

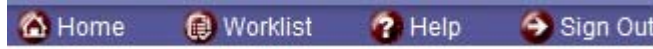
## Direct-Access Procedures

**Purpose** This enclosure establishes the Direct-Access online manual as the official reference for reporting personnel events and transactions.

**Policy** Direct-Access is a key competent in the U. S. Coast Guard's personnel and pay system. The procedures set forth in the Direct-Access online manual for maintaining personnel data must be followed by all Coast Guard personnel and their supervisors, unit administrative staffs and servicing personnel offices (SPOs).

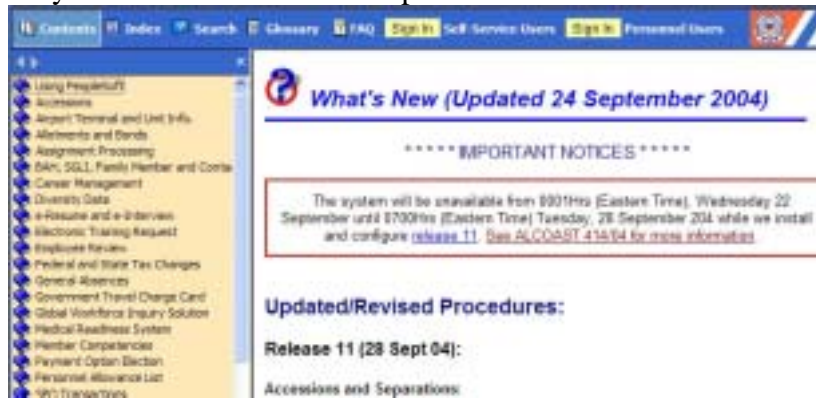
**Accessing the Online Manual** The online manual can be accessed from within the Direct-Access application, via the Coast Guard Data Network (CGDN) or over the Internet.

- To access the online manual from within Direct-Access you must first navigate to a data entry page then click on the **Help** link in navigation header of the page (shown below).



- To access the online manual over the internet start your web browser and enter <http://www.uscg.mil/hq/psc/ps> in the address field.

**About the Online Manual** The Direct-Access online manual is updated regularly. The first page displays the date the manual. Important notices are posted beneath the revision date, followed by a list of new or revised topics.





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## Direct-Access Procedures, Continued

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























### Contents of the Online Manual

Help topics are organized into "books" covering the PeopleSoft modules that have been implemented in Direct-Access. Click on one of the book icons  in left panel of this window to explore the topics available. Click on a topic icon  to open the topic.

**Tip:** You only need to click once. The manual is a web page, you don't need to double-click items to open them.

Each book contains a brief introductory topic, explaining the capabilities of the PeopleSoft module. Subsequent topics provide procedures for accomplishing specific tasks or viewing data.

The list below is a sample of the topics listed under the "Using PeopleSoft" book:

-  **Using PeopleSoft**
-  Welcome
-  How to Change Your Password
-  Using this help file
-  Training
-  Tutorials and Demonstrations
-  Tutorials for SPO Users
-  Quick Reference Guides
-  Frequently Asked Questions
-  About Employee ID Numbers
-  Signing In
-  Basic Navigation
-  How to Create Shortcuts
-  Search Tips
-  Keyboard Shortcuts
-  Internet Explorer Keyboard Shortcuts
-  Copying
-  Printing
-  PeopleSoft Action Types
-  Using Effective Dates
-  Operator ID Lookup
-  Guidelines for Granting Command Access
-  SPO Access Guidelines
-  Using Process Scheduler Web Option
-  Menu Paths

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## Direct-Access Procedures, Continued

### Conventions Used in the Online Manual

Links are formatted as follows:

- Words and phrases in underlined blue letters are links to other parts of the manual or other Internet/Internet web pages. Links to other web pages will open in a new window, while links to other parts of the manual will open in the window you are currently viewing.
- Some underlined words and phrases are expanding hot spots. These are used to introduce terms and acronyms you may not be familiar with. Clicking on one of the underlined words formatted in green text will display the additional information. Clicking on the underlined word again will dismiss the expanded text.

*Example Expanding Hot Spot Text:*

l phrases are expanding hot spots.  
in green text in the first line of this



d phrases are expanding hot spots *This is an example of an expanding hot spot.* T  
in one of the underlined words formatted in green text in the first line of this para

### Index, Search and Glossary

Use the *Index, Search and Glossary* features of the online manual to quickly locate information. These features are accessed via the toolbar at the top left part of your screen:

*WebHelp Toolbar:*



**Using Search:** Click the  button then enter your query in the search text field and click the  button. A list of topics matching your search will display in the area below the toolbar. Click on a topic title to view it.

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## Direct-Access Procedures, Continued

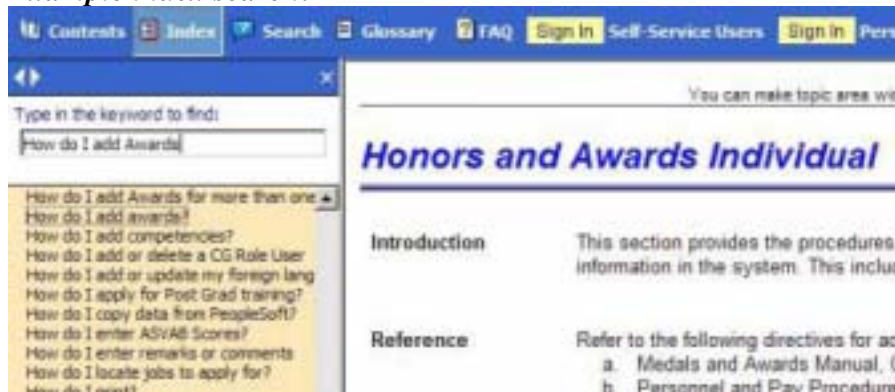
### Index, Search and Glossary (cont'd)

**Example search and results** (Note how we used the old term "Qualification Codes" but were directed to "Competencies" (the new term) in the search results):



**Using the Index:** The index works much like the search feature. Click the **Index** button, type your query into the text field that appears just beneath the tool bar. You can also scroll through the list without entering a keyword.

**Example index search:**



**Using the Glossary:** The Glossary can be used to lookup new terms you may not be familiar with. Simply click the **Glossary** button and scroll through the list of terms displayed just below the toolbar. Select a term and read the definition in the bottom half of the panel.