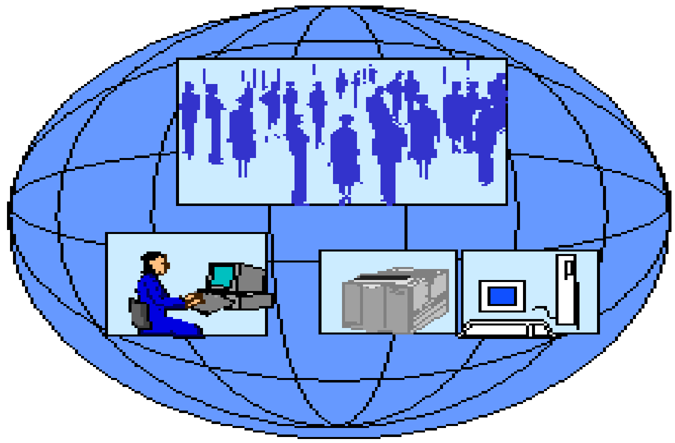

DCPDS Guide For Managers/Supervisors

People First, Mission Always

Published by the National Guard Bureau Office of Technician Personnel

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DCPDS Reference Guide for Managers/Supervisors

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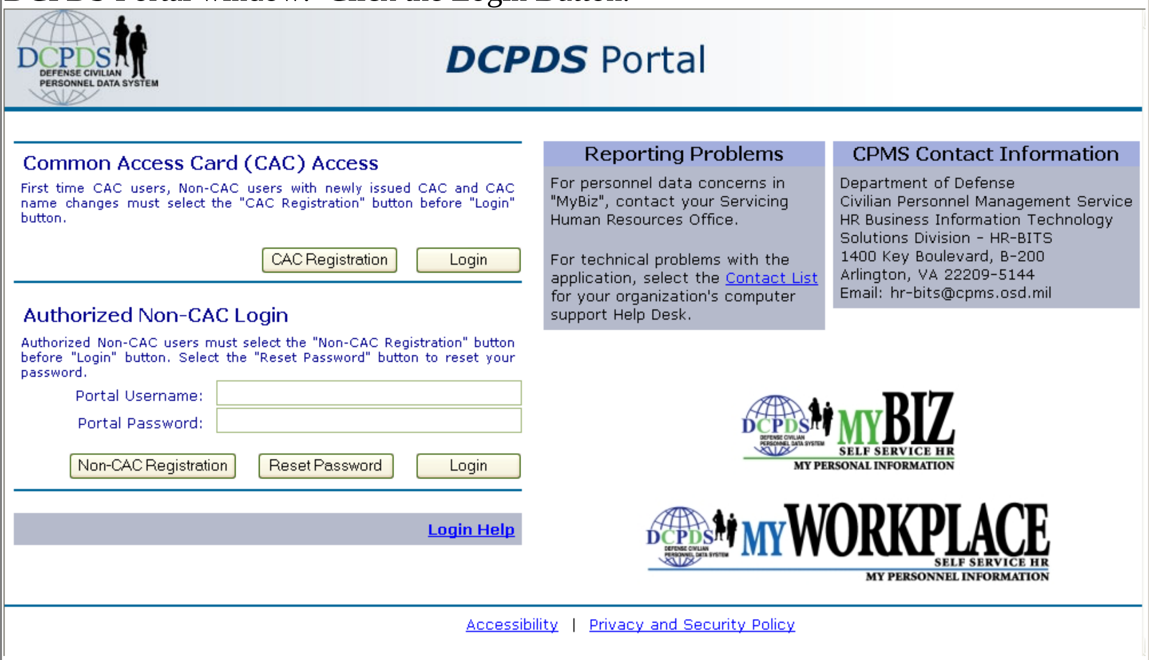
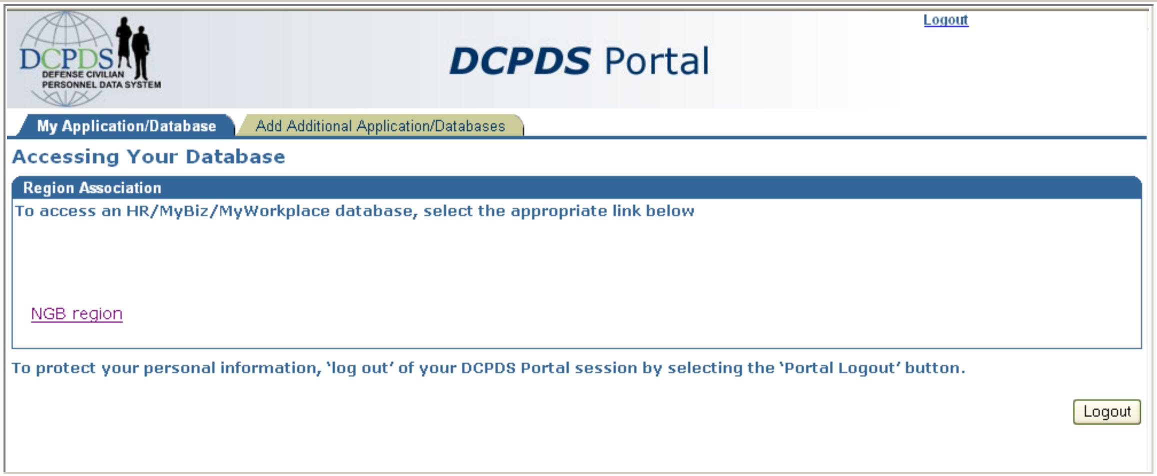
Topic	Page

Section Three – Inboxes

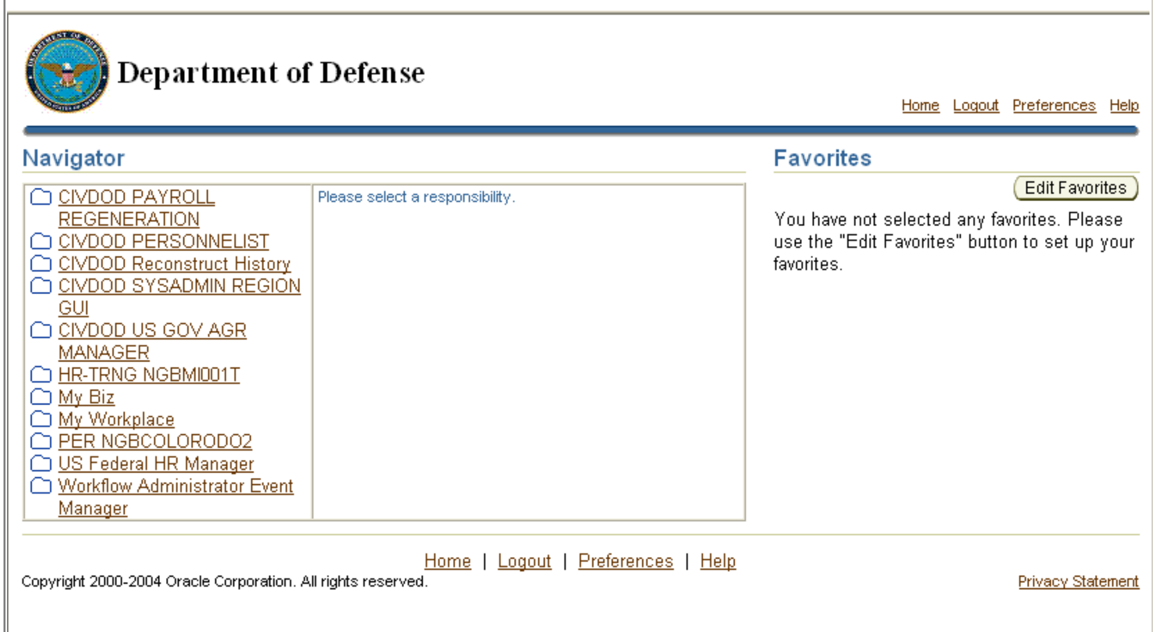
Section One – General Information

Logging into DCPDS

Step	Action
1	Open your Internet Explorer. Enter the web site: https://compo.dcpds.cpms.osd.mil. Click "OK" on the DOD Notice and Consent banner page. This will take you to the DCPDS Portal window. Click the Login Button. 
2	You should then receive a window that contains your CAC certificates. Make sure you select the certificate that is not your E-Mail certificate. You will then have to enter your CAC PIN. You will then receive the "Accessing your Database" window. Select "NGB Region".



3 The Navigator window displays. On the left side of this window is your DCPDS *responsibility* – for most users, this will be a “secure user ID” which is what DCPDS uses to control access to records.



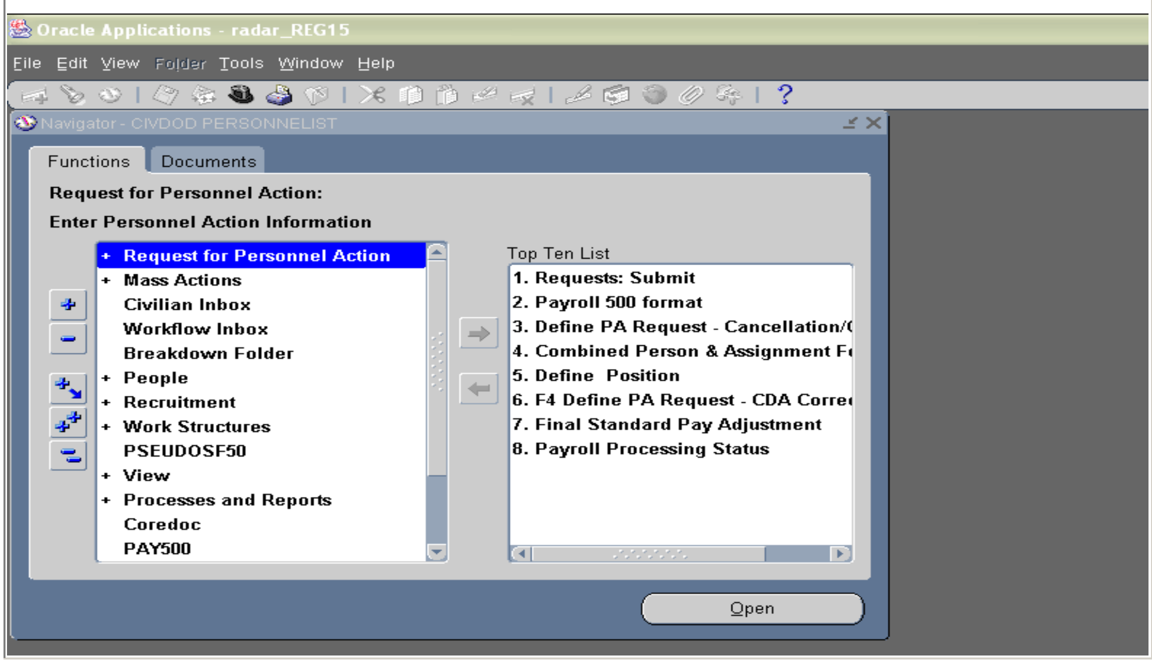
4 Click on the responsibility.

Some users may have more than one responsibility, in which case they will each be listed here, and you select the one needed to perform whatever function you need to do in DCPDS.

5 The center section of the Navigator screen will populate with the tasks appropriate for the responsibility you select.

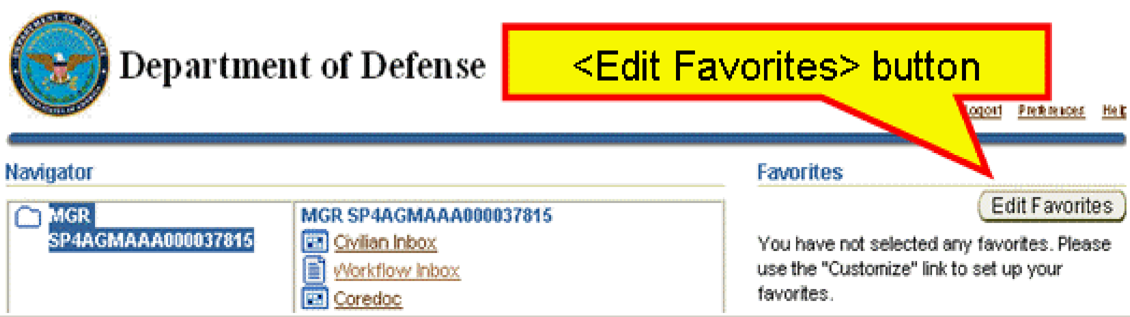
On the right side of the Navigator window there's a place for you to set up "favorites" if you want to (this is optional). See Favorites, below, for instructions.

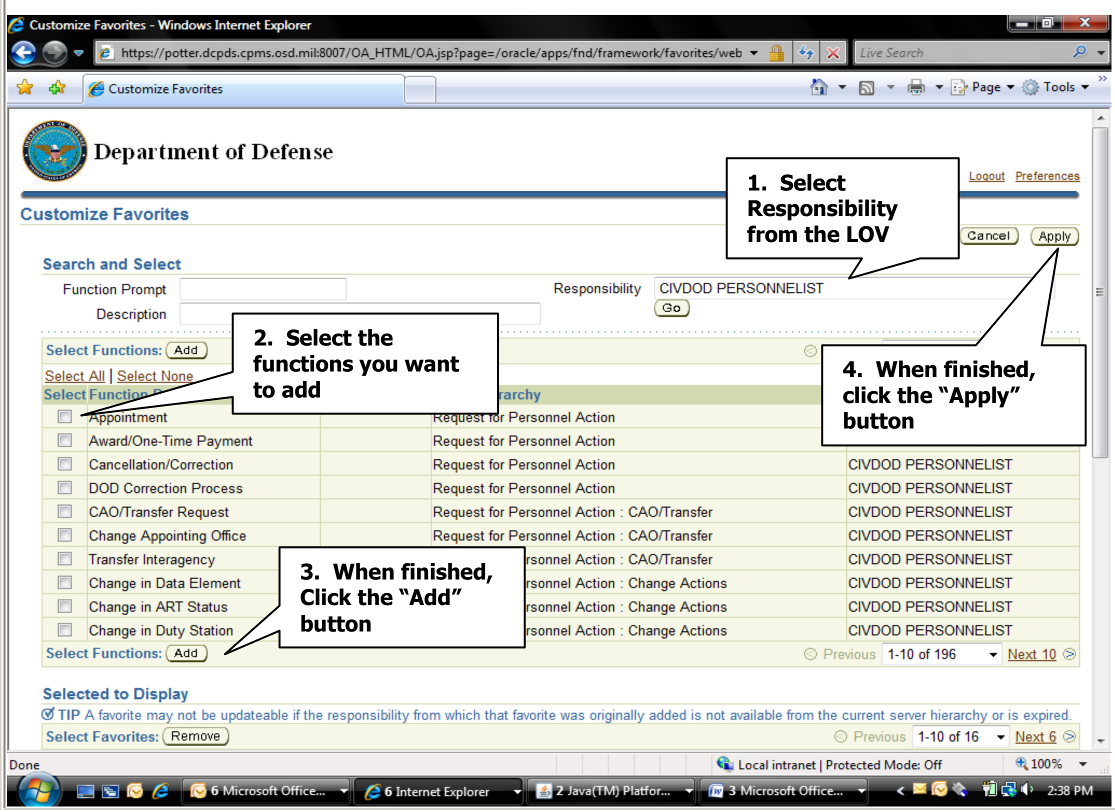
6 Once you have selected a task, the Oracle Applications 11i Java Applet window opens briefly, then (depending on what you selected – this does not apply to the Workflow Inbox) the regular Navigator menu will open in a new window, with the selected task window opening next.



Setting up Favorites

If you want to set up a “favorites” list on the new navigator, follow the steps below. This is an optional step, but it can be handy if you perform certain tasks in DCPDS repeatedly (it saves you from having to scroll through the entire navigator list). Note, if you have more than one responsibility, you can set up a separate favorites list for each.

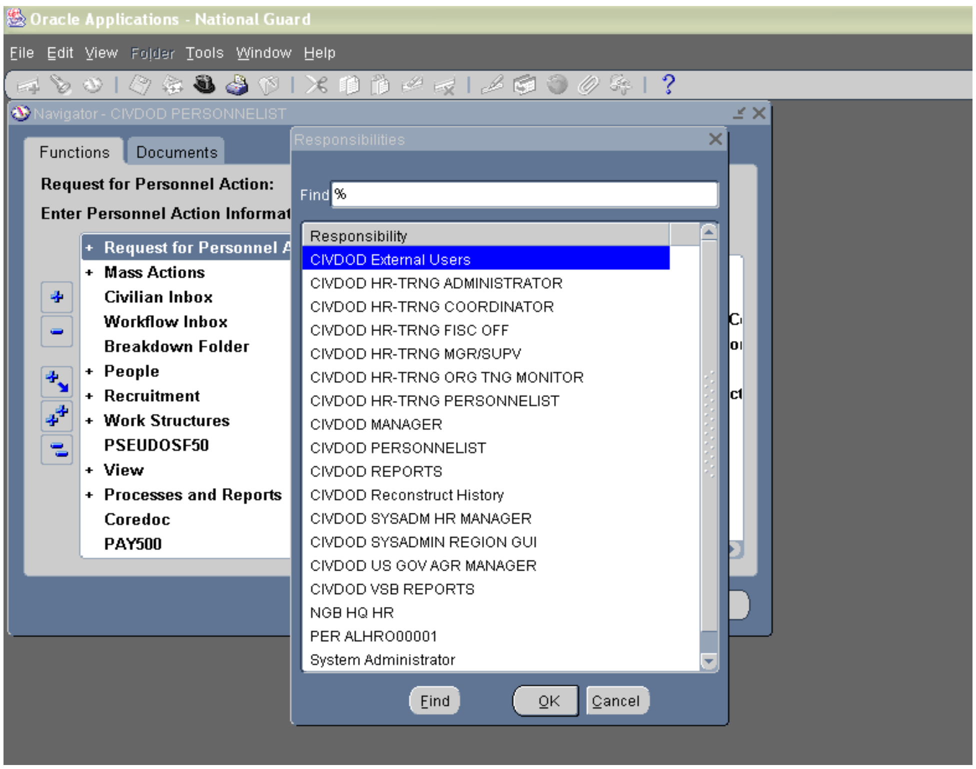
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>On the new navigator screen, click the <Edit Favorites> button.


</td></tr>
<tr><td>2</td><td>On the “Customize Favorites Portlet” window, select the responsibility (if you have more than one), select the task you want to move onto the favorites list, and click the right arrow to move it over. Repeat to add additional items to the list. When you’re done, click the <Apply> button.


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

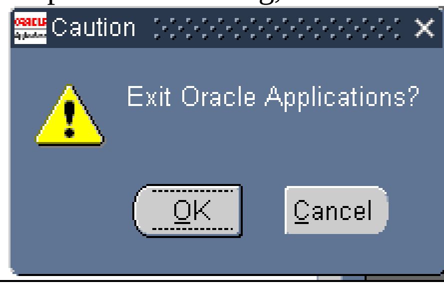
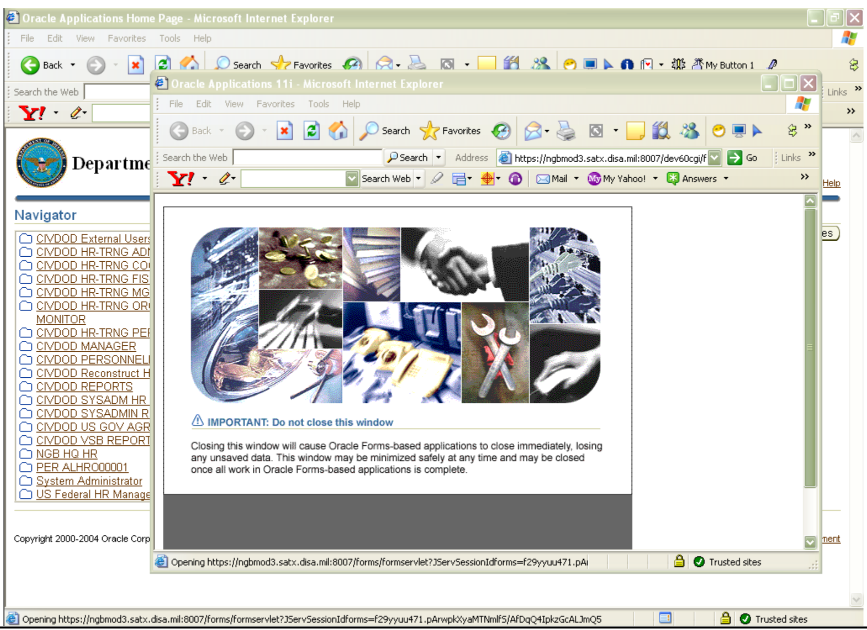
Changing Responsibility

In most circumstances, a user may have more than one responsibility. If you have more than one responsibility assigned to your user ID, you can switch to another responsibility without exiting DCPDS and logging on again.

Step	Action
1	Return to the **Navigator** window by closing any open windows to return to the Navigator window.
2	Now that you are in the **Navigator** Window, click the Switch Responsibility icon (the top hat) on the Toolbar.
3	Select the responsibility you wish to switch to, and then click <**OK**>.  The **Navigator** Window title and contents will now reflect the new responsibility.

How to Exit from DCPDS

When you are done working in DCPDS:

Step	Action
1	Click *File* → *Exit Oracle Applications* from the main menu.
2	Click <**OK**> on the prompt window asking, "Exit Oracle Application?" 
3	Close any other windows that were opened during your session (using the Close Window control button). These may include: 

Navigating Within DCPDS

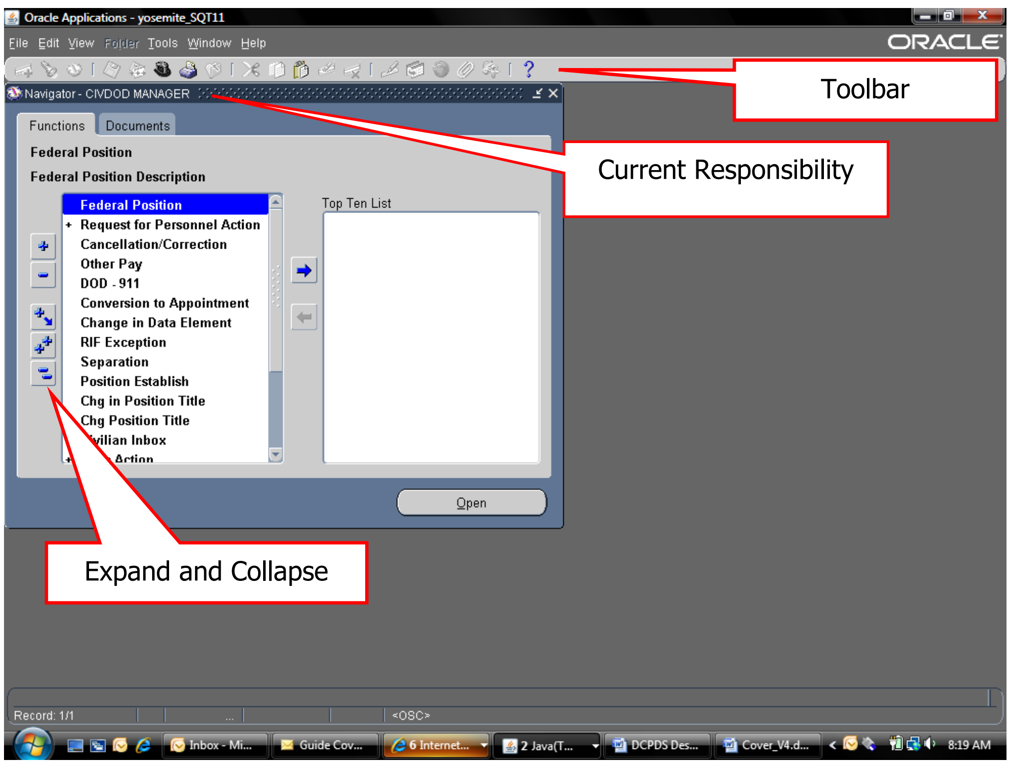
Navigator Window

The Navigator window displays the menu of categories and tasks you can perform in DCPDS, based on the responsibilities you have been assigned (a supervisor or manager has a somewhat different list than a personnelist, for instance).

- If you have been assigned more than one responsibility, the Navigator menu will be for the responsibility you selected in the Responsibilities window when you logged on (each responsibility has a different menu).
- At the top of the Navigator Window you will see the name of the responsibility to which you have logged on (e.g., "MGRALHRO00001).

Illustration

Below is a typical Navigator menu which is displayed if you log on under a supervisor or manager responsibility (actual items shown on the navigator will vary depending on your role):



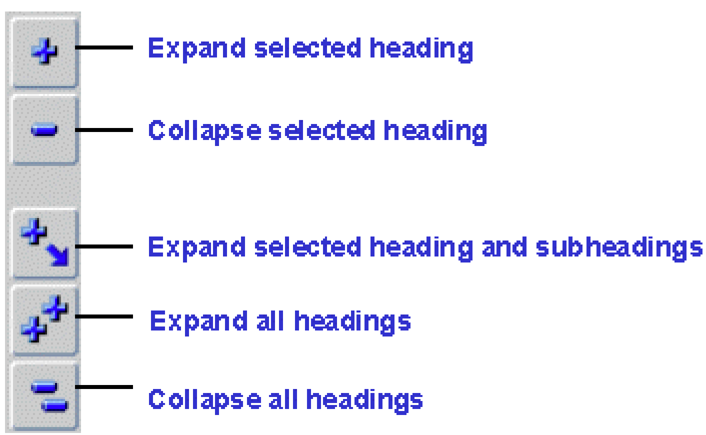
How the Navigation List is used

The Navigator menu contains two types of entries: headings and tasks. The tasks are the actual operations that you can perform (for example, initiate a request for Award). Headings are used to organize tasks into various categories, and are similar to the hierarchy of a file system, with main headings and subheadings. Headings and subheadings can be recognized because they have a plus (+) or minus (-) sign in front of them; every heading and subheading has at least one task associated with it.

Expanding and Collapsing Headings

Upon logging on, you will see a combination of headings and tasks on the Navigator menu. You can expand headings that begin with a plus sign (+) to display tasks and additional subheadings (if there are any).

- Subheadings will display indented below the items from which they are expanded.
- When a heading has been expanded, a minus sign (-) will display next to it.
- Once a heading is expanded, you can collapse it again to see only the main category heading and thus view a shorter list.
- Items with no plus or minus sign are tasks and cannot be expanded or collapsed.



Starting a Task from the Navigation List

To start a task from the Navigator menu ("tasks" are the items that don’t have a plus or minus sign next to them):

- Click the task on the navigation list you need to use, then click <Open>, or

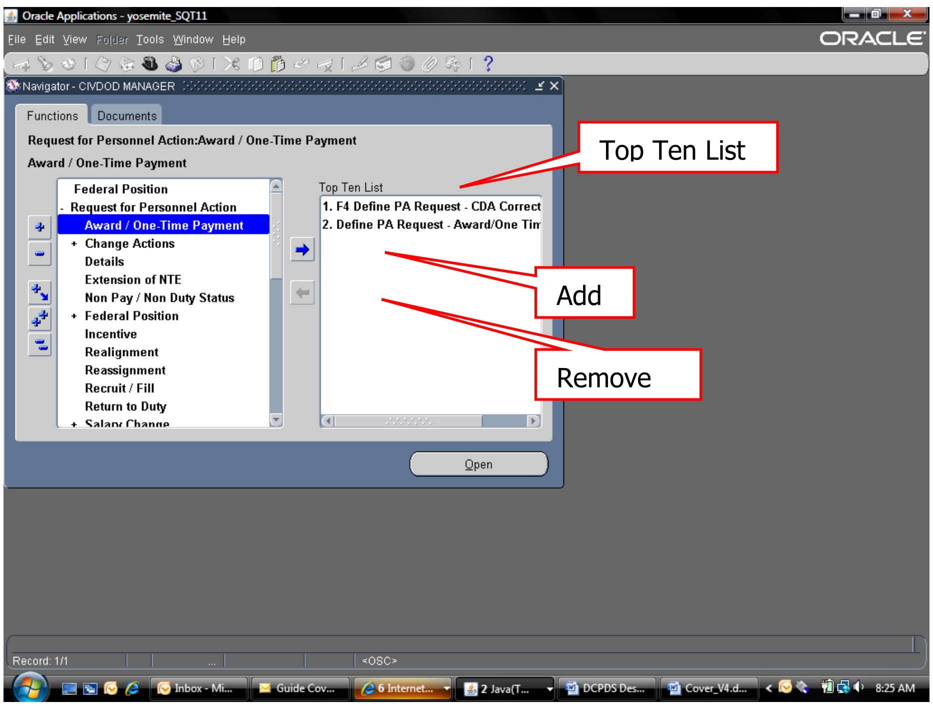
Double-click the task.

The Top Ten List

The Navigation Top Ten List

To quickly find and open menu items that you use frequently, you can create your own "Top Ten" list. The Top Ten List you create will be located on the right side of the Navigator Window.

- To start a task from your top ten list, press the number key on your keyboard that corresponds with the Top Ten List number of the item you want to open. For instance, to submit a report request, click the [2] key on the keyboard. You can also double-click the item from the top ten list or click it once (select it), then click the <Open> button.
- If you have more than one responsibility, you can create a different Top Ten List for each responsibility.



How to Add Items to Your Top Ten List

Follow these steps to add items to your top ten list:

Step	Action
1	Click an item from the navigation menu you use frequently.

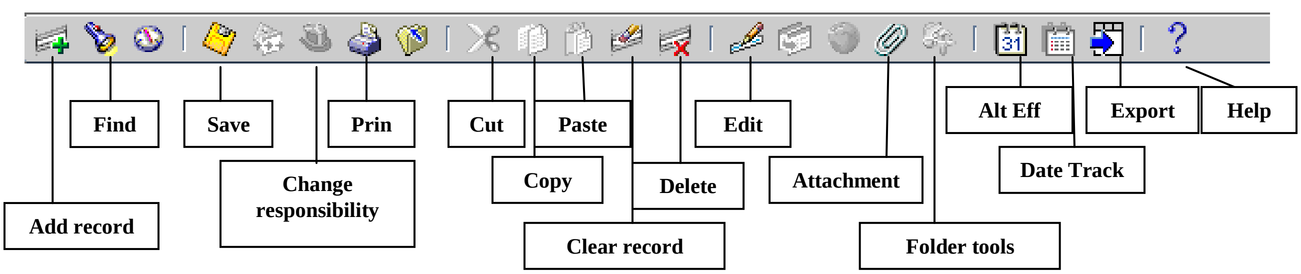
2	Click the <Add> button. • The item is now displayed in the navigation Top Ten List, with a Top Ten List number beside it. Note: the wording used for an item on the Top Ten list may vary somewhat from the wording used on the navigator list.
3	Repeat steps 1 and 2 for the other items you want to put on your list (up to ten items). You can add or remove items at any time. • To remove an item, select it (click on it) on the top ten list, then click the <Remove> button. • Each time you log on, your top ten list will be as you left it when you last exited.

The Toolbar

Many functions in DCPDS can be performed by using the toolbar icons at the top of the screen (just below the menu bar). Some general points:

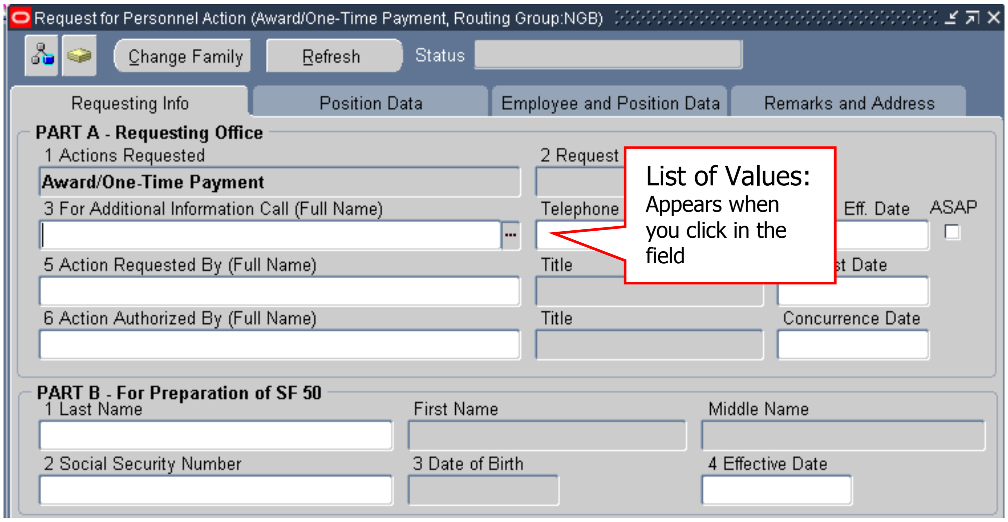
- Toolbar buttons will vary between screens depending on what functions are available; also, some may be displayed but "grayed out."
- To display the function of a button, move your mouse over it and an identifier will display briefly.

Toolbar Button Functions



List of Values

Lists of values are embedded in each field for which there is a list, and the list can be accessed by clicking on the down arrow (or a button containing three dots) at the right side of the field. Note, the LOV button is not visible until you have actually clicked in the field.



Keyboard Shortcuts

Everything that can be done with a mouse, by "pointing and clicking," can also be done using the keyboard. Keyboard "shortcuts" are alternate ways of performing the same functions available through the menu and Toolbar keys.

A list of keyboard shortcuts is available through the DCPDS help menu. To access the list, click Help on the Main Menu Bar, then click Keyboard Help. Click <OK> when you are done using the help screen.

Queries

If you use queries in DCPDS (e.g., to retrieve position records, or find a particular DDF in Extra Information), use [F11] to start the query function and Ctrl-[F11] to run the query.

Section Two – Processing the Request for Personnel Action

Introduction

The RPA is an interactive electronic form that automates the creating, editing, approving, coordinating, and tracking of personnel actions. It provides a single, integrated process to supervisors, managers, personnelists and payroll to manage personnel actions electronically, coordinate to the appropriate officials, and provide reports.

This module explains how to use the automated RPA to initiate personnel actions.

Mass Actions

DCPDS has the capability to initiate and process the following actions for a group of employees at once (without using an RPA):

- Mass Realignments

In general, data needed for processing mass actions must be provided on a spreadsheet or other electronic file, external to DCPDS, which is filled out by management and which must meet certain data standards. For the latest information and assistance on these mass actions, contact your servicing HRO.

Terms

Term	Description
RPA	Request for Personnel Action (also known as the Standard Form 52).
NPA	Notification of Personnel Action (also known as the Standard Form 50).
NOAC	Nature of Action Code. A code that identifies a specific type of personnel action such as promotion (702), resignation (317), etc.

Step-By-Step Instructions for Initiating a Request for Personnel Action (RPA)

The steps below take you through the process of initiating a Request for Personnel Action, and link you to pertinent sections of this Guide (or other references) for more detailed information about that step.

If your role is one of ***responding to*** an RPA (for your concurrence, review, or approval), you will respond to an RPA routed to you by using one of the inbox selections (Civilian Inbox or Workflow Inbox) on the **Navigator** Window (see ***Inboxes***). The steps below are for *initiating* an RPA.

- For security reasons, DCPDS will not allow you to process or view your own RPA. Also, the person's RPA that you are processing cannot be routed to that person for any type of action.

Step	Action
1	Log into DCPDS (see ***Logging into DCPDS***).
2	Determine what type of personnel action you are requesting. See ***Types of Personnel Actions*** below, which describes the types of actions that can be requested by most users. It also indicates what to include on the RPA. Although this is usually a straightforward determination, it can be confusing in some situations; if you have questions, contact your servicing HRO.
3	Access DCPDS via the DCPDS Portal link. When the Oracle logon screen displays, log in to DCPDS (see ***Logging into DCPDS***).
4	Initiate the RPA (see ***Initiating a Request for Personnel Action***, below, for more detailed instructions). Follow the instructions in the ***Types of Personnel Actions*** section below to determine what information to include on the RPA. In all cases, you will need to complete applicable portions of the requesting office information (Part A).
5	If you want to print a hard copy of the RPA, you should do this before routing the action to the next user (see ***Printing an RPA or NPA*** below) (optional).
6	Route the RPA to the next person in the routing chain (see ***Routing an RPA***, below).

After the Action is Processed

Once a personnel action has been approved and processed (updating the employee record), and the effective date has arrived (or is past), you will be able to print a Notification of Personnel Action (NPA) to provide to the employee or have the employee go to their My Biz account to retrieve their own copy of the completed action. See ***Printing an RPA or NPA***, below.

Types of Personnel Actions

The "Request for Personnel Action" heading on the Navigator menu shows the types of actions that can be requested by most users with a manager or supervisory level of responsibility. **Although most types of personnel actions are self-explanatory, there are some types of actions that can be confusing. If you have questions about the correct type of action to select, contact your servicing HRO.**

Below is a snapshot of some of the RPAs you can initiate.

- Request for Personnel Action
  - Award / One-Time Payment
  - + Change Actions
  - Details
  - Extension of NTE
  - Non Pay / Non Duty Status
  - + Federal Position
  - Incentive
  - Realignment
  - Reassignment
  - Recruit / Fill
  - Return to Duty
  - + Salary Change
  - Separation
  - Student Loan Repayment

Note: DCPDS does not include an "other" category. If the action you want to request is not covered, consult your servicing HRO for assistance.

Descriptions and Instructions for Different Types of Actions

Each of the following sections provides definitions of one type or family of personnel action(s), distinctions between other similar types of actions and what information to include on the RPA.

- Actions are in the same sequence as they appear on the Navigator menu (under the "Request for Personnel Action" heading) for managers/supervisors.
- This section is intended to provide general information applicable in most cases. For assistance in determining the correct type of action to submit, or for other questions, please contact your HRO.
- For instructions on completing the required data elements on the RPA, see ***Initiating a Personnel Request*** below.

Award / One-Time Payment

Use for individual awards for employees (monetary or time off).

Do not use for:

- Quality Step Increase (QSI) – use ***Salary Change: Irregular Performance Pay***
- Mass awards: contact your HRO for assistance and instructions for submitting mass awards.

Include on the RPA (always complete Part A):

- Employee name in part B.
- Award Amount in block 20 (tab 2 - Position)

Use the notepad if you have additional comments about the action (see ***Attaching a Note to your RPA***).

Change Actions: Change in Hours

Change in hours is used for part time employees only.

Do not use for:

- Change in hours for two pay periods or less.

Include on the RPA (always complete Part A):

- Employee name in Part B of the RPA.
- The new biweekly hours (decimals can be used) (tab 3, block 33).

Use the notepad if you have additional comments about the action (see ***Attaching a Note to your RPA***).

Change Actions: Change in Work Schedule

Change in work schedule is used to change an employee from full- to part-time or vice-versa, or some other type of schedule change (intermittent, seasonal, etc).

Do not use for:

- Change for only one pay period.
- Change in work schedule in conjunction with another action such as a reassignment, salary change, or recruit/fill, please contact your HRO for the appropriate action to process.

Include on the RPA (always complete Part A):

- Employee name in Part B.
- Include the new work schedule (tab 3, block 32). If the change is to other than a full-time schedule, include the biweekly hours (decimals can be used) (tab 3, block 33).

Use the notepad if you have additional comments about the action (see ***Attaching a Note to your RPA***).

Change Actions: Name Change

Name Change is used when an employee changes names due to marriage, etc.

Include on the RPA (always complete Part A):

- Select the employee using the Social Security number rather than the employee name (on page 1, part B, block 2). After the employee's name is retrieved, replace the name with the NEW name in the name block.

Use the Notepad (see ***Attaching a Note to your RPA***) to verify that the employee has notified the Social Security Administration of the name change.

Details

Use to initiate a detail for an employee, extend a detail, or terminate a detail. A detail is the assignment of an employee to a different position (or to a set of duties) for a short period of time without any change in grade or pay.

- A Notification of Personnel Action (SF50) will not produce for a detail. If documentation is needed, the Request for Personnel Action (RPA) is printed out and filed in the employee's OPF. Detail actions will not flow to payroll.

Include on the RPA (always complete Part A):

- Enter the employee name in Part B of the RPA.

- Use the Notepad (see ***Attaching a Note to your RPA***) to indicate the nature of the detail and the type of position to which the employee is being detailed.

Extension of NTE

Used for any of the following types of extensions of temporary actions:

- Extension of a temporary appointment (NOA 760)
- Extension of a term appointment (NOA 765)
- Extension of a temporary promotion (NOA 769)
- Extension of LWOP (NOA 773)

Do not use for:

- Initiating a furlough or LWOP action, see ***Non pay / Non Duty Status*** below.
- Extending a detail; see ***Details*** above.

Include on the RPA (always complete Part A):

- Employee name in Part B of the RPA.
- In Block 5-A you must select the appropriate NOAC from the List of Values (LOV) and then enter the NTE date of the extension.

Non Pay / Non Duty Status

Used for:

- Suspensions (placement in nonpay and nonduty status for disciplinary reasons, either temporarily or indefinite) (NOAs 450 and 452)
- Leave without pay (LWOP) (NOA 460)
- LWOP-US (leave without pay to serve in the uniformed services) (NOA 473)

Do not use for:

- Extensions of LWOP, see ***Extension of NTE*** above.
- Return to duty actions, see ***Return to Duty*** below.

Include on the RPA (always complete Part A):

- Include the employee name in Part B of the RPA.
- In Block 5-A you must select the appropriate NOAC from the List of Values (LOV). If the NOAC requires a NTE date make sure that it is entered.
- Enter any Remarks that are applicable to the action in the "Remarks" section of the RPA.

Position Actions: Establish Position

Establish position is used to initiate action to create a new position and it can be used to initiate recruitment for that position.

Do not use for:

- If you already have an established position description with an assigned position number, use the ***Recruit/Fill*** RPA.

Include on the RPA:

- Complete Part A.

Also check with your state Classifier to see what additional documentation/information will be needed i.e.,

- Position organization and characteristics
- Any conditions of employment or similar items that will have an impact on the recruitment process (need for security clearance, drug testing, travel requirements, etc.).

Position Actions: Position Review

Position review is used to initiate a classification review action for a position that may result in a noncompetitive reassignment, promotion, or change to lower grade. The RPA is used for encumbered jobs only. You will generally need to provide a draft job description and proposed classification with the RPA. Also check with your state Classifier to see if any additional information is required.

Do not use for:

- If you want to conduct a position review of a <u>vacant</u> job, use the ***Establish Position*** RPA.
- If any resulting personnel action will require competition, use the ***Establish Position*** RPA.

Include on the RPA:

- Complete Part A only.
- The Position Title (tab 2, block 15) of the position being reviewed.

Reassignment

Use to move an employee from one position to another with no change in grade. This is for non-competitive movements from one position to another already-established position description with no change in grade.

Do not use for:

- If the action requires competition, use a ***Recruit/Fill*** RPA.
- If the position to which the employee is being moved has not been established, use ***Position Establish*** or ***Position Review*** as appropriate.

Include on the RPA (always complete Part A):

- Employee name in Part B.
- The Position Title (tab 2, block 15) of the position to which the employee is being reassigned.

Recruit / Fill

Use to initiate staffing action for a vacant position. This is for a position that is already classified and has a PD number assigned, and to fill any established position that requires competition.

Do not use for:

- Any recruitment action that requires establishment of a position description should be initiated using the ***Position Establish*** RPA.

Include on the RPA:

- Complete Part A.
- The Position Title (tab 2, block 15) of the position being filled.

Use the Notepad (see ***Attaching a Note to your RPA***) to indicate what position is being filled, and whether any position data needs to be changed. Also make sure you include any conditions of employment or similar items that will have an impact on the recruitment process (need for security clearance, drug testing, travel requirements, etc.).

Return to Duty (RTD)

Used for the following types of actions that return an employee to pay or duty status after a documented period of nonpay or nonduty status:

- Return to Duty (RTD) (from LWOP, LWOP-US, or suspension) (NOA 292)

Do not use for:

- Putting an employee on nonpay or nonduty status, see ***Nonpay/Non Duty Status***.
- Extending a period of nonpay or nonduty status, see ***Extension of NTE***.

Include on the RPA (always complete Part A):

- Employee name in Part B.
- In Block 5-A enter the NOAC 292

Salary Change: Denial of WRI

Used to withhold a within-range increase to an employee because of a determination that the employee's performance is not an acceptable level of competence. Note: This action must be coordinated with your state HRO office.

Do not use for:

- Initiating an adverse action for disciplinary reasons, contact your HRO for advice.

Include on the RPA (always complete Part A):

- Employee name in Part B.

Use the notepad to document the reason for the denial (see ***Attaching a Note to your RPA***).

Salary Change: Locality Pay

This type of action is normally initiated at the HRO or in special situations (not by management).

Salary Change: Other Pay

Used to establish, change or terminate one of these specific types of allowance or premium pay (i.e., Retention Allowance).

Include on the RPA (always complete Part A):

- Employee name in Part B.

Use the Notepad to indicate:

- The type of allowance or premium pay
- The authorized percentage of basic pay
- Whether the allowance is being established, changed or terminated.

Salary Change: Pay Adjustment

This type of action is normally initiated at the HRO or in special situations (not by management).

Salary Change: Promotion

Used for the following types of actions when an employee's salary will be changed but neither classification of a position description nor recruitment is required:

- Promotion (NOA 702), e.g., career ladder promotions and non-competitive re-promotion
- Promotion NTE (temporary promotion) (NOA 703)

Do not use for:

- If you are requesting that an employee be non-competitively re-promoted due to accretion of duties, use the ***Position Review*** RPA.
- If you are requesting an action that requires competition, use the ***Recruit/Fill*** RPA.

Include on the RPA (always complete Part A):

- Employee name in Part B.
- In Block 5-A you must select the appropriate NOAC from the List of Values (LOV). If the NOAC requires a NTE date make sure that it is entered.

Salary Change: Irregular Performance Pay (Quality Step Increase (QSI)

Used to increase an employee's basic rate of pay through an additional within-range increase for sustained high quality performance.

Do not use for:

- Most other types of award payments see ***Award/One-Time Paymen***t above.

Include on the RPA (always complete Part A):

- Employee name in Part B.

Use the notepad if you have additional comments about the action (see ***Attaching a Note to your RPA***).

Salary Change: Termination of Grade Retention

This type of action is normally initiated at the HRO or in special situations (not by management).

Separation

Used for all types of separations (listed below). Contact your HRO if you are not sure of the correct type of separation.

- Retirement (Mandatory) (NOA 300)
- Retirement (Disability) (NOA 301)
- Retirement (Voluntary) (NOA 302)
- Retirement (Special Option) (NOA 303)
- Retirement in Lieu of Involuntary Action (NOA 304)
- Resignation in Lieu of Involuntary Action (NOA 312)
- Resignation (NOA 317)
- Removal (NOA 330)
- Death (NOA 350)
- Termination - Appointment in (NOA 352)
- Separation - US (NOA 353)
- Termination (NOA 357)
- Termination During Probation/Trial Period (NOA 385)

Include on the RPA (always complete Part A):

- Employee name in Part B.
- In Block 5-A you must select the appropriate NOAC from the List of Values (LOV).
- For resignations, print out the original RPA, have the resigning employee sign it in part D, and forward it to your HRO (in addition to completing and routing the electronic RPA).

For some separations (e.g., resignation), you will need to provide the reason for the separation. Please use the Notepad (see ***Attaching a Note to your RPA***) to document the reason for separation as well as the forwarding address of the separating employee.

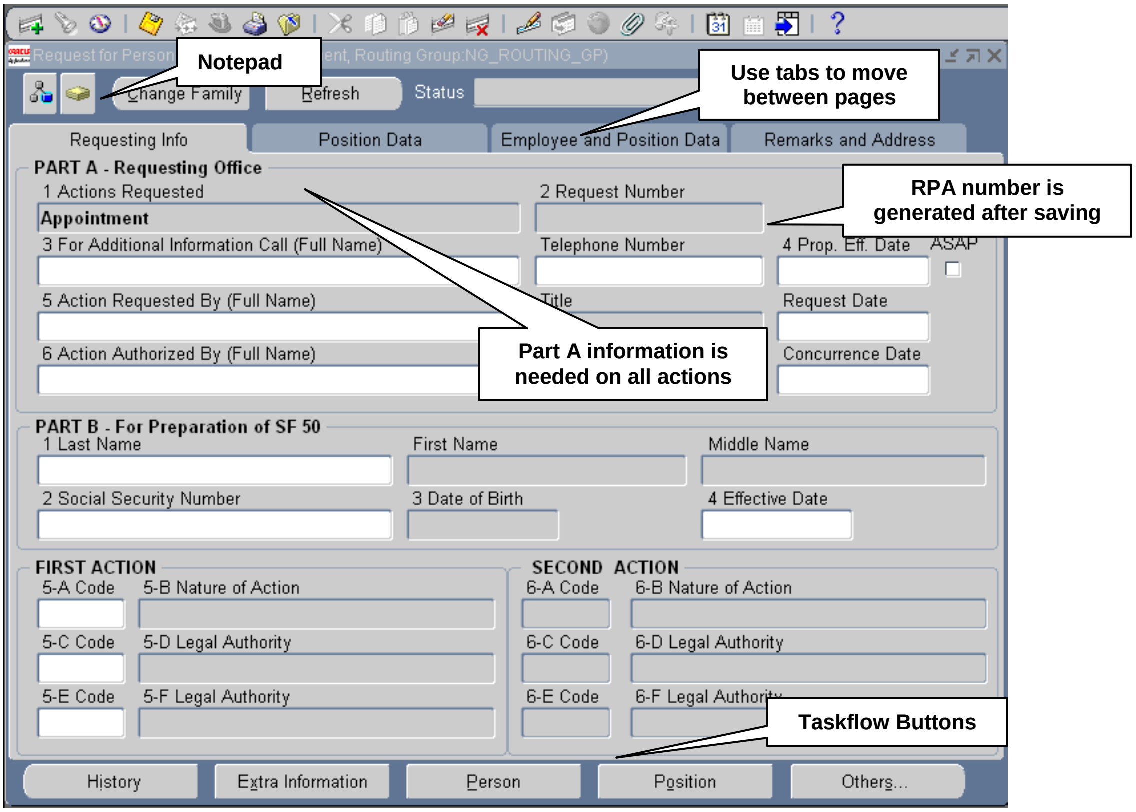
Initiating a Request for Personnel Action

Accessing the Request for Personnel Action

From the **Navigator** window, select *Request for Personnel Action* **<Open>** *Recruit/Fill* (or any of the other types of actions listed under the *Request for Personnel Action* menu) to display the RPA. *Recruit/Fill* is used in this guide as an example.

Request for Personnel Action Windows

The **Request for Personnel Action –Page 1 (Requesting Info)** window is displayed.



Types of Data Fields

Data fields on the RPA are colored to represent levels of access:

- White: you can enter or edit data in these fields.
- Gray: you can view data in these fields but not change it.

The RPA is configured based on the type of action you select and your responsibility; different actions require different types of information. The coloring scheme makes it very easy to determine what information you are able to include on the RPA – just look for the white fields. Follow the instructions in the ***Types of Personnel Actions*** section above to determine exactly what information to include on an RPA.

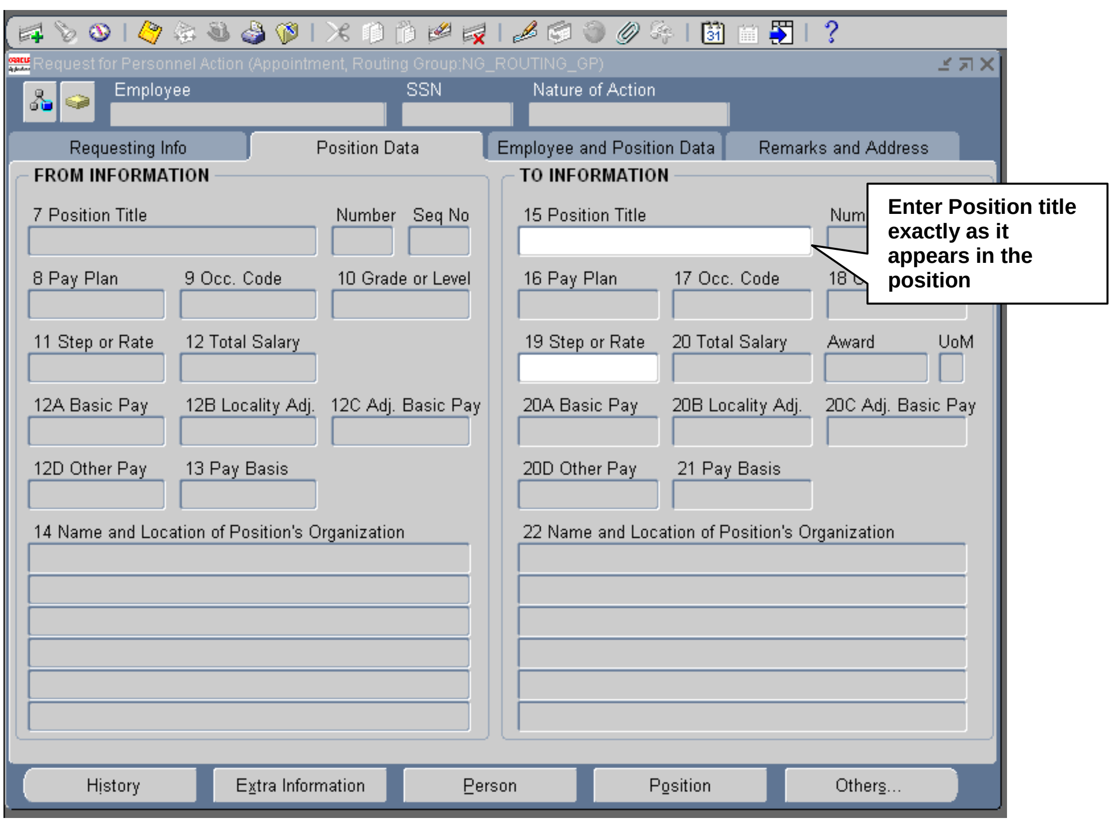
Explanation of Selected Fields on the RPA, p. 1

Data Field	Description/Action
Part A - Requesting Office of RPA – Page 1	
1. Actions Requested	The data field is automatically populated based on the action selected from the Navigator menu.

2. Request Number	Each RPA is assigned an RPA number by DCPDS for identification. The format is YYMMM / 2-char State Code/ HRO/ 10-Digit sequence number. The data field number will populate <u>after the first time the RPA is saved.</u> **Example**: 09SEPWIHRO0000352692
3. For Additional Information Call	Click the LOV button on the Toolbar for a listing of database names. Enter reduction criteria when requested (type the last name or the first few letters of the last name of the individual and click <**OK**>), click the name from the LOV, and click **<OK>**. This should be someone who can address specific questions about the action. If the phone number is not automatically populated, be sure to include it.
4. Proposed Effective Date	Enter the proposed effective date for this action in the DD-MMM-YYYY format, i.e., 09-JUN-2001. Hyphens **are** required and the month is always capitalized (or you can click the LOV button on the Toolbar and select the requested effective date from the calendar LOV). Alternately, click in the "ASAP" box if you want the effective date on this action to be <u>A</u>s <u>S</u>oon <u>A</u>s <u>P</u>ossible. However, as a general rule, you should always enter a specific date rather than selecting "ASAP." **Note**: You cann**ot** select both an effective date and the ***ASAP*** field. If you do not check ASAP or enter a date the system date will automatically default to ASAP.
5. Action Requested By	Click the LOV button on the Toolbar for a listing of names given the responsibility of requesting (it may just be your own). Click the correct name if there is a list, and click **<OK>** to automatically populate the data field. The Request Date field is automatically populated once the ***Action Requested By*** data field is completed. You can change the date by deleting it and typing in a new date or use the LOV button on the Toolbar to select another month, day and year.
6. Action Authorized By	Click the LOV button on the Toolbar for a listing of names given the role of authorizing official (it may just be your own), or leave blank if someone else will be authorizing this action (this field will be grayed out if you do not have authorizing responsibility). The Concurrence Date is automatically populated once the ***Action Authorized By*** data field is completed. You can change the date by deleting it and typing in a new date.
Part B - For Preparation of SF 50 – Page 1	
1. Effective Date (Block 4)	The effective date must always be entered first. Remember, you must never use the Date Track feature when processing an RPA.

2. Last Name (Block 1)	Click the LOV button from the Toolbar, click the name from the list displayed, and click **<OK>** to automatically populate the data field. Only the names of your employees are displayed in the LOV. If you select a name from the LOV, the ***First Name, Middle Name, Date of Birth*****, and** ***Social Security Number*** data fields will automatically populate on the RPA.
3. Social Security Number (Block 2)	This is automatically populated based on the ***Name*** data field. If desired, you can select the employee based on the SSN rather than by name (which will automatically populate the name field). Use the LOV or enter the SSN with hyphens (999-99-9999).
4. Nature of Action, Block 5-A	Select the appropriate NOA from the LOV.

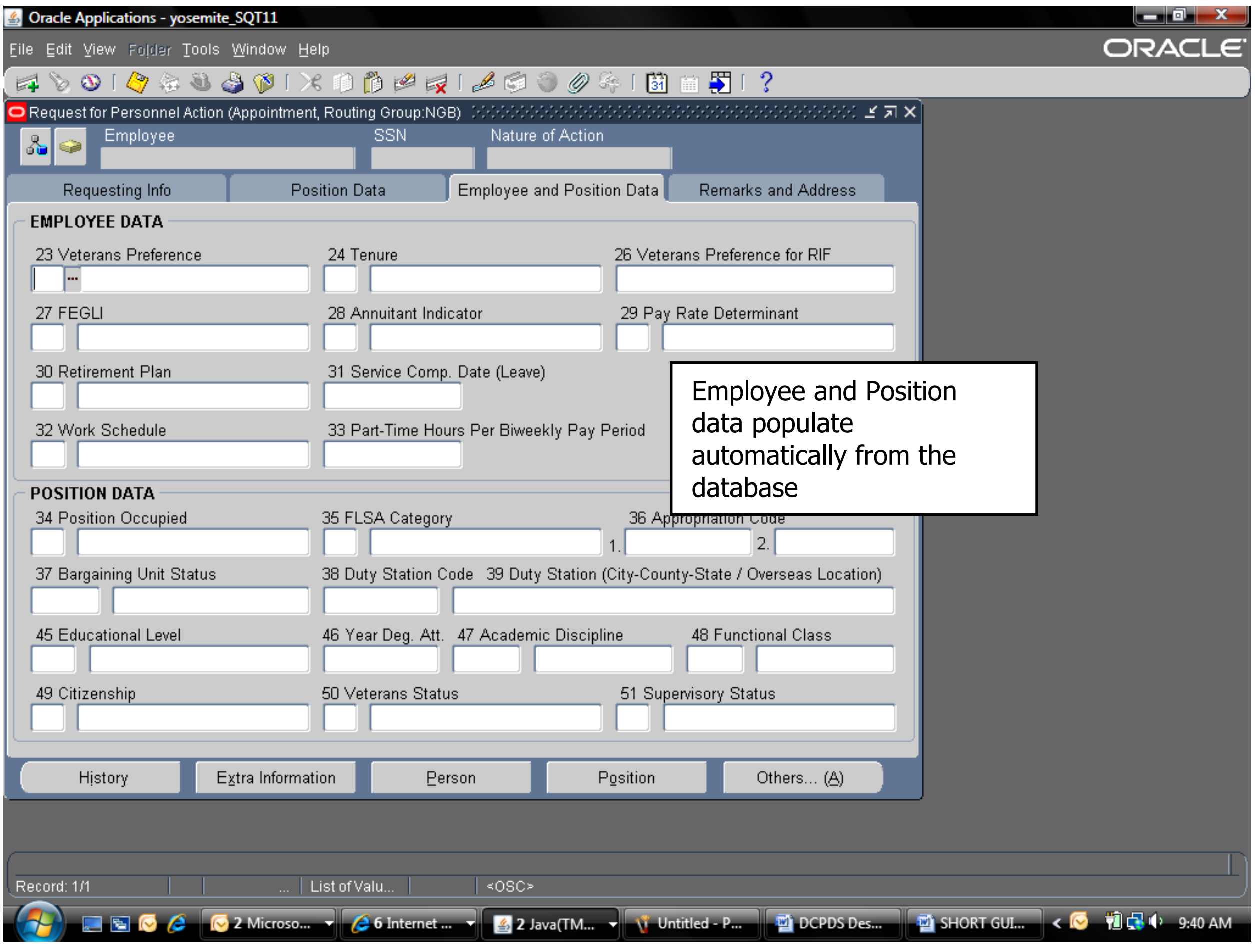
Request for Personnel Action - Page 2 (Position Data)



Page 2 Notes:

- **Employee and SSN** fields are automatically populated at the top of each page of the RPA once a person has been identified with an action (not applicable for a recruit/fill action since the selectee has not yet been identified).
- The **From** and **To Information** data fields are automatically populated (or <u>not</u> populated) based on the action requested.

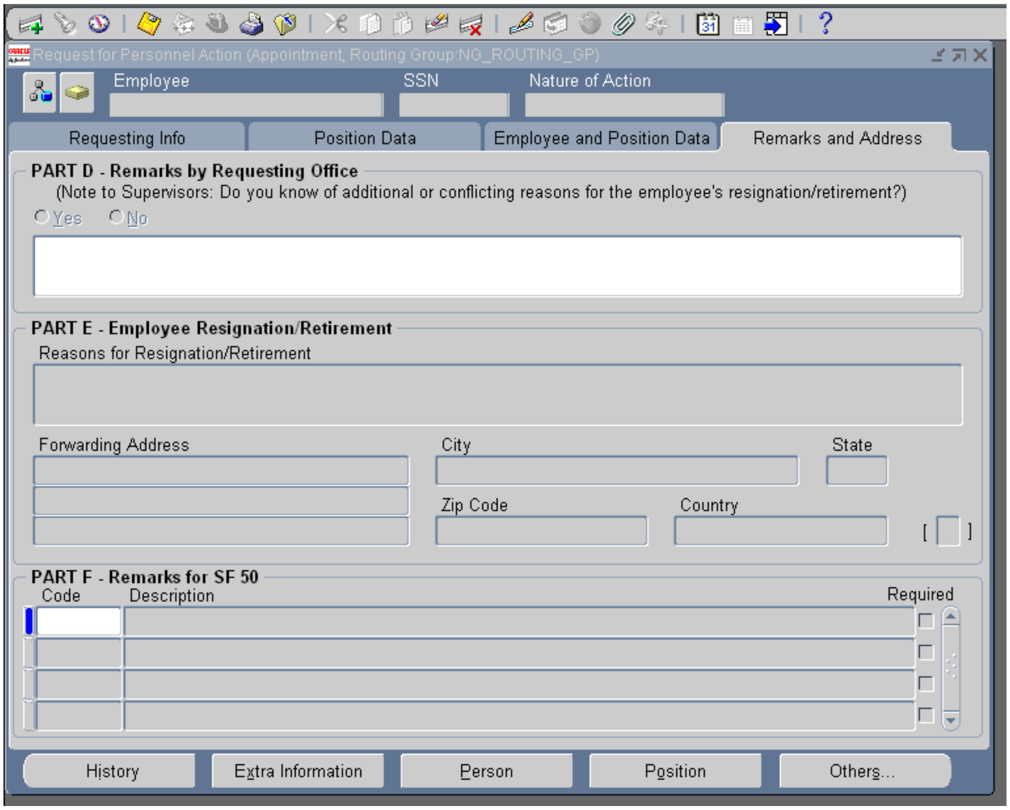
Request for Personnel Action – Page 3 (Employee and Position Data)



Page 3 Notes:

- Information on this page will vary depending on the type of action requested and whether an employee name or position title has been entered on pages 1 and 2. Otherwise, initiators do not normally complete these data fields.

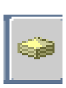
Request for Personnel Action - Page 4 (Remarks and Address)



Page 4 Notes:

- **Remarks by Requesting Office (Part D):** This section is provided to include additional information about the action; i.e., information needed to process the action
- **Employee Resignation/ Retirement (Part E):** You will provide the information needed to process a separation action.

Attaching a Note to the RPA



Use the Notepad button on the top of the RPA to access the notepad.

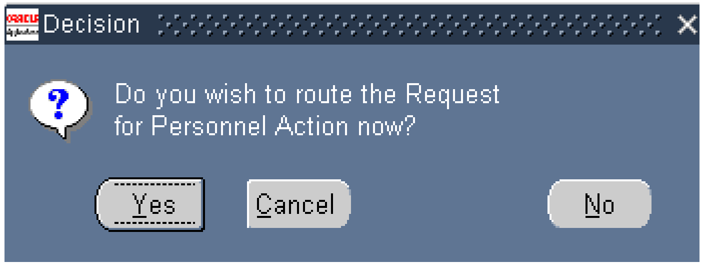
- You can use the notepad to write any notes pertinent to the action. Click in the white text area and begin typing to start a new note. If there is already information in the notes section (that is, the action was sent to you from someone else who added a note), add your notes to the bottom. (You do not need to use the <**New**> or <**Append**> buttons).
- You should include your name and the date with your note so that others reading the note will know where it came from. Notes accompany the RPA during its routing and are accessible to anyone who has access to the RPA.
- When you receive an RPA routed to you from another user, you should check for accompanying notes by clicking on the notepad button.
- Notes have a limit of 2000 characters. If you need more room, you should include the information using the "attach document" feature (see ***Attaching Documents or Comments to an RPA***).

Saving your RPA

When you are done working on the RPA, click the Save icon on the Toolbar to save your RPA action **OR** on the menu bar, select ***File*** > ***Save***, then proceed with the routing instructions (see ***Routing an RPA***, below).

Routing an RPA

Once you click on the Save icon on an RPA, a dialog box is displayed.

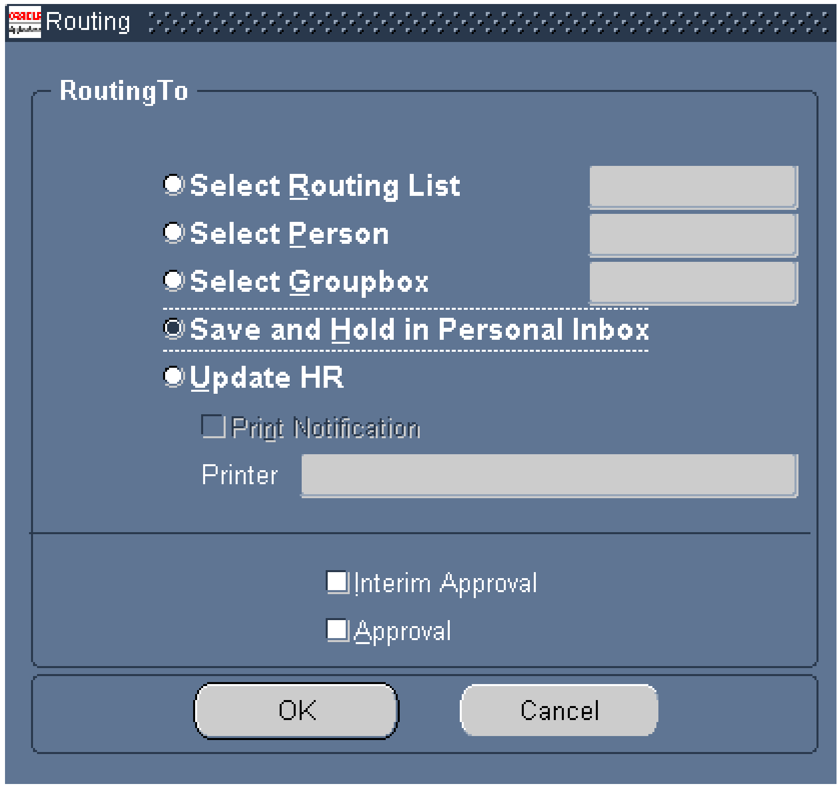


- Click **<Yes>** to display the **Routing** Window (including routing it to your inbox).
- Click **<Cancel>** to return to the RPA.
- Click **<No>** to save your action and return to the RPA (without routing it).

The Routing Window

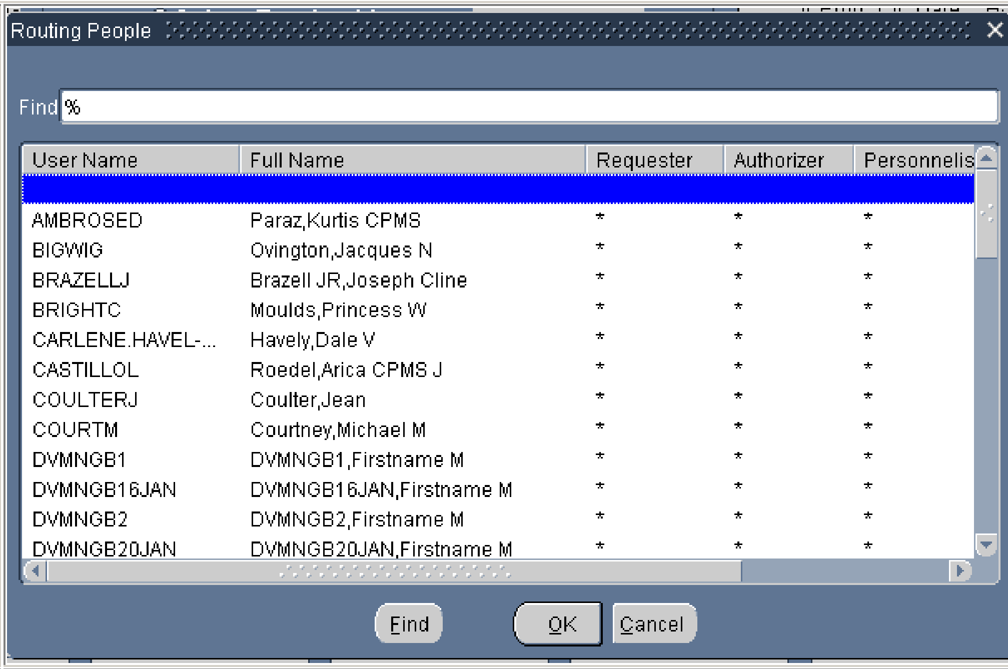
When you click <**Yes**> on the routing decision window, the **Routing** window is displayed. This window gives you several options for processing your RPA.

- You will normally route the RPA from your inbox to another user by using the "Select Person" option.
- Some of the options in the **Routing** window may be grayed out, depending on your role and responsibility. For instance, the "Update HR" selection is only available to personnelists in the HRO.



Routing Window options are described below. **Note**: if you want to print a hard copy of the RPA, you should do this before routing it; see ***Printing an RPA or NPA***.

Routing To	**Description/Function**
Select Routing List	This option sends the RPA to a pre-determined sequence of recipients. This option is not used by the National Guard.
Select Person	This option routes the action to a particular individual, and is the most commonly used method of routing an RPA. Click *Select Person* to display a listing of individuals, then click the correct individual to whom you want to route the action. If you know the actual User Name (User ID) of the person, type in the first few letters of the user name (without using your mouse) to quickly narrow the list. To search by the name or by an embedded part of the name or User ID, click the Find block at the top of the window and type some or all of the last or first name surrounded by percent signs (wild cards), then click the <**Find**> button at the bottom of the window. If you do not know the User Name of the person you wish to route it to, please contact your HRO before making a selection. Click **<OK>** to populate the data field on the **Routing** Window. Then click **<OK>** on the **Routing** Window to actually "send" the action to that person.

	
Select Groupbox	This option sends the RPA to a "groupbox" which is an inbox shared by a group of people. Groupboxes are most commonly used at the HRO, serving as general "in boxes" for actions coming into the HRO. Often, the last person to review an RPA before it goes to the HRO will send the action to a designated HRO groupbox. Click *Select Groupbox* to display a listing of established groupboxes (contact your servicing HRO if you are not sure of the correct groupbox to select). Then click the groupbox and click **<OK>** to populate the data field on the **Routing** Window. Finally, click **<OK>** on the **Routing** Window to route the action to the selected groupbox.
Save and Hold in Personal Inbox	This is the default option; it saves the RPA in your own inbox. **Important**: If you are the initiator of an RPA, you should <u>always</u> select this option before sending the RPA to another user. This will allow you to track and view the action later. In addition, the RPA <u>must</u> be in <u>your</u> inbox in order to access the gatekeeper checklist for that action. You can also select this option if you have not finished working on the RPA action. You can then access the action from your inbox later and complete it (see ***Inboxes)***. Click **<OK>** to save the RPA to your Inbox. ○ If you are the initiator of the RPA, the system will generate the RPA number and display it in a window; click <**OK**> to close this window. ○ The RPA that you saved will be accessible in your inbox and a blank RPA will be on your screen; close the RPA window to return to the Navigator window or to the inbox (depending on how you accessed the

	action).
Update HR	This procedure is done at the HRO and will generate a Notification of Personnel Action (SF50) after all authorizations are done and processing is completed.
Interim Approval, Approval	These blocks are used by the HRO.
<Cancel>	Click **<Cancel>** to stop the process and return to the RPA.
<OK>	Click the **<OK>** button to route the action to the selected user or inbox.

Refreshing Your Inbox After Routing - IMPORTANT

If you are using the Civilian Inbox it is very important that you refresh your inbox after routing the RPA to another user or groupbox (see ***Inboxes*** section for distinctions between the Civilian Inbox and the Workflow Inbox).

- After you route an RPA that was opened from your Civilian Inbox, you are returned to your inbox. The action that you routed is still visible even though it is not technically "your" action anymore. You can still click the <**Respond**> button, display the action, even route it again to another user. However, this can cause system problems.
- If you are using the Workflow inbox, the RPA will not be in your Workflow inbox after you route the action.

Always remember to refresh your inbox by pushing Ctrl-[F11] on your keyboard when you return to the civilian inbox after routing an RPA.

Tracking an RPA

Within DCPDS, you can track any RPA that has been in your inbox using the <**References**> icon on the **Notification Details** window, or the **<History>** taskflow button on the RPA itself. This process is explained in this section.

Accessing the RPA

To view the RPA history within DCPDS, you must first retrieve the RPA from your inbox. The procedure for doing this varies somewhat depending on which inbox you are using (see ***Inboxes*** section for distinctions between the Civilian Inbox and the Workflow Inbox).

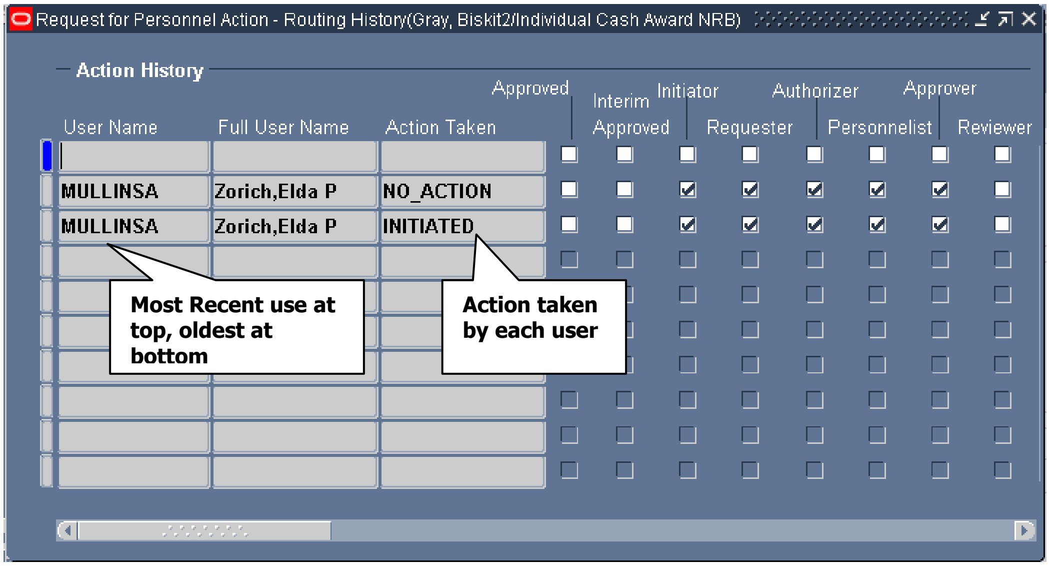
- **Workflow Inbox:**
    - If the RPA is active in your inbox (open), select (click on) the subject link in the inbox to display the RPA Notifications window. Scroll down and click the <**References**> icon to display the RPA history.
    - If the RPA is closed (not active in your inbox), change views to display "**All Notifications**" (click the <**Go**> button after selecting the "**All Notifications**" view). Then select (click on) the subject link in the inbox to display the RPA Notifications window. Scroll down and click the <**References**> icon to display the RPA history.
- **Civilian Inbox:**
    - If the RPA is active in your inbox (open), open your inbox, click the <**Open**> button to display the **Notification Details** window. Click the <**References**> icon to display the RPA history.
    - If the RPA is closed (not active in your inbox), un-check the **<Display Only Open Notifications>** checkbox at the top of the window, and push **Ctrl-[F11]** on your keyboard. Then select the RPA and click the <**Open**> button to display the **Notification Details** window. Click the <**References**> icon to display the RPA history.

Tracking History

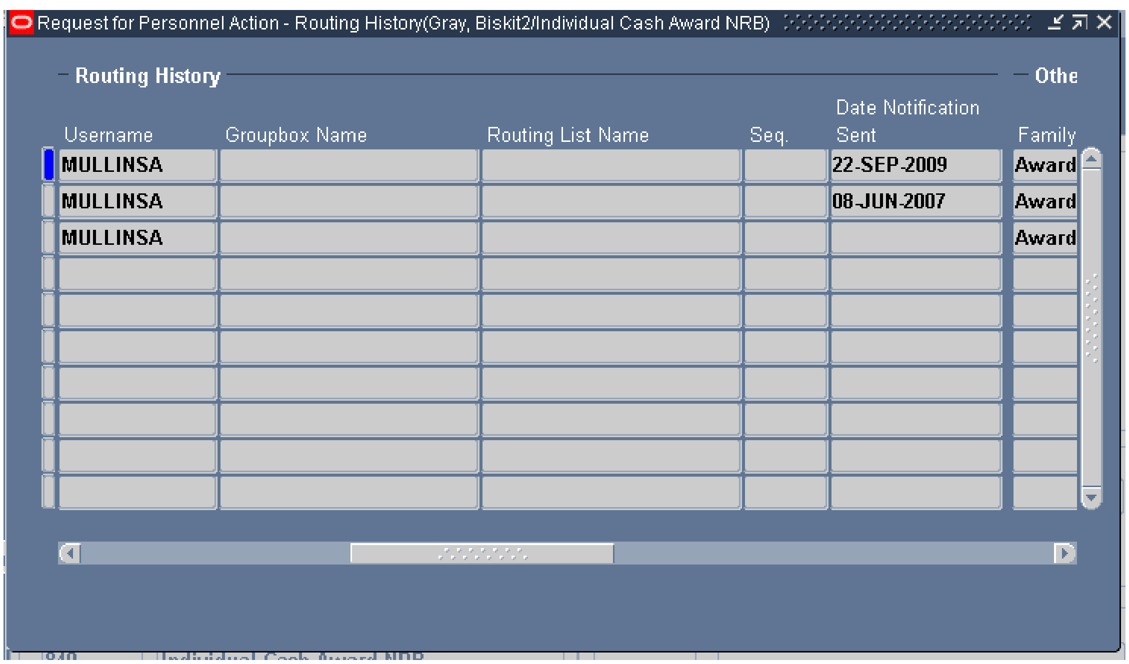
Clicking the <**Routing History>** button (on the **Notification Details** screen) or the <**History**> taskflow button at the bottom of the RPA) will show a history of the routing of the RPA – who initiated the request, who approved it, who reviewed it, etc. You can see the progress of a form as it is routed, including personal inboxes and groupboxes.

- Be sure to use the scroll bar on the bottom of the window to display additional routing information.
- No information can be changed in this window. It is for viewing only.

The **"Action History"** section, shown below, indicates what user(s) have had the action, and what action they took (if any).

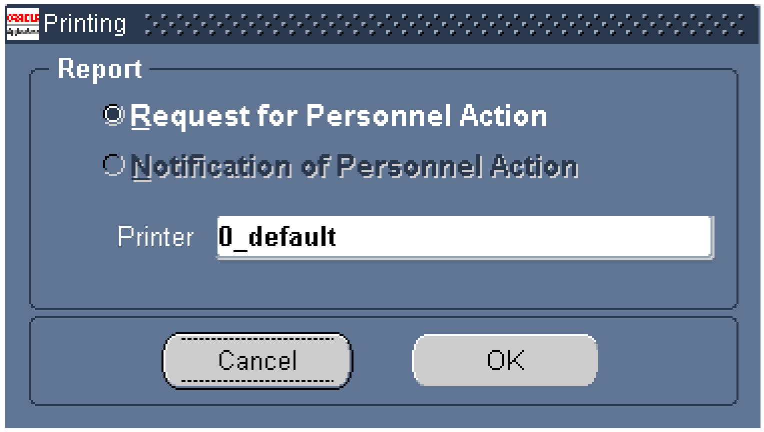


The **"Routing History"** section, shown below, displays as you scroll to the right. It shows what user (inbox or groupbox) had the action, and when. The user (or groupbox) shown in the top line of the routing history is the user who currently has the action.



Printing an RPA or NPA

To print a hard copy of the RPA, click ***File* , *Print*** on the menu bar while the RPA is displayed on your screen, or click the Print icon on the Toolbar. The **Printing** window displays.



- You have the option of printing the Request for Personnel Action (RPA) or the Notification of Personnel Action (NPA or SF50). However, this latter option is grayed out until **on or after the effective date** of a finalized personnel action. In addition, the option to print the Notification of Personnel Action is only available using the Civilian Inbox, not the Workflow Inbox (see ***Inboxes***).
- Most users will have a default printer associated with their user ID, which will display in the ***Printer*** block. If no printer name is showing in the "Printer" block, click in that block to display the list of values and select the printer you want to use.
- Click **<OK>** on the **Printing** Window to begin the print process.

Attaching Documents or Comments to an RPA

This section shows how to attach word documents, spreadsheets, or other computer files (including lengthy comments) to a Request for Personnel Action (RPA), how to view and/or print an attached document, and how to delete an attachment.

- This section does not cover attaching a note using the notepad, see ***Attaching a Note to the RPA***.

Accessing the Request for Personnel Action

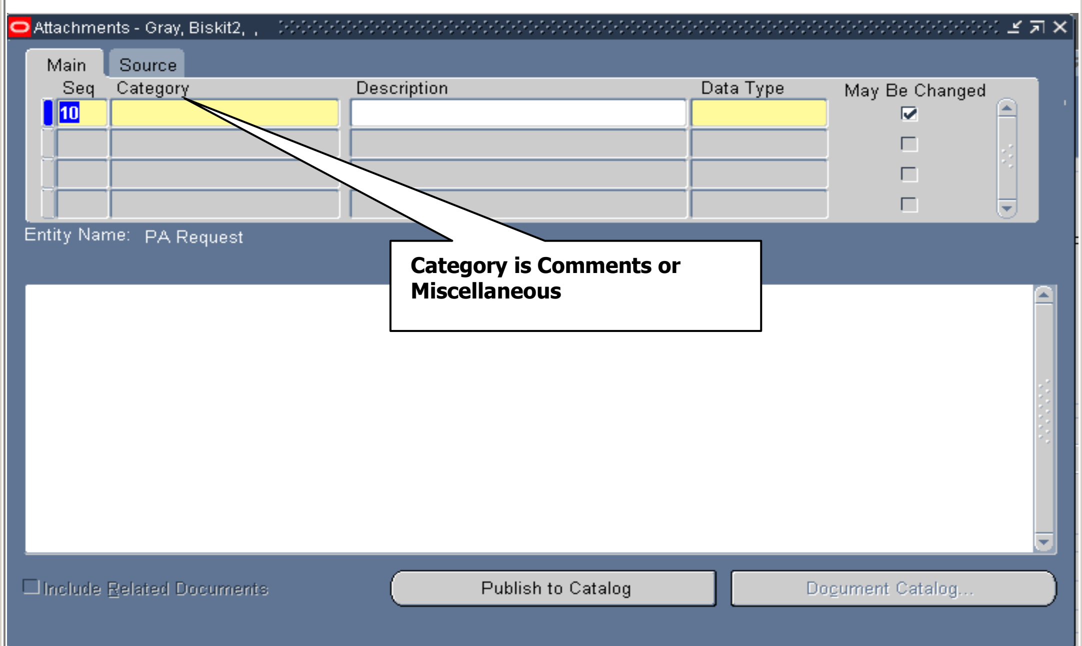
You can attach a document or note to an RPA that you are creating, or to an RPA that has already been created and is in your inbox.

- See ***Initiating a Request for Personnel Action*** for instructions for creating an RPA; you can then use the processes in this section to attach a document to that RPA.
- See ***Inboxes*** for instructions on viewing and acting on an RPA that is in your inbox (either an RPA that you created and saved to your inbox, or an RPA that

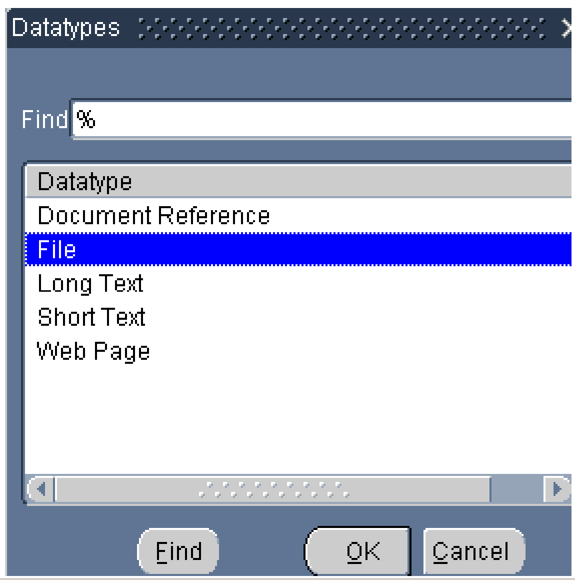
someone else created and sent to you). Use the processes in this section to attach a document to an RPA once you have opened it. To view an attachment to an RPA that you have received, see ***Viewing and Printing an Attachment***.

Step for Attaching a Document or Comment

Follow these steps to get started with the attachment process:

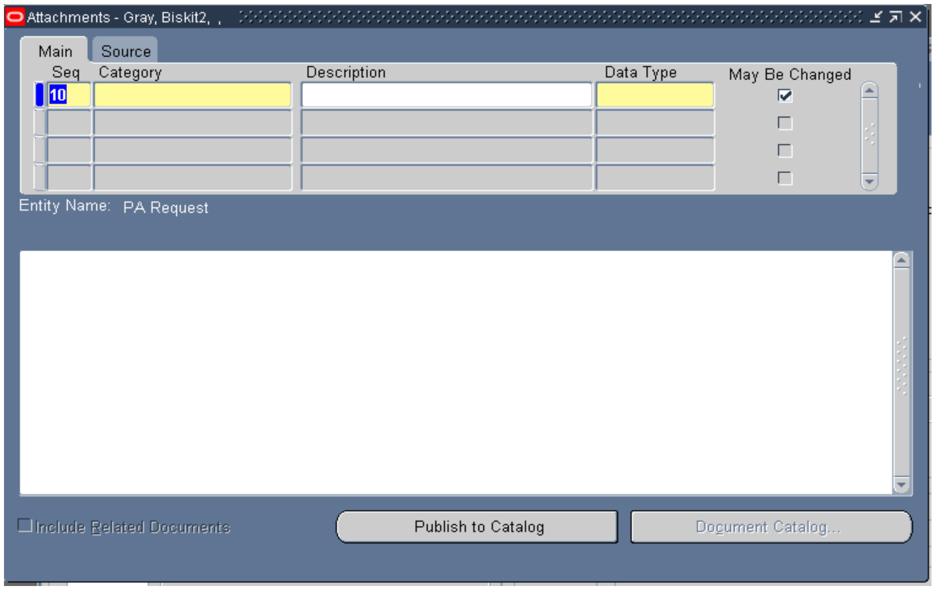
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1
</td><td>While the RPA to which you want to attach a document is open on your screen, click the Attachments icon (the paperclip) on your toolbar.</td></tr>
<tr><td>2</td><td>The Attachment Window is displayed:

</td></tr>
<tr><td>3</td><td>Click the Category data field. Type in the letter "C" or "M" depending on whether you are going to type in some comments ("C"), or attach a file ("M" -- Miscellaneous). You can also select one of these using the LOV button.

<u>Comments</u> allows you to enter text and save it with the RPA. This is similar to using the notepad, but using Comments does not have the 2000-character size limitation of the notepad.
<u>Miscellaneous</u> is used to attach an existing document from another application such as Microsoft Word, Excel, etc.
</td></tr>
<tr><td>4</td><td>Type a description of the information to be attached in the Description data field</td></tr>
</table>

	by typing something descriptive, short, specific, and understandable to users, e.g., "Job description PD0314," "Org Chart Trng Div," etc.
5	Click the ***Data Type*** data field. Then click the LOV button for a listing of data types that can be attached. Click the data type you want and click **<OK>**. The most commonly used data types are: ○ File – allows you to attach a Word document, spreadsheet, etc., to the RPA. When you select this, an Upload File window will open. Continue at ***Attaching a File***, below. ○ Long Text – allows you to type free-form comments similar to using the notepad, but without the 2000-character limitation of the notepad. Continue at ***Adding a Comment***, below. ○ Short Text – allows you to type free-form comments similar to the notepad. Also like the notepad, Short Text has a 2000-character limitation. Continue at ***Adding a Comment***, below. 

Adding a Comment (Long or Short Text)

Click in the large white area and type your comments:

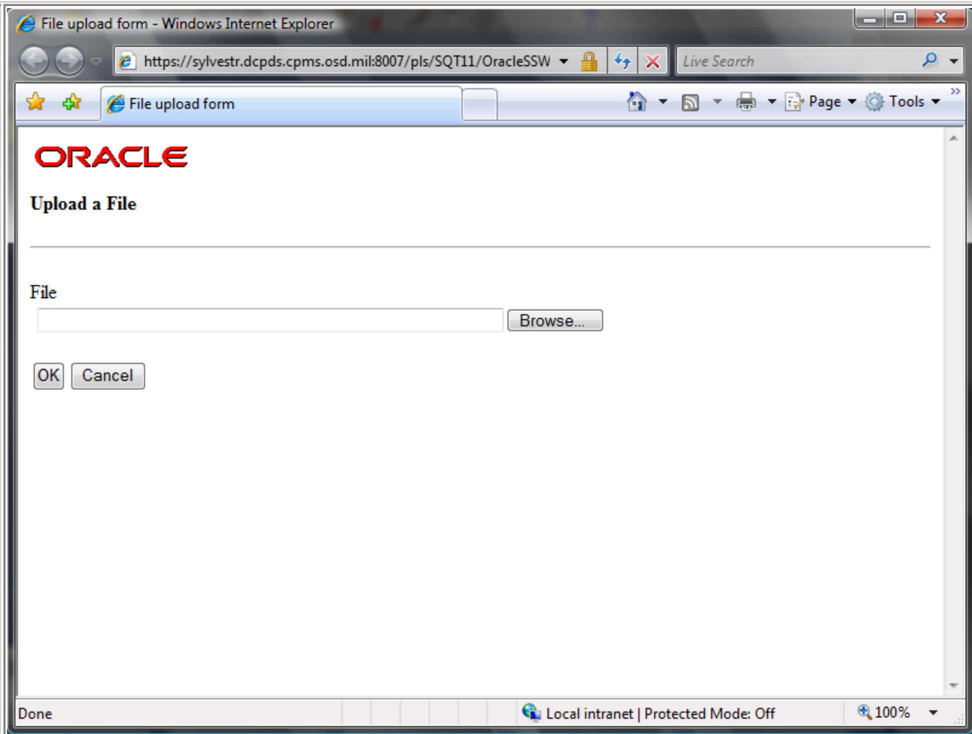
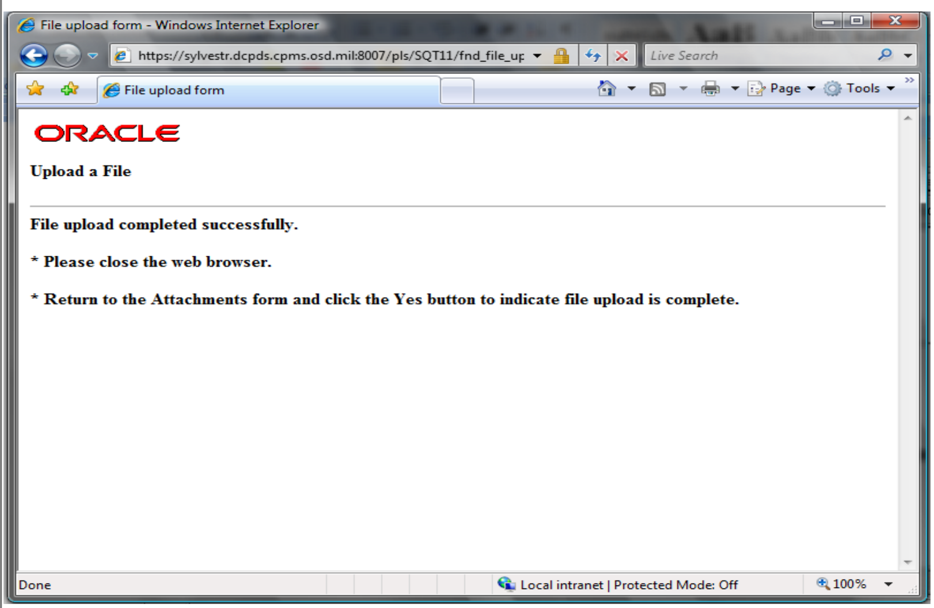


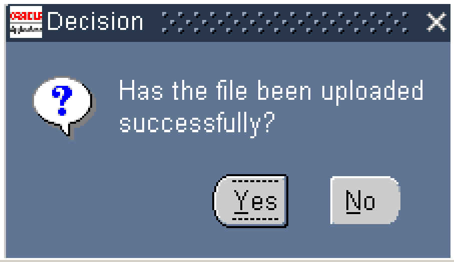
When you are done typing the comments, click the **Save** button on the toolbar to save the attachment information. You can then close the attachment window to return to the RPA, or add another attachment if desired.

Attaching a File

Follow these instructions to attach a file (Word document, Excel spreadsheet, or other computer file):

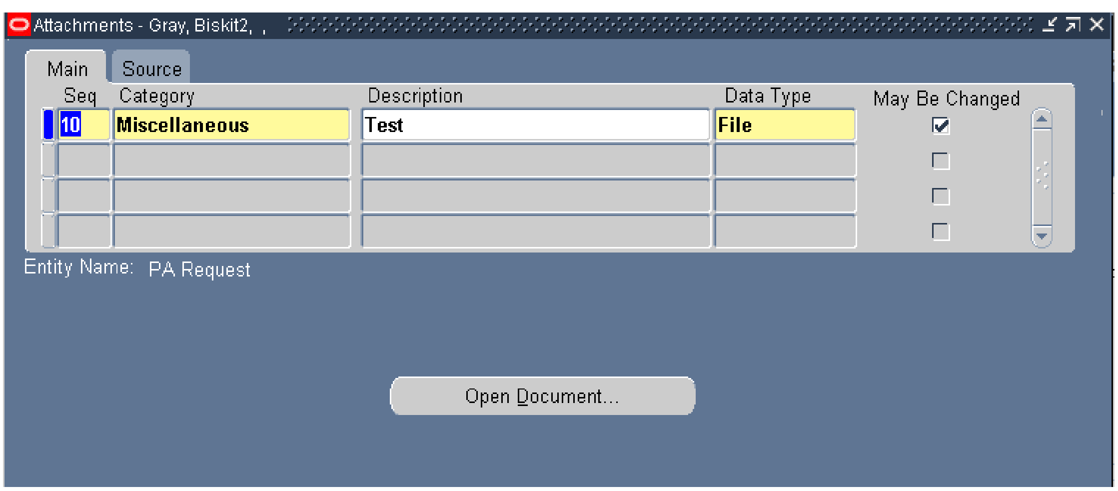
Step	Action
1	When you select "File" as the "Data Type" in step 5 above, a **File Upload** window displays:

	
2	Click the <**Browse**> button and find the file that you want to attach. You will have access to the same drives and folders that you normally access from your workstation. After you have selected the file, click the <**OK**> button on the **File Upload** window.
3	Once the file has been uploaded, the following message displays: 
4	Close the window to return to the Attachment window, and click the <**Yes**> button on

	the decision window: 
5	Click the **Save** button on the toolbar to save the attachment information. You can then close the **Attachment** window to return to the RPA, or add another attachment if desired.

Viewing and Printing an Attachment

Follow the steps below to view or print an attachment to an RPA.

Step	Action
1 	To view the attachment(s) to an RPA, click the Attachment icon on the Toolbar (the RPA must be open on your screen). **Note**: You can tell if there is an attachment to an RPA or any other personnel document by the "paper" in the paper clip Attachment button on the Toolbar.
2	The **Attachments** Window is displayed. Click on the line containing the attachment you want to view or print (if there is more than one item). ○ For a file, click the <**Open Document**> button. The file will open in a separate browser window where you can view or print it. ○ Comments will display automatically when you select a "Comment" item. 

3	When you are done, close the **Attachment** window to return to the RPA.

Deleting an Attachment

To delete an attachment to an RPA, follow these steps:

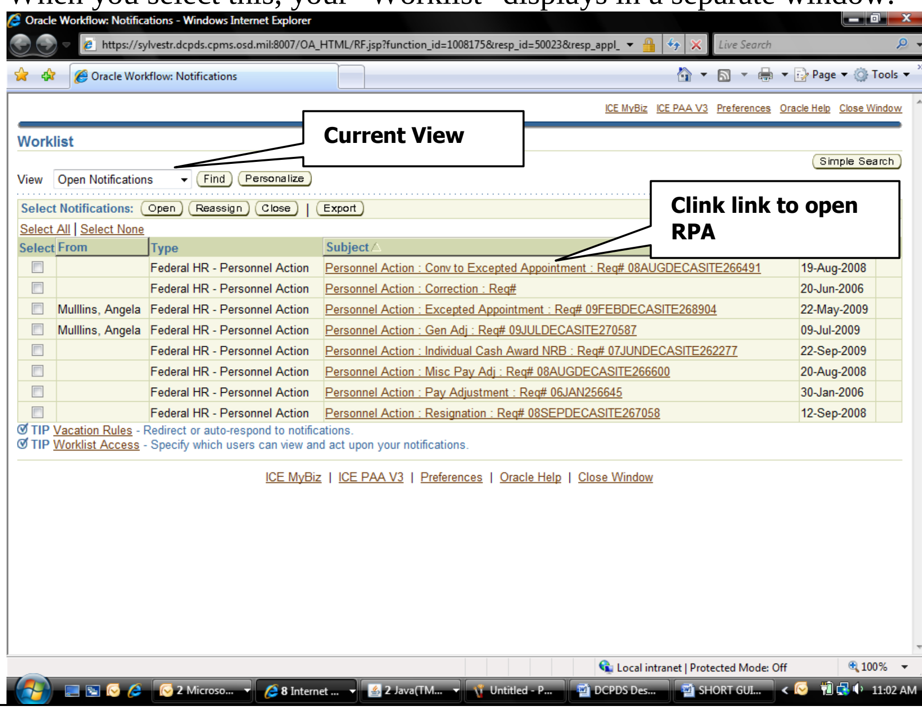
Step	Action
1 	Click the Attachment button on the Toolbar (the RPA must be open on your screen). **Note**: You can tell if there is an attachment to an RPA or any other personnel document by the "paper" in the paper clip Attachment button on the Toolbar.
2	The **Attachments** Window is displayed. Use your scroll bar to locate and click on the item you want to delete (if there is more than one item).
3 	Click the **Delete Record** button on the toolbar.
4	The following message is displayed. Click the appropriate button.  ○ *Attachment* means that you are "un-attaching" the document from the RPA, but the document itself will still exist. Note: documents attached to RPAs in DCPDS are saved (stored) on the DCPDS server. When you use the delete "Attachment" option, the document will still be using space on the server. ○ *Document and Attachment* means that you are both un-attaching the document and deleting it. This option will remove the document from the DCPDS server and should normally be used.
5	Click the <**Save**> icon on the toolbar to save your changes to the **Attachment** Window.

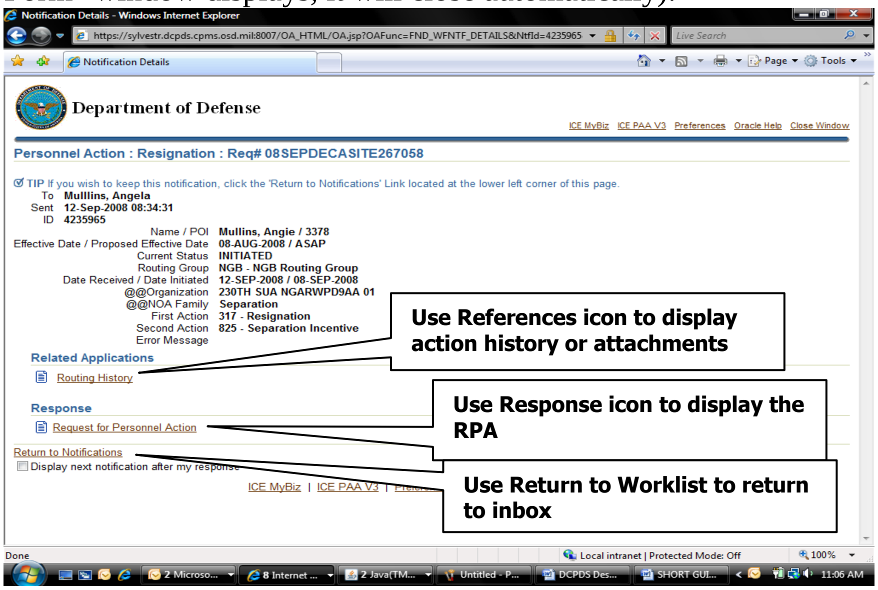
Section Three –Inboxes

Workflow Inbox

Displaying an RPA using the Workflow Inbox

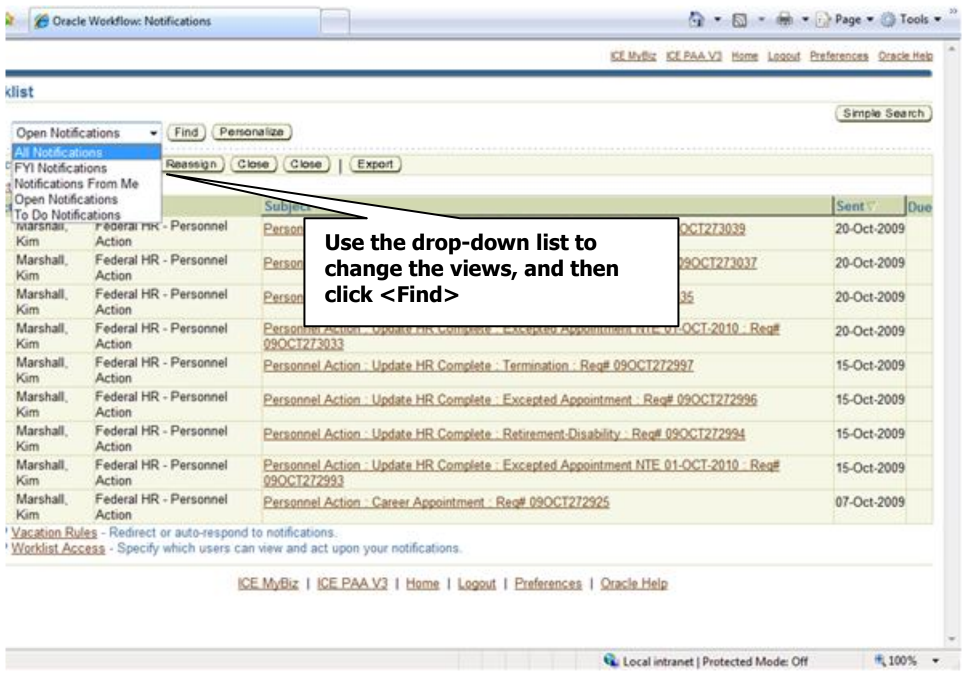
The "Workflow Inbox" is the Oracle 11i version of the Civilian Inbox on the navigator menu. Follow these steps to display an RPA from this inbox**:**

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Select Workflow Inbox from the Navigator menu (note, if you move this item to your "Top Ten" List, it will show as Customizable Workflow Worklist).</td></tr>
<tr><td>2</td><td>When you select this, your "Worklist" displays in a separate window:

</td></tr>
<tr><td>3</td><td>When the Workflow inbox displays, click on the underlined link in the subject field of the inbox for the RPA that you want to work on.</td></tr>
</table>

4	This opens the "Notification Details" window. From here, scroll down to the "Response" area and click on the RPA icon to open the RPA itself (a "Launching Form" window displays, it will close automatically). 
5	The RPA will display in a different window. Review and/or change the RPA as needed.
6	When you close the RPA (or route it to someone else), you will return to the **Notification Details** window (shown in step 4 above). Click on "Return to Worklist" to return to your inbox (don't just close this window as this will also close your inbox).

Inbox Views

The Workflow Inbox comes with five standard "views" that you can access by using the drop-down list to select the one you want, then clicking the <Go> button:

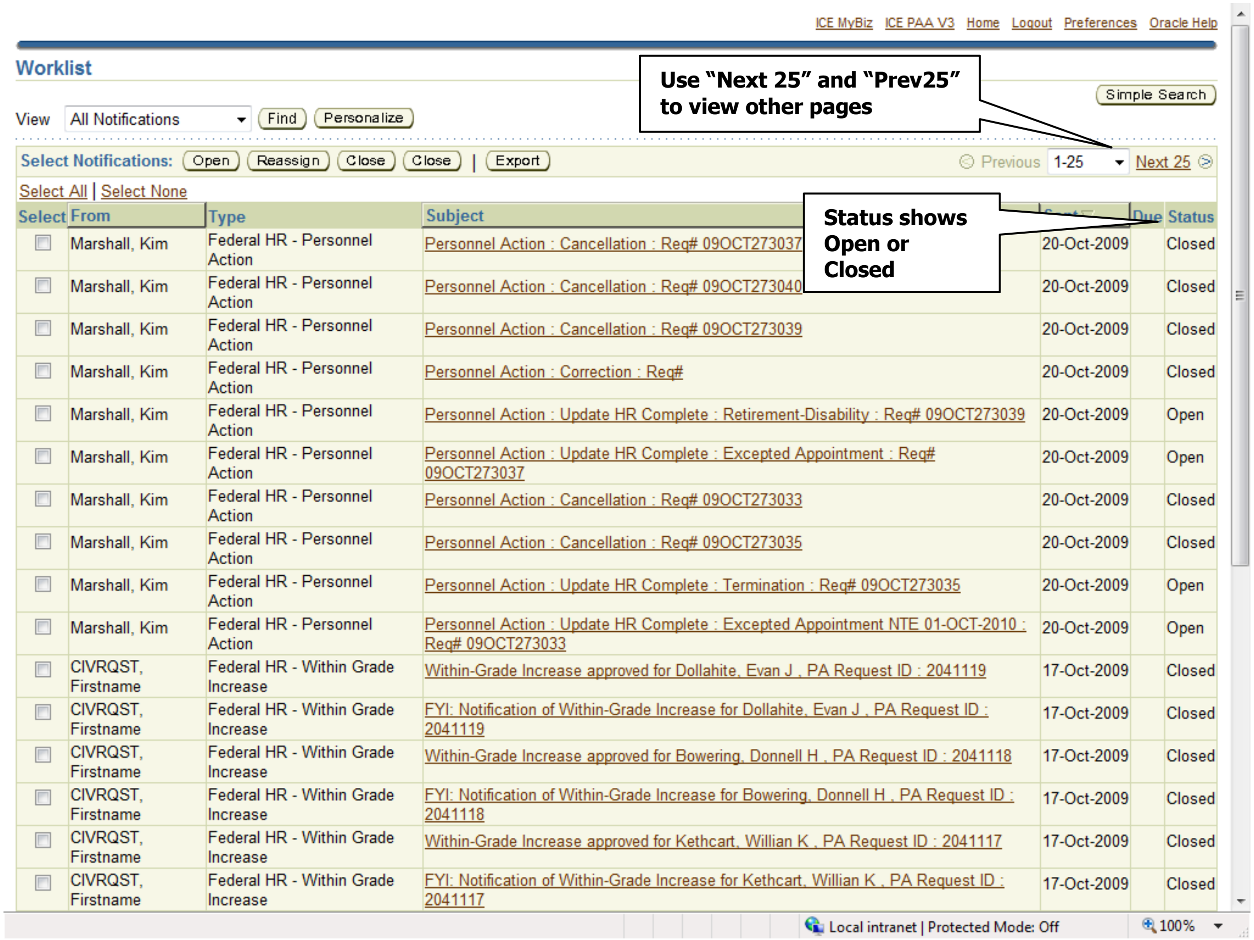


The most commonly used views are "Open Notifications" (the default view) and "All Notifications" which will display all actions open and closed RPAs in your inbox.

- You can create your own views with different columns, sorts, and filtering criteria.

Closed Actions

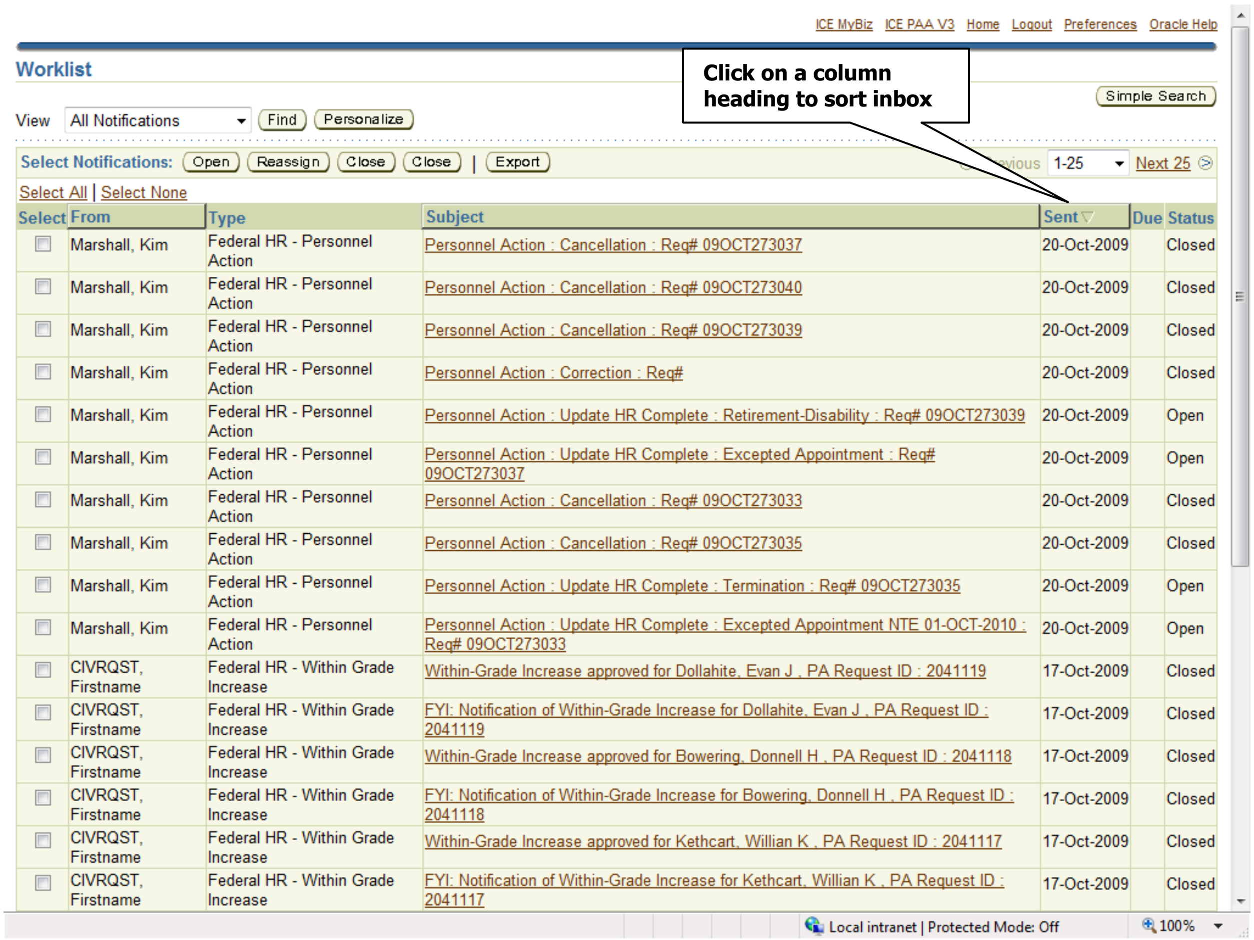
Use the "All Notifications" view to search for a closed action (one that is no longer open in your inbox or one that has been completed). If there are lots of actions in your inbox, you will have links ("Next 25," "Prev 25") that allow you to view additional pages of information. You cannot actually view a closed RPA from the workflow inbox. You can "open" it to display the **Notifications Details** window, but you cannot view or print the RPA form itself.



Select	From	Type	Subject	Sent	Due	Status
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Cancellation : Req# 09OCT273037	20-Oct-2009		Closed
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Cancellation : Req# 09OCT273040	20-Oct-2009		Closed
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Cancellation : Req# 09OCT273039	20-Oct-2009		Closed
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Correction : Req#	20-Oct-2009		Closed
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Update HR Complete : Retirement-Disability : Req# 09OCT273039	20-Oct-2009		Open
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Update HR Complete : Excepted Appointment : Req# 09OCT273037	20-Oct-2009		Open
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Cancellation : Req# 09OCT273033	20-Oct-2009		Closed
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Cancellation : Req# 09OCT273035	20-Oct-2009		Closed
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Update HR Complete : Termination : Req# 09OCT273035	20-Oct-2009		Open
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Update HR Complete : Excepted Appointment NTE 01-OCT-2010 : Req# 09OCT273033	20-Oct-2009		Open
	CIVRQST, Firstname	Federal HR - Within Grade Increase	Within-Grade Increase approved for Dollahite, Evan J , PA Request ID : 2041119	17-Oct-2009		Closed
	CIVRQST, Firstname	Federal HR - Within Grade Increase	FYI: Notification of Within-Grade Increase for Dollahite, Evan J , PA Request ID : 2041119	17-Oct-2009		Closed
	CIVRQST, Firstname	Federal HR - Within Grade Increase	Within-Grade Increase approved for Bowering, Donnell H , PA Request ID : 2041118	17-Oct-2009		Closed
	CIVRQST, Firstname	Federal HR - Within Grade Increase	FYI: Notification of Within-Grade Increase for Bowering, Donnell H , PA Request ID : 2041118	17-Oct-2009		Closed
	CIVRQST, Firstname	Federal HR - Within Grade Increase	Within-Grade Increase approved for Kethcart, Willian K , PA Request ID : 2041117	17-Oct-2009		Closed
	CIVRQST, Firstname	Federal HR - Within Grade Increase	FYI: Notification of Within-Grade Increase for Kethcart, Willian K , PA Request ID : 2041117	17-Oct-2009		Closed

Sorting Actions in the Workflow Inbox

To sort items in your inbox, click on the column heading of the column you want to use for your sort.



Select	From	Type	Subject	Sent	Due	Status
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Cancellation : Req# 09OCT273037	20-Oct-2009		Closed
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Cancellation : Req# 09OCT273040	20-Oct-2009		Closed
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Cancellation : Req# 09OCT273039	20-Oct-2009		Closed
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Correction : Req#	20-Oct-2009		Closed
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Update HR Complete : Retirement-Disability : Req# 09OCT273039	20-Oct-2009		Open
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Update HR Complete : Excepted Appointment : Req# 09OCT273037	20-Oct-2009		Open
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Cancellation : Req# 09OCT273033	20-Oct-2009		Closed
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Cancellation : Req# 09OCT273035	20-Oct-2009		Closed
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Update HR Complete : Termination : Req# 09OCT273035	20-Oct-2009		Open
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	CIVRQST, Firstname	Federal HR - Within Grade Increase	FYI: Notification of Within-Grade Increase for Bowering, Donnell H , PA Request ID : 2041118	17-Oct-2009		Closed
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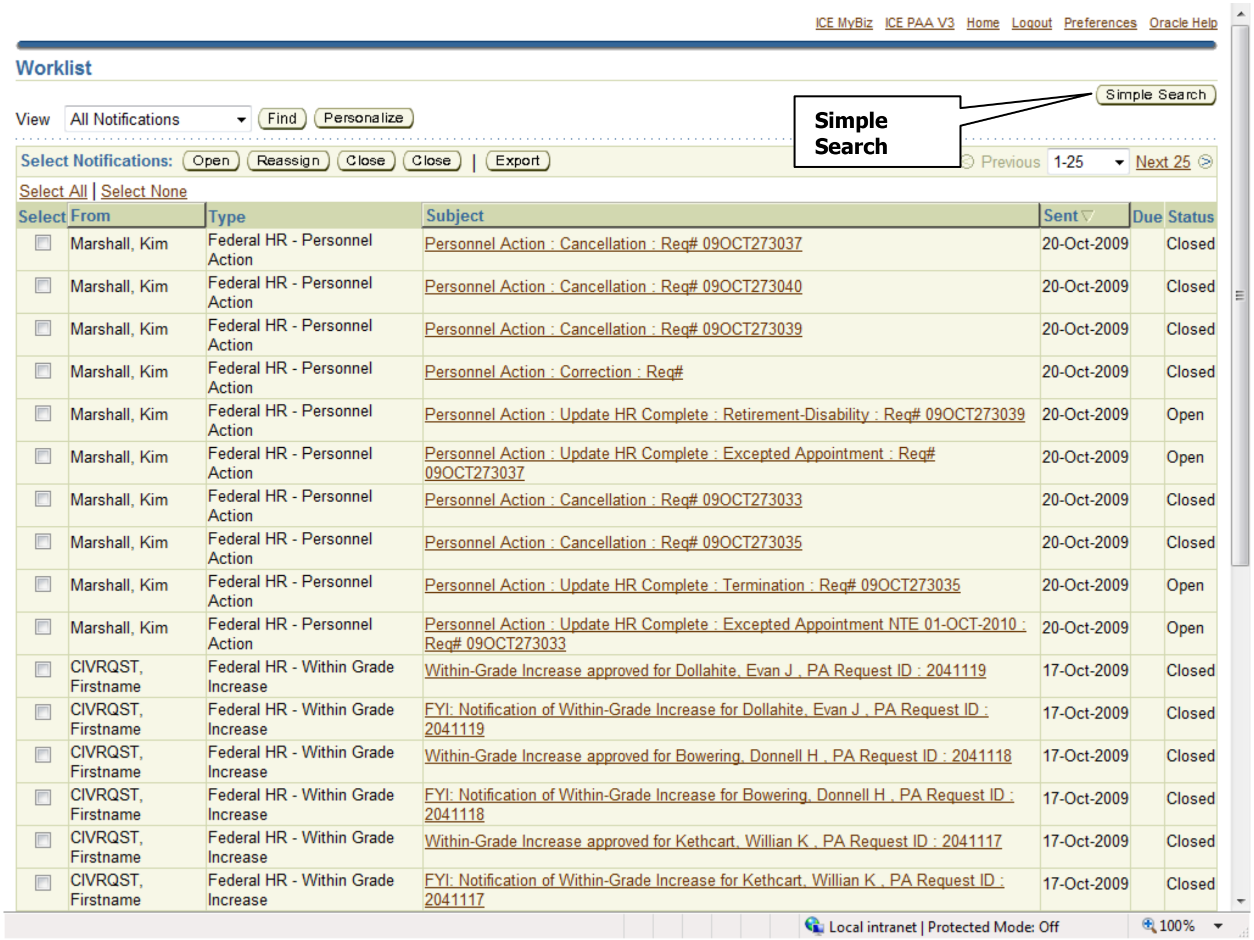
	CIVRQST, Firstname	Federal HR - Within Grade Increase	FYI: Notification of Within-Grade Increase for Kethcart, Willian K , PA Request ID : 2041117	17-Oct-2009		Closed

Searching the Workflow Inbox

If you have a lot of actions in your inbox (for example, if you are looking at "All Notifications" which includes closed actions), you can use "Simple Search" to help locate a specific action. Begin by clicking the <Simple Search> button on the inbox window:



Select	From	Type	Subject	Sent	Due	Status
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Cancellation : Req# 09OCT273037	20-Oct-2009		Closed
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	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Cancellation : Req# 09OCT273039	20-Oct-2009		Closed
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Correction : Req#	20-Oct-2009		Closed
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Update HR Complete : Retirement-Disability : Req# 09OCT273039	20-Oct-2009		Open
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Update HR Complete : Excepted Appointment : Req# 09OCT273037	20-Oct-2009		Open
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Cancellation : Req# 09OCT273033	20-Oct-2009		Closed
	Marshall, Kim	Federal HR - Personnel Action	Personnel Action : Cancellation : Req# 09OCT273035	20-Oct-2009		Closed
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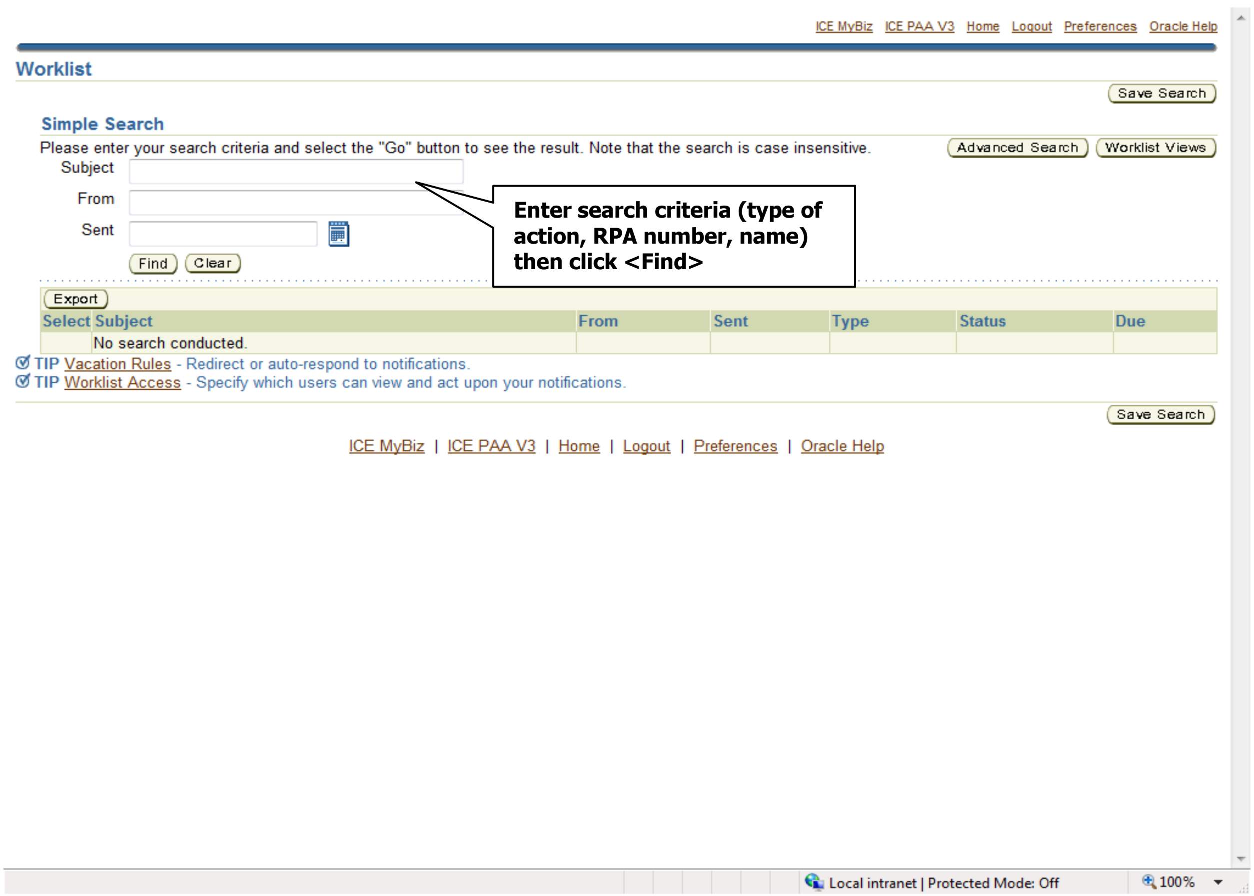
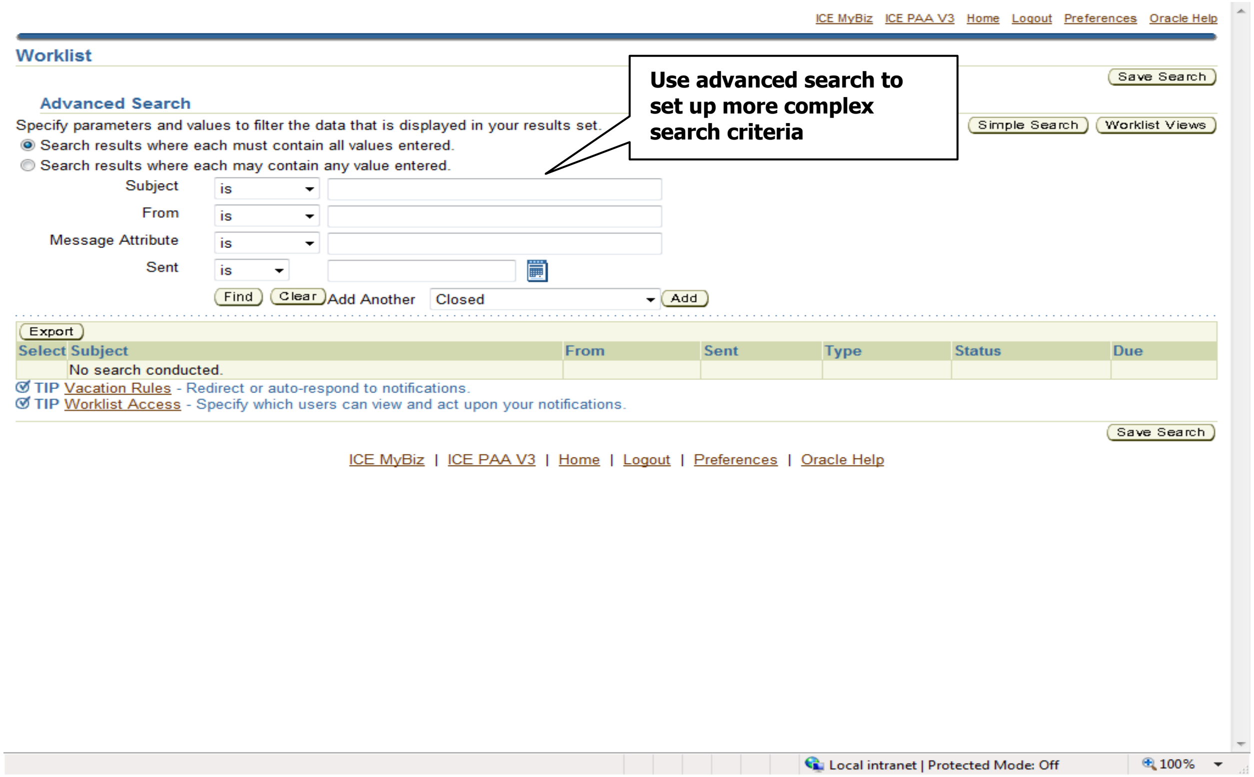
	CIVRQST, Firstname	Federal HR - Within Grade Increase	FYI: Notification of Within-Grade Increase for Kethcart, Willian K , PA Request ID : 2041117	17-Oct-2009		Closed

The Simple Search Window

On the Simple Search screen, enter your search criteria.

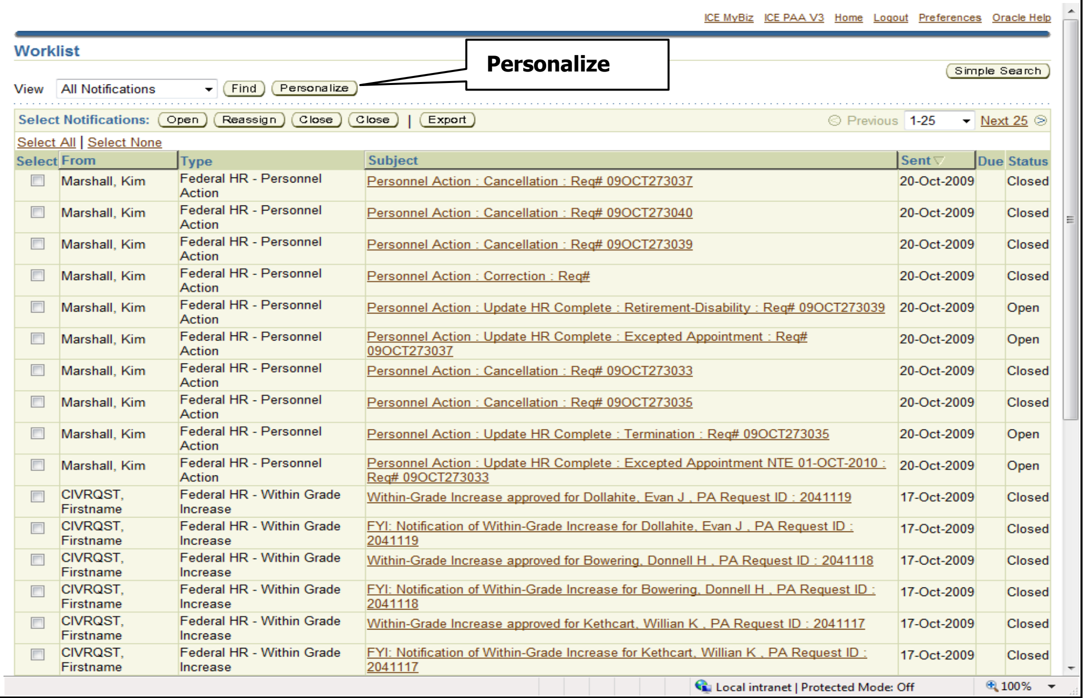
- In the "Subject" line, you can search for an RPA number, a type of action (e.g., Promotion), or an employee name.
- Search criteria is not case sensitive and does not require use of wild cards. To search for an action for John Smith for example, you can just enter "smith" or "SMITH".
- Use the "From" line to search for actions sent to you from another user.
- Use the "Sent" line to search for actions sent to you on a specific date.
- Once you've entered your search criteria, click the <Go> button. Actions that meet your search criteria will display.
- “Advanced Search" lets you set up more complex search criteria using any of the data fields used in the Workflow inbox.

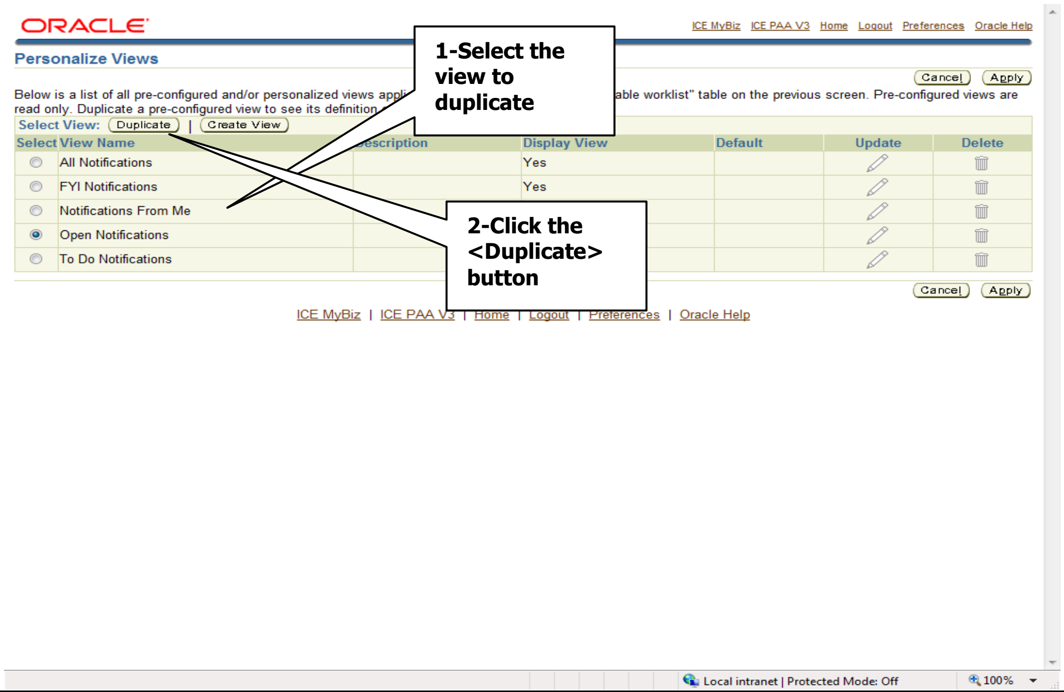



ICE MyBiz ICE PAA V3 Home Logout Preferences Oracle Help
Worklist
Use advanced search to set up more complex search criteria
Save Search
Advanced Search
Specify parameters and values to filter the data that is displayed in your results set.
Simple Search
Worklist Views
Search results where each must contain all values entered.
Search results where each may contain any value entered.
Subject
From
Message Attribute
Sent
is
Find
Clear
Add Another
Closed
Add
Export
Select Subject From Sent Type Status Due
No search conducted.
TIP Vacation Rules - Redirect or auto-respond to notifications.
TIP Worklist Access - Specify which users can view and act upon your notifications.
Save Search
ICE MyBiz | ICE PAA V3 | Home | Logout | Preferences | Oracle Help
Local intranet | Protected Mode: Off
100%

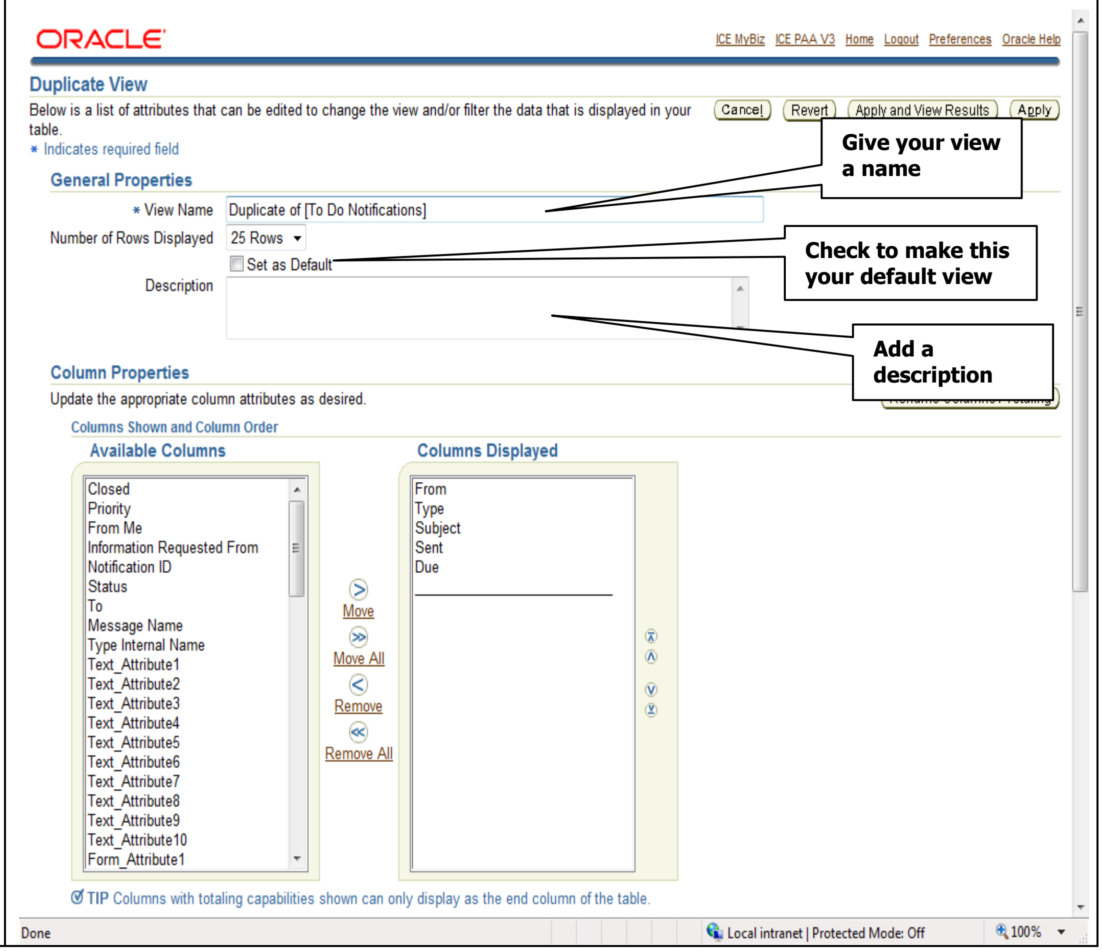
Personalizing Inbox Views

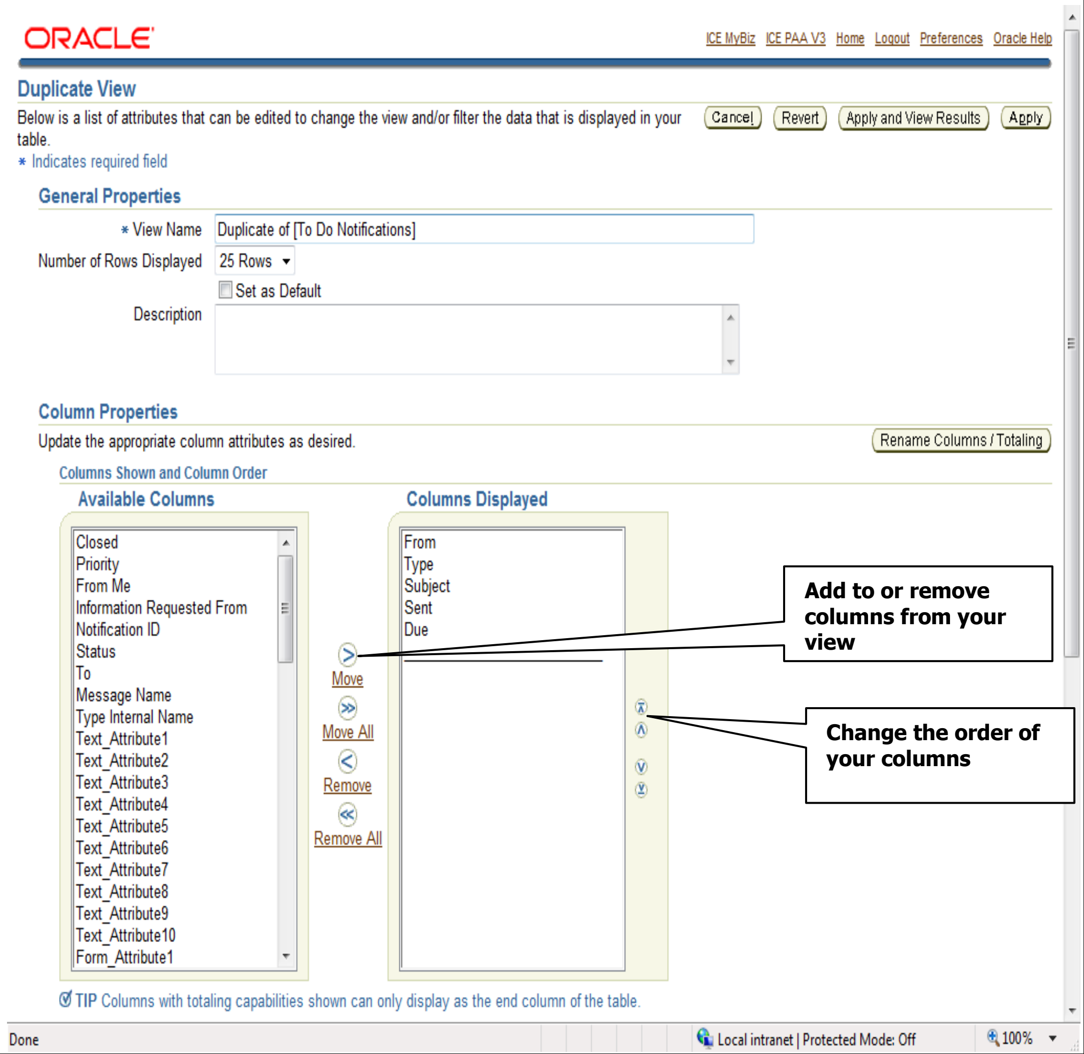
You can create your own "personalized" views of your inbox which allows you to specify what columns to display, how the actions should be sorted, and what filtering criteria to use (if any). Follow these steps to create a custom view:

Step	Action
1	Click the <**Personalize**> button on the inbox window. 

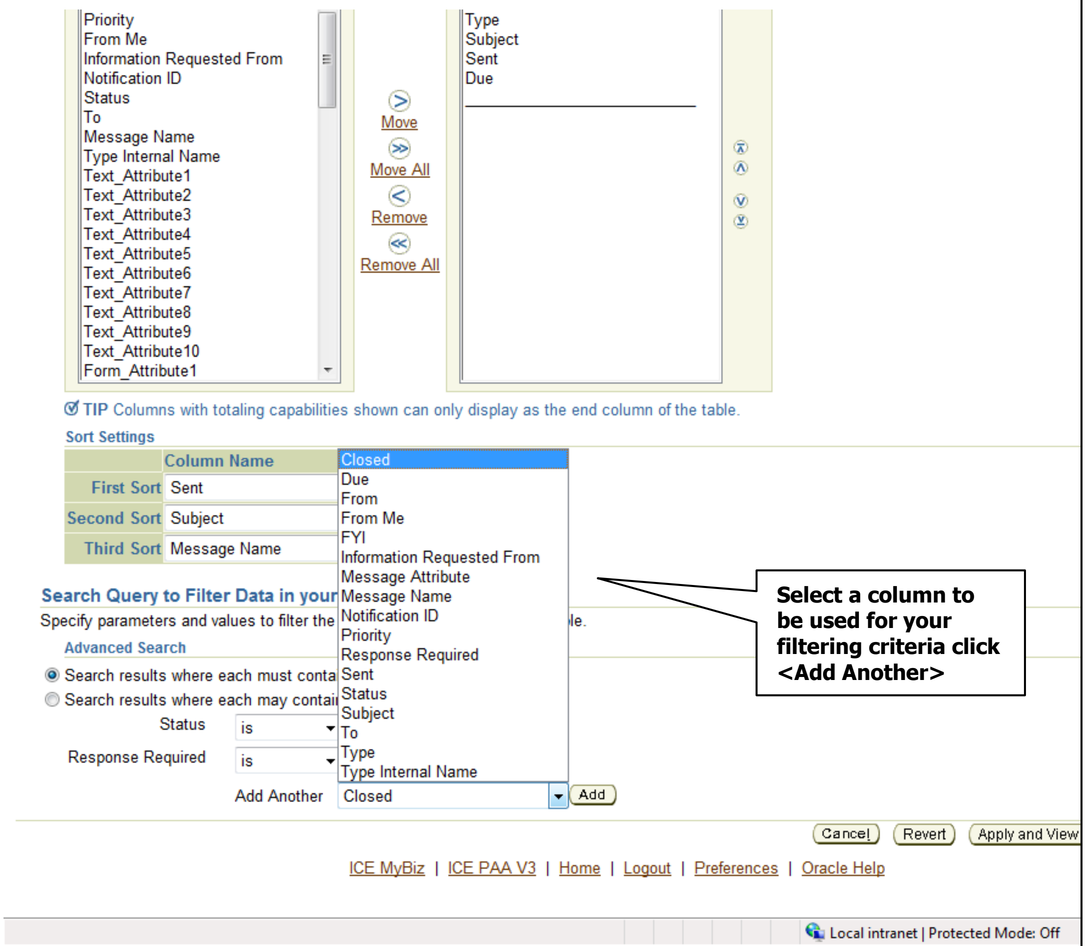
<table>
<tr>
<td>2</td>
<td>On the Personal Table Views window, you can create a brand new view using the <Create View> button, or you can copy an existing view (recommended) by selecting the view to copy and clicking the <Duplicate> button:


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

3	Fill out the "General Properties" fields as follows: • **View Name**: Give your view a new name (this is the name that will display on the drop-down list of views on the main inbox window). • **Number of Rows Displayed**: You can specify a different number of rows to display if desired. • **Set as Default**: Check the box if you want this to be your default view (the view that will automatically display when you open the inbox). "Open Actions" is the standard default. Only one view can be the default. • **Description**: Optional, add descriptive information if desired. 

4	In the "Column Properties" area, you can identify what columns to include in your view, and what sort order to use. • To add a new column, select (click on) the column from the left side ("Available Columns") and click the right <**Move**> arrow to add it to the right side ("Columns Displayed"). To remove a column, select it from the right and click the left <**Remove**> arrow. • Use the up- and down-arrows at the right side of the window to change the left-to-right order of the columns. • To select a column for sorting, select the column from the drop-down list of columns, then select whether you want it ascending (low to high) or descending (high to low). 

<table>
<tr><td>5</td><td>You can include filtering criteria if desired. Begin by selecting the column that will be used for filtering (e.g., use the "Subject" column to filter for a type of action), then click the <Add Another> button.

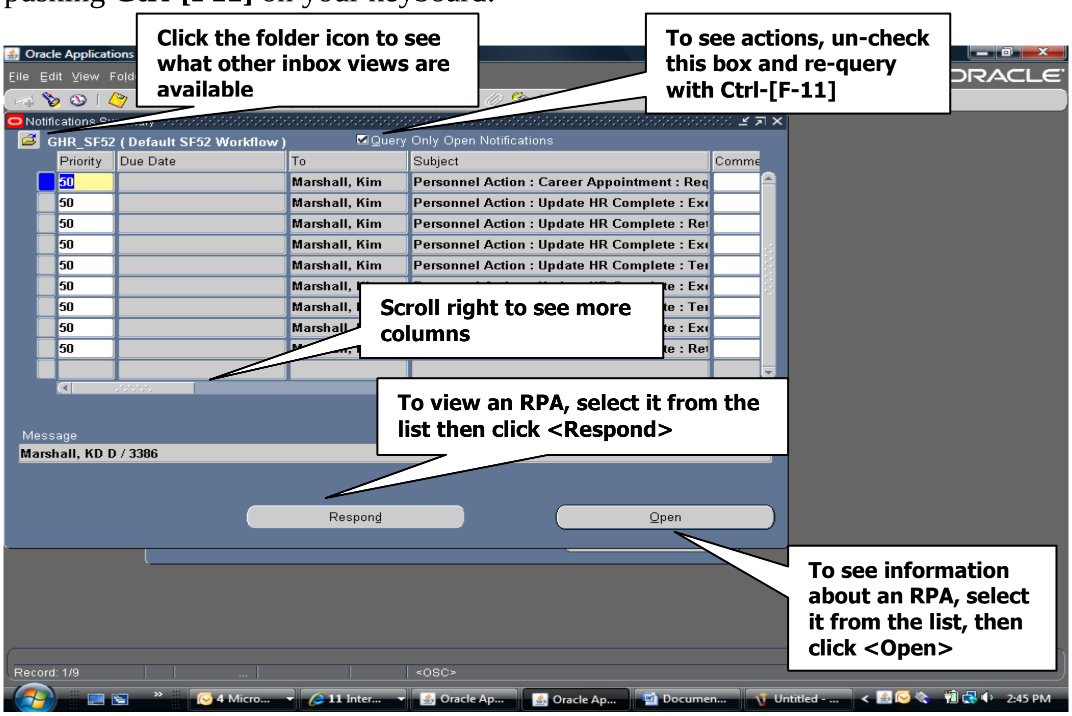


</td></tr>
<tr><td>6</td><td>The screen will re-display with the selected column now available for entering criteria. Select the type of comparison to be made (is, contains, starts with, ends with), then enter the comparison value in the adjoining field. For example, to filter your inbox to show only promotion actions, this section would read Subject contains Promotion. You can add other data fields to your filtering criteria if desired by repeating steps 5 and 6.</td></tr>
<tr><td>7</td><td>When you are done, click the <Apply> button at the bottom of the window. Your new view will be available on the list of views for the inbox.</td></tr>
</table>

Civilian Inbox

The "Civilian Inbox" is the inbox that will display within the Navigator Window. It is the original inbox view that was created for DCPDS. This inbox will contain the same actions as the Workflow Inbox, just with a different view.

Displaying the RPA using the Civilian Inbox

Step	Action
1	Select *Civilian Inbox* from the Navigator menu (note, if you move this item to your "Top Ten" List, it will show as *Civilian Workflow Inbox).*
2	The Civilian Inbox will display (called **Notifications Summary**). It will appear to be empty -- you need to REFRESH it to display any actions that you may have by pushing **Ctrl-[F11]** on your keyboard:  **Note**: The inbox window is substantially longer than one screen; to see other columns, use the scroll bar at the bottom of the window to move to the right. You can customize the display of your Civilian Inbox by rearranging the order of columns or displaying actions in a different sequence.

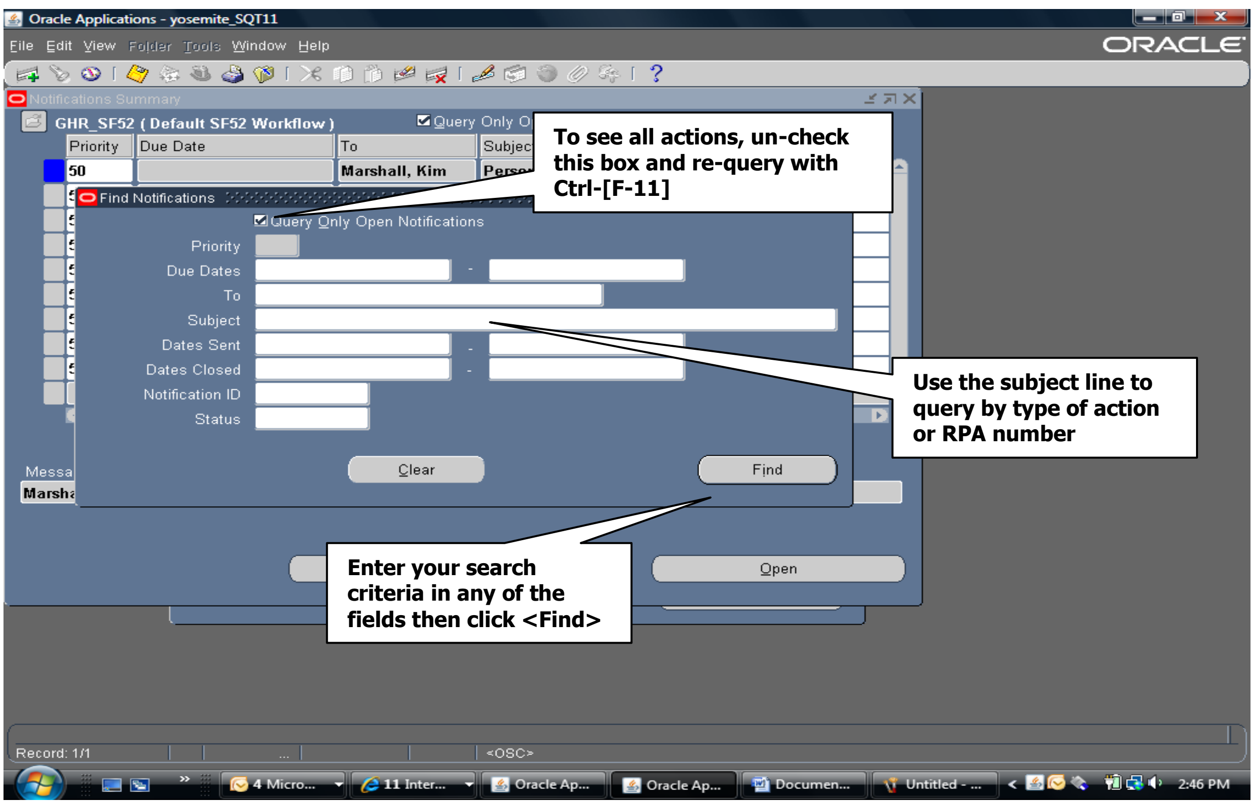
3	To access a specific action in your inbox, click on it (anywhere on that line) so that the blue record indicator appears on the left side of the action. If your list is long, you may need to use the scroll bar on the right side of the inbox window. • To view the action, click the <**Respond**> button. • To track or view information about the action, click the <**Open**> button.

Viewing Closed Actions

By default, whenever you open your inbox, you will see only open actions. In order to see closed actions, click the **Query Only Open Notifications** block to clear the "X", then push **Ctrl-[F11]** on your keyboard to refresh your inbox.

Searching the Civilian Inbox

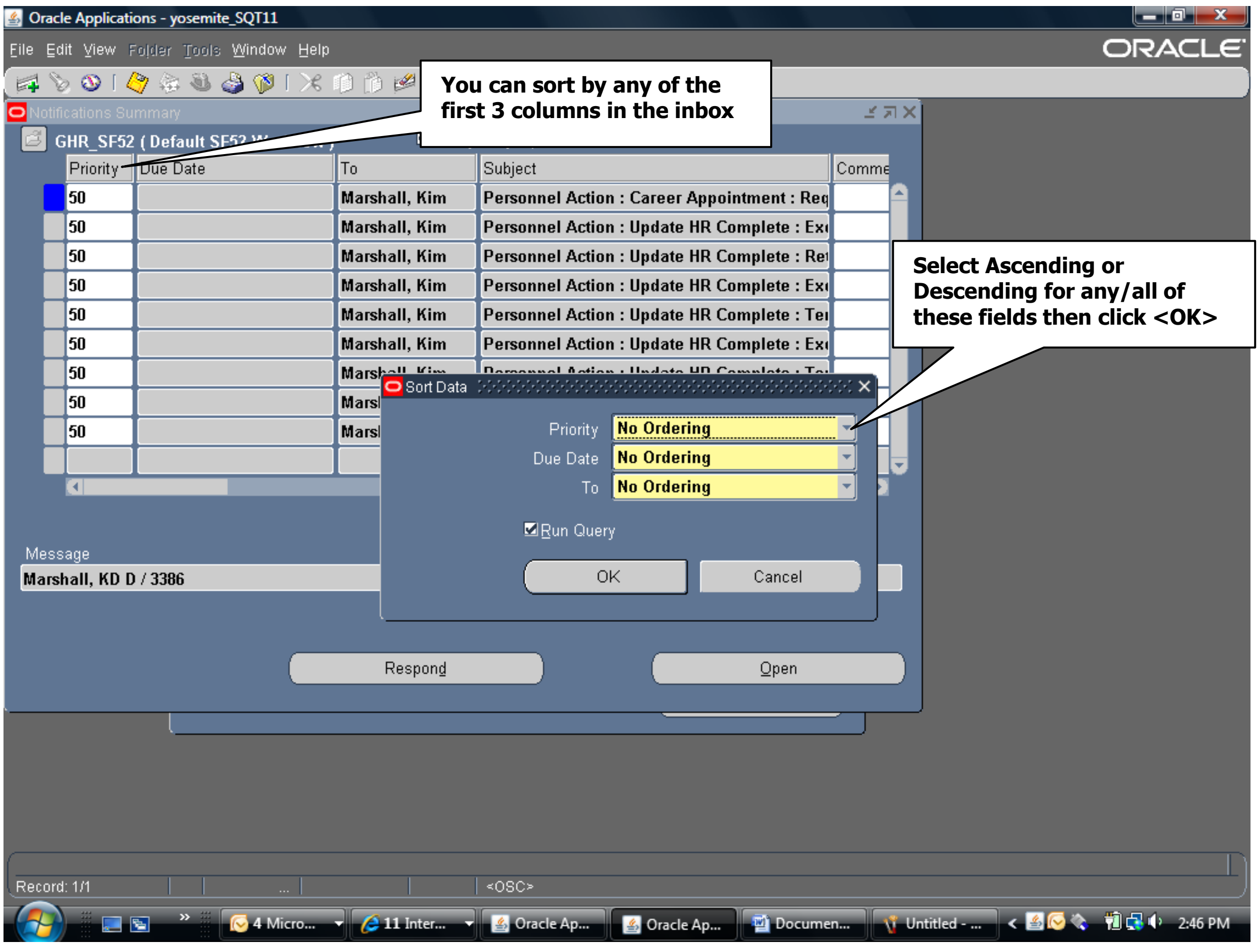
If you have lots of actions in your inbox (e.g., if you are looking at both open and closed actions) and want to search for a specific action, use the "Find" function by clicking the Find icon (the flashlight) or selecting *View* → *Find* from the top line menu. The Find window displays:



Sorting the Civilian Inbox

You can sort the actions in your inbox by any of the first three columns.

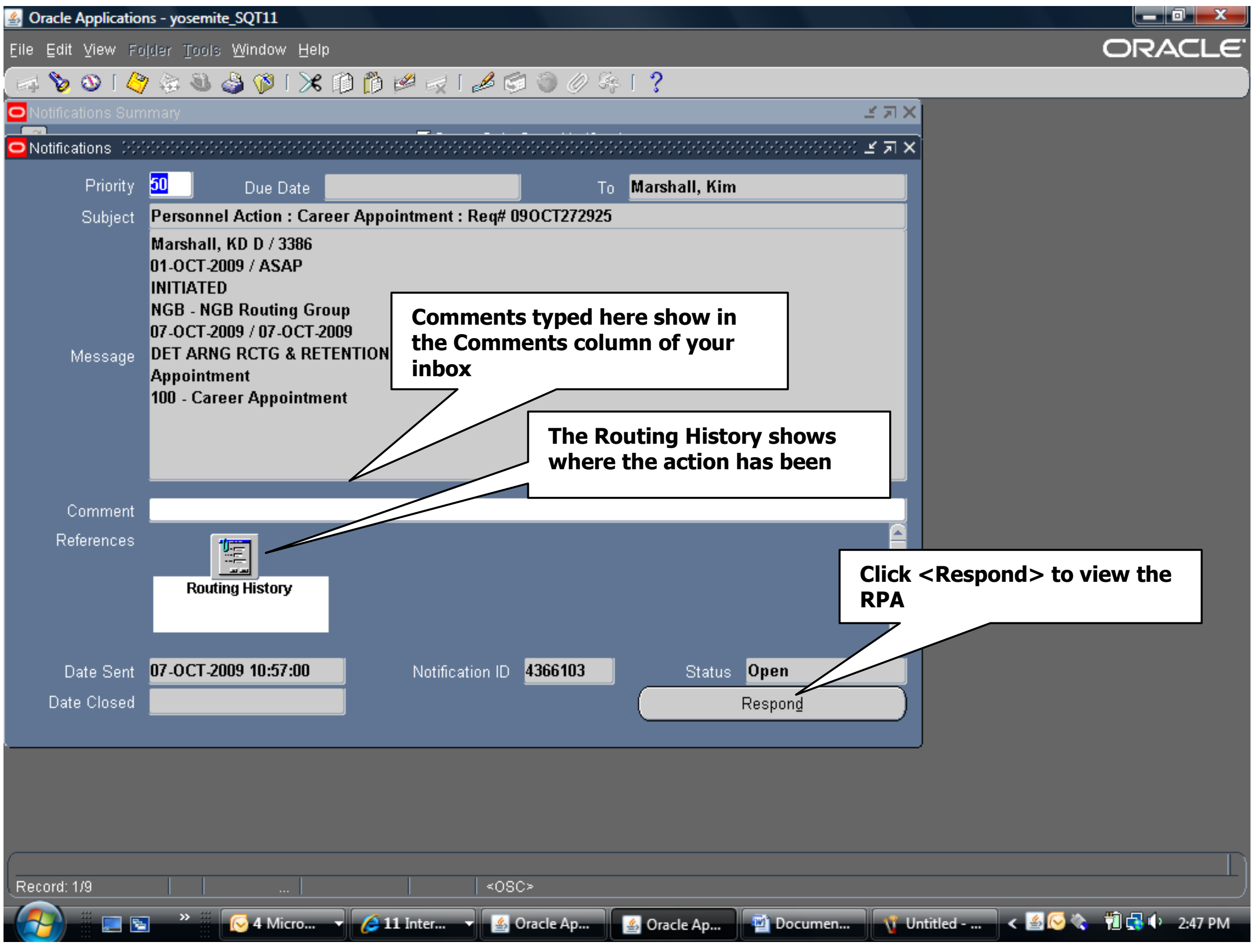
- If you want to sort on a different column (not one of the first three), you must move that column to make it one of the first three. By setting up and saving a custom view, you can also set it up to sort the way you want.
- Select *Folder* → *Sort Data* from the top line menu. Use the drop-down menu at the right of any or all three of the columns to select Ascending (low to high) or Descending (high to low).
- Click <**OK**> to change the sort.



The Notifications Window

The **Notifications** window provides additional information about the RPA.

- You can enter comments that will show in your inbox if desired. These comments are only for you -- they will not travel with the RPA.
- Click <**Routing History**> icon on the **Notifications** Window to display the **Routing History** Window. This window shows where this action has been, who has had the action, and what they did with it. This is the same window that displays when you click the <**History**> taskflow button at the bottom of an RPA.
- Click the <**Respond**> button to display the actual RPA form itself.



Customizing the Civilian Inbox

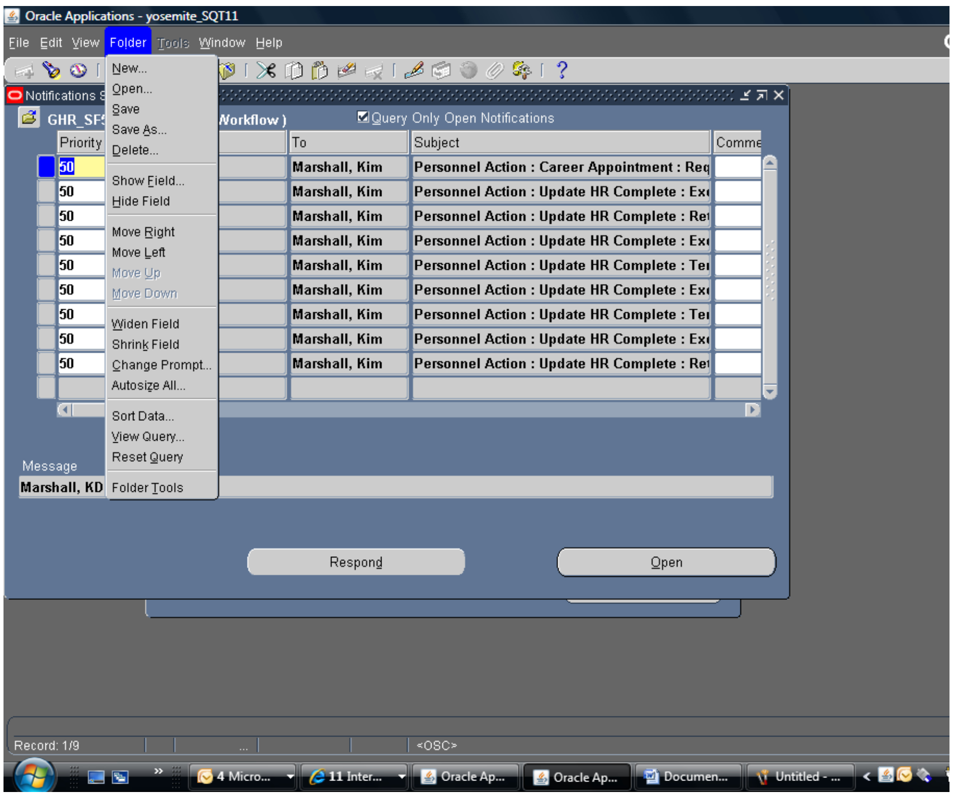
You can personalize the appearance of your inbox in a number of ways:

- You can specify what columns to show or not show.
- You can change the order of columns from left to right.
- You can sort the items in different ways.

- You can expand or shrink the width of columns.
- You can save different views with different names.

Using Folder Tools

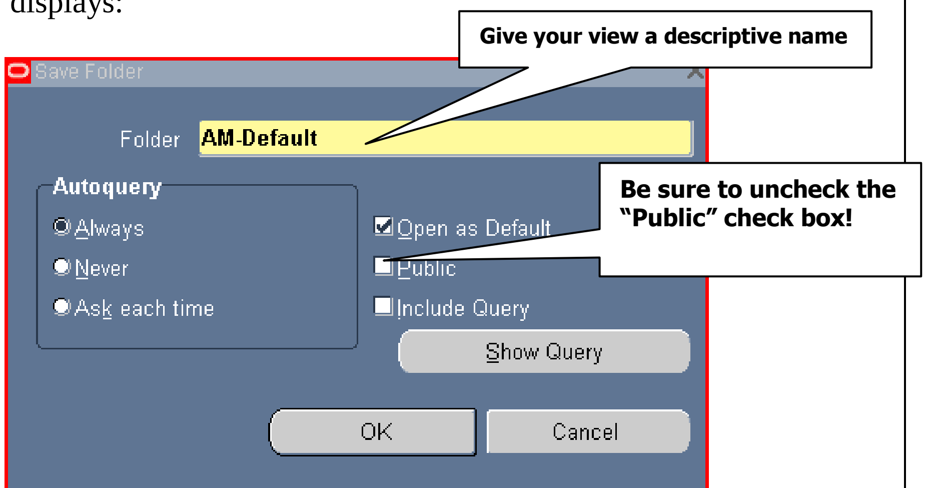
The folder tools menu lets you change the appearance of your inbox. You can use the Folder menu or the Folder Tools window that displays when you click the Folder Tools icon.



- To change the width of a column, click in the column you want to change and click the Widen Field or Shrink Field icon (or the corresponding entries from the Folder menu).
- To hide a column, click in the column you want to hide, and click the Hide Field icon.
- To restore a column that you previously hid, click in the column next to where you want to restore the column, then click the Show Field icon. This will display a list of hidden columns from which you can select.
- To move columns around (left to right), click in a column and click the Move Right or Move Left icon. You can do this repeatedly until the column is located where you want it.

Saving a Folder View

You can save different folder views for various purposes, then the next time you open your inbox, you can select one of your pre-set views:

Step	Action
1	Once your inbox is set up the way you want it (columns sized and arranged, sorted, etc.), select *Folder* → *Save As* from the menu. The *Save Folder* window displays: 
2	Make up a descriptive name for the folder view.
3	Select the "Autoquery" choice as follows: • To "Always" for the inbox to auto-populate when the folder is opened. • To "Ask each time" if you want to be prompted to run the query (not auto-populated). • To "Never" if you never want the inbox to populate when you open this view (use this if you just want the view to display, with the intention of running a different query each time you use this view).
4	Select (click) "Open by Default" if you want this view to automatically open each time you use this folder. You can only have one default view, so if you make this your default, any former default view will be canceled.
5	**Important: Un-check the "Public" box** if it is checked – users should NEVER make their folder views Public (this allows anyone to see this folder view which could eventually result in thousands of views).
6	Click <**OK**> to save your new folder view. • The new name of the folder view is now showing next to the folder icon at the top of the window. • The next time you open your inbox you can retrieve and use this view by clicking on the folder icon and selecting the view from the list of folders. • If you made this your default view, it will automatically open when you open your inbox.