Navigating eServices

Lesson Objective: Confidently and competently navigate the e-Services areas frequently used by commanders.

Desired Learning Outcomes:

1. Know how to choose the applications you will use frequently.
2. Know how and where to complete approvals and validations in eServices and how to change permissions for your staff.
3. Know how to find and where to input data for promotions, SUIs, and ordering supplies.
4. Know where to go and how to give credit for Mentor Inputs/Skills Evaluations in the Learning Management System.
5. Know where to go and how to upload the monthly Vehicle Data.
6. Know where to go and how to start your inventories.

Scheduled Lesson Time: 30 minutes

Introduction

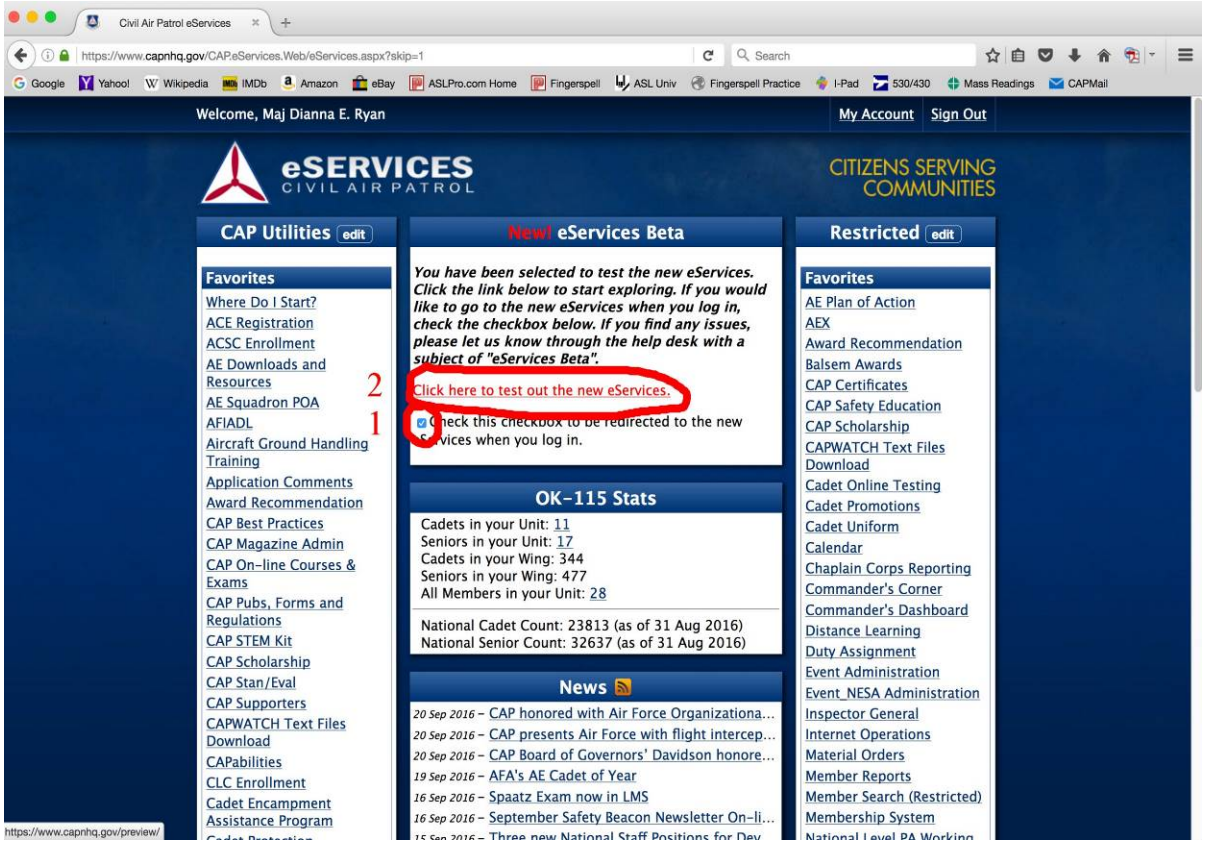
Many new commanders lament the "paperwork" that goes along with the position. This lesson is designed to make the practical use of eServices as intuitive and painless as possible. The various sections will have both typed instructions and "screen shots" to show you where to click. All instructions will be based upon the "new" version of eServices because it actually is much more intuitive to navigate and does not require the training time that the original e-Services did.

1. Choosing the applications you will use frequently

To ensure you have the fewest navigation "clicks" to get where you want, you should choose the apps that you use most frequently. You can turn the apps on and off as your needs change. If you are starting with the original eServices, you will need to get to the new version. (See next page.)

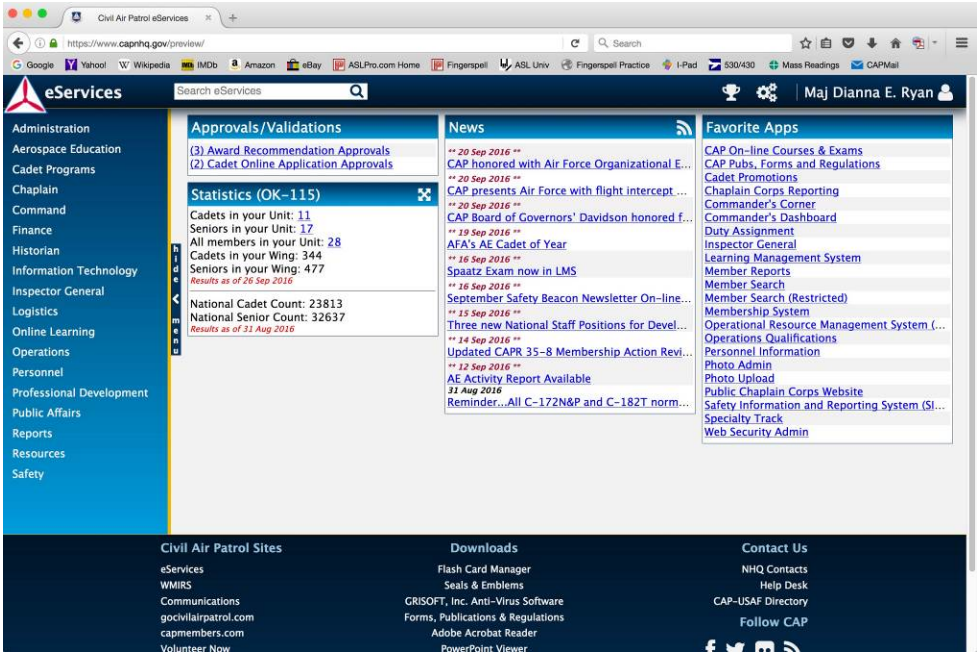
First, check the box next to “Check this checkbox to be redirected to the new eServices when you log in.”

Second, click the “Click here to test out the new eServices.”

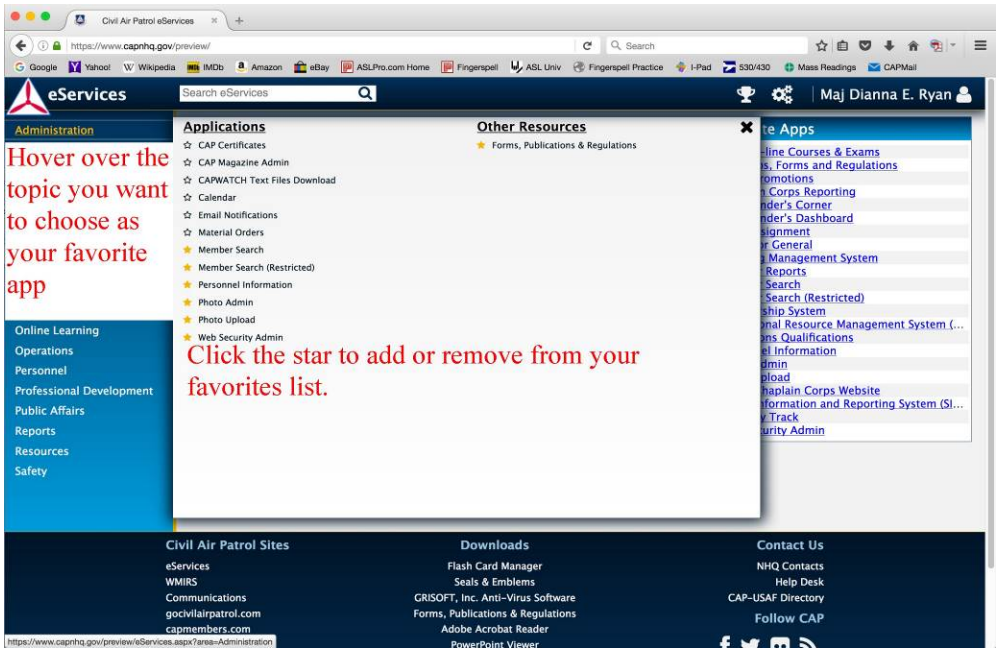


Doing these two things will ensure you have the ease of access and least amount of work getting started. Some members have used the old system for a long time and know where things are in it, but getting there still requires more work, and more memory on their part. The new eServices is less work and requires less time learning how to navigate it/where to find things.

This will take you to your new home screen:



To set up your favorite apps, start by hovering the mouse arrow over the individual area on the left side of the screen. Click on the star next to the one you want to add or remove. If the star is filled in (golden), it is in your favorites. If it is empty, it is not included in your favorites.

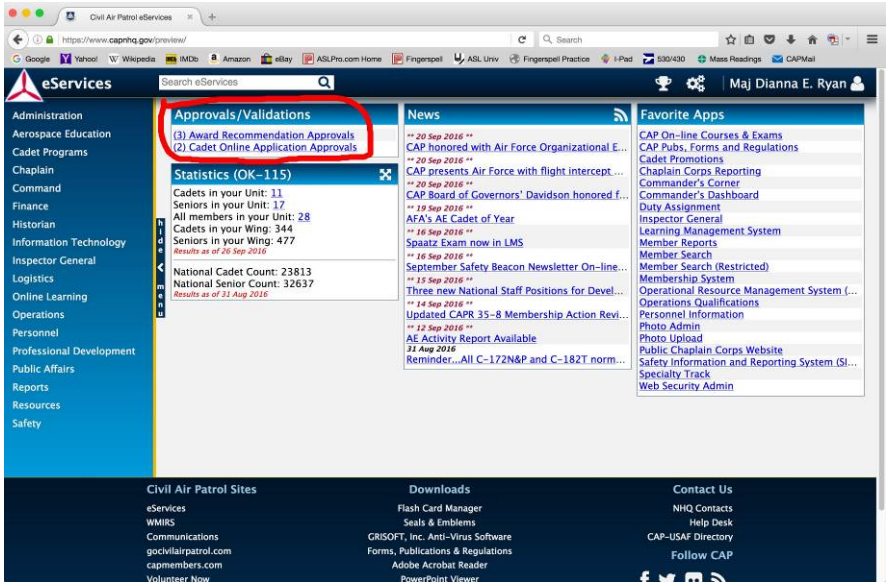


2. Completing approvals and validations in eServices, and changing permissions for your staff.

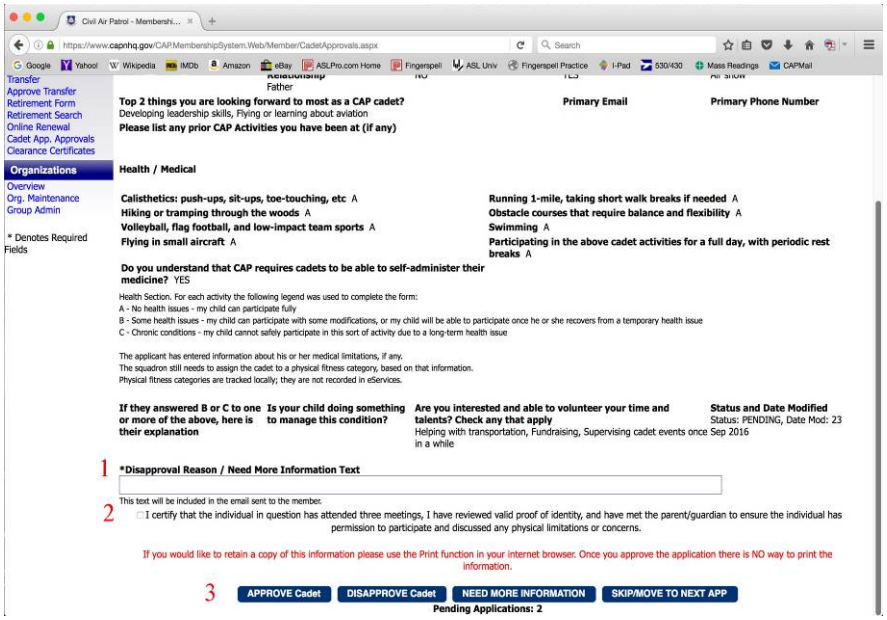
Approvals

As the commander, you will automatically receive notification for approvals on your home page. Click on it (Cadet Online Application Approvals was chosen for this example).

If you need to deny, be sure you have one or more valid reasons: enter that/those reason(s) as it is a required action when denying a request.

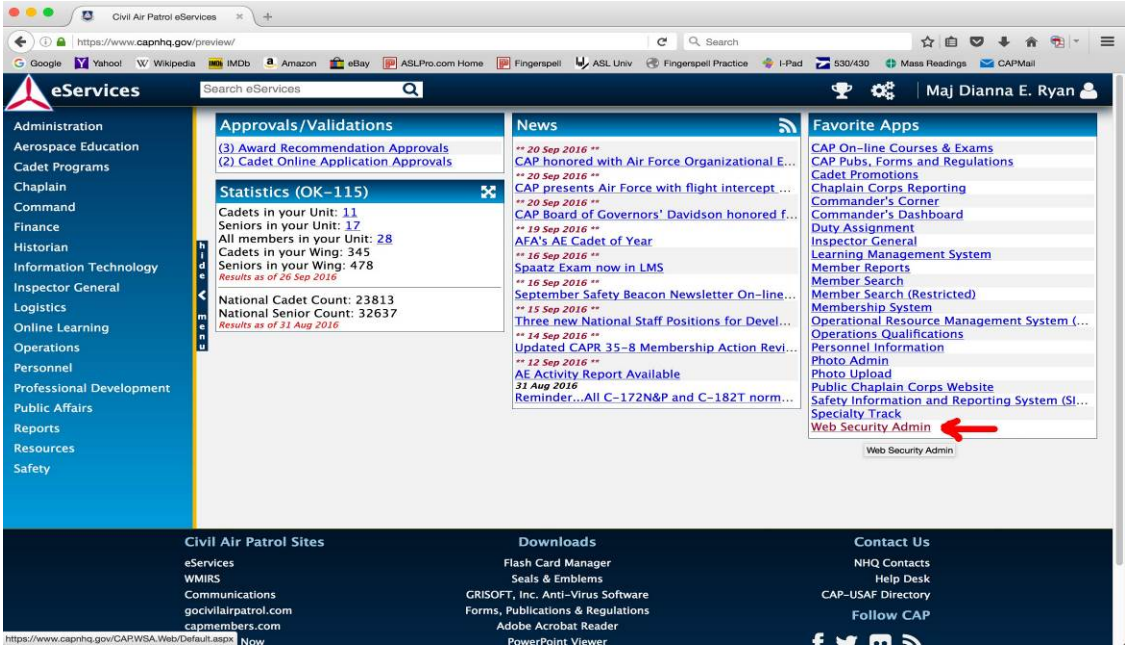


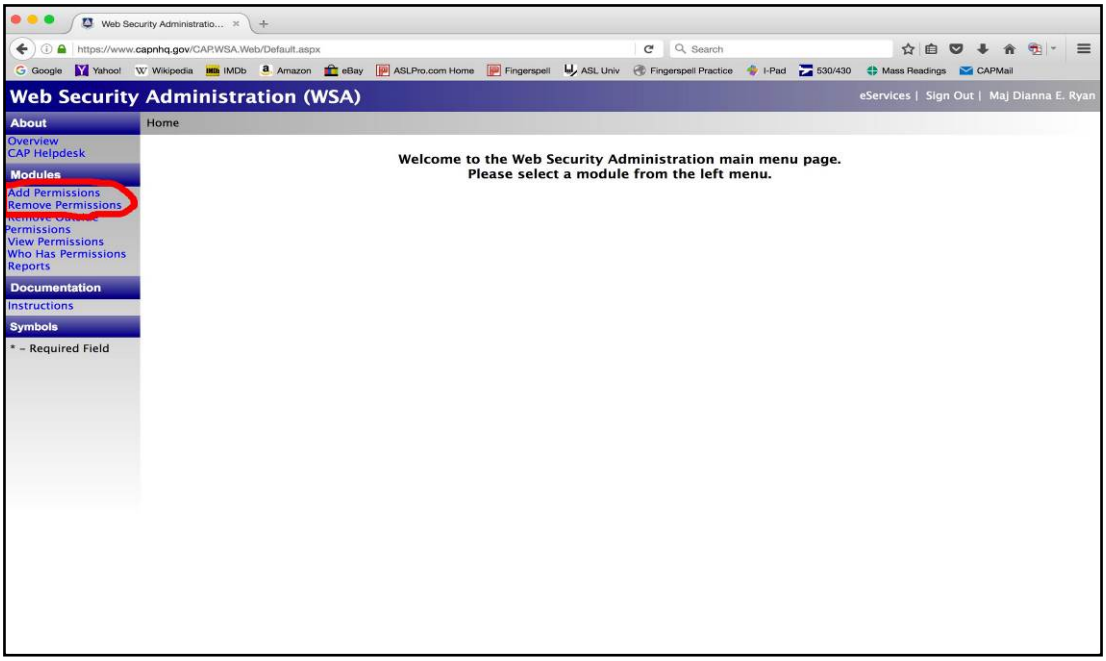
Certify, then Approve, Disapprove, Ask for more information, or move to the next applicant.



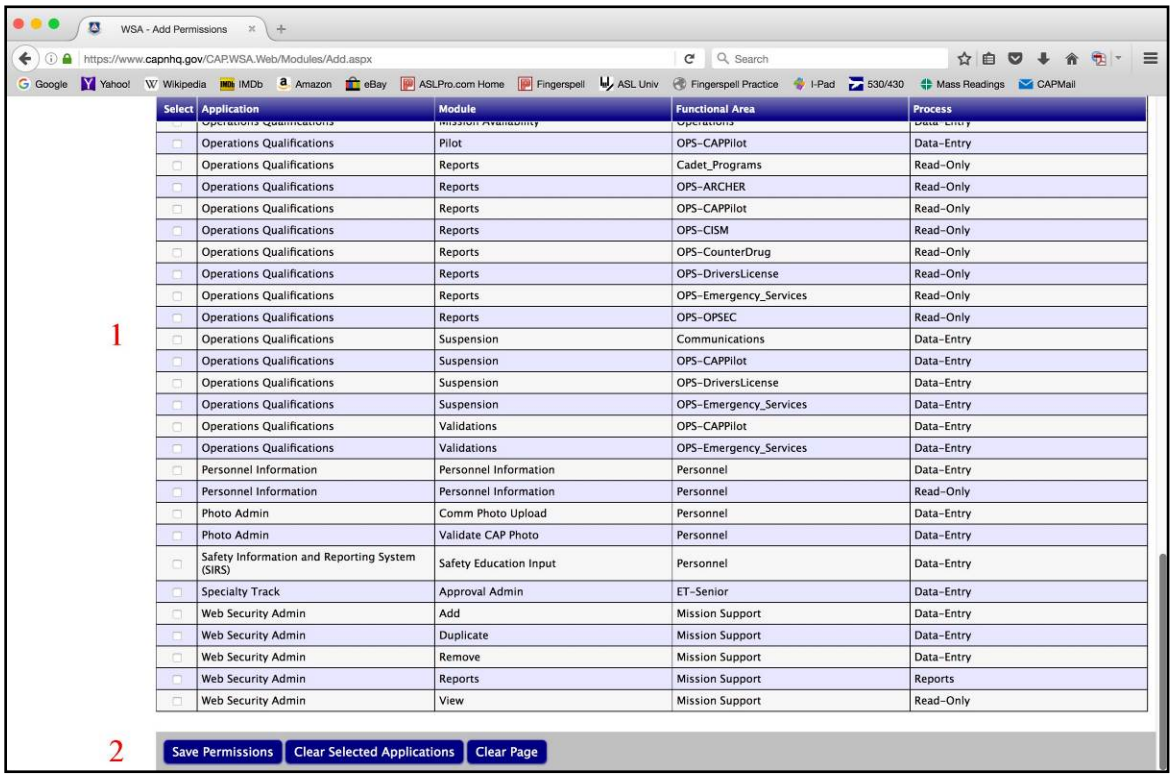
Permissions

Sometimes you need to give a staff member permissions that are beyond his/her duty positions. The way to give only one or two permissions instead of everything that goes along with another duty position is to use the Web Security Administration function (found in **Administration**). You simply go to the WSA, choose the staff member, and choose the permissions to add or remove, then save the permissions you gave/removed.





Below is a listing of the permissions that can be given. This capability does work across the board and there are some approvals that only the commander is allowed to approve.



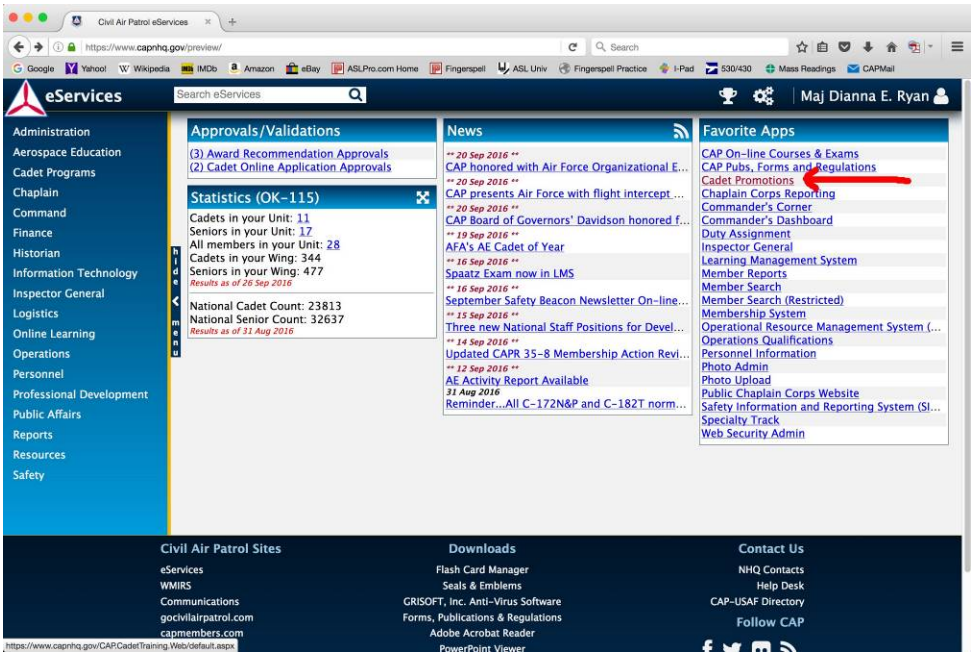
Select	Application	Module	Functional Area	Process
	Operations Qualifications	Pilot	OPS-CAPPilot	Data-Entry
	Operations Qualifications	Reports	Cadet_Programs	Read-Only
	Operations Qualifications	Reports	OPS-ARCHER	Read-Only
	Operations Qualifications	Reports	OPS-CAPPilot	Read-Only
	Operations Qualifications	Reports	OPS-CISM	Read-Only
	Operations Qualifications	Reports	OPS-CounterDrug	Read-Only
	Operations Qualifications	Reports	OPS-DriversLicense	Read-Only
	Operations Qualifications	Reports	OPS-Emergency_Services	Read-Only
	Operations Qualifications	Reports	OPS-OPSEC	Read-Only
	Operations Qualifications	Suspension	Communications	Data-Entry
	Operations Qualifications	Suspension	OPS-CAPPilot	Data-Entry
	Operations Qualifications	Suspension	OPS-DriversLicense	Data-Entry
	Operations Qualifications	Suspension	OPS-Emergency_Services	Data-Entry
	Operations Qualifications	Validations	OPS-CAPPilot	Data-Entry
	Operations Qualifications	Validations	OPS-Emergency_Services	Data-Entry
	Personnel Information	Personnel Information	Personnel	Data-Entry
	Personnel Information	Personnel Information	Personnel	Read-Only
	Photo Admin	Comm Photo Upload	Personnel	Data-Entry
	Photo Admin	Validate CAP Photo	Personnel	Data-Entry
	Safety Information and Reporting System (SIRS)	Safety Education Input	Personnel	Data-Entry
	Specialty Track	Approval Admin	ET-Senior	Data-Entry
	Web Security Admin	Add	Mission Support	Data-Entry
	Web Security Admin	Duplicate	Mission Support	Data-Entry
	Web Security Admin	Remove	Mission Support	Data-Entry
	Web Security Admin	Reports	Mission Support	Reports
	Web Security Admin	View	Mission Support	Read-Only

3. Finding and inputting data for promotions, SUIs, and ordering supplies.

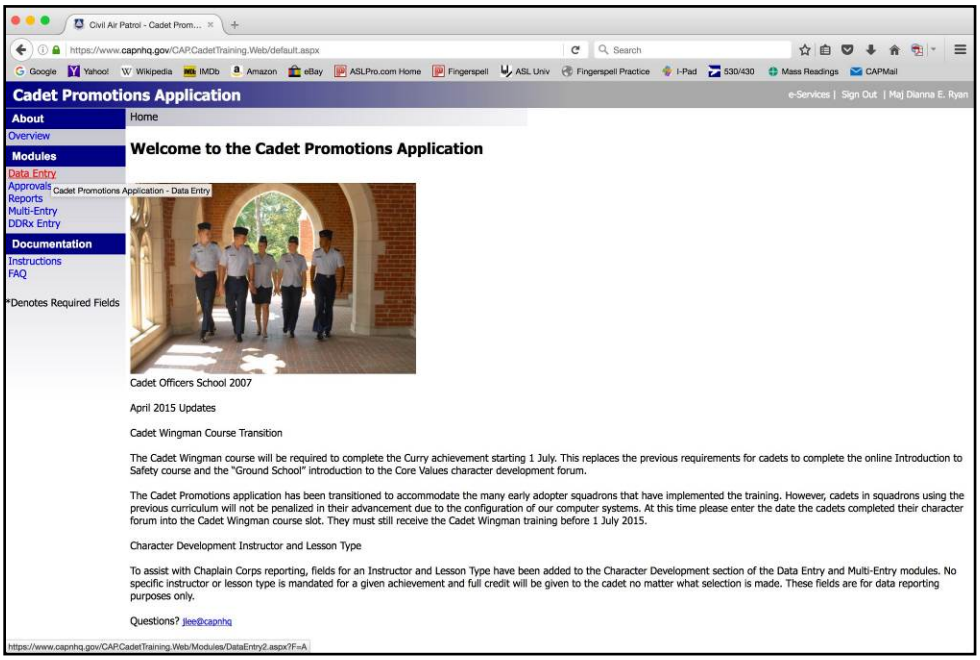
If you are not in the primary duty position for evaluating and promoting cadets (i.e. you have designated a DCC), ordering supplies (i.e. you have designated an AO/PAO), or ordering STEM Kits (i.e. you have designated an AEO), you probably won't have chosen those areas as a favorite. As the squadron commander, you still need to know how to direct your staff to those locations. Even if you are not part of the wing IG team as an Inspection Team Augmentee or Team Leader (highly advised), you **will** need to know where to upload your SUI information.

Cadet Promotions

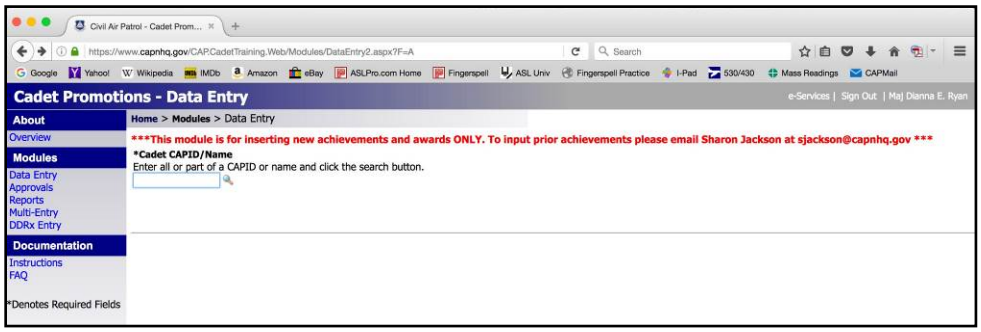
If you haven't chosen Cadet Promotions as a favorite app, it is located in….Cadet Programs (intuitive!). If you have it as a favorite app, simply click on the link.



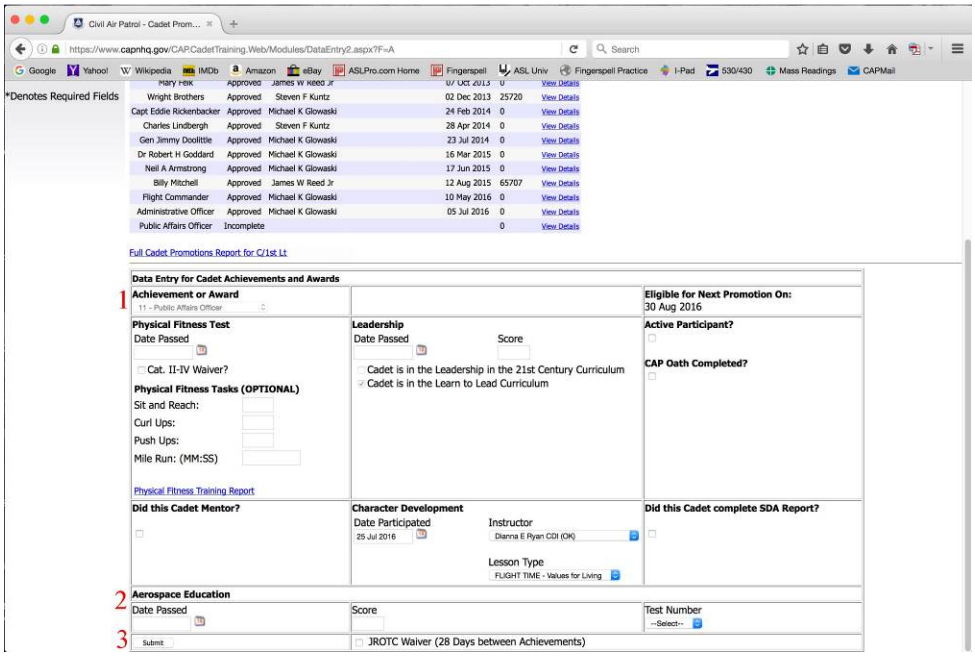
Click on Data Entry if you are entering the data or on Approvals if you are approving your DCC's recommendations.



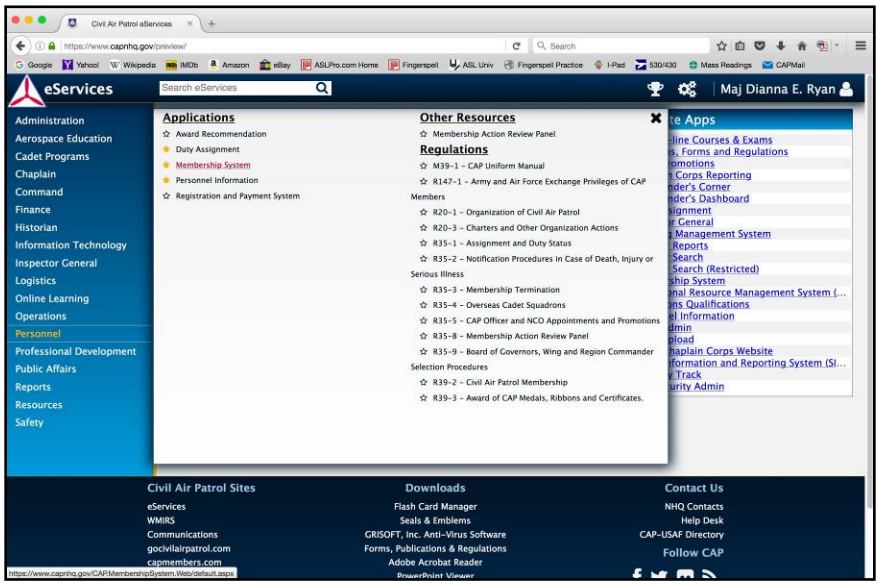
Enter the cadet's name or CAPID.



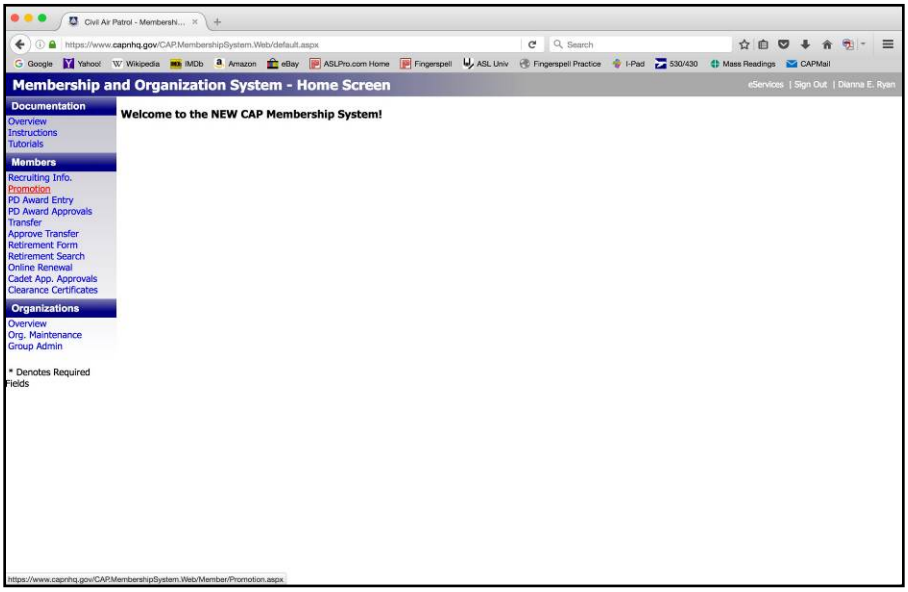
Enter the data. (This cadet's identifying data were removed.) Entering the data, should be done as each item is completed: you do not need to wait until everything is ready for the promotion. Then click submit when ready. If you (as the commander) enter the data, then as the commander, it is automatically approved!



Senior Promotions

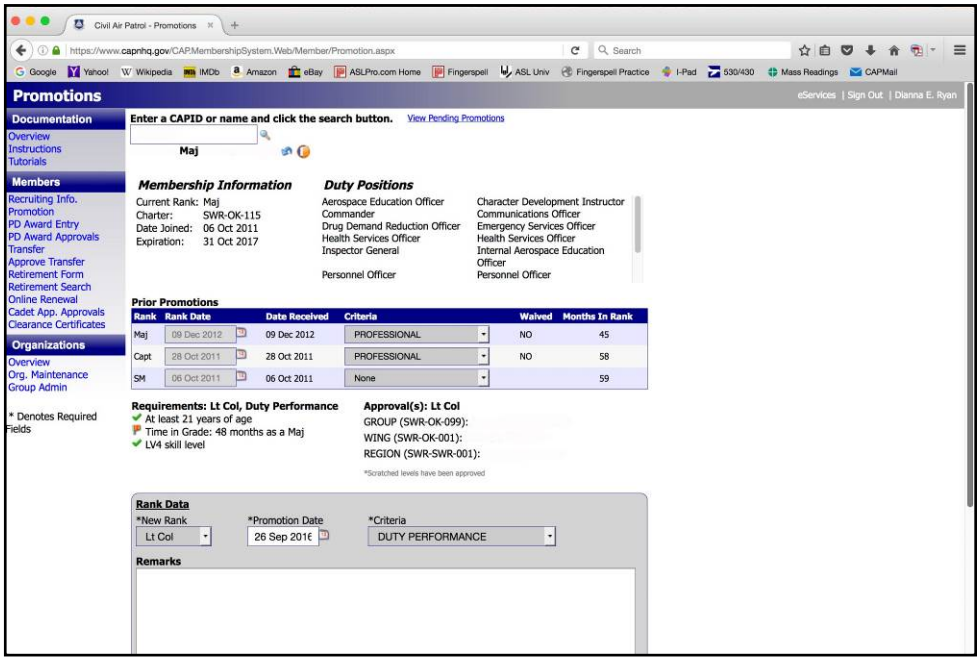


The Senior promotion link is located in a slightly less intuitive location: it is found in Personnel.



After you click on the Personnel link in the left menu, click on Membership System.

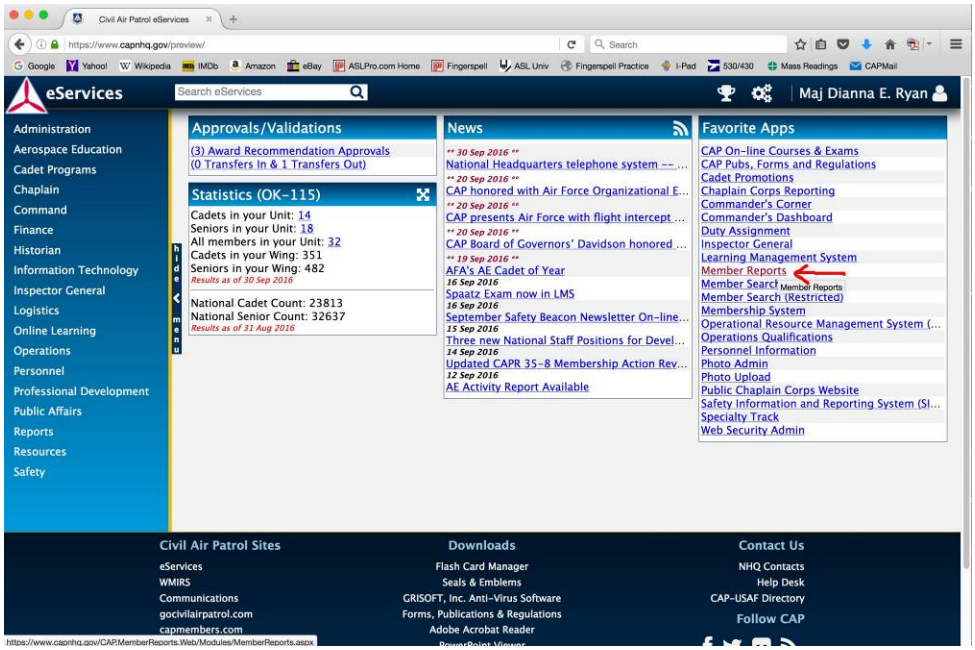
Enter the CAPID or name where prompted, and several areas will auto-populate. This member's and the commander's identifying data were removed. Ensure all the required information is entered and then request the promotion.



SUI

You will have an SUI every 2 years. To make the process easier for everyone involved, and because you are required to, you need to upload all supporting documentation for the SUI team. When all of this is done properly, an SUI team can review all of your documents and almost complete the inspection before they arrive. If the SUI team only needs 15-30 minutes to finish up, everyone's experience is greatly improved, and everyone's stress level is greatly diminished.

Knowing where to find the data you need will make your job gathering it very easy. Most of



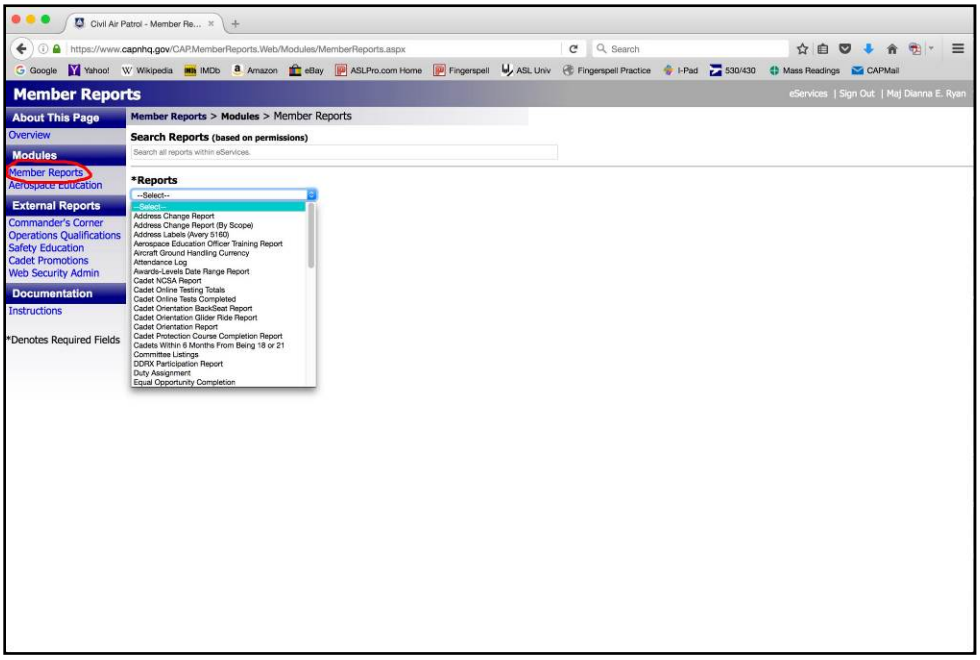
what you need is found in Member Reports.

You will be offered several choices of what reports you need. The title may not be obvious, but for the most part the titles are very closely named to what you need.

You can choose Member Reports or Aerospace Education Reports from this screen.

Member Reports will be automatically chosen as the default, but if you bounce back and forth, you can always come back to Member Reports.

(See next page.)


Member Reports
eServices | Sign Out | Maj Dianna E. Ryan
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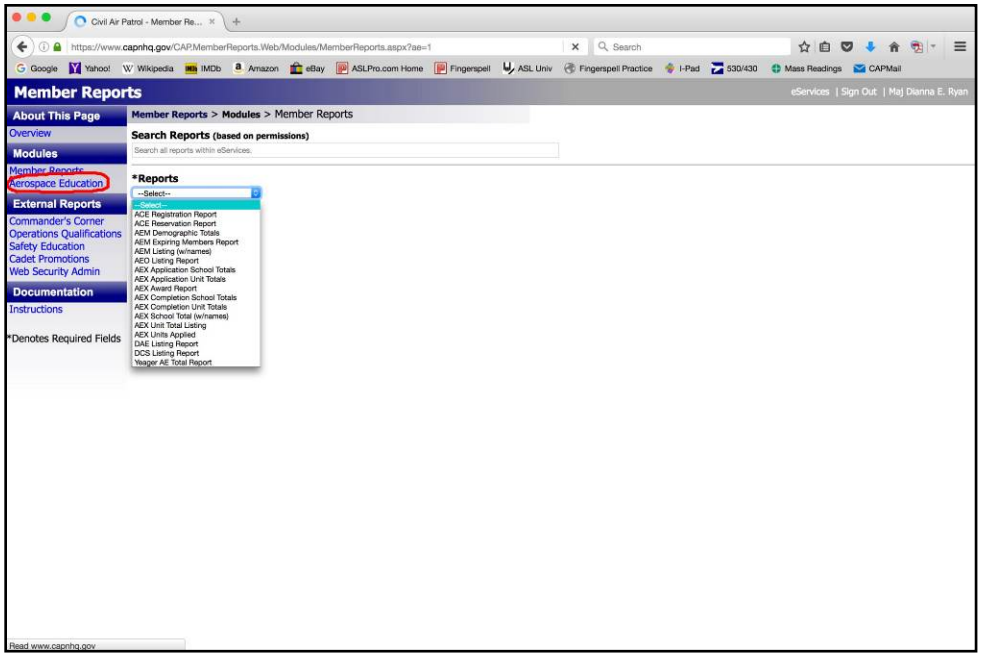
Search Reports (based on permissions)
*Reports
--Select--
Address Change Report
Address Change Report (By Scope)
Address Labels (Avery 5160)
Aerospace Education Officer Training Report
Aircraft Ground Handling Currency
Attendance Log
Awards-Levels Date Range Report
Cadet NCSA Report
Cadet Online Testing Totals
Cadet Online Tests Completed
Cadet Orientation BackSeat Report
Cadet Orientation Glider Ride Report
Cadet Orientation Report
Cadet Protection Course Completion Report
Cadets Within 6 Months From Being 18 or 21
Committee Listings
DDRX Participation Report
Duty Assignment
Equal Opportunity Completion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*Denotes Required Fields
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Search Reports (based on permissions)
*Reports
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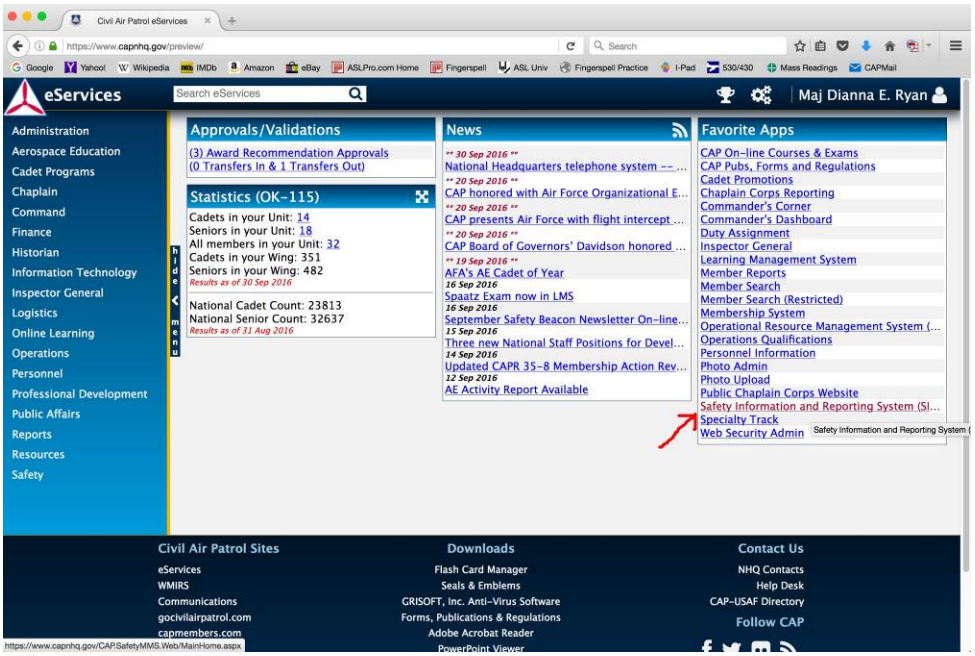
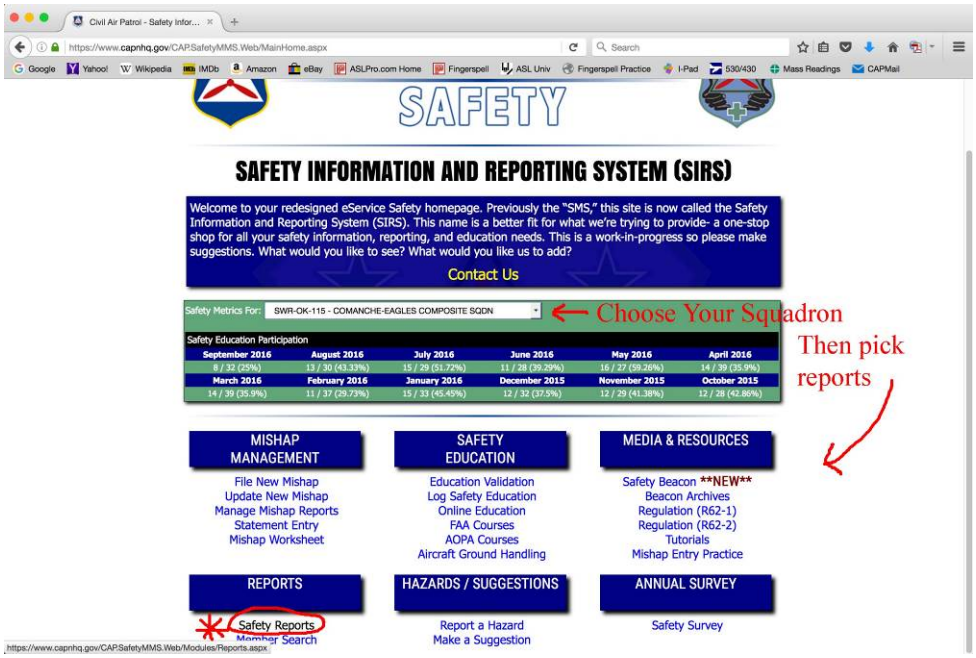
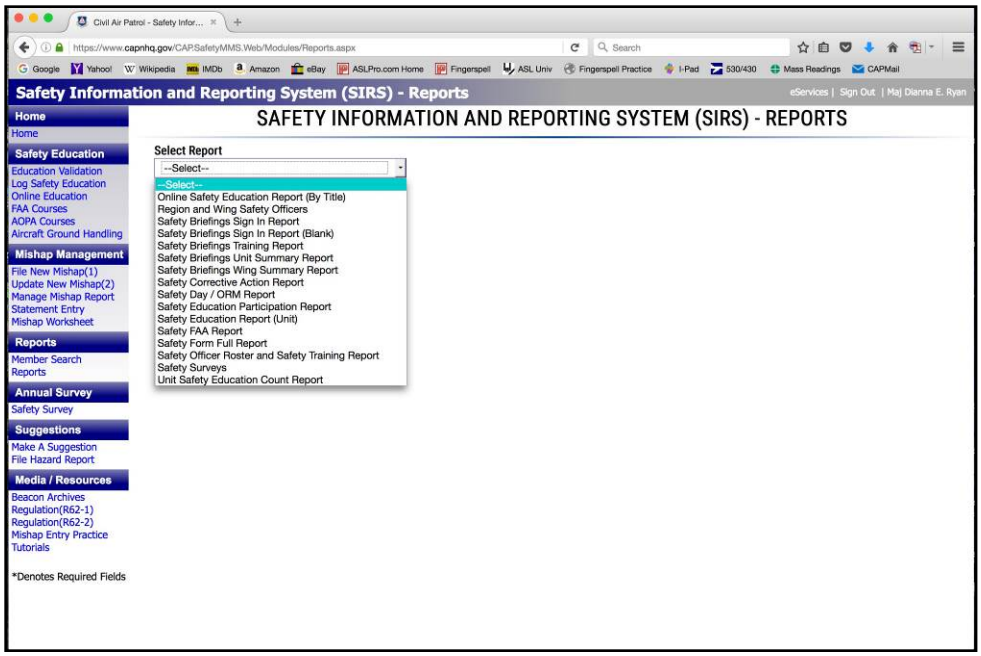
ACE Registration Report
ACE Reservation Report
AEM Demographic Totals
AEM Expiring Members Report
AEM Listing (w/names)
AEO Listing Report
AEX Application School Totals
AEX Application Unit Totals
AEX Award Report
AEX Completion School Totals
AEX Completion Unit Totals
AEX School Total (w/names)
AEX Unit Total Listing
AEX Units Applied
DAE Listing Report
DCS Listing Report
Yeager AE Total Report

You will also need to get various safety reports from time to time (not only for the SUI).

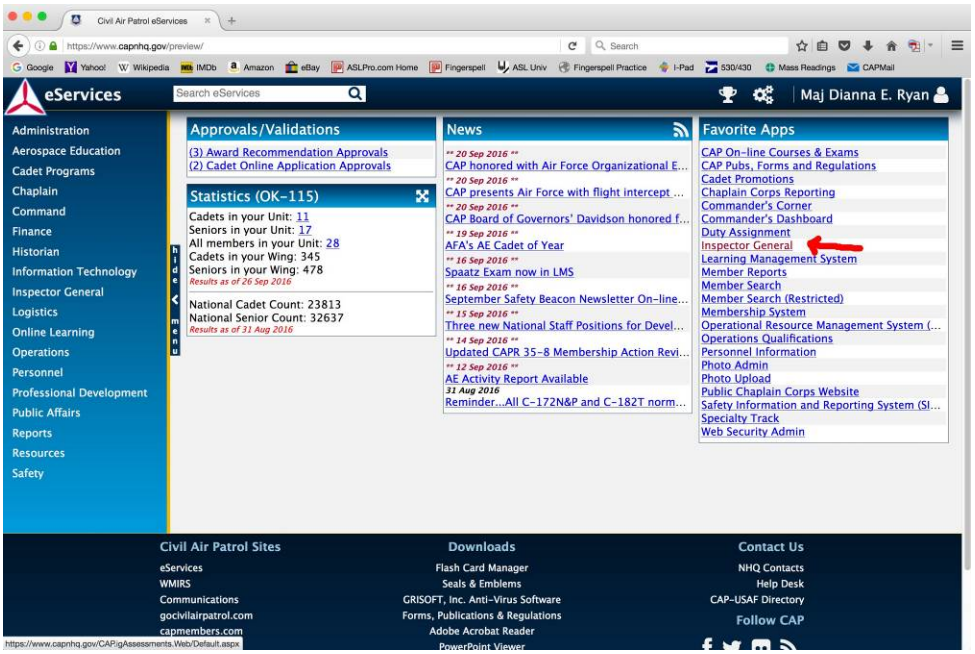




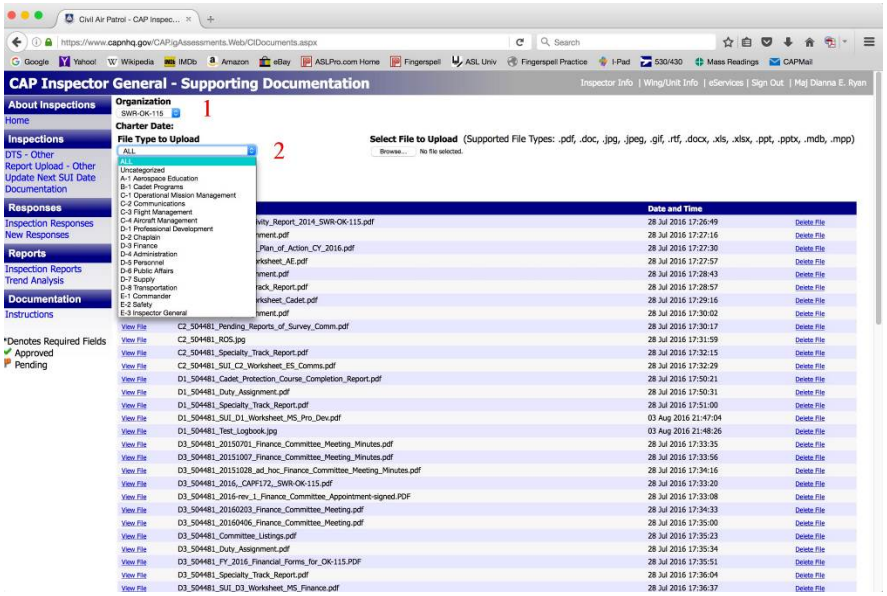
Next, choose the report you need.



To upload Inspector General data, you will start at Inspector General and select Documentation.

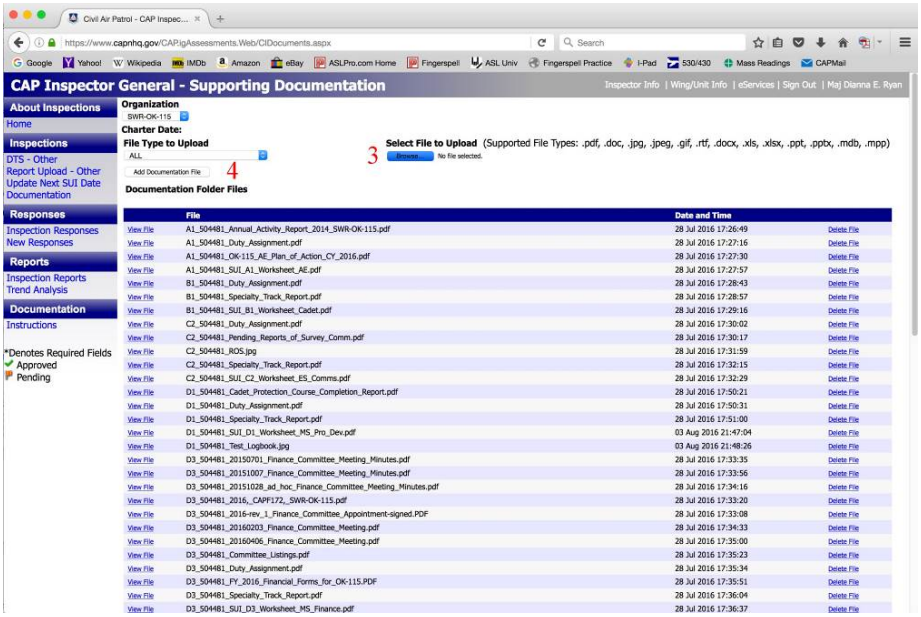


Then choose your unit (if not already defaulted to it) and then choose where the file you are

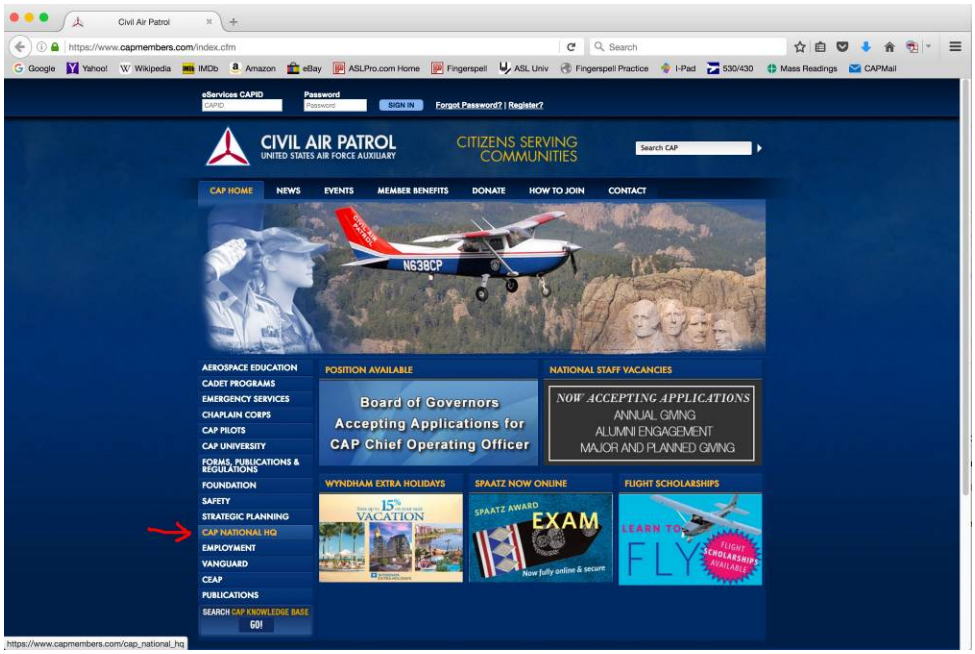


uploading goes.

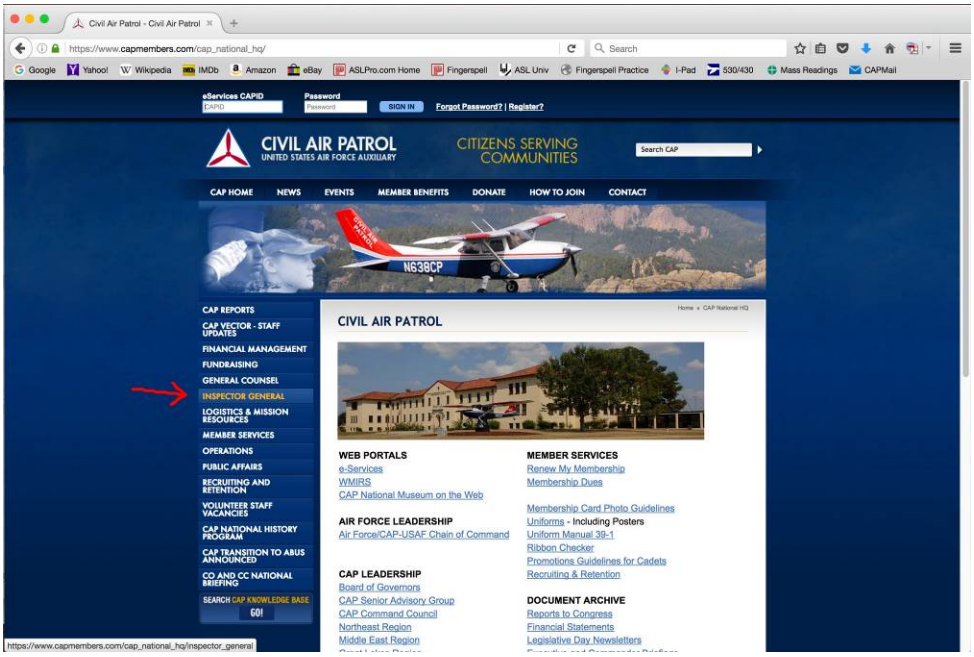
Next, browse the location of the file from your computer and finally you upload it via the Add Documentation File button. You can only upload only one file at a time. It helps if you keep your files in digital format all year round.

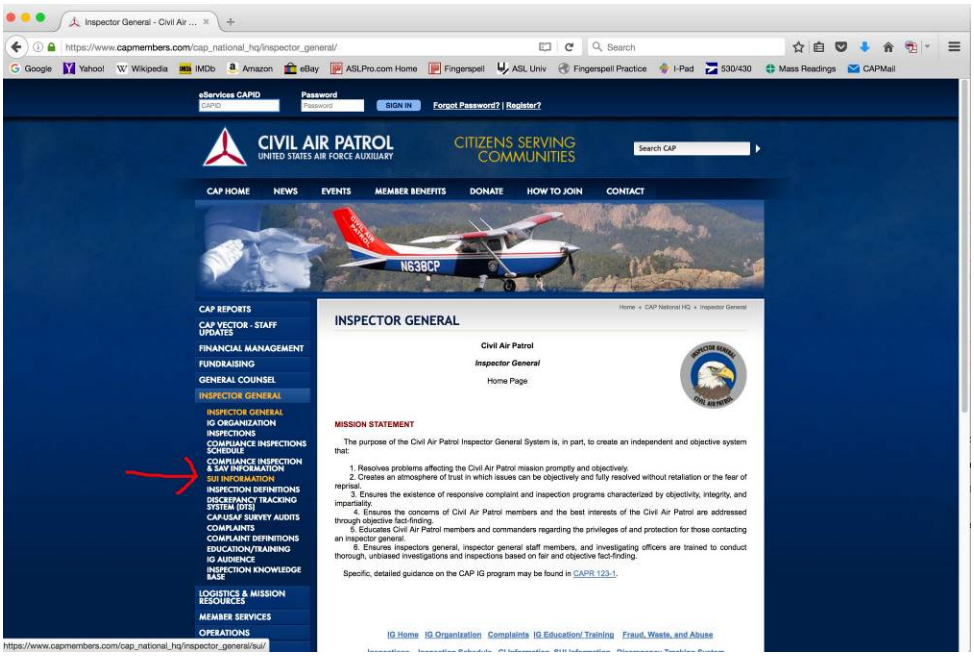


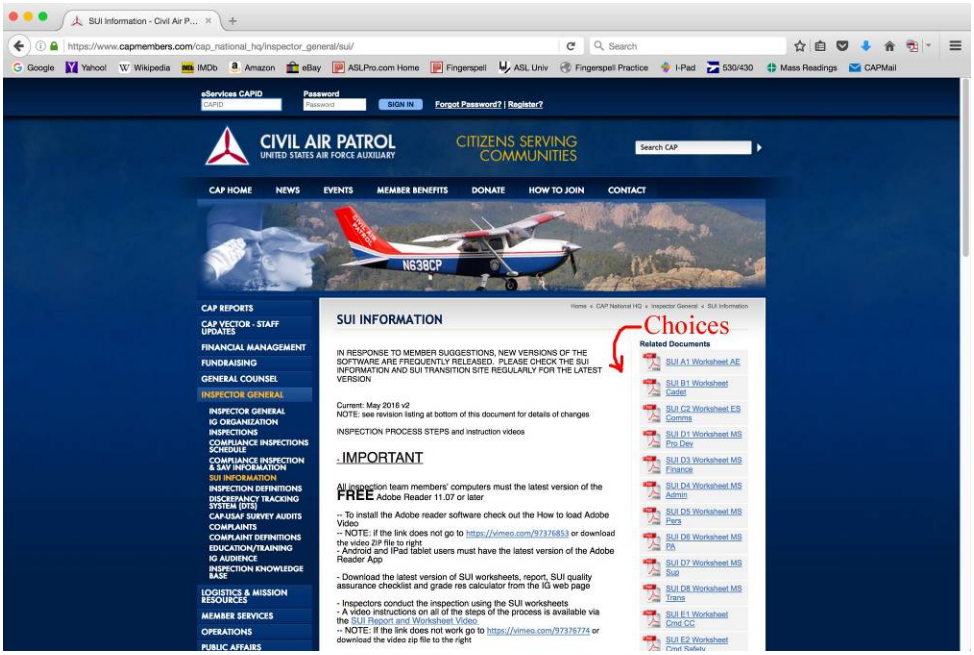
Getting the SUI Sheets is easy. The information is available to the public. The sheets are located on CAPMembers.com.



When you go to the capmembers.com website, https://www.capmembers.com/ ->CAP National HQ->Inspector General->SUI Information->choose one or more…



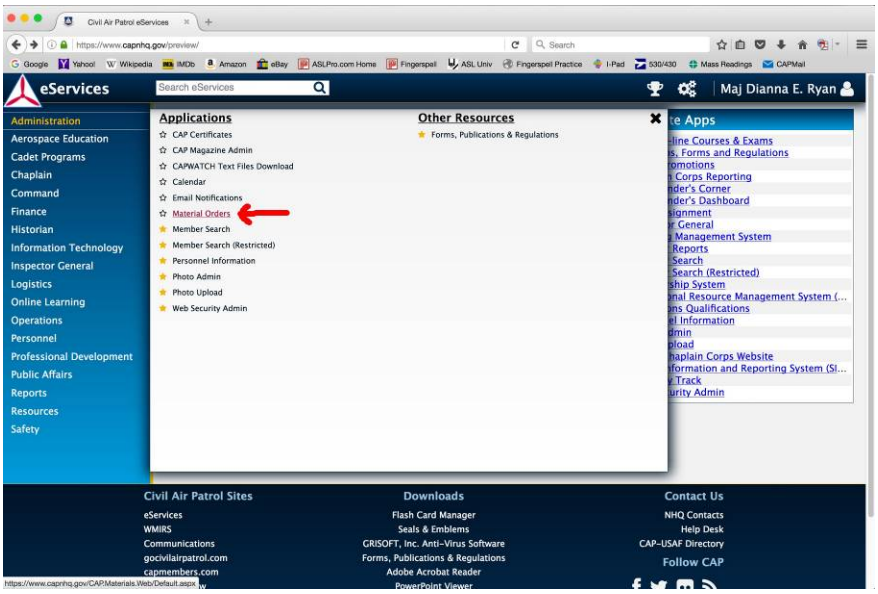




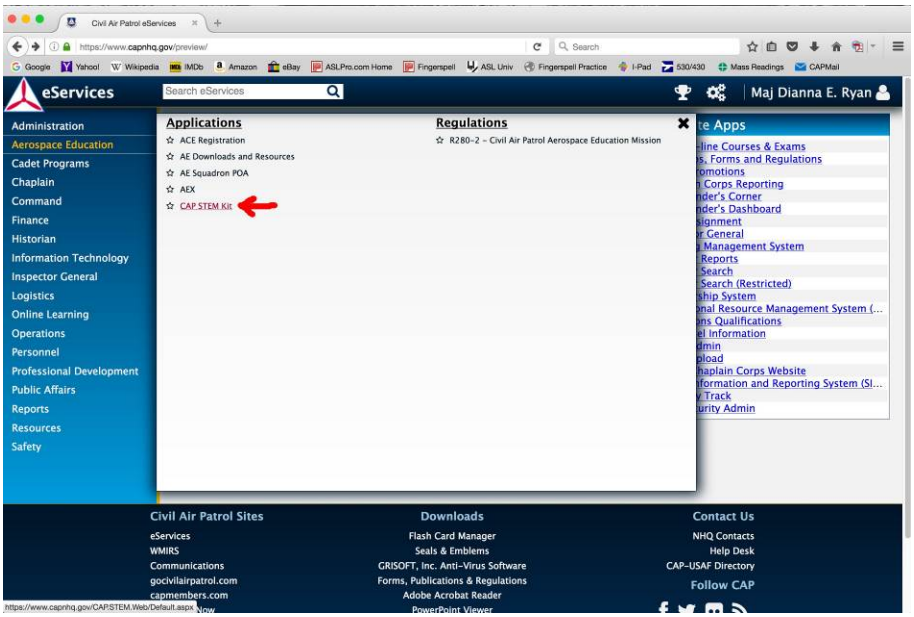
Your choices for the download are for individual areas or the entire SUI package in a zip file. You can download the grade calculator as well.

Ordering Supplies

NHQ will give you some supplies for free (forms, pamphlets, recruiting materials, and some AE resources). Go to Administration and then Material Orders. Make your choices and submit.

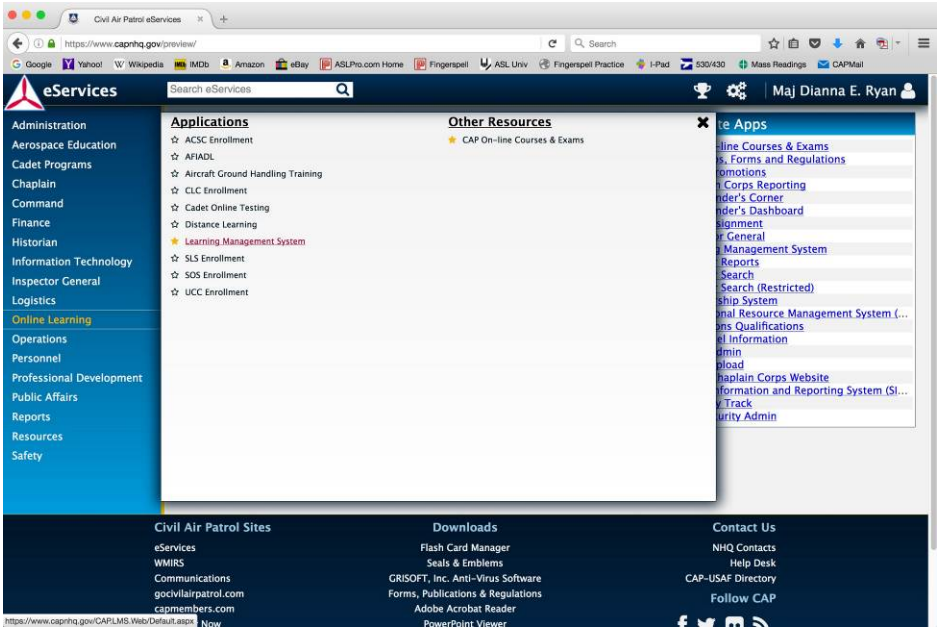


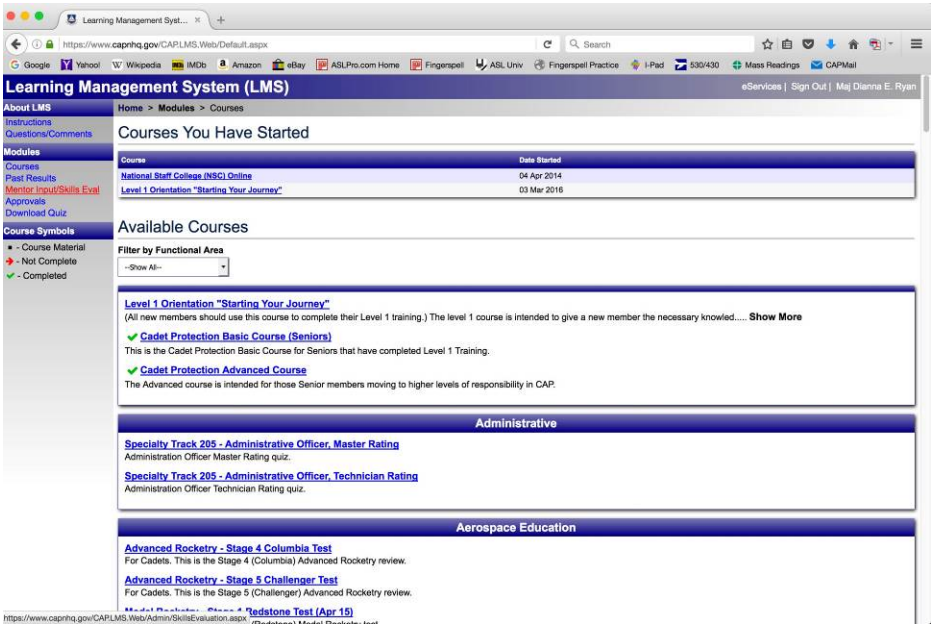
Getting your STEM kit is very similar: simply look under Aerospace Education.



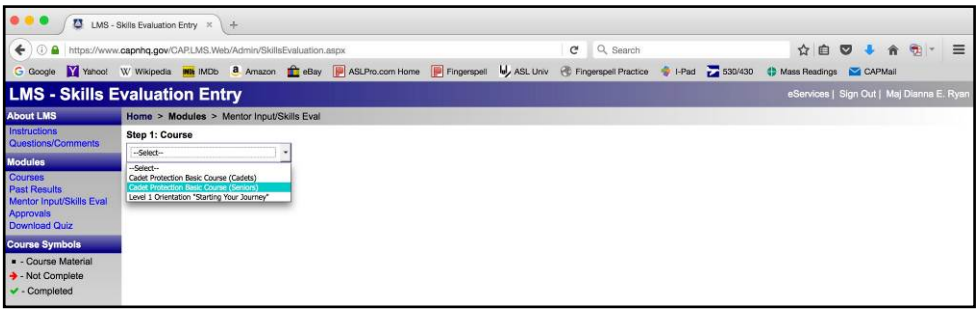
4. Giving credit for Mentor Inputs/Skills Evaluations in the Learning Management System.

When you have a new senior member you must ensure s/he has taken cadet protection and is given credit for it. Cadet protection is included in the new members "Level 1 Orientation course". Once the member has taken the level 1 orientation course, the member is required to have a discussion with the commander (or your designee). One of the more important topics you should discuss is cadet protection. If the discussion is acceptable, give the member credit for the level 1 orientation in the same way cadet protection is provided for the cadets in the screens below.



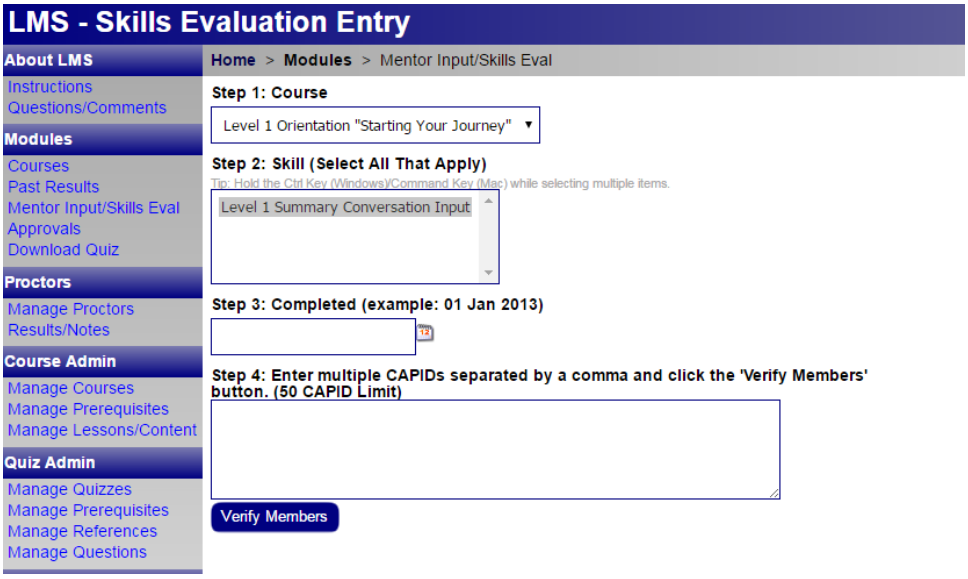


Choose Mentor Input/Skills Eval



For your Senior members, choose “Level 1 Orientation.” For cadets, choose “Cadet Protection Basic Course”.

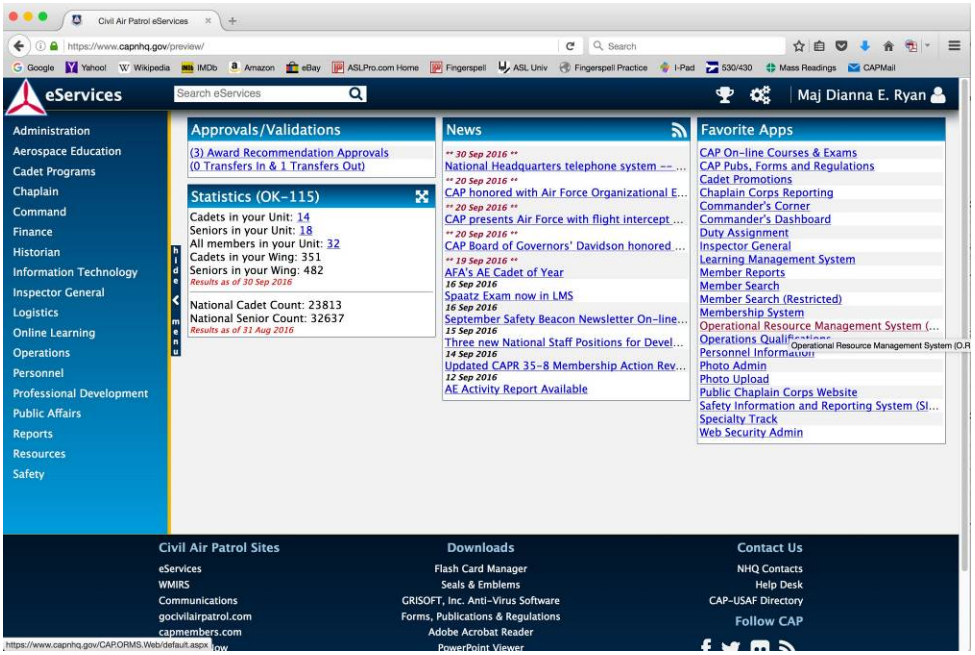
This will be the same procedure for all tasks requiring a mentor to enter credit. **NOTE:** To ensure the appropriate credit is given, make sure the correct task is selected (highlighted) in Step 2. (see below)

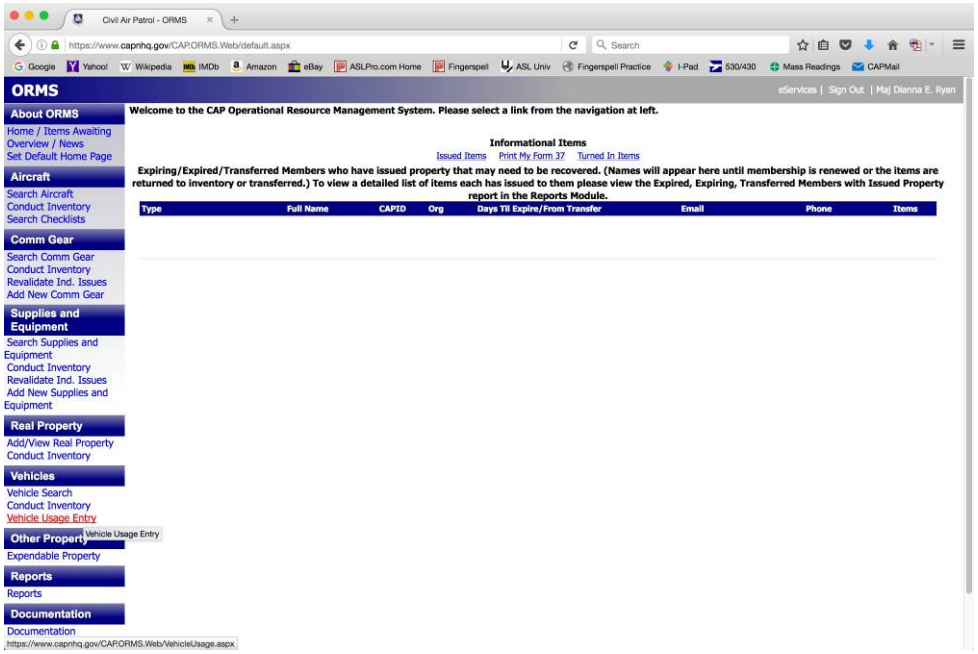


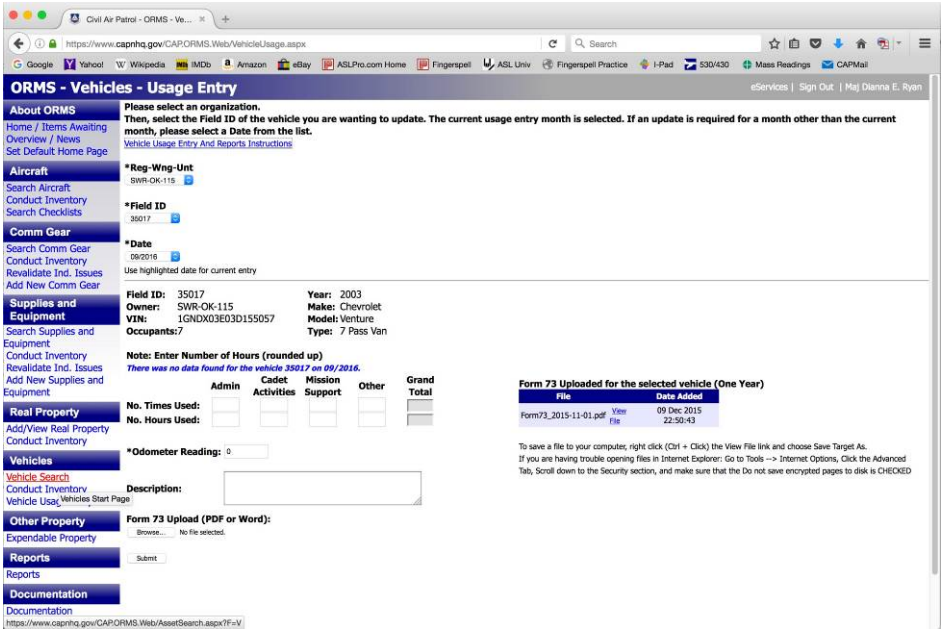
Notice: To ensure the Cadet Protection course is complete when the cadet turns 18 years old, cadets who are 17 years old are allowed to complete the Cadet Protection Basic Course. Cadets who are 18 years old are required to have the Cadet Protection Basic Course complete before they can be around other cadets. In other words, when a cadet turns 17 they may take the cadet protection basic course and the course must be complete before the cadet turns 18 years old.

5. How to upload the monthly Vehicle Data.

Keeping your paperwork straight every month is easier if you scan your documentation and upload it to eServices. If you have a CAP vehicle, you will have to enter the data for the vehicle usage every month. Start at ORMS and click on Vehicle Usage Entry:

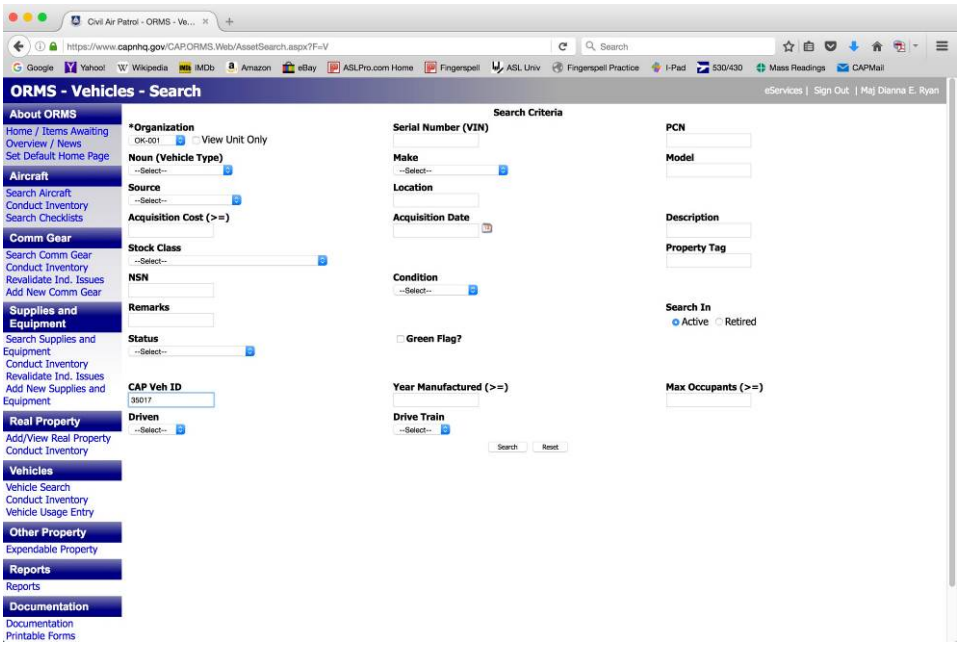




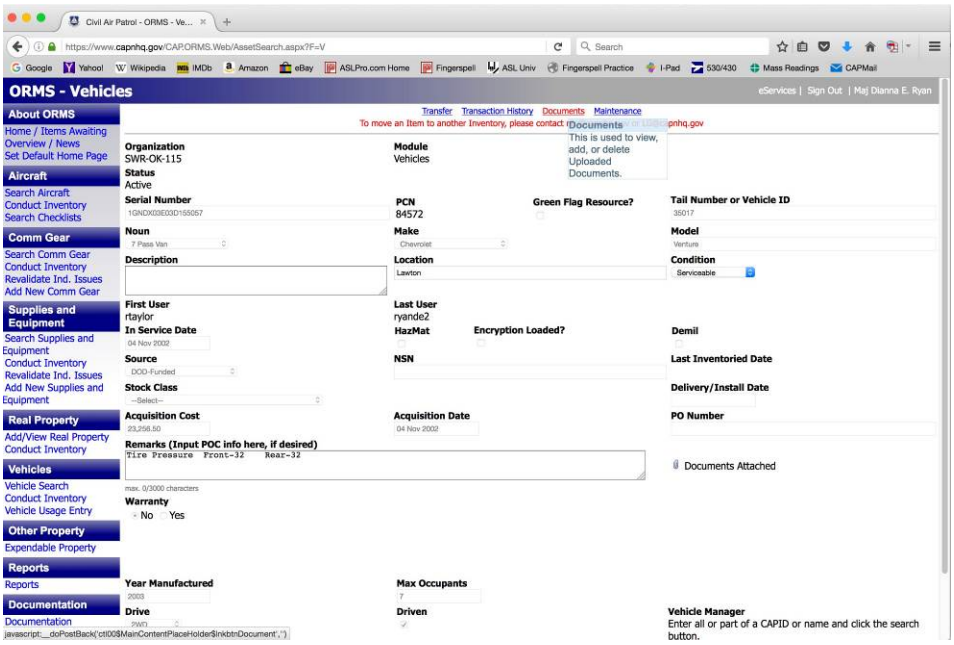


After you enter the data for the monthly usage, you should upload your scanned copy of the CAPF 73. You are already in the system, and this makes it easy for you, your director of transportation, and the SUI team when they need to find your documents. Click on the Vehicle Search.

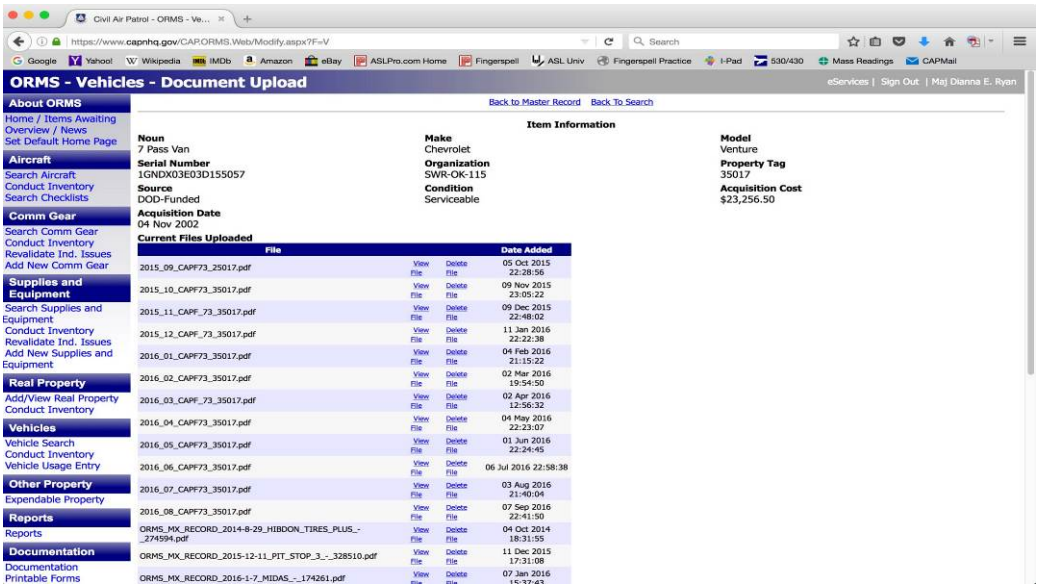
That leads you to:



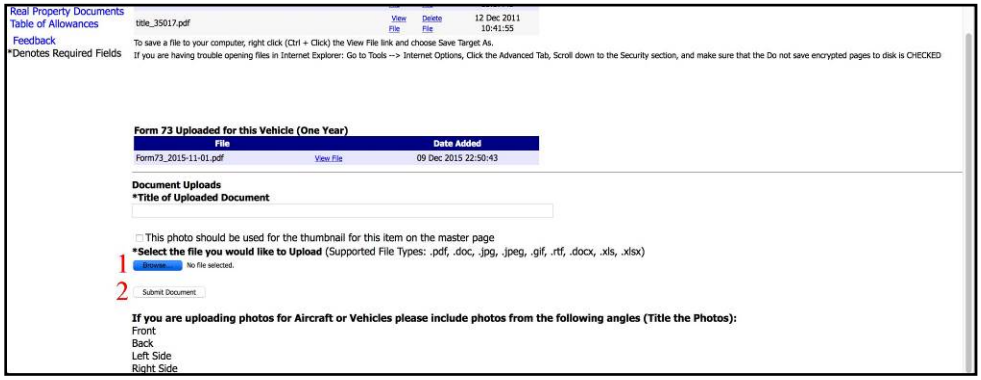
Enter the vehicle number of the vehicle and you will get to:



When you click on documents, it will lead you to:

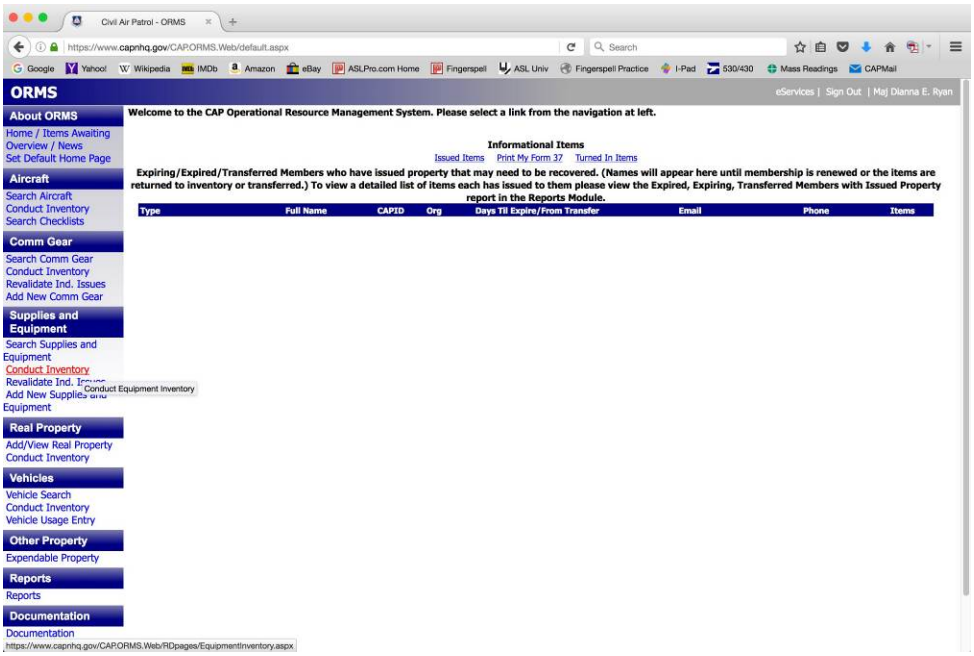


You browse your scanned file in and submit it. If you notice the file name for this vehicle's CAPF 73, it contains the date (YYYY_MM) the form (_CAPF_73) and the vehicle number (_35017) in it. This makes finding anything missing very easy for you. This location is also where you upload the rest of the vehicle's records & paperwork.

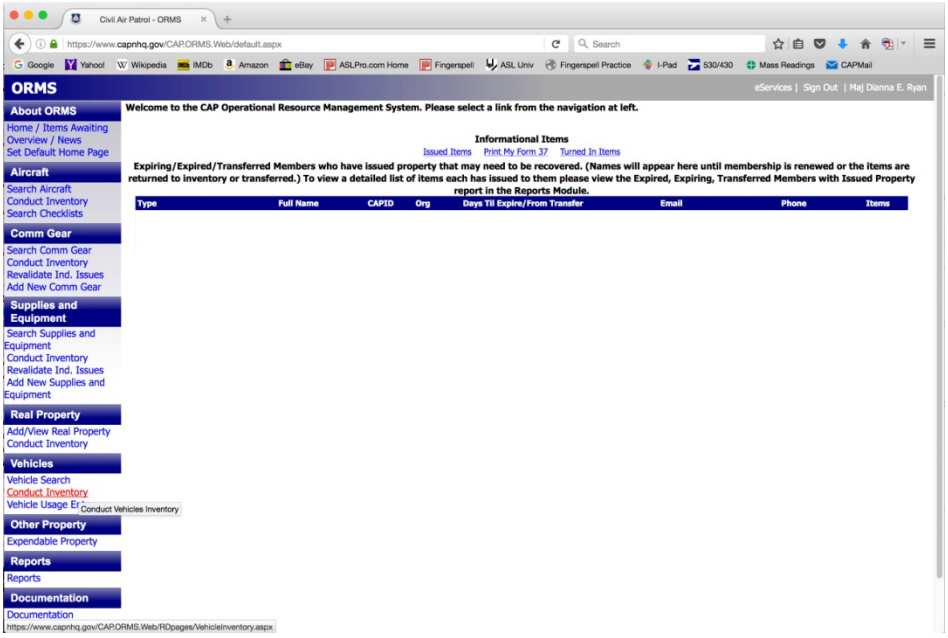


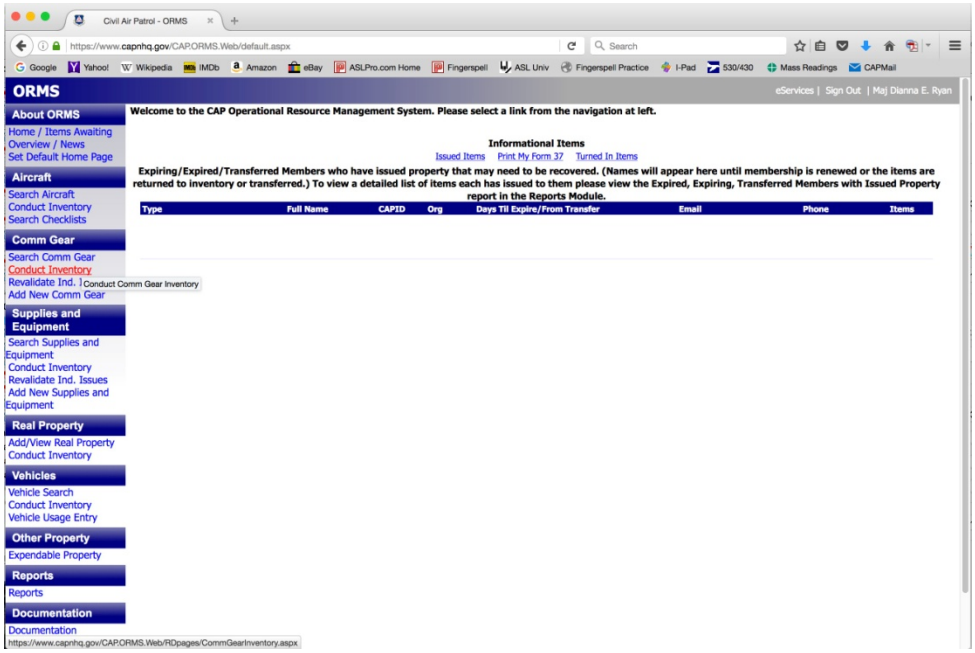
6. How to start your inventories.

As a new commander, one of the first things you will do is conduct an "eyes-on/hands-on" inventory of everything in the squadron. You will also do this inventory every year. You have the right to do it any time you need to confirm the location of the assets you signed and accepted responsibility for.



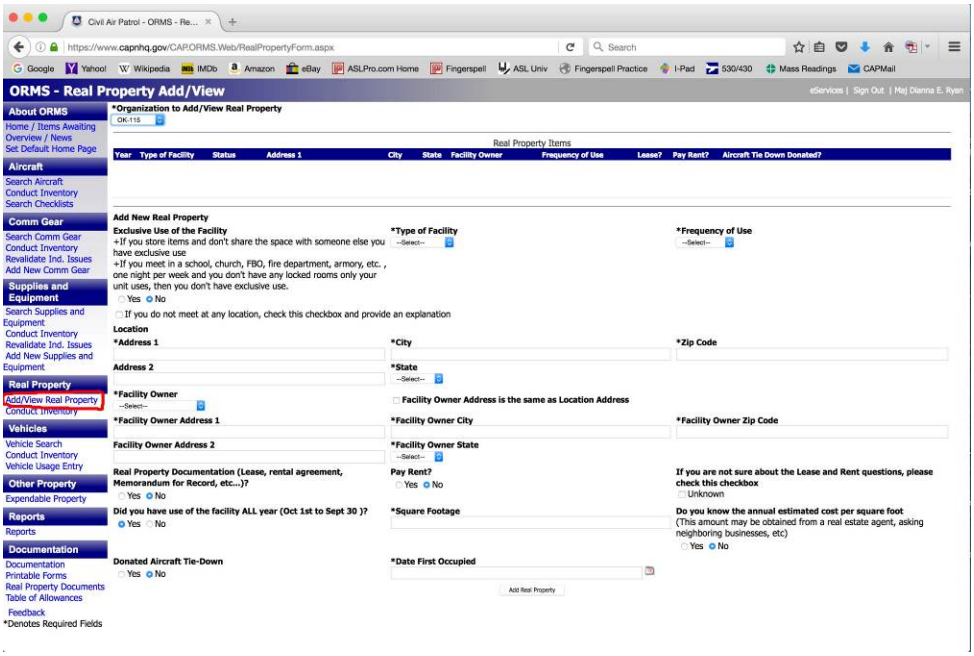
This is easy: you were just there a moment ago! (Home page -> ORMS) Now choose the inventory (inventories) you need to conduct:





Real Properties

You must account for any properties you have annually. It is smarter and safer to put any properties you use frequently in the system so that CAP insurance can cover accidents that may happen. Once you are in ORMS, click Add/View Real Property, then enter the data:



Lesson Summary and Closure

eServices can be intimidating at first glance, but what you just learned should have you feeling confident that you can easily and quickly enter, complete, and approve awards and promotions. You can modify an individual member's eServices permissions to allow them the authority to do the job you have tasked them to do. You now know where and how to find reports for and upload the documents related to your SUI; you can conduct your inventory and upload your monthly vehicle usage report (CAPF 73); you know where you can order certain supplies for your unit; you can add property to the insurance system to protect the landowner in case of an accident. This list is far from exhaustive and many things were specifically not covered. The ones that were covered are the most commonly used or are the hardest to remember where to find them. While you will need many more resources, this lesson is meant to be saved as a quick guide/resource for eServices during your time as a commander.