

# PPC SPO User Guide

## SPO Access to the Electronically Imaged PDR (EI-PDR)

### Overview

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

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**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.

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**SPO Access to the Electronically Imaged PDR (EI-PDR)**

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## **WebNow Account Access and Deactivation**

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

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**Reference** (a) Personnel and Pay Procedures Manual (PPPM), PPCINST M1000.2 (series)

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**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.

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**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 perform SPO PDR duties.

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## **WebNow Account Access and Deactivation, Continued**

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### **SPO Procedures to establish a WebNow account**

<b>Step</b>	<b>Action</b>	<b>Remarks</b>
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. If member doesn't have HRS access, then complete form CG-7421B (DA User Role Designation)
2	Complete form CG-7421D (and CG-7421B if the user doesn't already have "HRS/SPO" access)	<p>Both of these required forms can be found on PPC's website located at: <a href="http://www.uscg.mil/ppc/forms/">http://www.uscg.mil/ppc/forms/</a>. See pages 7 and 8 for samples of completed forms.</p> <p>Forms must be digitally signed and transmitted to PPC Topeka via e-mail. Note: Complete CG-7421D (ImageNow User Access) first, then attach it to a CG-7421B (DA User Role Designation) and submit the completed forms to PPC using the e-mail button in block 13 of the CG-7421B.</p> <p>Reminder: When completing form CG-7421B, Direct Access User Role Designation, mark user roles in block 7 that you currently hold and wish to retain. <b>Each new authorization/designation form supersedes previous authorizations and designations.</b> 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.</p>
3	Receive confirmation from PPC that your WebNow account has been established.	<p>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.</p> <p>Additionally, the "SPO IPDR" button on the Direct Access "CG Member Info Page" will be enabled (colored vice gray).</p>
4	Properly file the WebNow user access form.	Each user shall file the CG-7421D form for the duration the user has account access. Once requests for deactivation of the account have been completed the original "activation" requests can be destroyed.

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## WebNow Account Access and Deactivation, Continued

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### SPO Procedures to Deactivate a WebNow account

Step	Action	Remarks
1	Complete and submit a PPC Customer Care Trouble Ticket.	<p>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.</p> <p>The PPC Customer Care Trouble Ticket can be found on PPC's CG Portal site: <a href="http://cglink.uscg.mil/PPCticket">http://cglink.uscg.mil/PPCticket</a>.</p> <p>A sample Trouble Ticket is shown in this section on page 9.</p>

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## **WebNow Account Access and Deactivation, Continued**

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### **SPO WebNow Help Contacts**

<b>Problem</b>	<b>Contact</b>	<b>Remarks</b>
WebNow is not loading after pressing the "SPO IPDR" link	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 "SPO IPDR" link 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 after receiving e-mail confirmation that the CG-7421B and the CG-7421D forms have been processed.
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: <a href="http://cglink.uscg.mil/PPCticket">http://cglink.uscg.mil/PPCticket</a> .  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)

Note: CG-7421B is only required if the user doesn't already have CGHRS-SPO access.

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.

Show/Hide Attachments
Reset Form

Attach Miscellaneous Click here to attach your CG-7421D submitting in conjunction with SPO access.

U.S. Coast Guard

### DIRECT ACCESS USER ROLE DESIGNATION

*Please fill out online. Do not print. This authorization supersedes current role designations.*

1. User's Name (Last, First, MI.) <b>Smith, John, M</b>	2. Rank <b>E05</b>	3. Employee ID # <b>7654321</b>
4. Dept ID & Unit Name (Include Staff Symbol) 000012/SPO Timbuktoo	5. Area Code & Phone Number (999) 555-1212	6. E-mail Address john.m.smith@uscg.mil

7. Role Designation—Do not forget current elevated roles (Current designations will be removed if not included on this request).  
*Note: See Chapter 2 of the Personnel and Pay Procedures Manual, PFCINST M1000.2(series), for an explanation of user roles common to field units.*

**Command**

CGSSCMD—[CMD] Command User (Evale, Dite, Airport Terminal, etc.)

CGEMPREV—[E6 & Above] Employee Review Only (not needed if you have CGSSCMD or CGHRS)

**Administration**

CGFIELDADM—[Admin] Access to Airport Terminal & Member Personal Profile (Competencies, Training, & Awards)

CGHRSVW—[Admin] View only access to the CGHRS Role

CGHRS—[SPO] Pay Tech (See Chapter 2 of the Personnel and Pay Procedures Manual, PFCINST M1000.2(series) for rules)

CGHRSUP—[SPO] Payment Approving Official (PAO). \*\*ES's require Justification Memo\*\*

*Note: See Chapter 2 of the Personnel and Pay Procedures Manual, PFCINST M1000.2(series), for an explanation of user roles common to field units.*

PPC (MAS) Approval Signature

**Reserve Only Administration**

CGRSVISC/CGRSVORD—[DXR] Reserve Orders Approval/Funding

CGRSVMGR—[Reserve Manager] Create, review, and endorse request for reserve orders

CGRSVDRL—[Reserve Admin] Schedule, Edit, and Approve Reserve IDT Drills

**Training**

CGFTESO—[Training Center] Unit Educational Services Officer. \*\*Requires Designation Memo\*\*

CGTRNOFF—[Unit ESO] Electronic Training Request Unit ESOs. \*\*Requires Designation Memo\*\*

CGTRNFAC—[Training Center] TAS Course Sessions

CGTRNTQC—[TQC] TAS Course Scheduler

**Security**

CGSECURN—Unit Security Manager (View Only)

CGSECUVW—Area/Dist Security Manager (View Only) \*\*Requires Digital Signature from DCMS-34\*\*

DCMS-34 Approval Signature

**Various/Others**

CGURINALYSIS—[Unit Urinalysis Coordinator] Unit rosters with DOD-ID numbers. \*\*Requires Designation Memo\*\*

CGASGN—[PSC] Assignment Officer (EPM/OPM/RPM)

CGAIRTRM—[Relocation/Housing Office] Airport Terminal Only (Not required if administration roles checked above)

CGGWIS—[Various] Global Workforce Inquiry System (Provides View Only Access to Personal Data and Reports)

Comments/Others [not listed] - Describe what you need to access in DA:

**Automatic Revocation:** Elevated Direct Access roles are automatically terminated upon PCB, separation, retirement, reassignment of duties (FleetUps), and change of organization (interoffice transfer). Users will retain Self-Service access only.

**CGHRSUP user roles for PAOs are automatically terminated each fiscal year unless the PAO completes annual required training and is re-designated in accordance with Chapter 2 of Personnel and Pay Procedures Manual, PFCINST M1000.2(series).**

**Manual Revocation:** Supervisors may submit an email citing the reason and which elevated roles to revoke to PPC Customer Care at: [PPC-DG-CustomerCare@uscg.mil](mailto:PPC-DG-CustomerCare@uscg.mil).

**Form Submission:** Please be sure to submit elevated roles request in a timely manner. Also recognize that if a user submits a new access form and it is processed by PPC before the SPO submits the PCB departing endorsement, the system will automatically terminate the new access once they are departed.

**Digital Signature:** <http://www.uscg.mil>  
Once a digital signature is applied the form is locked from editing. Only the signee can remove their own signature by right clicking and selecting "Clear Signature". If the signee is unavailable to remove a signature you start over by downloading a new form here: <http://www.uscg.mil/ppc/forms#tabs-1>

**Attachments:** Can be viewed by clicking the 'Show/Hide' Attachment button on the top left of the form. You can only attach one multipage attachment to the form for each role. You cannot attach multiple single page documents.

**User Acknowledgement:** I understand that I am authorized to access the Direct Access 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-66004), which is required for all U.S. Coast Guard AIS users. It contains the full scope of Authorization and Acknowledgement.*

8. User's Signature: [Signature]

Click Here - Email form to AO

**Authorizing Official Acknowledgement:** I certify that the access I have authorized is based on an official need. I am aware of the general functionality I have authorized and I am aware of what this will allow this member/employee to complete.

\*\*\*Only the CO/OIC and XO/XPO of any unit or Division/Branch Chiefs (including sub units) at the following units may sign:  
HQs/DCMS/CGPSC/PPC/FORCECOM/AREA ("By Direction" is not authorized)\*\*\*  
*Note: For Contractor Users, the Contracting Officer's Technical Representative (COTR) signs as AO.*

9. AO EMPLID: <b>1234567</b>	10. AO RANK: <b>W04</b>	11. AO TITLE: <b>SPO Chief</b>	12. AO Phone: <b>(999) 555-1212</b>
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13. AO's Signature: [Signature]

Click Here - Email form to PPC

**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.

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SPO Access to the EI-PDR

01 June 2016

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WebNow Account Access and Deactivation, Continued

CG-7421D Sample - ImageNow User Access Authorization Form  
 Digital signature required.

DEPARTMENT OF HOMELAND SECURITY U.S. Coast Guard IMAGENOW USER ACCESS AUTHORIZATION		
<i>Please fill out online and sign digitally! This authorization supercedes previous applications.</i>		
1. User's Name (Last, First, MI.) (Please print or type) Smith, John, M	2. Rank/Rate YN2	3. Employee ID # (Not SSN) 7654321
4. Dept ID & Unit Name (Include Staff Symbol) 000012/SPO Timbuktoo	5. Area Code & Phone Number (999) 555-1212	6. e-mail address john.m.smith@uscg.mil
7. User Role Description (Include current roles, this authorization supercedes all of your previous authorizations):		
<b>PPC General:</b>		
RAS: <input type="checkbox"/> Accounting Techs <input type="checkbox"/> Admin	<input type="checkbox"/> ACT/RES Pay Techs <input type="checkbox"/> Supervisor/Auditors	<input type="checkbox"/> Annuitant Pay Techs <input type="checkbox"/> View & Print <input type="checkbox"/> View Only
SES: <input type="checkbox"/> ADT <input type="checkbox"/> ADT View & Print <input type="checkbox"/> ADT View Only	<input type="checkbox"/> IDT <input type="checkbox"/> IDT View & Print <input type="checkbox"/> IDT View Only	<input type="checkbox"/> SOCS <input type="checkbox"/> SOCS View & Print <input type="checkbox"/> SOCS View Only
TVL: <input type="checkbox"/> Claim Examiners	<input type="checkbox"/> System Support	<input type="checkbox"/> View & Print <input type="checkbox"/> View Only
<b>Security Administrators:</b> <input type="checkbox"/> CS User Auth - DA & JUMPS User Auth Forms <input type="checkbox"/> ID AIS		<b>Administrators:</b> <input type="checkbox"/> ImageNow Administrator <input type="checkbox"/> Scanners
<b>HQs/PSC/SPOs:</b>		
Document Processors (Scanners/Image Processors) <input type="checkbox"/> PSD-MR <input type="checkbox"/> OPM-3 <input type="checkbox"/> Boardroom Administrators		
Records Review - Full Access <input type="checkbox"/> OPM <input type="checkbox"/> RPM (Officer Records) <input type="checkbox"/> OPM/RPM Boardroom Accounts <input type="checkbox"/> BCMR/Congressional Review <input type="checkbox"/> Auditor Support		
Records Review - Restricted Access <input checked="" type="checkbox"/> SPO IPDR <input type="checkbox"/> EPM <input type="checkbox"/> PSC/Hqs (limited) <input type="checkbox"/> PPC		
8. Authorizing Official (Signature & Typed or printed name, Rank, Title (if applicable), and 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) sign as AO.		
Signature, PRINTED or TYPED Name, Rank, Title (see instructions), Phone I. M. Daboss SPO Supervisor (999) 555-1212		
<b>Privacy Act Statement</b>		
AUTHORITY: Execute Order 10450, 9397, and Public Law 99-474, the Computer Fraud and Abuse Act, and the Privacy Act (5 U.S.C. 552a).		
PRINCIPAL PURPOSE: To record names, signatures, and other identifiers for the purpose of identifying and tracking access to the U.S. Coast Guard (USCG) systems and information. NOTE: Records may be maintained in accordance with the Privacy Act (5 U.S.C. 552a).		
ROUTINE USES: None.		
DISCLOSURE: Disclosure of this information to unauthorized persons may provide the requester with information that is not intended for their use. The requester must provide the request in writing and acknowledge the request.		
Acknowledgment: I understand that I am authorized to access the ImageNow/WebNow system and that any unauthorized use of this system is a violation of Federal law (18 U.S.C. 2201-2202) (note: Refer to the Automated Information Systems Protection Policy (AISPP) for more information). I acknowledge that this authorization is required for all U.S. Coast Guard AIS users, it contains the full Scope of Authorization and is subject to the Privacy Act (5 U.S.C. 552a).		
10. User's Signature I. M. Daboss	11. Date 05/17/2016	<b>e-Mail to PPC (CCB)</b>
<b>Revocation Procedure:</b> 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 or via email at <a href="mailto:PPC-DG-CustomerCare@uscg.mil">PPC-DG-CustomerCare@uscg.mil</a> for all ImageNow account revocations.		

Digital signature required.

Save completed, digitally signed form and attach it to your CG-7421B. Submit the complete forms to PPC using the e-mail button in block 13 of the CG-7421B. You can use this button (e-Mail to PPC (CCB)) if submitting the form without a CG-7421B.

Digital signature required.

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## WebNow Account Access and Deactivation, Continued

### Sample PPC Customer Care WebNow Account Deactivation Trouble Ticket

#### PPC Customer Care Trouble Ticket Submission Form

(Press 'Submit' after completing the form)

**Can Your Supervisor, PAO or AO Help?** Many issues can be resolved at the unit or SPO level. Please check with your supervisor, SPO Payment Approving Official (PAO), or for travel-related issues, your Travel Approving Official (AO) for assistance before submitting a trouble ticket.

A separate ticket or email is required for each issue or individual affected by an issue. Do not submit tickets or emails with multiple members listed.

Review the list of [DA-9.1 Known Issues](#) before submitting a trouble ticket or email for a Direct Access/Global Pay problem.

#### Contact Information -- Who is submitting this ticket?

POC Employee ID: → 1234567 → → → → → →  
POC Email: → first.m.last@uscg.mil  
POC First Name: → First  
POC Last Name: → Last  
POC Title, Rate or Rank: → YNC  
POC Daytime Phone Number: → 785-555-1212 Ext. 1212  
*(include area code & ext)*

#### Member/Employee Information -- Who is this ticket for?

Member/Employee ID: → 7654321  
Member/Employee First Name: → John  
Member/Employee Last Name: → Smith

#### Problem/Issue Information -- If Travel related issue, include Travel Order Number (TONO) and travel dates in the description.

User Role for this issue: → I am a Command, SPO or ADMIN support user  
Category: → EI-PDR/WEBNOW → → →  
Type: → USER ACCT/ASSISTANCE  
Cause: → REMOVE/DISABLE USER  
Description of Problem/Request: → Please deactivate YN2 Smith's ImageNow/WebNow account. Member is departing on PCS orders.

Submit

## WebNow Account Access and Deactivation, Continued

### Sample PPC Customer Care Password Reset and WebNow Error Trouble Ticket

**PPC Customer Care Trouble Ticket Submission Form**  
*(Press 'Submit' after completing the form)*

**Can Your Supervisor, PAO or AO Help?** Many issues can be resolved at the unit or SPO level. Please check with your supervisor, SPO Payment Approving Official (PAO), or for travel related issues, your Travel Approving Official (AO) for assistance before submitting a trouble ticket.

A separate ticket or email is required for each issue or individual affected by an issue. Do not submit tickets or emails with multiple members listed.

Review the list of [DA 9.1 Known Issues](#) before submitting a trouble-ticket or email for a Direct Access/Global Pay problem.

**Contact Information** - Who is submitting this ticket?

POC Employee ID: 1234567  
POC Email: first.m.last@uscg.mil  
POC First Name: First  
POC Last Name: Last  
POC Title, Rate or Rank: YNC  
POC Daytime Phone Number: 785-555-1212 Ext. 1212  
(include area code & ext)

**Member/Employee Information** - Who is this ticket for?

Member/Employee ID: 1234567  
Member/Employee First Name: First  
Member/Employee Last Name: Last

**Problem/Issue Information** - *If Travel related issue, include Travel Order Number (TONO) and travel dates in the description.*

User Role for this issue: I am a Command, SPO or ADMIN support user  
Category: EI-PDR/WEBNOW  
Type: USER ACCT/ASSISTANCE ▾  
Cause: UNLOCK USER

Description of Problem/Request: I cannot access WebNow with my password Please provide me with a password to login to WebNow. My user ID is 1234567

Or, (for error messages/problems - change "type" to "system problem" and select a "cause" and explain the error or problem.

"After logging into WebnNow, I receive the following error message (Type the exact message you are receiving."

Submit

## SPO PDR Scanning and Verification Process

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**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.

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

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**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-BOPS-C-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-BOPS-C-MR Section will review documents forwarded by a SPO to ensure proper format and readability prior to adding the document into the EI-PDR.

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**Discussion** This section provides instructions and criteria required to identify, label, scan, e-mail, and follow-up on all documents sent to PSC-BOPS-C-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-BOPS-C-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).

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**SPO PDR Scanning and Verification Process, Continued**

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**SPO Procedures**

<b>Step</b>	<b>Action</b>	<b>Remarks</b>								
1	Identify and Label Documents prior to Scanning	<p>Review COMDTINST M1080.10(series) to ensure the document is authorized in the EI-PDR. The PSC-BOPS-C-MR Section constantly receives unauthorized EI-PDR documents that are ultimately shredded.</p> <p>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.</p>								
2	Scan documents	<p>The below criteria applies to scanned documents:</p> <table border="1"> <thead> <tr> <th align="center">Criteria</th> <th align="center">Description</th> </tr> </thead> <tbody> <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-BOPS-C-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.</td> </tr> </tbody> </table>	Criteria	Description	One member's record per scanned file	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").	Adobe (.pdf) format	This is the required format for documents to ensure they can be opened by PSC-BOPS-C-MR. The Adobe documents must be legible and of good quality.	Less than 10MB file size	Ensure e-mail attachments are less than 10 megabytes (MB). E-mails exceeding 10MBs will not be sent.
Criteria	Description									
One member's record per scanned file	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").									
Adobe (.pdf) format	This is the required format for documents to ensure they can be opened by PSC-BOPS-C-MR. The Adobe documents must be legible and of good quality.									
Less than 10MB file size	Ensure e-mail attachments are less than 10 megabytes (MB). E-mails exceeding 10MBs will not be sent.									
3		<p>A sample forwarding e-mail is shown on page X-4-14.</p> <p>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.</p> <p>Do <b>not</b> 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.</p>								

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## **SPO PDR Scanning and Verification Process, Continued**

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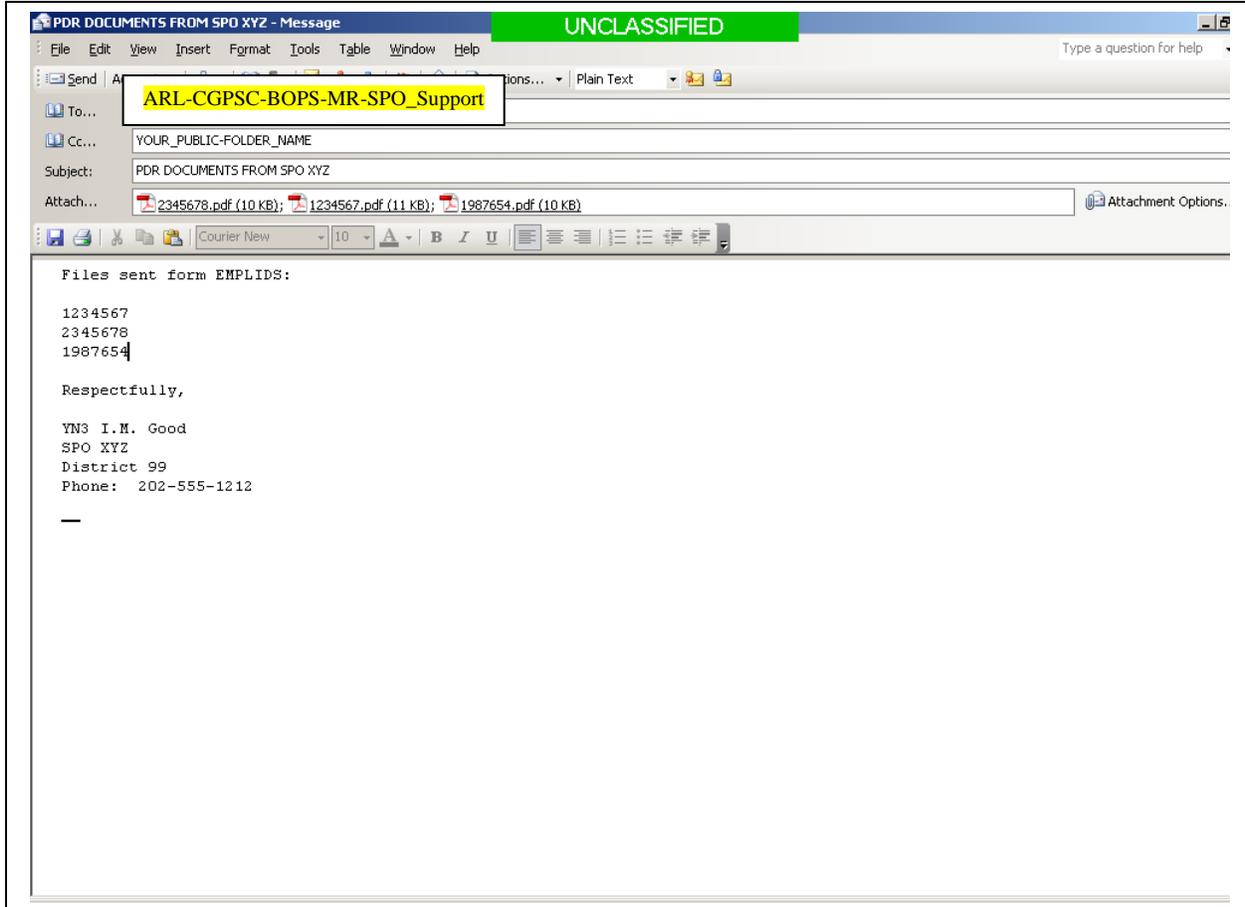
**SPO Procedures (continued)**

<b>Step</b>	<b>Action</b>	<b>Remarks</b>
4	Save forwarding e-mail to file tracking folder.	<p>Each SPO shall create a centralized “public e-mail” folder to store e-mails sent to the PSC-BOPS-C-MR. You will need to submit a help ticket to your local ESU/ESD IT helpdesk to have this done.</p> <p>The ARL-PF-CGPSC-BOPS-MR-SPO_Support public e-mail folder is a good example of a “public folder e-mail name”. A sample e-mail to PSC-BOPS-C-MR with attachments is shown on the next page.</p>
5	Verify documents were filed in member’s EI-PDR	<p>After 14 days, the SPO must verify that documents forwarded to the PSC-BOPS-C-MR Section 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).</p> <p>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.</p> <p>Purge your SPO public e-mail folder contents upon verification of EI-PDR inclusion.</p>
6	Contact the PSC-BOPS-C-MR Section as needed	<p>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-BOPS-C-MR Section Chief, <a href="mailto:michael.r.lemorie@uscg.mil">michael.r.lemorie@uscg.mil</a>, with a list of documents sent but not filed.</p>

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## SPO PDR Scanning and Verification Process, Continued

### Sample SPO EI-PDR Forwarding E-mail



## **SPO WebNow User Guide**

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**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.

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**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.*

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**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-BOPS-C-MR per this link: <http://www.uscg.mil/psd/mr>

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

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**Contents**      The following topics are covered in this guide:

<b>Topic</b>	<b>See Page</b>
<a href="#">Accessing WebNow Documents</a>	16
<a href="#">Viewing WebNow Records</a>	18
<a href="#">Printing WebNow Records</a>	20
<a href="#">Exporting WebNow Records</a>	21

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## SPO WebNow User Guide, Continued

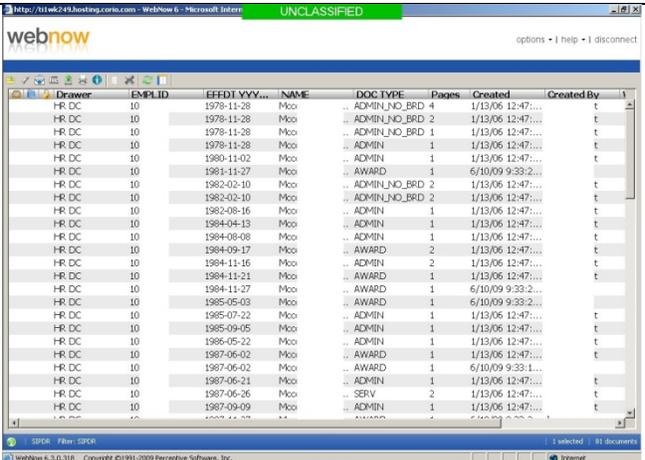
### Accessing WebNow Documents

Step	Action	Remarks
1	Login to Direct Access (PeopleSoft) with your User ID and password	Go to <a href="https://portal.direct-access.us">https://portal.direct-access.us</a>
2	Click on the <a href="#">Member Info Report</a> located on the “Self Service for Commands” Pagelet	Select “Member Info Report”
3	Type the Member’s Employee ID in the block marked EmplID and press the “Tab” button.  This should list the member’s name to the right of the EmplID.  Afterwards, click on the SPO IPDR link to launch the “WebNow” application.	
4	After clicking the <a href="#">SPO IPDR</a> link, a new window should appear with the WebNow Login Screen (see diagram on right).  <i>Note - WebNow may take a while to load initially</i>	

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## SPO WebNow User Guide, Continued

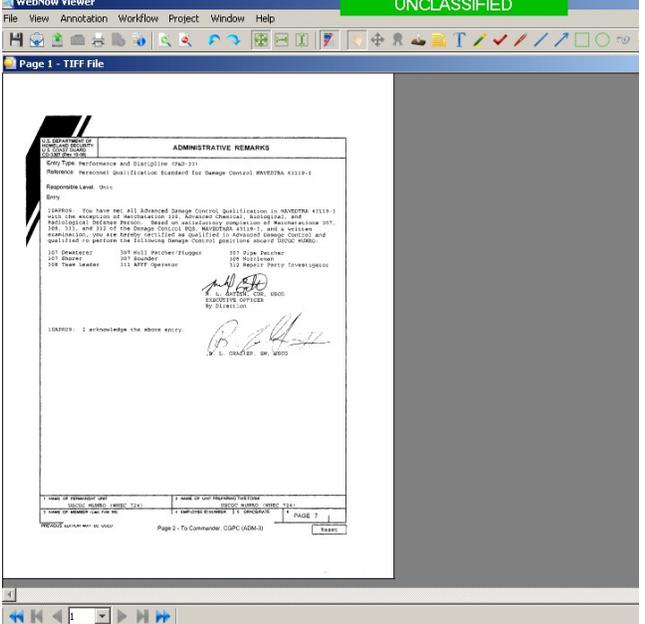
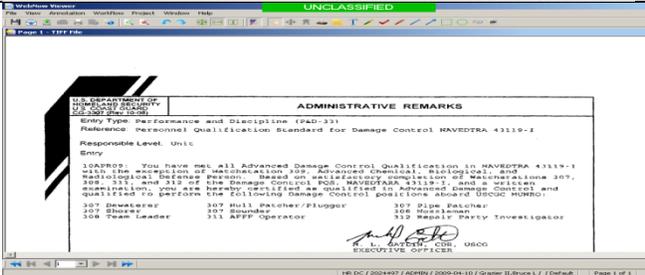
### Accessing WebNow Documents (continued)

Step	Action	Remarks																																																																																																																																																																																																								
6	Enter your WebNow User Name and Password and press the “Connect” button.	<i>Note – Your User ID is your Employee ID</i>																																																																																																																																																																																																								
7	You should now see a screen that looks similar to the one at the right.	 <p>The screenshot shows a web browser window displaying the WebNow application. The page title is 'UNCLASSIFIED'. The main content is a table with columns: Drawer, EMPL ID, EFFECT YYY, NAME, DOC TYPE, Pages, Created, and Created By. The table lists various documents, including administrative records and awards, with dates ranging from 1978 to 1987.</p> <table border="1"> <thead> <tr> <th>Drawer</th> <th>EMPL ID</th> <th>EFFECT YYY</th> <th>NAME</th> <th>DOC TYPE</th> <th>Pages</th> <th>Created</th> <th>Created By</th> </tr> </thead> <tbody> <tr><td>HR DC</td><td>10</td><td>1978-11-28</td><td>Mco</td><td>ADMIN_NO_BRD</td><td>4</td><td>1/13/06 12:47:...</td><td>t</td></tr> <tr><td>HR DC</td><td>10</td><td>1978-11-28</td><td>Mco</td><td>ADMIN_NO_BRD</td><td>2</td><td>1/13/06 12:47:...</td><td>t</td></tr> <tr><td>HR DC</td><td>10</td><td>1978-11-28</td><td>Mco</td><td>ADMIN_NO_BRD</td><td>1</td><td>1/13/06 12:47:...</td><td>t</td></tr> <tr><td>HR DC</td><td>10</td><td>1978-11-28</td><td>Mco</td><td>ADMIN</td><td>1</td><td>1/13/06 12:47:...</td><td>t</td></tr> <tr><td>HR DC</td><td>10</td><td>1980-11-02</td><td>Mco</td><td>ADMIN</td><td>1</td><td>1/13/06 12:47:...</td><td>t</td></tr> <tr><td>HR DC</td><td>10</td><td>1981-11-27</td><td>Mco</td><td>AWARD</td><td>1</td><td>6/10/09 9:33:2...</td><td>t</td></tr> <tr><td>HR DC</td><td>10</td><td>1982-02-10</td><td>Mco</td><td>ADMIN_NO_BRD</td><td>2</td><td>1/13/06 12:47:...</td><td>t</td></tr> <tr><td>HR DC</td><td>10</td><td>1982-02-10</td><td>Mco</td><td>ADMIN_NO_BRD</td><td>2</td><td>1/13/06 12:47:...</td><td>t</td></tr> <tr><td>HR DC</td><td>10</td><td>1982-08-16</td><td>Mco</td><td>ADMIN</td><td>1</td><td>1/13/06 12:47:...</td><td>t</td></tr> <tr><td>HR DC</td><td>10</td><td>1984-04-13</td><td>Mco</td><td>ADMIN</td><td>1</td><td>1/13/06 12:47:...</td><td>t</td></tr> <tr><td>HR DC</td><td>10</td><td>1984-08-08</td><td>Mco</td><td>ADMIN</td><td>1</td><td>1/13/06 12:47:...</td><td>t</td></tr> <tr><td>HR DC</td><td>10</td><td>1984-09-17</td><td>Mco</td><td>AWARD</td><td>2</td><td>1/13/06 12:47:...</td><td>t</td></tr> <tr><td>HR DC</td><td>10</td><td>1984-11-16</td><td>Mco</td><td>ADMIN</td><td>2</td><td>1/13/06 12:47:...</td><td>t</td></tr> <tr><td>HR DC</td><td>10</td><td>1984-11-21</td><td>Mco</td><td>AWARD</td><td>1</td><td>1/13/06 12:47:...</td><td>t</td></tr> <tr><td>HR DC</td><td>10</td><td>1984-11-27</td><td>Mco</td><td>AWARD</td><td>1</td><td>6/10/09 9:33:2...</td><td>t</td></tr> <tr><td>HR DC</td><td>10</td><td>1985-05-03</td><td>Mco</td><td>AWARD</td><td>1</td><td>6/10/09 9:33:2...</td><td>t</td></tr> <tr><td>HR DC</td><td>10</td><td>1985-07-22</td><td>Mco</td><td>ADMIN</td><td>1</td><td>1/13/06 12:47:...</td><td>t</td></tr> <tr><td>HR DC</td><td>10</td><td>1985-09-05</td><td>Mco</td><td>ADMIN</td><td>1</td><td>1/13/06 12:47:...</td><td>t</td></tr> <tr><td>HR DC</td><td>10</td><td>1986-05-22</td><td>Mco</td><td>ADMIN</td><td>1</td><td>1/13/06 12:47:...</td><td>t</td></tr> <tr><td>HR DC</td><td>10</td><td>1987-06-02</td><td>Mco</td><td>AWARD</td><td>1</td><td>1/13/06 12:47:...</td><td>t</td></tr> <tr><td>HR DC</td><td>10</td><td>1987-06-02</td><td>Mco</td><td>AWARD</td><td>1</td><td>6/10/09 9:33:1...</td><td>t</td></tr> <tr><td>HR DC</td><td>10</td><td>1987-06-21</td><td>Mco</td><td>ADMIN</td><td>1</td><td>1/13/06 12:47:...</td><td>t</td></tr> <tr><td>HR DC</td><td>10</td><td>1987-06-26</td><td>Mco</td><td>SERV</td><td>2</td><td>1/13/06 12:47:...</td><td>t</td></tr> <tr><td>HR DC</td><td>10</td><td>1987-09-09</td><td>Mco</td><td>ADMIN</td><td>1</td><td>1/13/06 12:47:...</td><td>t</td></tr> </tbody> </table>	Drawer	EMPL ID	EFFECT YYY	NAME	DOC TYPE	Pages	Created	Created By	HR DC	10	1978-11-28	Mco	ADMIN_NO_BRD	4	1/13/06 12:47:...	t	HR DC	10	1978-11-28	Mco	ADMIN_NO_BRD	2	1/13/06 12:47:...	t	HR DC	10	1978-11-28	Mco	ADMIN_NO_BRD	1	1/13/06 12:47:...	t	HR DC	10	1978-11-28	Mco	ADMIN	1	1/13/06 12:47:...	t	HR DC	10	1980-11-02	Mco	ADMIN	1	1/13/06 12:47:...	t	HR DC	10	1981-11-27	Mco	AWARD	1	6/10/09 9:33:2...	t	HR DC	10	1982-02-10	Mco	ADMIN_NO_BRD	2	1/13/06 12:47:...	t	HR DC	10	1982-02-10	Mco	ADMIN_NO_BRD	2	1/13/06 12:47:...	t	HR DC	10	1982-08-16	Mco	ADMIN	1	1/13/06 12:47:...	t	HR DC	10	1984-04-13	Mco	ADMIN	1	1/13/06 12:47:...	t	HR DC	10	1984-08-08	Mco	ADMIN	1	1/13/06 12:47:...	t	HR DC	10	1984-09-17	Mco	AWARD	2	1/13/06 12:47:...	t	HR DC	10	1984-11-16	Mco	ADMIN	2	1/13/06 12:47:...	t	HR DC	10	1984-11-21	Mco	AWARD	1	1/13/06 12:47:...	t	HR DC	10	1984-11-27	Mco	AWARD	1	6/10/09 9:33:2...	t	HR DC	10	1985-05-03	Mco	AWARD	1	6/10/09 9:33:2...	t	HR DC	10	1985-07-22	Mco	ADMIN	1	1/13/06 12:47:...	t	HR DC	10	1985-09-05	Mco	ADMIN	1	1/13/06 12:47:...	t	HR DC	10	1986-05-22	Mco	ADMIN	1	1/13/06 12:47:...	t	HR DC	10	1987-06-02	Mco	AWARD	1	1/13/06 12:47:...	t	HR DC	10	1987-06-02	Mco	AWARD	1	6/10/09 9:33:1...	t	HR DC	10	1987-06-21	Mco	ADMIN	1	1/13/06 12:47:...	t	HR DC	10	1987-06-26	Mco	SERV	2	1/13/06 12:47:...	t	HR DC	10	1987-09-09	Mco	ADMIN	1	1/13/06 12:47:...	t
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SPO WebNow User Guide, Continued

Viewing WebNow Records

Step	Action	Remarks
1	<p>To <b>view the contents</b> of a member's document, simply <b>"double-click"</b> the document on the grid list you want to view. (Default view is entire page).</p> <p>Once opened, use the options provided on the <b>Page</b> toolbar (located at the bottom of the screen) to move between pages in your document.</p>	 <p>The screenshot shows a software window titled 'WebNow Viewer' with a green 'UNCLASSIFIED' label. The window contains a document page titled 'Page 1 - TIFF File'. The document content includes a header 'ADMINISTRATIVE REMARKS', a 'RESPONSIBLE LEVEL' section, and a 'PERSONNEL' list. There are also handwritten signatures and dates visible on the document page.</p>
2	<p>To <b>enlarge the viewing size</b> of your document press the <b>"Fit Width" Button</b> on the tool bar (<b>Green ↔ button</b>).</p>	 <p>This screenshot is similar to the first one, but the 'Fit Width' button on the bottom toolbar is highlighted in green, indicating the action being described.</p>
3	<p>To <b>close the document</b> and return to your document list, <b>press the "X" in the upper-most right hand corner</b> of the window.</p> <p>Continue the process above to view the rest of the member's documents.</p>	 <p>This screenshot shows the document window with the 'X' button in the top right corner highlighted, indicating the final step of closing the document.</p>

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**SPO WebNow User Guide, Continued**

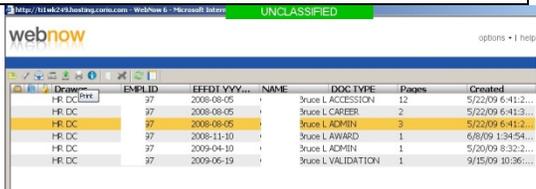
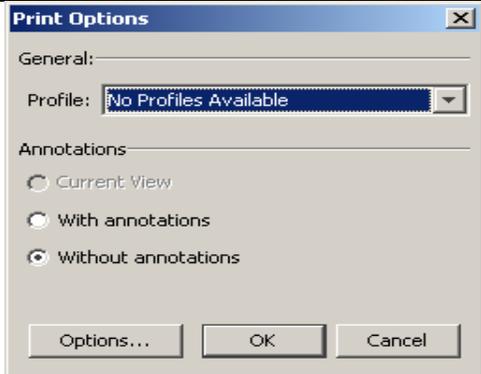
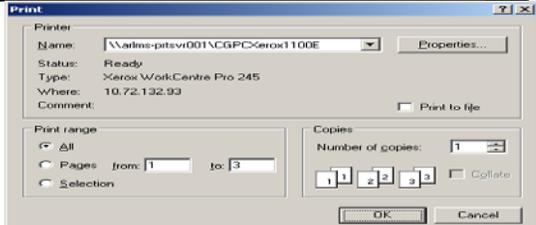
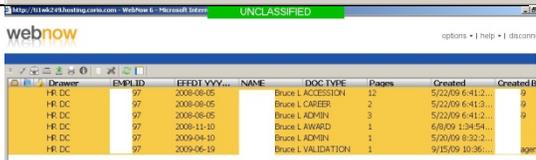
Viewing WebNow Records (continued)

Step	Action	Remarks
4	<p>To view a different member's records, you must go back to the <b>Member Info</b> area in DA and retrieve the next member's information.</p> <p>Once you have the next member's record up in the CG Member Info Window, click the <a href="#">SPO IPDR</a> link again and the list of records for the next member will appear in the WebNow window.</p> <p>Repeat process as often as needed.</p>	 <p>The screenshot shows the United States Coast Guard WebNow interface. At the top, there is a navigation bar with 'My Page' and 'Requests' tabs. Below this is the 'CG Member Info Report' section for 'Outlaw, Josey W.' with an Empl ID of .9876543. There is a 'Create Report' button and a link for 'SPO IPDR' which is circled in red with an arrow pointing to it. A 'Docs' link is also visible.</p>

*Continued on next page*

SPO WebNow User Guide, Continued

**Printing WebNow Records** Follow these steps to print from WebNow..

Step	Action	Remarks
1	<p><b>To print a single document</b>, simply select the document you want to print by <b>clicking on it once in the grid list</b>.</p> <p>Once you have the document “highlighted” <b>press the “print” button (looks like a small printer)</b> located on the button toolbar</p>	 <p>The screenshot shows the WebNow interface with a grid of documents. One document is highlighted in yellow. The grid columns include Drawer, EMBL ID, EFDI, VVV, NAME, DOC TYPE, Pages, and Created.</p>
2	<p>You will then get a print options window like the one at the right.</p> <p>If you want to print the document as it appeared in the system, <b>press the “OK” button</b>.</p> <p>You can add “Options” and/or print “With annotations” to your documents as well.</p>	 <p>The screenshot shows the 'Print Options' dialog box. It has sections for 'General' (Profile: No Profiles Available), 'Annotations' (Current View, With annotations, Without annotations), and buttons for 'Options...', 'OK', and 'Cancel'.</p>
3	<p>You will then see what appears as a “Normal Windows” Print window. <b>Select your printer and press “OK”</b>.</p> <p>Your document will print to your selected printer.</p>	 <p>The screenshot shows the standard Windows 'Print' dialog box. It includes fields for Printer Name, Status, Type, and Where. It also has options for Print range (All, Pages, Selection) and Copies (Number of copies, Collate), with 'OK' and 'Cancel' buttons at the bottom.</p>
4	<p><b>To print all the documents</b> in the Grid, simply; <b>click the document at the top</b>, then <b>hold down your “shift key” and press the document at the bottom</b>. All the documents should be highlighted (selected).</p> <p>Follow the same print process listed above and all highlighted documents will be printed.</p>	 <p>The screenshot shows the WebNow grid with multiple documents selected, indicated by yellow highlighting across several rows.</p>

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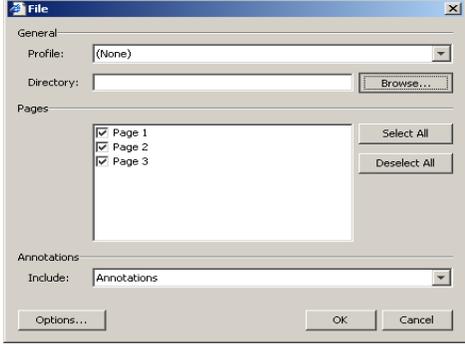
SPO WebNow User Guide, Continued

**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.

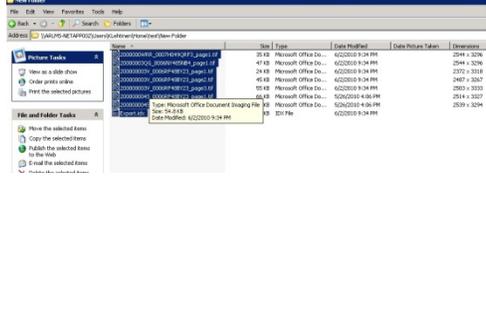
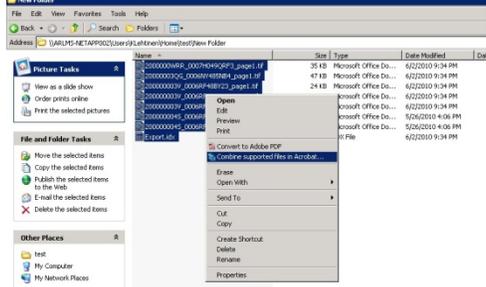
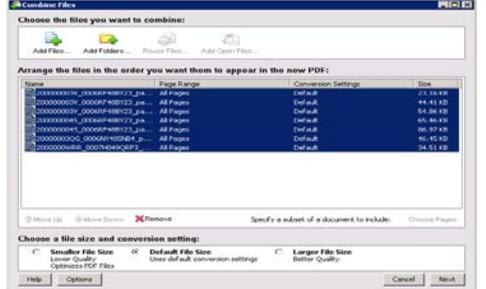
To use this method take the following steps:

Step	Action	Remarks
1	<p><b>Select the document/documents</b> you want to export from the grid list.</p> <p><i>In this example only one document has been selected.</i></p> <p>Then <b>press the “Export to File” button</b> on the toolbar (located just to the left of the “Print” button).</p>	
2	<p>The following window will appear. The number of pages listed depends on the documents you selected above.</p> <p>You can export “some” or “all” of the pages of any document. <i>By default the window “selects all”.</i> You can de-select any pages you don’t want exported.</p> <p>You must “designate” a location for your files to be exported. You do this by pressing the “Browse” button on the right-hand side of the “Directory:” field.</p>	

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SPO WebNow User Guide, Continued

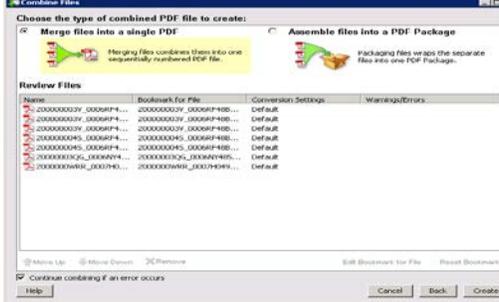
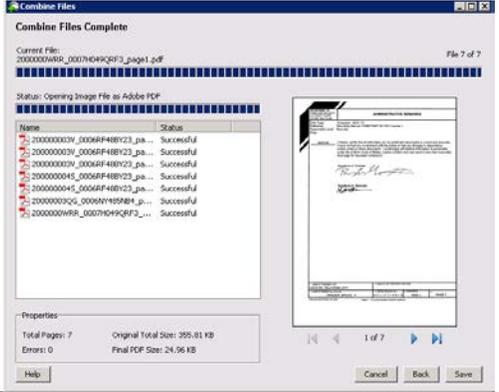
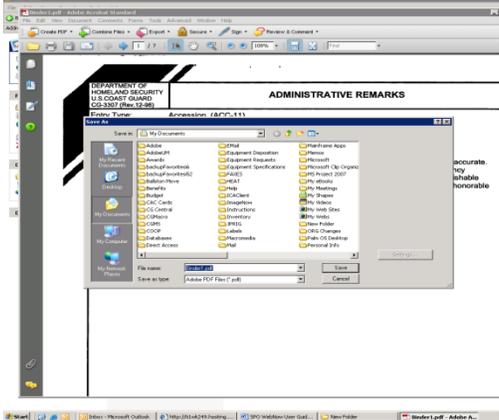
Exporting WebNow Records (continued)

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

Continued on next page

SPO WebNow User Guide, Continued

Exporting WebNow Records (continued)

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

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