td><td>The Query List search list will display. Enter all or part of the query name -- CG_DEPT_ROLE_QRY (note the use of underscores (__) in places of spaces), and click the Search button.



Select the Query from the search results and click the Run link.</td></tr>
<tr><td>3</td><td>The query data entry page will display. Enter AUSCG in the first field and the department ID number in the second field. Use the lookup tool to search for the department ID number if necessary. Click on the to perform a search.


</td></tr>
</table>

Continued on next page

User Role Query, Continued

Procedure **(continued)**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>Click the View Results button to run the query.</td></tr>
<tr><td>5</td><td>The query results will be shown below the data entry area.
Download results in : Excel97 SpreadSheet CSV Text File (1509 kb)
Excel2K SpreadSheet
View All First 1 - 100 of 2532 Last
<table>
<tr><th></th><th>ID</th><th>User LOGIN ID</th><th>Rank</th><th>Name</th><th>Empl Class</th><th>Department</th><th>Sub Dept ID</th><th>Position</th><th>Role Name</th><th>Role Description</th><th>Last Updated by</th></tr>
<tr><td>1</td><td>1234567</td><td>1234567</td><td>YN1</td><td>Adams, Adam</td><td>Regular</td><td>PPC CUSTOMER CARE BR</td><td>007799</td><td>CUSTOMER CARE - DUTY</td><td>CGSSMBR</td><td>CG Self Service Member</td><td>MMOUSE</td></tr>
</table></td></tr>
<tr><td>6</td><td>The user may download the results in MS Excel format by clicking the link above the query results.</td></tr>
<tr><td>7</td><td>Repeat steps 3 and 4 to run queries on other departments or use the menus to exit the application.</td></tr>
</table>

CG Member Married to Member Query

Introduction

This section provides the procedure for running the Member Married to Member query.

Purpose

This query identifies married Coast Guard couples where both members are drawing BAH at a "with-dependent" rate.

The query is used to verify correct BAH payments. There are only certain circumstances where both members of a military couple are entitled to receive BAH at the with-dependent rate. See Chapter 3-E (BAH-Member Married to Member) of the Coast Guard Pay Manual, COMDTINST M7220.29(series) for more information.

Usage

This query is run monthly by PPC (MAS) to identify accounts for further research.

Access

Only "CGHRSIC" role users can access and run this query.

Selection Criteria

The selection criteria are from the Spouse Personal Profile page of the Dependent Data application. The query will list any member whose:

1) Spouse in Service block is checked,
2) Branch of Service field contains CG Regular or CG Reserve, or
3) Couples both have BAH code "L" or BAH codes "L" and "T".

Query Data Fields

The Member Married to Member query provides the following information:

Field	Description
Mbr Emplid	Member's employee ID number
Mbr Name	Member's name (Last, First MI)
Empl Class	Member's employee classification (Regular, SELRES, IRR, etc.)
Earn Type	BAH earnings type code (L or T)
Max Eff Date	Date current BAH row started

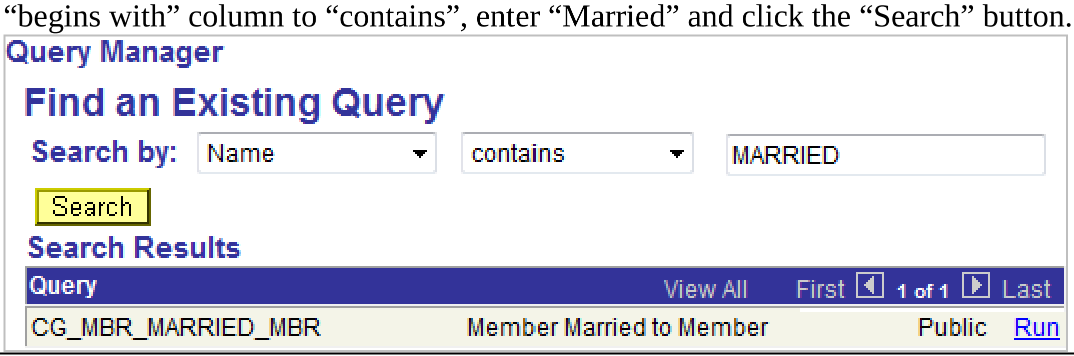
Continued on next page

CG Member Married Member Query, Continued

Query Data Fields **(continued)**

Field	Description
Stop Date	Date BAH row closed, if applicable.
Spouse Emplid	Spouse’s employee ID Number
Spouse's Name	Spouse’s name (Last, First MI)
Relationship to Employee	Relationship to Employee - Spouse
Spouse Branch of Service	U. S. Coast Guard (USCG) or U. S. Coast Guard Reserve (USCGR)
Eff Date	Date current BAH row started
Earn Type	BAH earnings type code (L or T)
Stop Date	Date current BAH row closed, if applicable.

Procedure Follow these steps to run the Member Married to Member query:

Step	Action
1	Select menu items in the following order: Direct Access People Tools > Query Manager > Use > Query Manager
2	The “Find an Existing Query” page will appear. Enter all or part of the query title (CG_MBR_MARRIED_MBR), or change the “begins with” column to “contains”, enter “Married” and click the “Search” button. 
3	Click the Run link.
4	A new window will open with the query results. Use one of the download results links to save a copy of the query if desired. 

Continued on next page

CG Member Married Member Query, Continued

Procedure **(continued)**

Example query results in "Excel 2K SpreadSheet" format:

Member Married to Member												
Mbr Emplid	Mbr Name	Empl Class	Earn Type	Max Eff Date	Stop Date	Spouse Emplid	Spouse's Name	Relationship to Employee	Spouse Branch of Service	Eff Date	Earn Type	Stop Date
1234567	Last, First M.	Regular	BAH-L	7/1/2010		1234567	Last, First M.	Spouse	USCG	7/1/2010	BAH-L	
1234567	Last, First M.	Regular	BAH-L	4/1/2010		1234567	Last, First M.	Spouse	USCGR	4/1/2010	BAH-L	
1234567	Last, First M.	Regular	BAH-L	6/13/2008		1234567	Last, First M.	Spouse	USCGR	8/9/2010	BAH-L	10/7/2010
1234567	Last, First M.	Regular	BAH-T	5/17/2010		1234567	Last, First M.	Spouse	USCG	5/28/2008	BAH-L	
1234567	Last, First M.	Regular	BAH-L	5/28/2008		1234567	Last, First M.	Spouse	USCG	5/17/2010	BAH-T	
1234567	Last, First M.	Regular	BAH-T	7/27/2010		1234567	Last, First M.	Spouse	USCG	7/27/2010	BAH-L	
1234567	Last, First M.	Regular	BAH-L	7/27/2010		1234567	Last, First M.	Spouse	USCG	7/27/2010	BAH-T	
1234567	Last, First M.	Regular	BAH-T	8/9/2010		1234567	Last, First M.	Spouse	USCG	8/6/2010	BAH-L	
1234567	Last, First M.	Regular	BAH-L	8/6/2010		1234567	Last, First M.	Spouse	USCG	8/9/2010	BAH-T	
1234567	Last, First M.	Regular	BAH-T	7/1/2010		1234567	Last, First M.	Spouse	USCG	7/1/2010	BAH-L	
1234567	Last, First M.	Regular	BAH-L	7/1/2010		1234567	Last, First M.	Spouse	USCG	7/1/2010	BAH-T	
1234567	Last, First M.	SELRES	BAH-L	8/9/2010	10/7/2010	1234567	Last, First M.	Spouse	USCG	6/13/2008	BAH-L	

MGIB-SR RESERVE Reaffiliation Query

Introduction

This section provides the procedure for running the MGIB-SR RESERVE Reaffiliation query.

Purpose

This query identifies those members who are currently in the IRR, ASL, or ISL, have a MGIB-SR code that starts with 'C', and did not reaffiliate with the SELRES within one (1) year

Procedure

Follow these steps to run the MGIB-SR RESERVE Reaffiliation query.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the Enterprise Menu, select menu items in the following order:
Direct Access People Tools > Query Manager > Use > Query Manager</td></tr>
<tr><td>2</td><td>The “Find an Existing Query” page will appear.
Enter all or part of the query title (RESERVE_MGIB_SR_REAFFILIATION), or change the “begins with” column to “contains”, enter “MGIB” and click the “Search” button.

</td></tr>
<tr><td>3</td><td>Click the Run link.</td></tr>
<tr><td>4</td><td>A new window will open with the query results. Use one of the download results links to save a copy of the query if desired.

</td></tr>
</table>

Continued on next page

MGIB-SR RESERVE Reaffiliation Query, Continued

Procedure **(continued)**

Step	Action
5	The query shows the: • ID – Member's Employee ID • Job Title – Member's Rate or Rank • Name – Member's Last Name, First Name and Middle Initial • Date member Became IRR – Date the member's assignment to the IRR, ISL or ASL was effective. • Previous Affiliation -- Member's reserve affiliation prior to current assignment • MGIB-SR Eligibility Code – **Code** **Description** CA Ineligible: Member has completed course of instruction required for BA or equivalent CB Eligibility Suspended: Granted period of authorized non-availability-all other-not to exceed 1 yr CC Eligibility Suspended: Granted period of authorized non-availability-missionary-up to 3 yrs CD Eligibility Suspended: Being processed for unsatisfactory participation CE Eligibility Suspended: Voluntarily depart from a qualifying position CF Ineligible: Member on long-term orders CG Eligibility Terminated: In receipt of ROTC scholarship See Part VII, Chapter 7, Montgomery GI Bill – Selected Reserve to update a member's MGIB-SR Eligibility Code.

PPC SPO Manual

Part X, Error Feedback, Reports and Queries

Chapter 3, Ad Hoc Request Procedure

Overview

Introduction	This section provides the procedure for requesting ADHOC reports from PPC Topeka.
Before You Begin	Set Internet Explorer to Allow Pop-ups from the Direct-Access site.
Existing Reports and Queries	Please review the available reports and queries in Chapter 2 of this part before submitting a request for an ADHOC report.
Discussion	Additional queries may be available depending on which user roles are held. To see a list of queries, select the following menu items: **People Tools, Query Manager, Use**, and **Query Manager.** Enter ***CG*** in the Search for box and press **Search**. Review the list of queries available. Press the Run link for any query desired.

Procedure

Introduction

Follow this procedure to request an ADHOC report.

Procedures

If unable to locate a report or query in Direct Access that meets the required needs, or if data is needed from another system that is managed by PPC (JUMPS or TPAX), the user will need to submit a request for an ADHOC report. Follow these steps to submit a request:

1. Go to the PPC Customer Care web page at http://www.uscg.mil/ppc/ccb/,
2. Select the "I am a Command, SPO or ADMIN support user" option from the User Role for This Issue list
3. Select "PERSONNEL ACTION" from the Category section of the online Trouble-Ticket form.
4. Select the "HR DATA REQUEST" option in the Type section of the form.
5. Select the "ADHOC REPORT" option in the Reason section of the form.
6. Enter a complete description of the query in the "requirements for the ADHOC report request" section of the form.

Example:

```
Please provide a list of all personnel attached to the
USCGC Example (WLB-X12), OPFAC 18-12345, from 1 May 2006
through 30 April 2007. We need to determine eligibility
for a Unit Commendation. Provide results in MS Excel
format with the following columns:

Name (last, first, mi)
Rate/Rank
Current Unit (ID and Description)
Report date (on USCGC Example)
Depart date (if departed USCGC Example)

Point of contact: YNC Jim Smith, (757) 555-1212.
```

The request will be forwarded to PPC (PS&R) for a direct reply.

PPC SPO Manual

Part X, Error Feedback, Reports and Queries

Chapter 4, SPO Access to the Electronically Imaged PDR (EI-PDR)

Overview

Introduction

This chapter provides procedures to obtain EI-PDR access, scan, forward, and verify EI-PDR documents, and a software user guide.

WebNow™ Software

EI-PDRs are stored in a document imaging system repository. WebNow is an internet browser-based software application which facilitates access to the repository. As a browser-based application, WebNow does not require installation on the standard workstation; it functions within Internet Explorer.

Contents

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WebNow Account Access and Deactivation

Introduction

This section provides instructions and procedures for a Servicing Personnel Office (SPO) to obtain and deactivate WebNow/ImageNow accounts.

Reference

(a) Personnel and Pay Procedures Manual (PPPM), PPCINST M1000.2A

Responsibilities

The Branch Chief in which the SPO is located or the next senior member within the chain of command is the approving authority for WebNow Access and Deactivation requests for the SPO Supervisor.

The SPO Supervisor is the approving authority for WebNow Access and Deactivation requests for other personnel assigned to the SPO.

The Coast Guard Pay & Personnel Center (PPC) Topeka receives and processes WebNow and Direct Access User Authorization and Deactivation forms. PPC will also maintain a list of the SPO Supervisors and “next senior member” to verify requests have been approved at the appropriate level.

PSC-BOPS-C will regularly monitor accounts for proper access and recommend removal.

Discussion

The purpose of a SPO WebNow account is for “official business only” access to the EI-PDR in order to comply with COMDTINST M1080.10 (series). EI-PDR

Once missing documents in the EI-PDR are identified, the SPO will scan and send the documents to PSC-PSD-MR for inclusion in the EI-PDR. This process is identified in the guide “SPO PDR Scanning and Submission Procedures”.

A SPO WebNow account is issued with “read-only” access, and is restricted to only those SPO personnel who perfrom SPO PDR duties.

Continued on next page

WebNow Account Access and Deactivation, Continued

SPO Procedures to establish a WebNow account

Step	Action	Remarks
1	Ensure member has CGHRS access in Direct Access	See Part I, Chapter 2, DA SPO User Roles and Access (HRS/HRSUP), of this manual.
2	Complete forms CG-7421B and CG-7421D and FAX to PPC.	Both of these required forms can be found on PPC's website located at: http://www.uscg.mil/ppc/forms/. See pages 5 and 6 for samples of completed forms. Forms must be faxed to PPC Topeka at (785) 339-2297. Reminder: When completing form CG-7421B, Direct Access Authorization and Payment Approving Official (PAO) Designation, mark user roles in block 7 that you currently hold and wish to retain. **Each new authorization/designation form supersedes previous authorizations and designations.** Users at the Academy and TRACEN SPOs may have additional roles. If you are unsure about the roles you currently hold, refer to the user access form you most recently submitted or run the DA User Role Query. For procedures see: http://www.uscg.mil/ppc/ps/self_service/commands/user_role_query.htm
3	Receive confirmation from PPC that your WebNow account has been established.	You will receive an email from PPC stating that your WebNow account has been established and provided a User ID and Password. Your User ID will be your EMPLID. Additionally, the "SPO IPDR" button on the Direct Access "CG Member Info Page" will be enabled (colored vice gray).
4	Properly file the WebNow user access forms.	Each SPO shall file the CG-7421B and the CG-7421D forms for the duration the member has account access. Once requests for deactivation of the account have been completed the original "activation" requests can be destroyed.

Continued on next page

WebNow Account Access and Deactivation, Continued

SPO Procedures to Deactivate a WebNow account

Step	Action	Remarks
1	Complete and submit a PPC Customer Care Trouble Ticket.	It is the member and the member's supervisor responsibility to ensure accounts are deactivated immediately upon transfer/reassignment, or in cases of violation of the official use restriction. Deactivation is required even when transferring to another SPO office. A PPC Customer Care Trouble Ticket can be found on PPC’s Website at: http://www.uscg.mil/ppc/ccb/. A sample Trouble Ticket is shown in this section

Continued on next page

WebNow Account Access and Deactivation, Continued

SPO WebNow Help Contacts

Problem	Contact	Remarks
WebNow is not loading after pressing the "DOCS" button	Wait – initial load of WebNow application make take up to two minutes.	The new version of WebNow may take a while to load initially. However, once it loads and you are logged in, your response time should be normal.
Initial WebNow Account Login problem or the "DOCS" button is not enabled.	PPC Customer Care Branch at 866-PPC-USCG (772-8724)	Contact the PPC Customer Care Branch if the WebNow account is not established within 3 days after FAXing the CG-7421B and the CG-7421D forms.
WebNow Password Resets or hard error messages.	Submit a PPC Customer Care Trouble Ticket	PPC will provide password resets for WebNow UserIDs. They will also collect and forward all trouble issues outside of their support level to CG-631 for action. For Password resets or other errors messages, submit a PPC Customer Care Trouble Ticket from PPC's Website at: http://www.uscg.mil/ppc/ccb/. See example in this section for both password and error message issues.

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WebNow Account Access and Deactivation, Continued

CG-7421B Sample – Direct Access User Access Authorization (Add CGSIPDR role)

Reminder: Mark user roles in block 7 that you currently hold and need to retain. Each new authorization/ designation form supersedes previous authorizations and designations. Run the DA User Role Query if you are unsure of the roles you currently hold.

The DA user role for WebNow access is "CGSIPDR". It only appears on versions of the form revised in Jun 2010 or later. If using the Feb 10 version of the form, request the CGSIPDR role by listing the role name in the **Others Not Listed** section

U.S. DEPARTMENT OF HOMELAND SECURITY
U. S. Coast Guard
CG-7421B (Rev. 06-10)

DIRECT ACCESS USER ACCESS AUTHORIZATION AND PAYMENT APPROVING OFFICIAL (PAO) DESIGNATION

1. User's Name (Last, First, MI.) (Please print or type)	2. Rank/Rate:	3. Employee ID #
BOLINSKI, JOSEPH, P	YN1/E6	1234567

4. Dept ID & Unit Name (Include Staff Symbol)	5. Area Code & Phone Number:	6. e-Mail address:
003406 PSSU MYCITY, US	212-555-1212 EXT. 1234	joseph.p.bolinksi@uscg.mil

7. User Role Description (Note: See Chapter 1 of the Personnel and Pay Procedures Manual, PPCINST M1000.2(series) for an explanation of user roles common to field units). (Include current roles, this authorization supersedes all of your previous authorizations):

- ☐ **CGSSCMD**--Command User (evals, drills, Airport Terminal, etc.)
- ☐ **CGEMPREV** -- Employee Review Only (not needed if you have CGSSCMD or CGHRS)
- ☐ **CGRSVDRL** – Schedule, Edit and Approve Reserve IDT Drills (Only)
- ☐ **CGRSVMGR** – Create, review, and endorse requests for reserve orders.
- ☐ **CGAIRTRM**--Airport Terminal Only (Relocation Specialists/Housing Office)
- ☐ **CGFIELDADM**--Unit with access to Member Competencies (Quals, Awards & Schools) (Route request through your Servicing Personnel Office – Per Pay & Personnel Procedures Manual, PPCINST M1000.2(series), Chap 1.)
- ■ **CGGWIS**--Global Workforce Inquiry System (Provides View Only Access to Personal Data)
- ■ **CGHRS** -- (SPO) DEPT ID 003406 (See Chapter 1 of the Personnel and Pay Procedures Manual, PPCINST M1000.2(series) for rules)
  - ☐ **CGAPPL** – Applicant Data (Use with CGHRS for accessions. This role is necessary to create applicant IDs. **Cannot be selected with CGHRSUP**.)
- ■ **CGHRSUP—(SUPERVISOR, Payment Approving Official (PAO)) (Application must be approved by PPC (MAS)).** (See Chapter 1 of the Personnel and Pay Procedures Manual, PPCINST M1000.2(series))
  - ☑ **CGSIPDR** (SPO Supervisor/Auditor Access to the EI-PDR via WebNow - also complete form CG-7421D)

PPC (MAS) PAO Designation Approved by (name/signature): ________________ Date:________

- ☐ **CGMRS** — Medical Readiness System Clinical Access (Med care providers)
- ■ **CGTRNOFF** – Electronic Training Request (ETR). Unit ESOs.
- ☐ **CGFTESO** – Unit Educational Services Officer. Unit ESOs.
- ☐ **CGSECURN**--Unit Security Manager (View Only)
- ☐ **CGSECUVW**--Area/Dist Security Manager (View Only). Fax completed form to COMDT (CG-86) at **202-372-3950** for approval. CG-86 will forward to PPC.

  CG-86 Name/Sign:________________ Date:________
- ☐ **CGTRNFAC**--Training Center (TAS Course Sessions)
- ☐ **CGTRNTQC**--TQC/TAS Course Scheduler
- ☐ **CGASGN**--CGPSC (epm/opm/rpm) or District/PSSU Reserve Assignment Officer
- ☐ **CGRSVISC/CGRSVORD**—Reserve Orders Approval/Funding, District (r)/PSSUs only.
- ■ Others Not Listed. Please describe (in the space below) what you need to access in Direct-Access.

CGSIPDR

Revocation:
Direct Access Roles are automatically terminated upon PCS, separation, retirement, reassignment of duties (Fleet-Ups) and change of organization (inter-office transfer).

Users who have been reassigned (PCS, Change of Department IDs) will retain Self-Service access.

The user role termination process is kicked off by submission of a PCS departing endorsement. If the member submits a new access form, and it is processed by PPC before the SPO submits the PCS departing endorsement, the system will terminate the new access. Please be sure to submit transactions in a timely manner.

If Revocation is due to reasons other than those listed above contact PPC Customer Care via on-line trouble-ticket at http://www.uscg.mil/ppc/ccb or http://cgweb.ppc.uscg.mil/ccb/ or via email at PPC-DG-CustomerCare@uscg.mil

8. ***Authorizing Official (Signature & Typed or printed name, Rank, Title (CO/OIC, XO/XPO or HQ/DCMS/CGPSC/FORCECOM/OPCOM/DIST Branch Chief) & Phone Number):***

I certify that the access I have authorized is based on an official need. I'm aware of the general functionality I have authorized and I'm aware of what this will allow this member to complete. If this is for a contractor, the Contracting Officer's Technical Representative (COTR) signs as AO.

Signature AND PRINTED or TYPED Name,	Rank,	Title,	Area Code & Phone (ext)	9 Date:
A.B.SEA	CWO3	SPO Sup.	212-555-1212 1034	10 JUN 2010

Continued on next page

WebNow Account Access and Deactivation, Continued

CG-7421D Sample - ImageNow User Access Authorization Form

Please fill out online or print neatly! This authorization supercedes previous applications.

U.S. DEPARTMENT OF HOMELAND SECURITY
U. S. Coast Guard
CG-7421D (Rev. 05-10)

IMAGENOW USER ACCESS AUTHORIZATION

1. User's Name (Last, First, MI.) (Please print or type)	2. Rank/Rate:	3. Employee ID # (Not SSN)
Blonski, Joseph P.	E6/YN1	1234567

4. Dept ID & Unit Name (Include Staff Symbol)	5. Area Code & Phone Number:	6. e-Mail address:
003406 PSC-bops-c	202-555-1212	Joseph.P.Blonski@uscg.mil

7. User Role Description (Include current roles, this authorization supercedes all of your previous authorizations):

PPC General:

RAS: ☐ Accounting Techs ☐ Act/Res Pay Techs ☐ Annuitant Pay Techs
☐ Admin ☐ Supervisor/Auditors ☐ View & Print
☐ View Only

FAR: ☐ Records Review – KS Member Record Review

OTHER: (describe below)

SES: ☐ ADT ☐ IDT ☐ SOCS
☐ ADT View & Print ☐ IDT View & Print ☐ SOCS View & Print
☐ ADT View Only ☐ IDT View Only ☐ SOCS View Only

TVL: ☐ Claim Examiners ☐ System Support ☐ View & Print ☐ View Only

Security Administrators:
☐ **CS User Auth –** DA & JUMPS User Auth Forms ☐ **ID AIS**

Administrators:
☐ **ImageNow Administrator** ☐ **Scanners**

HQs/PSC/SPOs:

DC Users of the Boardroom Software*
☐ Boardroom Users

SPO Supervisors and Auditors *
■ SPO IPDR

DC Scan, Link, QC and Board Administrators *
☐ Delete Capabilities ☐ HR Document Processors

DC Member Record Review & Audit Remediation *
☐ Records Review/Audit

DC Assignment Officers; Member Info Access*
☐ Detailers

HQ's DA User Auth Forms
☐ HRDC USER AUTH

OPM3 – Employee Review *
☐ OPM3

* **Require completion of Direct Access User Access Authorization form (CG-7421B). Select 'Other' above' and write-in 'WEBNOW or IMAGENOW'. Users outside of PPC or PSC need PSC-BOPS approval.**

8. **Authorizing Official** *(Signature & **Typed or printed** name, Rank, Title (CO/OIC, XO/XPO or HQ/DCMS/CGPSC/FORCECOM/OPCOM/DIST Branch Chief) & Phone Number):*
I certify that the access I have authorized is based on an official need. I'm aware of the general functionality I have authorized and I'm aware of what this will allow this member to complete. If this is for a contractor, the Contracting Officer's Technical Representative (COTR) signs as AO.

I.M. Daboss CDR Branch Chief 202-555-1213
Signature, **PRINTED or TYPED** Name, Rank, Title (see instructions), Phone

9 Date: 5/12/2010

Privacy Act Statement

AUTHORITY: Executive Order 10450, 9397; and Public Law 99-474, the Computer Fraud and Abuse Act.
PRINCIPAL PURPOSE: To record names, signatures, and other identifiers for the purpose of identifying individuals requesting access to U. S. Coast Guard (USCG) systems and information. NOTE: Records may be maintained in both electronic and/or paper form.
ROUTINE USES: None.
DISCLOSURE: Disclosure of this information is voluntary; however, failure to provide the requested information may impede, delay or prevent further processing of this request.

Acknowledgment: I understand that I am authorized to access the ImageNow/WebNow system and that accessing it for purposes beyond the Scope of Authorization is a violation of Federal law (18 U.S.C. 1030 et al) (Note: Refer to the Automated Information Systems (AIS) User Acknowledgement Form (CG-5500A), which is required for all U.S. Coast Guard AIS users, it contains the full Scope of Authorization and Acknowledgement.)

10. User's Signature:	11. Date: 5/12/2010	**Fax to: (785) 339-2297**

Revocation Procedure:
ImageNow access must be terminated upon PCS, separation, retirement, reassignment of duties (Fleet-Ups) and change of organization (inter-office transfer). Contact PPC Customer Care via on-line trouble-ticket at http://www.uscg.mil/ppc/ccb or http://cgweb.ppc.uscg.mil/ccb/ or via email at PPC-DG-CustomerCare@uscg.mil for all ImageNow account revocations.

U.S. DEPT. OF HOMELAND SECURITY, USCG, CG-7421D (Rev. 05-10)

Continued on next page

WebNow Account Access and Deactivation, Continued

Sample PPC Customer Care WebNow Account Deactivation Trouble Ticket

Employee ID #:	2345678 HELP
Non-Employees: Contractors and other non-employees should enter the User ID assigned when their account was established.	
E-Mail:	Ima.N.Charge@uscg.mil HELP
First Name:	Ima HELP
Last Name:	Charge HELP
Title, Rate or Rank:	CWO4 HELP
Daytime Telphone: (Include area code & ext.)	202-555-1212 HELP
Member/Employee Information Who is this ticket for?	
Employee ID #:	123456 HELP
First Name:	Joseph HELP
Last Name:	Blonski HELP
Problem/Issue Information	
User Role for this issue:	I am a Command, SPO or ADMIN support user HELP
Category:	PERSONNEL ACTION
Type:	OTHER PERS ACTION NOT LISTED
Reason:	OTHER-NOT LISTED

Please enter a description of the problem or the requirements for the ADHOC report request
For password resets **be sure to include your user ID if it's not the same as your employee ID**.

FOR PCS TRANSFERS/SEPARATIONS:

Please Deactivate YN1 Joseph Blonski's WebNow account. His WebNow UserID is 1234567.

FOR OTHER REASONS (DISCIPLINARY, ETC.)

Please Deactivate YN1 Joseph Blonski's WebNow account and Remove his Direct Access role CGSIPDR.
His WebNow UserID is 1234567and his Direct AccessUserID is 1234567.

WebNow Account Access and Deactivation, Continued

Sample PPC Customer Care Password Reset and WebNow Error Trouble Ticket

Employee ID #:	1234567
E-Mail:	Joe.P.Blonski@uscg.mil
First Name:	Joe
Last Name:	Blonski
Title, Rate or Rank:	YN3
Daytime Telphone: (Include area code & ext.)	202-555-1212
Member/Employee Information Who is this ticket for?	
☑ Same as contact information?	
Employee ID #:	1234567
First Name:	Joe
Last Name:	Blonski
Problem/Issue Information	
User Role	I am the Member/User (self-service issue)
Category:	MBR-SS PASSWORD/USER ACCESS
Type:	OTHER-NOT LISTED
Reason:	OTHER-NOT LISTED

Please enter a description of the problem or the requirements for the ADHOC report request
For password resets **be sure to include your user ID if it's not the same as your employee ID**.

Password Problem:

I cannot access WebNow with my password.
Please provide me with a password to login
to WebNow. My UserID is 1234567.

For Error Message Problems:

After logging into WebNow, I recieve the
following error message:
(Write down the exact message you are
recieving).

SPO PDR Scanning and Verification Process

Introduction

This section provides a Servicing Personnel Office (SPO) the criteria and quality-control procedures to identify, scan, e-mail, and verify updates of documents forwarded to PSC for inclusion in a member's EI-PDR.

Reference

(a) Military Personnel Data Records System, COMDTINST M1080.10(series)

Responsibilities

The SPO Supervisor has oversight responsibility to ensure documents contained in the SPO PDR match documents authorized for placement in the Electronically Imaged (EI) PDR.

SPOs will review the EI-PDR to identify missing documents. Missing documents will be scanned and forwarded to PSC-PSD-MR for inclusion in the EI-PDR. SPO Personnel must ensure documents sent to PSC have been added to the EI-PDR within the established timelines.

The SPO will identify equipment capable of scanning all required documents as prescribed in this process guide. If no scanner is currently available it is the SPO's responsibility to procure one for this process.

The PSC-PSD-MR Branch will review documents forwarded by a SPO to ensure proper format and readability prior to adding the document into the EI-PDR.

Discussion

This section provides instructions and criteria required to identify, label, scan, e-mail, and follow-up on all documents sent to PSC-PSD-MR for inclusion in the EI-PDR.

Familiarization with the Military PDR System COMDTINST M1080.10(series) is essential to this process. There are documents kept in the SPO PDR that are not required in the EI-PDR and vice versa.

Consequently, any documents sent to PSC-PSD-MR that are not required in the EI-PDR will not be added or returned. Additionally, all documents required in the EI-PDR may not be authorized in the SPO PDR, and therefore may not be visible to the user at the SPO (i.e. OERS, etc).

Continued on next page

SPO PDR Scanning and Verification Process, Continued

SPO Procedures

<table>
<tr><th>Step</th><th>Action</th><th>Remarks</th></tr>
<tr><td>1</td><td>Identify and Label Documents prior to Scanning</td><td>Review COMDTINST M1080.10(series) to ensure the document is authorized in the EI-PDR. The PSC-psc-mr Branch constantly receives unauthorized EI-PDR documents that are ultimately shredded.

For documents that do not contain an EMPLID, write the EMPLID on the upper right hand corner of the document. All documents relating to a member's dependents (e.g., birth certificates, adoption papers, etc.) must contain the member's EMPLID and relationship such as EMPLID – Spouse, EMPLID – Child, or EMPLID – Parent.</td></tr>
<tr><td>2</td><td>Scan documents</td><td>The below criteria applies to scanned documents:

<table>
<tr><th>Criteria</th><th>Description</th></tr>
<tr><td>One member's record per scanned file</td><td>Multiple documents for the same member are allowed. Do not include documents for more than one member per .pdf file. The scanned file name will be the member's EMPLID (e.g., "1234567.pdf").</td></tr>
<tr><td>Adobe (.pdf) format</td><td>This is the required format for documents to ensure they can be opened by PSC-PSD-MR. The Adobe documents must be legible and of good quality.</td></tr>
<tr><td>Less than 10MB file size</td><td>Ensure e-mail attachments are less than 10 megabytes (MB). E-mails exceeding 10MBs will not be sent.

Use the guide below to compress Adobe files:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>With your file open in Adobe, select "Document"→ "Reduce File Size" from the Menu Bar.</td></tr>
<tr><td>2</td><td>In the "Reduce File Size" Window next to "Make Compatible With", press the "dropdown arrow" and select "Acrobat 8.0 and higher", press "OK"</td></tr>
<tr><td>3</td><td>When saving the file, give it the member's EMPLID (i.e. 1234567.pdf) as the name.</td></tr>
</table>
</td></tr>
</table>
</td></tr>
</table>

Continued on next page

SPO PDR Scanning and Verification Process, Continued

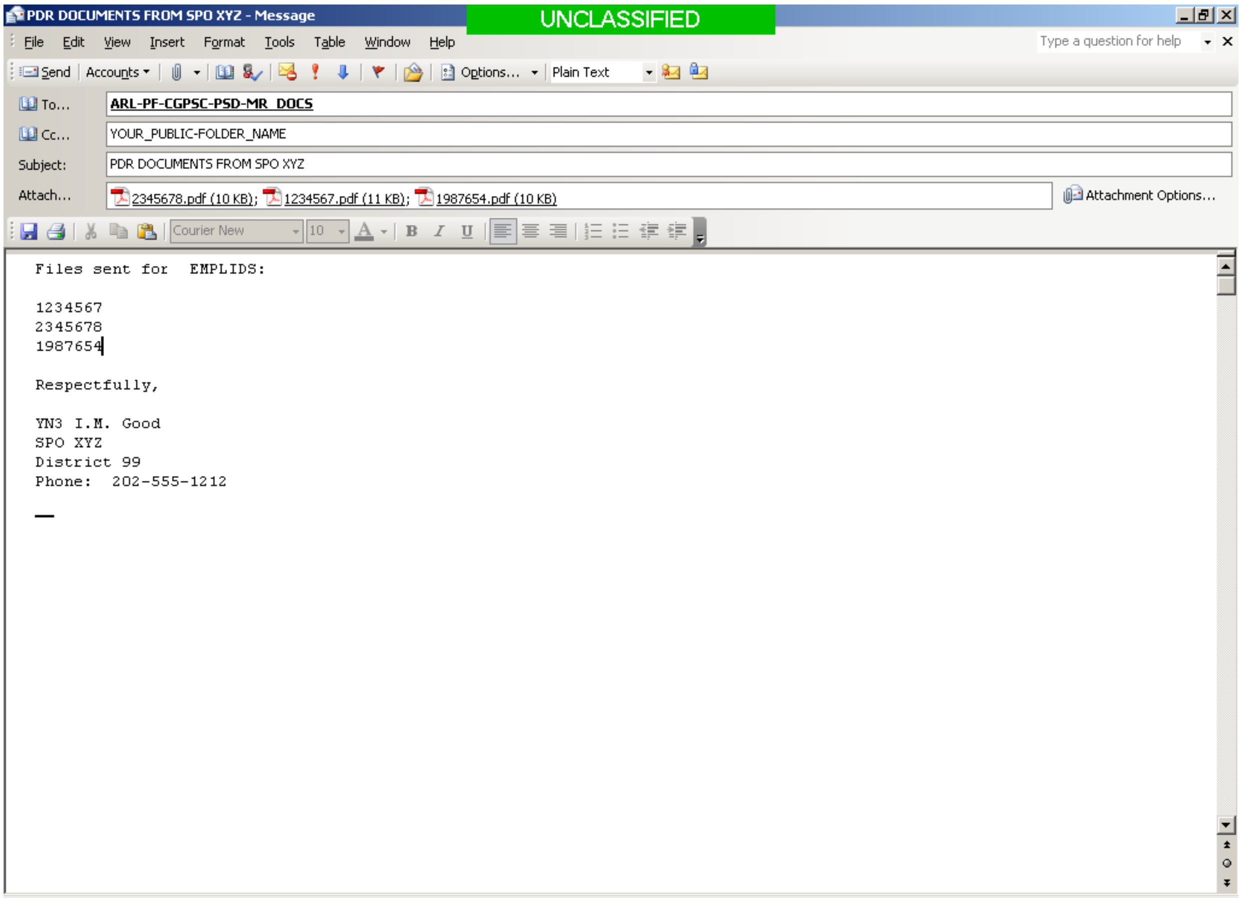
SPO Procedures (continued)

Step	Action	Remarks
3	E-mail documents to ARL-PF-CGPSC-PSD-MR_DOCS	A sample forwarding e-mail is shown on page 4. Read receipt of the forwarding e-mail is strongly encouraged. To request a read receipt, check box under Options for “Request a read receipt for this message” prior to sending. Do **not** encrypt the message. Encrypted emails cannot be opened once delivered to the PSC folder. Per DHS and Coast Guard Policy, PII information which is considered "Sensitive But Unclassified" (SBU) requires no special handling (encryption/password protection) when sent from/to "uscg.mil" or "dhs.gov" addresses.
4	Save forwarding e-mail to file tracking folder.	Each SPO shall create a centralized “public e-mail” folder to store e-mails sent to the PSC-PSD-MR. You will need to submit a help ticket to your local ESU/ESD IT helpdesk to have this done. The ARL-PF-CGPSC-PSD-MR_DOCS public e-mail folder is a good example of a “public folder e-mail name”. A sample e-mail to PSC-PSD-MR with attachments is shown on the next page.
5	Verify documents were filed in member’s EI-PDR	After 14 days, the SPO must verify that documents forwarded to the PSC-PSD-MR Branch are filed in the member’s EI-PDR. This action requires comparing e-mails and Adobe files stored in the SPO central folder to EI-PDR contents. (See “SPO WebNow User Guide” for information on how to access/use WebNow). Sorting documents in WebNow by the “Date Created” is a good method for doing your comparison. This will move the most recently added documents to the top. Purge your SPO public e-mail folder contents upon verification of EI-PDR inclusion.
6	Contact the PSC-PSD-MR Branch as needed	If 14 days have passed and documents are discovered not properly filed in a member’s EI-PDR as part of the verification process above, send an e-mail to the PSC-PSD-MR Branch, harrison.j.morten@uscg.mil, with a list of documents sent but not filed. Send an e-mail to the PSC-PSD-MR Branch COTR, charles.a.thompson2@uscg.mil, if the problem remains unresolved after 3 business days.

Continued on next page

SPO PDR Scanning and Verification Process, Continued

Sample SPO EI-PDR Forwarding E-mail



PDR DOCUMENTS FROM SPO XYZ - Message

UNCLASSIFIED

File Edit View Insert Format Tools Table Window Help

Type a question for help

Send Accounts Options... Plain Text

To... ARL-PF-CGPSC-PSD-MR_DOCS

Cc... YOUR_PUBLIC-FOLDER_NAME

Subject: PDR DOCUMENTS FROM SPO XYZ

Attach... 2345678.pdf (10 KB); 1234567.pdf (11 KB); 1987654.pdf (10 KB)

Attachment Options...

Courier New 10

Files sent for EMPLIDS:

1234567
2345678
1987654

Respectfully,

YN3 I.M. Good
SPO XYZ
District 99
Phone: 202-555-1212

SPO WebNow User Guide

Introduction

This Guide provides a Servicing Personnel Office (SPO) the information and procedures necessary to access, view, print, and export EI-PDR documents using Direct Access and WebNow.

Prerequisites for Using WebNow

The following items are required to access SPO WebNow records;

- A SPO WebNow account with User ID and password
- A Direct Access 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 "SPO WebNow Account Access and Deactivation Guide" to obtain it.

Discussion

The purpose of a SPO WebNow account is for "official business only" which is to comply with COMDTINST M1080.10(series). Additionally, the SPO cannot provide a "complete" copy of a member's record due to their limited access. However, members can still obtain a copy of their EI-PDR from PSC-PSD-MR per this link: http://www.uscg.mil/psd/mr

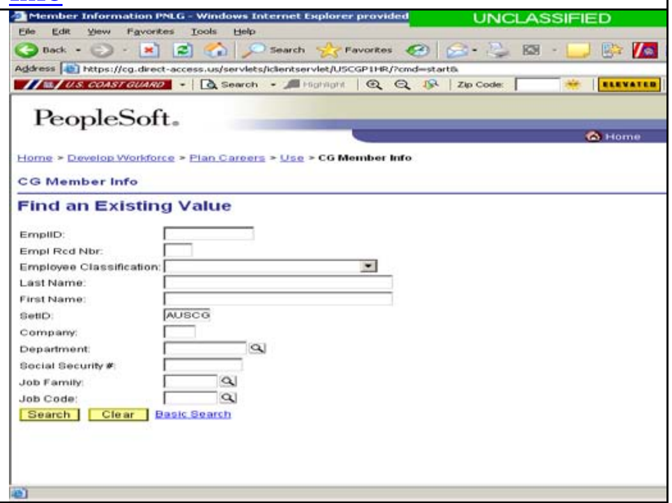
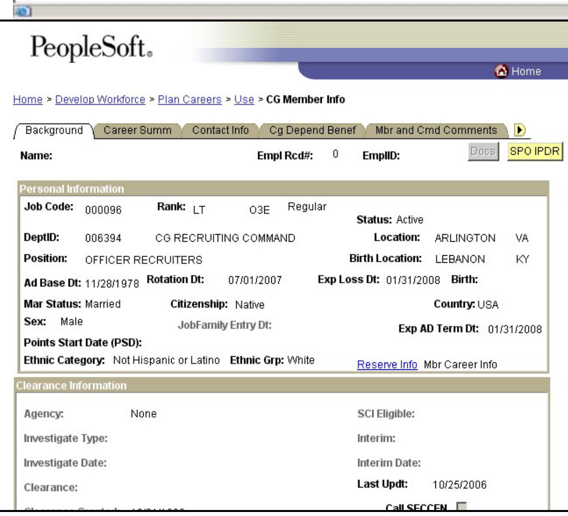
A SPO WebNow account is issued with "read-only" access.

Contents

The following topics are covered in this guide:

SPO WebNow User Guide, Continued

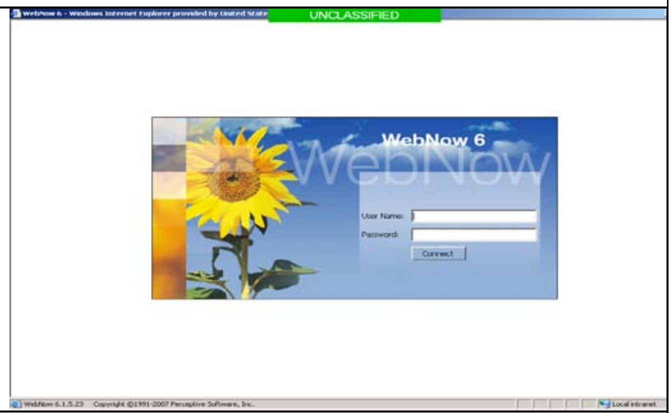
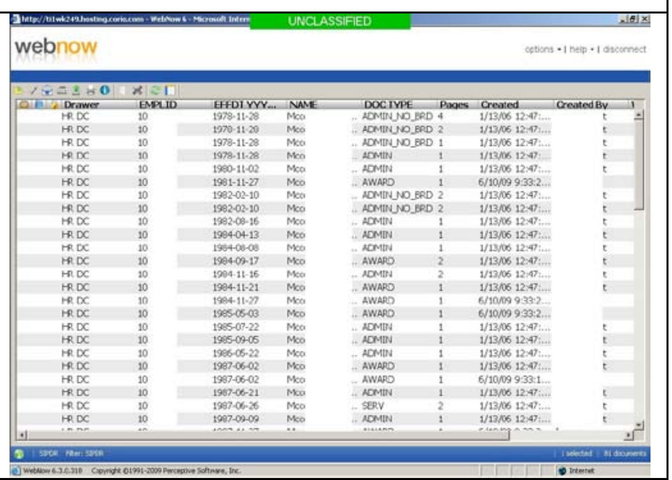
Accessing WebNow Documents

Step	Action	Remarks
1	Login to Direct Access (PeopleSoft) with your User ID and password	Go to https://ep.direct-access.us/
2	Proceed to the CG Member Info Search Page	Go to Direct Access Content > Develop Workforce > Plan Careers > Use > [CG Member Info]()
3	Type the Member's Employee ID in the block marked EmplID and press the "Search" button. This will bring up the members' record in Direct Access.	
4	Press the yellow "SPO IPDR" button located in the upper-right corner of the page. *Note – If the "SPO IPDR" button is not enabled (grey vice yellow), you do not have the proper roles in Direct Access to access WebNow. See prerequisites above for using WebNow.*	

Continued on next page

SPO WebNow User Guide, Continued

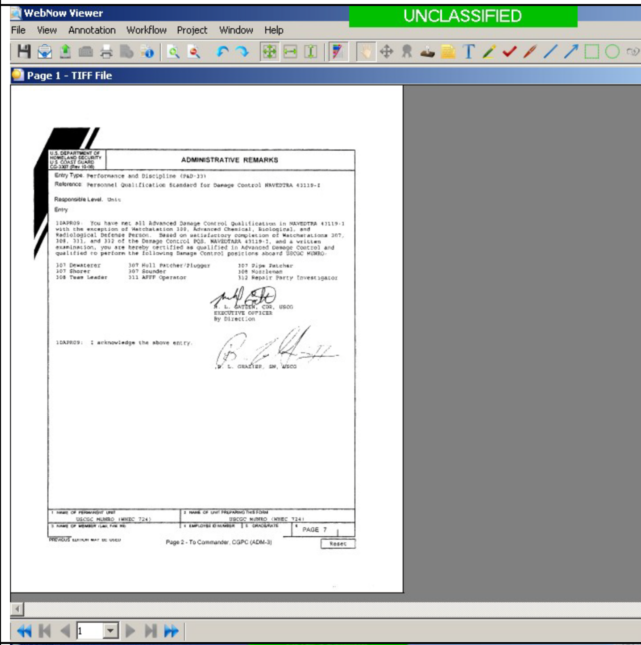
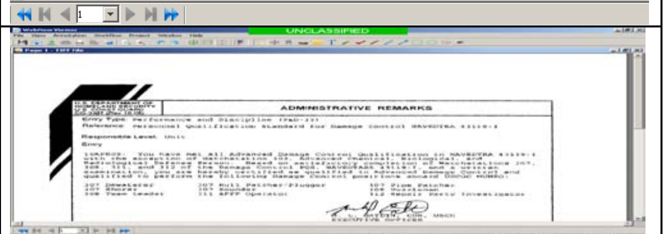
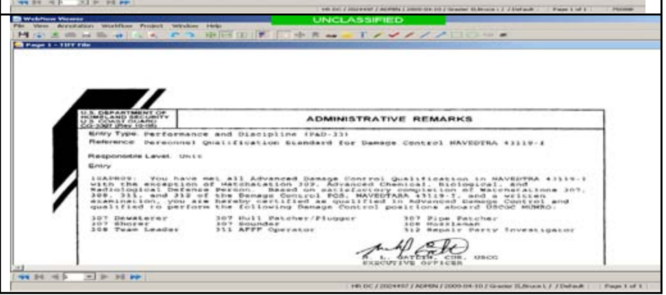
Accessing WebNow Documents **(continued)**

Step	Action	Remarks
5	After pressing the “DOCS” button, a new window should appear with the WebNow Login Screen (see diagram on right). *Note - WebNow may take a while to load initially*	
6	Enter your WebNow User Name and Password and press the “Connect” button.	*Note – Your User ID is your Employee ID*
7	You should now see a screen that looks similar to the one at the right.	

Continued on next page

SPO WebNow User Guide, Continued

Viewing WebNow Records

Step	Action	Remarks
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 ←→ 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.	

Continued on next page

SPO WebNow User Guide, Continued

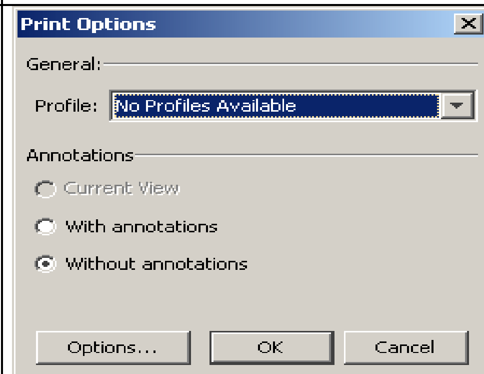
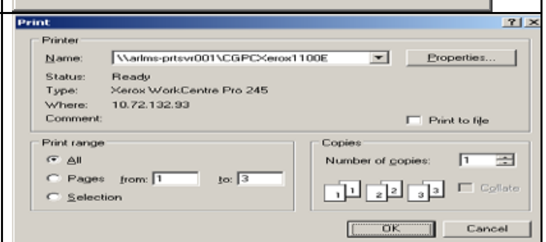
Viewing WebNow Records **(continued)**

Step	Action	Remarks
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. Once **you have the next member's record up** in the CG Member Info Window, **press the "SPO IPDR" button** and the list of records for the next member will appear in the WebNow window. Repeat process as often as needed.	

Continued on next page

SPO WebNow User Guide, Continued

Printing WebNow Records

Step	Action	Remarks
1	**To print a single document**, simply select the document you want to print by **clicking on it once in the grid list**. Once you have the document "highlighted" **press the "print" button (looks like a small printer)** located on the button toolbar	
2	You will then get a print options window like the one at the right. If you want to print the document as it appeared in the system, **press the "OK" button.** You can add "Options" and/or print "With annotations" to your documents as well.	
3	You will then see what appears as a "Normal Windows" Print window. **Select your printer and press "OK".** Your document will print to your selected printer.	
4	**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). Follow the same print process listed above and all highlighted documents will be printed.	

Continued on next page

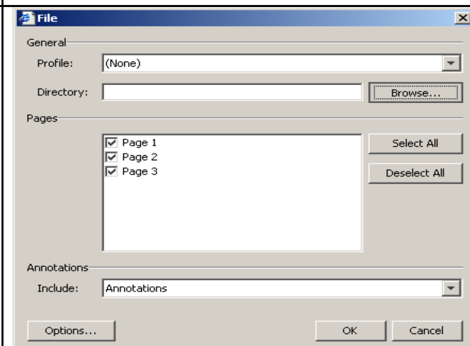
SPO WebNow User Guide, Continued

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.

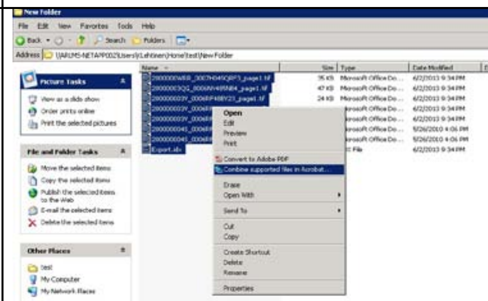
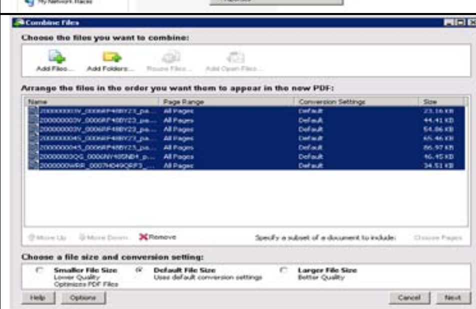
To use this method take the following steps:

Step	Action	Remarks
1	**Select the document/documents** you want to export from the grid list. *In this example only one document has been selected.* Then **press the "Export to File" button** on the toolbar (located just to the left of the "Print" button).	
2	The following window will appear. The number of pages listed depends on the documents you selected above. You can export "some" or "all" of the pages of any document. *By default the window "selects all"*. You can de-select any pages you don't want exported. 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.	

Continued on next page

SPO WebNow User Guide, Continued

Exporting WebNow Records **(continued)**

Step	Action	Remarks
3	When the folder menu appears, **select or "create" a folder to export your files**. To avoid confusion, it is "**highly suggested**" that the folder you select "**is empty".** That way your "exported files" will not be mixed together with previous files in the folder.	
4	When the export function completes, the window will close. *You must then go to the folder where you exported your files*. All files have been exported in TIF format and each TIF file represents one page of a document. To combine all of these files into one Adobe document, proceed to step 5.	
5	Select "all the documents" you exported including the index file (Export.idx). Position your mouse pointer over highlighted area of files and "right click". From the list of options select "Combine Supported Files in Acrobat".	
6	You should then see a window that looks like the one on the right. Accept Default settings and Press "Next".	

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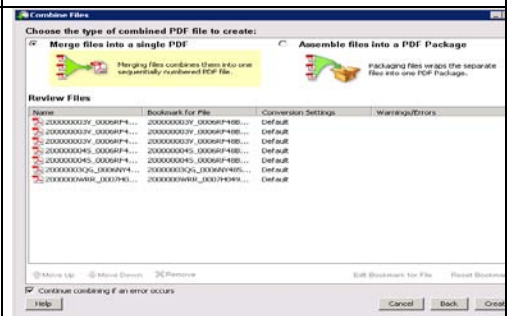
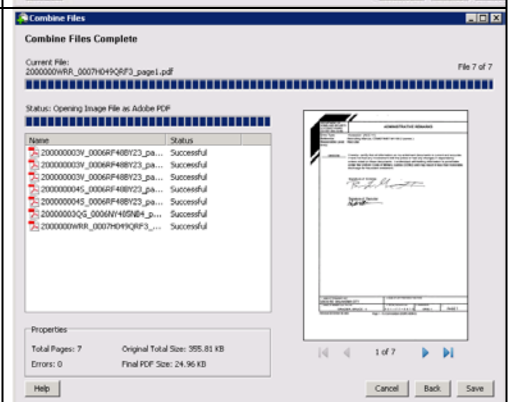
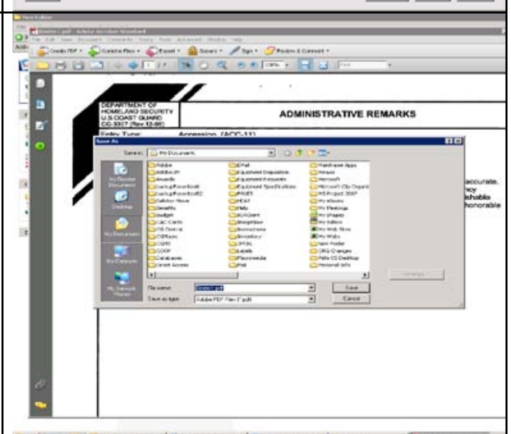
SPO WebNow User Guide, Continued

Exporting WebNow Records **(continued)**

Step	Action	Remarks
7	New window on right will appear. Accept settings to “Merge files into a single PDF” and press “Create” Button.	
8	You will see the files being merged in the “Combine Files” window. When completed press the “Save” Button.	
9	The “Save As” Window will appear with a default name of Binder1.pdf (with your .pdf document in the background). Change name and save.	
10	This completes the Exporting WebNow Records Function.	

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