The
Defense Civilian Personnel Data System

DESK GUIDE

for Managers and Supervisors

Updated October 2005

The DCPDS Desk Guide

	Please send comments or suggestions about this Desk Guide to: Cindy Petrella at Cindy.Petrella@dla.mil Or Carol Griffin at Carol.Griffin@dla.mil

TABLE OF CONTENTS

HOW TO Index…

Introduction

Contents	This section covers the following topics:
Purpose and use of this Guide	This guide is for managers and supervisors who have need to access information about the civilian personnel workforce or initiate or review personnel actions using DCPDS. It provides abbreviated, step-by-step instructions.
What is DCPDS?	DCPDS (Defense Civilian Personnel Data System) is a human resources information system that supports civilian personnel operations in the Department of Defense (DoD). It covers all DoD civilian employees: appropriated fund, non-appropriated fund, and local national employees.

Logging On to DCPDS

Contents

This chapter covers the following topics:

Before You Begin

You will need a user ID and password to gain access to and use DCPDS.

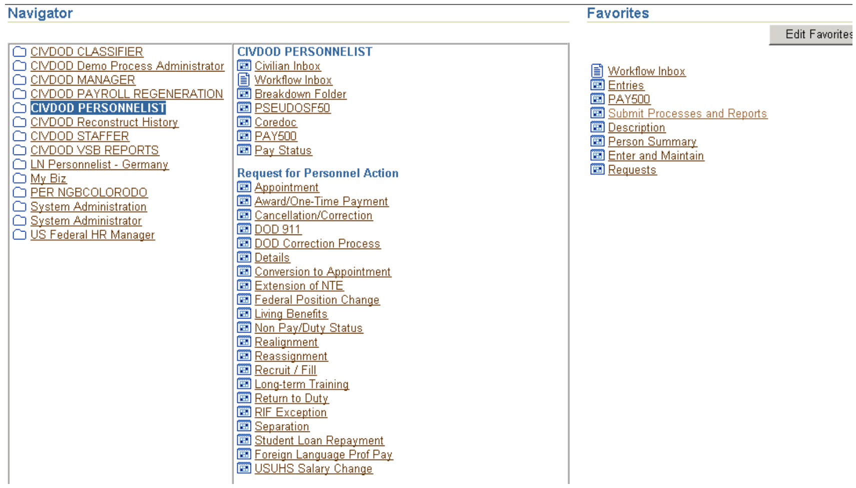
Logging on to DCPDS

Follow these steps to log in to DCPDS:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>Launch Internet Explorer, type the following in the address:
https://cols7.hroc.dla.mil:8007/OA_HTML/US/ICXINDEX.htm
DCPDS will open in a separate browser window.</td></tr>
<tr><td>2</td><td>Enter your DCPDS user ID and password, then click <Connect>:

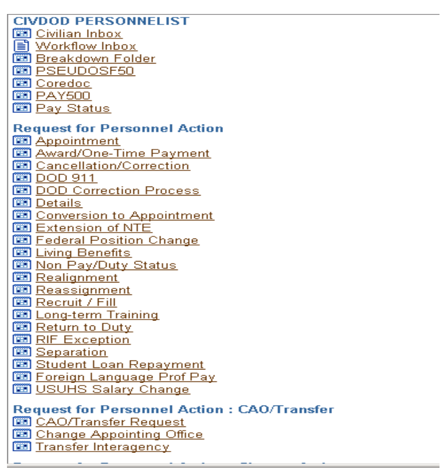

If this is the first time you are logging in, or if you have had your password reset, you will get a message that your password has expired and you will have to change it. The window for changing your password will open when you click the <OK> button on the message window.</td></tr>
</table>

3 After successfully entering the user ID and password the users "home page" will display.



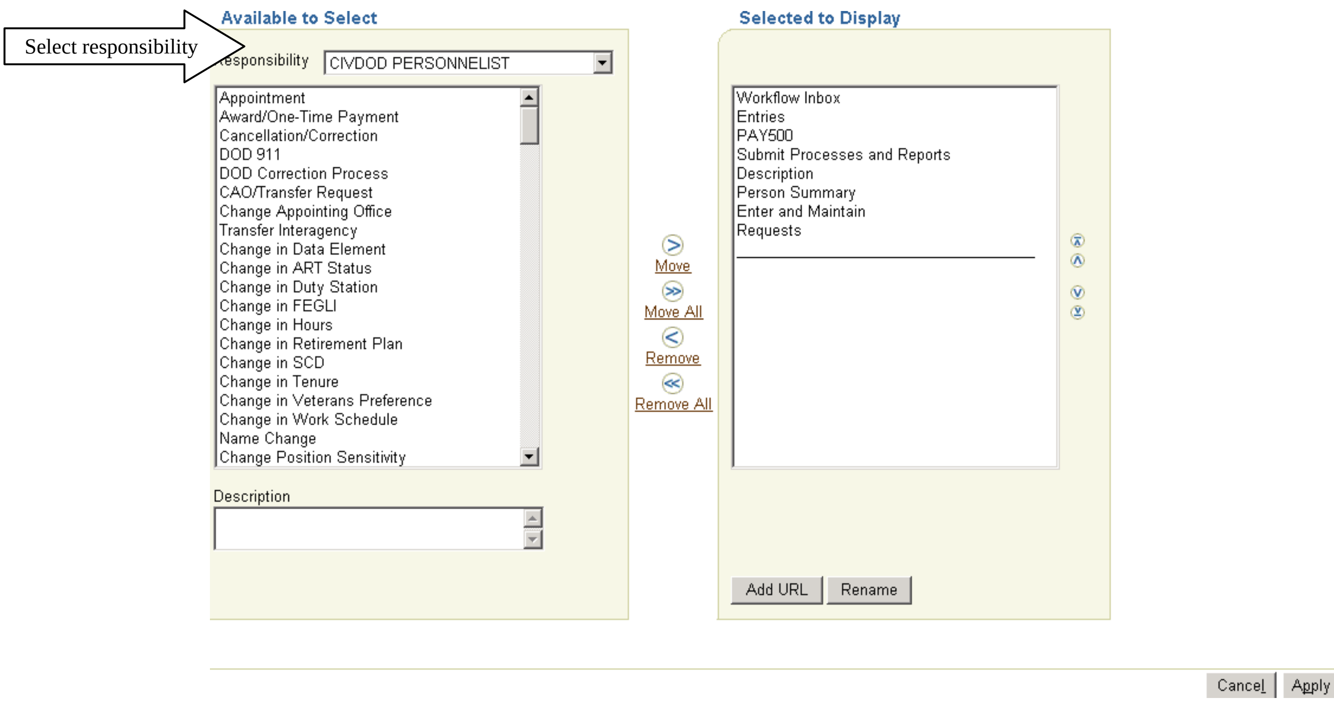
The web page displays with three columns, Responsibilities, Functions List, and Favorites. The left column displays all of the Responsibilities attributed to the user.

The column in the middle displays the functions allowed by the responsibility selected, below is an example of what a CIVDOD PERSONNELIST would see if that responsibility on the left column was selected,



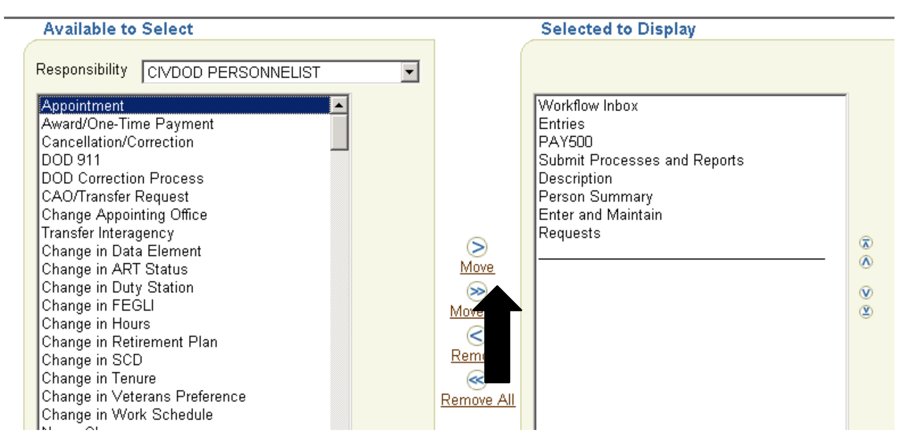
The column on the right is your stored favorites. This feature provides the user the ability to create a list of most often used items – similar to the top ten list available in the professional user interface views. Your top ten list will still be available within the professional user interface but those links can be recreated here, on your home page, at your leisure. Favorites allow a user to personalize their home page with those menu items used most often for quick access, and can be a shortcut to DCPDS functionality or a link to "favorite" web sites. Use the following procedure to add a favorite to your Framework home page.

Click the Edit Favorites button, the Customize Favorites window will display.

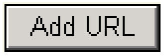


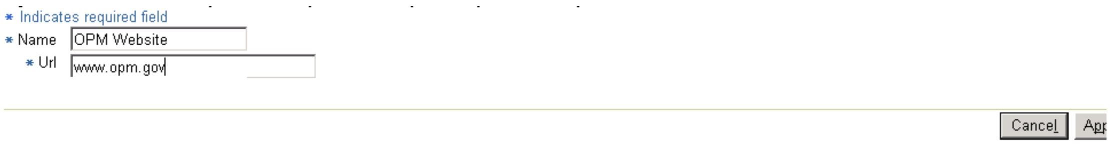
To add a "favorite" DCPDS function select the Responsibility that provides the function you desire to set as a favorite. Our example will add "Appointment from the "CIVDOD Personnelist" responsibility.

Highlight the function you want to add as a favorite, click the "Move" arrow.

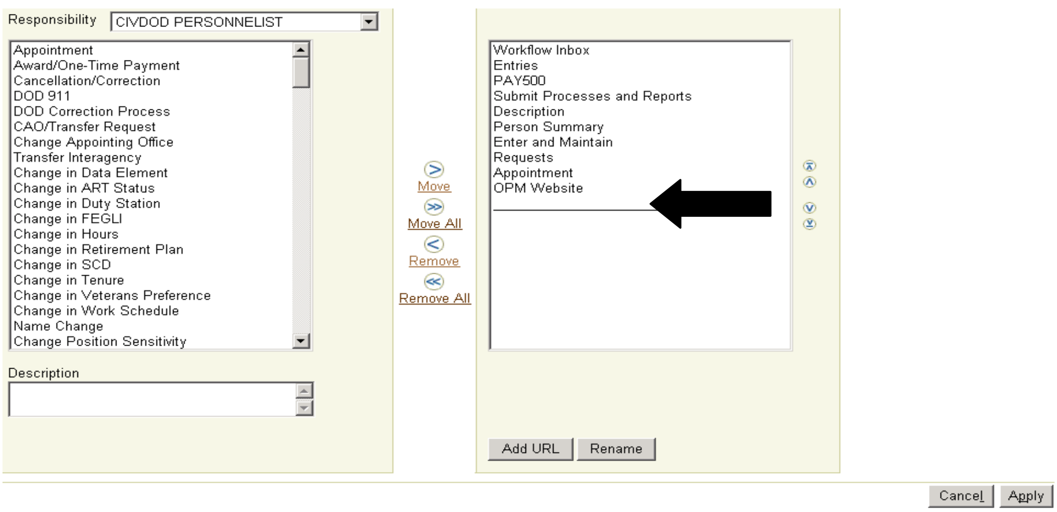


The function will move from the left column and be added to the column on the right.

To add a "favorite" website, click the  button.

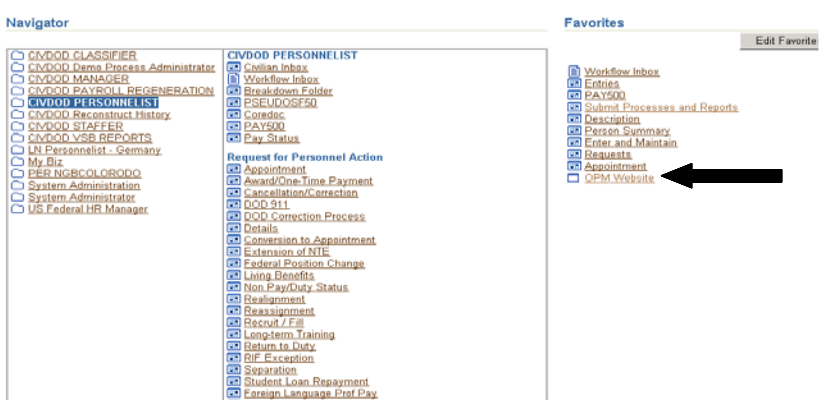


Type the name you want displayed on your home page, type the URL information, and click the Apply button.



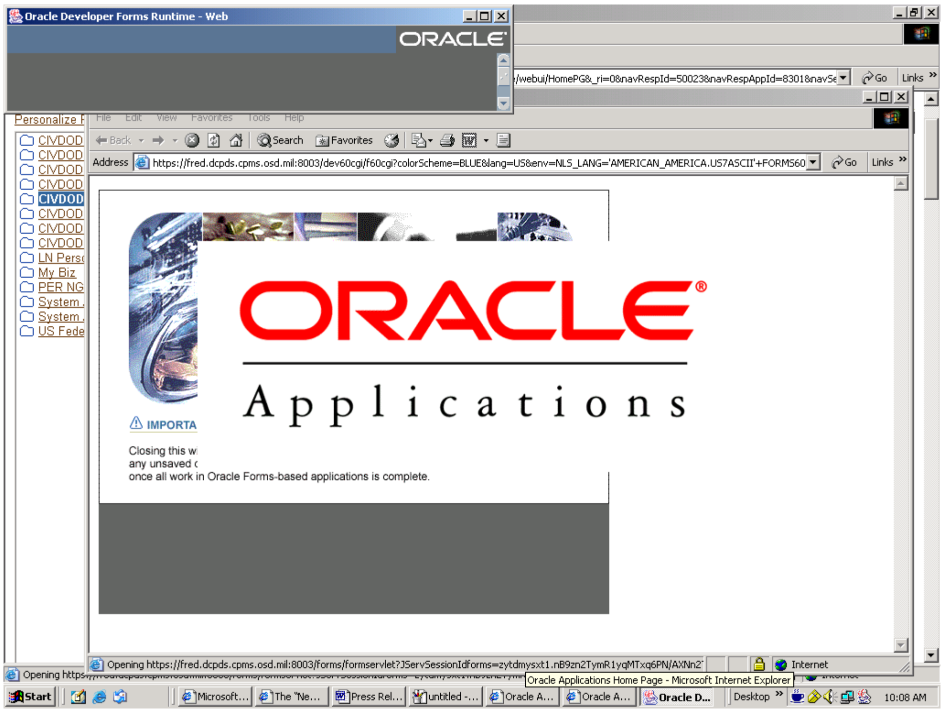
When you return to the Customize Favorites window the OPM Website has been added to the favorites list. When you have finished adding all of the favorites you desire click .

After applying the changes you are returned to your home page, the new links should appear under the favorites column.

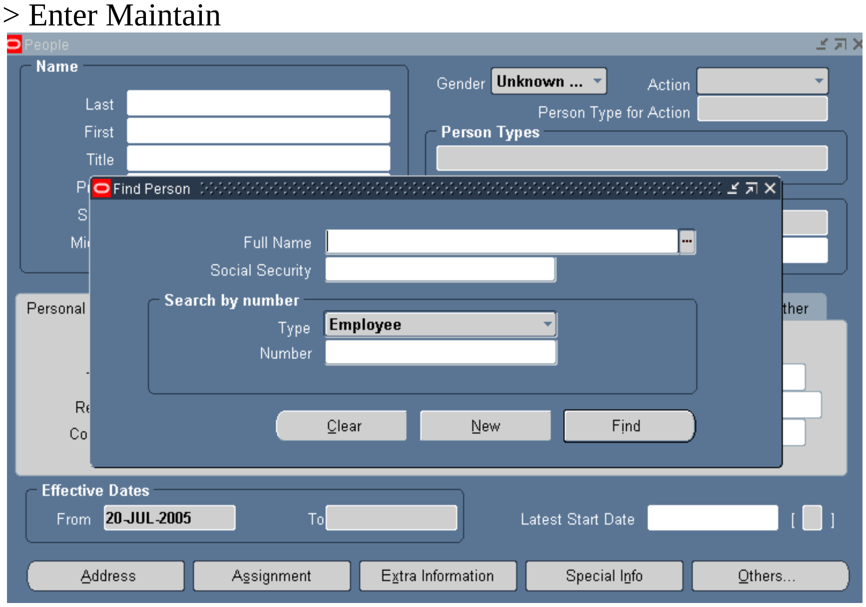


The professional user interface is launched only when a form used in the DCPDS has to be loaded.
Simply click on any of the normal functions and the professional forms will be loaded. Clicking on the Enter and Maintain favorite link produces the following results:

- J Initiator launches



- People > Enter Maintain

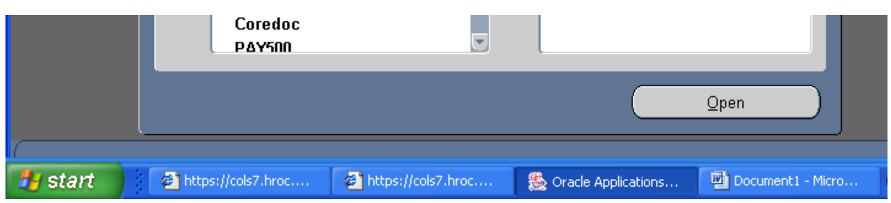


Once you have entered the professional user interface there is no need to return to the Framework homepage, normal DCPDS navigation can be used. Closing the Person window will return you to the Navigation list you are familiar with and you can continue with the normal usage.

<table>
<tr>
<td>4, con’t</td>
<td>
It can take a moment for the navigator menu to display while several different windows open. Never close this window while using DCPDS.

The Navigator menu will display shortly (see *Navigator Window*, p. 13). When you arrive at the Navigator window, maximize your browser window by clicking the Maximize window control button at the top right of the screen:

</td>
</tr>
<tr>
<td></td>
<td>
Once you maximize your screen, you should see the lower panel showing the record number. You should have at least the following windows open (J-Initiator, DCPDS) during a typical DCPDS session.



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

Changing your password

At times it may be necessary, or you may want, to change your password:

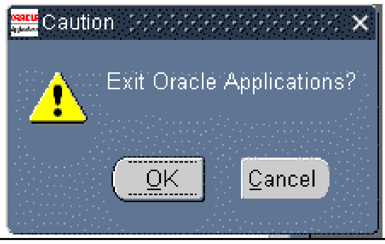
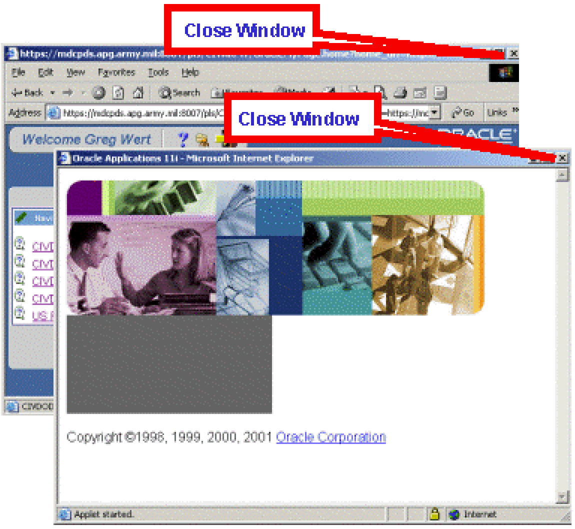
- When you first log in to DCPDS.
- If you know or suspect someone else has learned your password.
- As a matter of security procedures, you will periodically (e.g., every 90 days) be required to change your password.
- You may want to change your password in conjunction with changing other passwords.

To change your password, from the Navigator menu click the Edit menu, then select *Preferences* → *Change Password*.

Your new password must be at least eight characters long, with no two of the same characters in a row, and must start with a letter.

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 in DCPDS

Contents

This section covers the following topics:

Navigator Window

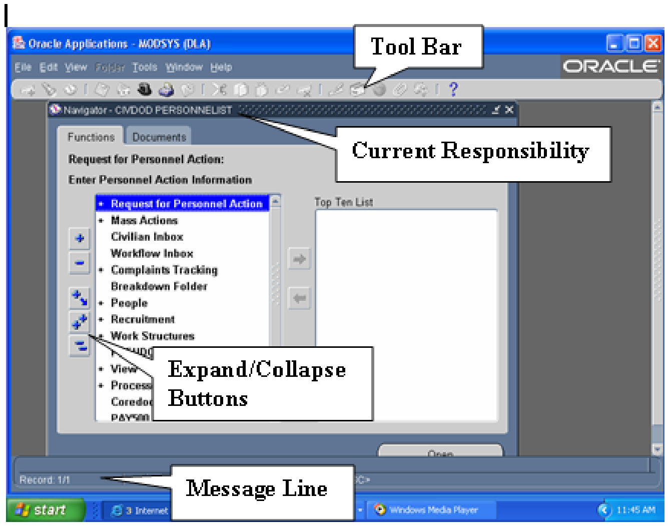
The Navigator window

The Navigator window displays the menu of categories and tasks you can perform in DCPDS, based on the responsibilities you have been assigned.

- At the top of the Navigator Window you will see the name of the responsibility to which you have logged on (e.g., "MGR SECUREVIEW02903").

Illustration

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



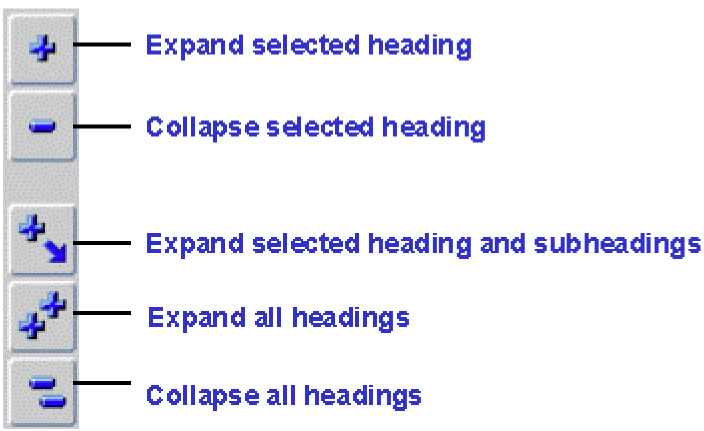
How the Navigation List is Organized

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 Promotion RPA). 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):

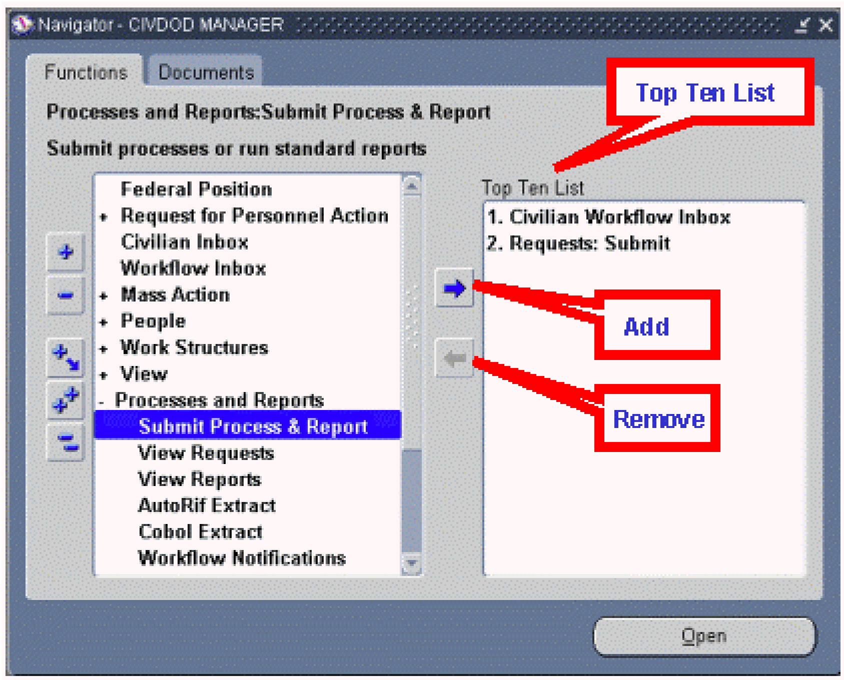
- Click the task on the navigation list you need to use, then click <Open>, or
- Double-click the task.

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, I would click the [2] key on my 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.

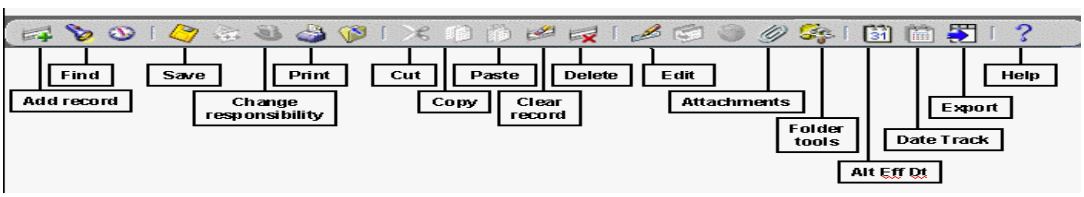
The Toolbar

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:

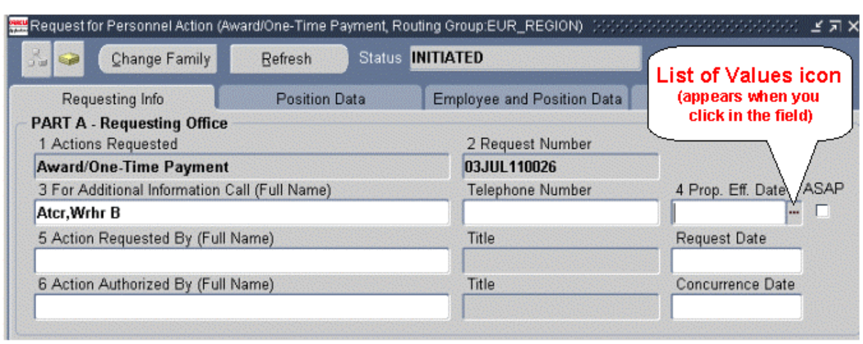
- Toolbar buttons will vary between screens depending on what functions are available; also, some may be displayed but "grayed out."
- To display the function of a button, move your mouse over it and an identifier will display briefly.

Toolbar Button Functions



List of Values

There is no longer a "List of Values" (LOV) icon on the toolbar. Instead, lists of values are embedded in each field for which there is a list, and the list can be accessed by clicking on the button containing three dots at the right side of the field. Once the List of Values has displayed, use it the same as before. Note, the LOV button is not visible until you have actually clicked in the field.



Keyboard Shortcuts

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), the keys used to run queries are [**F11**] to start the query function and **Ctrl**-[**F11**] to run the query. [**F4**] cancels a query.

Retrieving Information

Contents

This section covers the following topics:

Information available in DCPDS

Information in DCPDS can be retrieved in a variety of ways to meet specific needs. The following are discussed in this chapter:

- Employee records can be retrieved to find specific pieces of information about one employee;

Terms

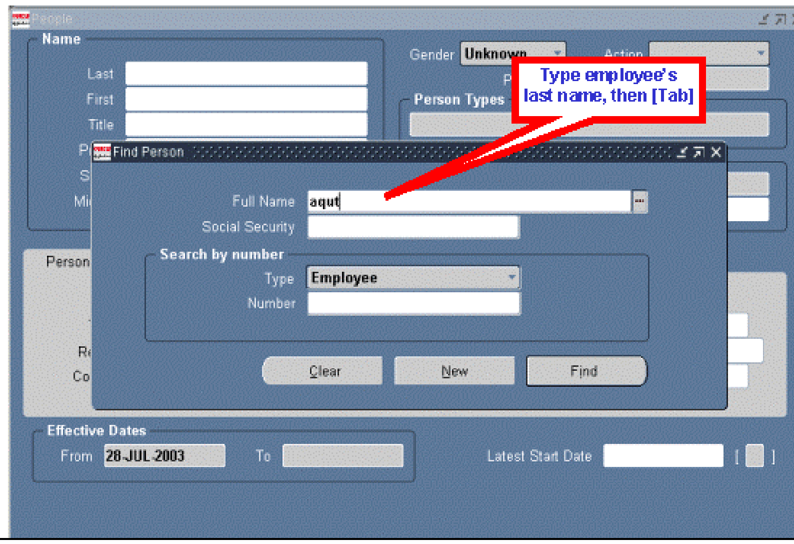
Query – *Query* is used interchangeably with *search* to describe the retrieval of records or data.

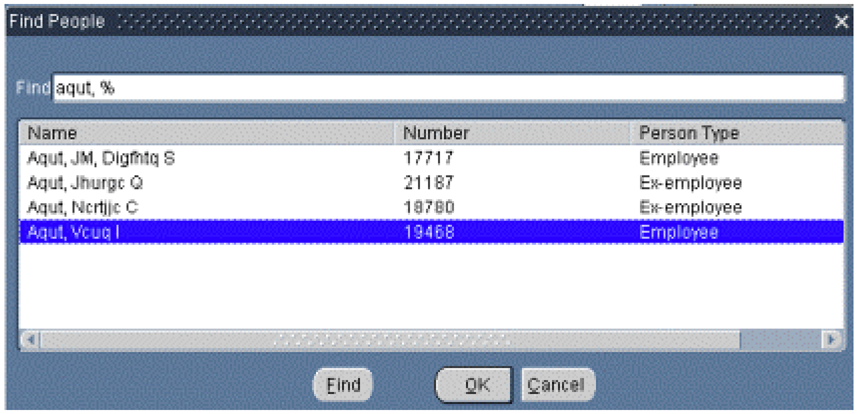
Retrieving and Viewing Employee Records

Finding an employee record

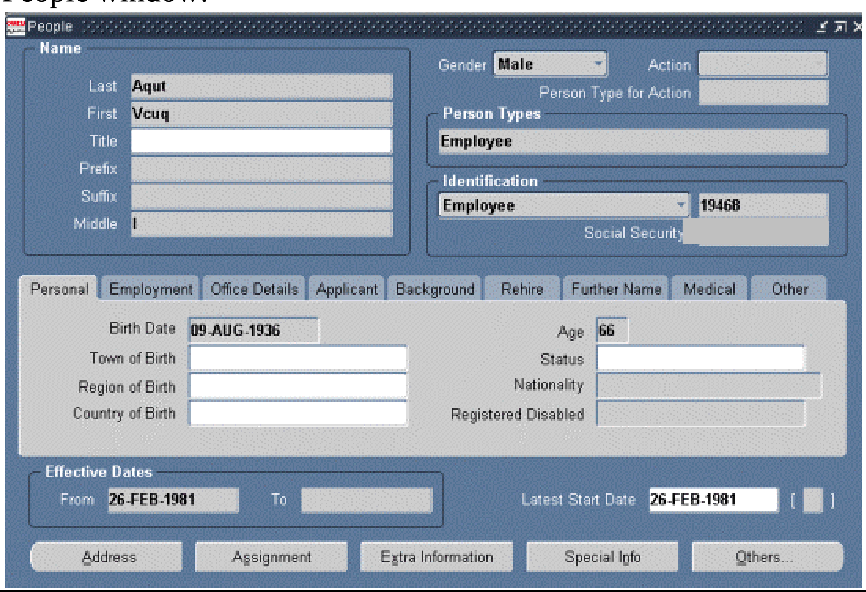
Your access to employee records is determined by the permissions established with your user ID. As a general rule, supervisors, managers, and administrative personnel will have access to the records of employees in their organization only.

Follow these steps to retrieve an employee record:

Step	Action
1	From the **Navigator** Window select *People* → *Enter and Maintain*. The **People** window displays, with the **Find Person** window open on top: 
2	Type in some or all of the employee's last name, and press [Tab]. Note: you can also find a record using the employee's social security number by entering the SSN (with dashes) in the Social Security block.

<table>
<tr>
<td>3</td>
<td>If there is more than one employee whose last name matches the letters you entered, a list of matching names will display:


Select the desired employee from the list and click <OK>. The selected employee’s record will be displayed on the Find Person window.
If only one employee’s name matches, no list will display; the employee’s record will be displayed on the Find Person window.

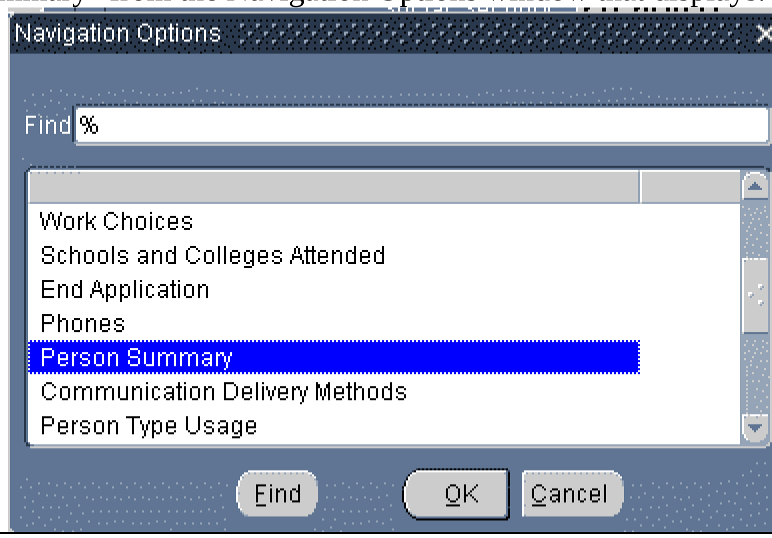
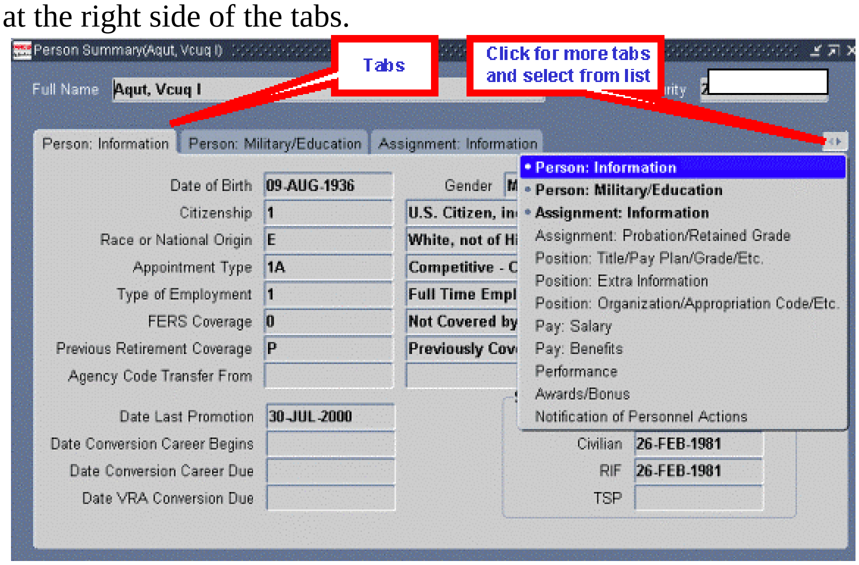
</td>
</tr>
<tr>
<td>4</td>
<td>With the information on the Find Person window fully populated, click the <Find> button. The employee's record will display in the People window:


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

The Person Summary

Accessing the Person Summary

The "Person Summary" is a feature that provides quick access to basic data from an employee’s record organized into various categories. This is read only data. Follow these steps to access and use the Person Summary:

Step	Action
1	Follow the instructions above for retrieving the employee record for which you want to view the employee summary.
2	Once the employee's record is displayed, click the <Others> button on the bottom of the People window, and select "Person Summary" from the Navigation Options window that displays. 
3	The Person Summary displays with the first three tabs visible. Additional tabs can be displayed by clicking the double arrow icon at the right side of the tabs. 

When you're done

When you have finished reviewing the record, you can exit or search for another employee's record:

- To exit, close any windows that you have opened until you return to the **Navigator** window.
- To search for another employee's record, close any open windows until you have returned to the **People** window. Then click the Find button on the toolbar (the flashlight) to re-display the **Find Person** window, and follow the instructions for steps 2-4 of *Finding an employee record*, page 19.

Printing RPAs (Requests for Personnel Action)

Many users want to print a hard copy of RPAs that they initiate (or review). There are two ways to do this:

- You can print from the RPA itself (using the Print icon on the toolbar). See Printing an RPA in the RPA chapter of this Guide (you will also need to follow the instructions for the printing process described below). If you initiate an RPA and want a hard copy, you should print it after you have saved it to your inbox (so that the RPA number prints).
- You can select "Request for Personnel Action" from the Processes and Reports selection on the Navigator menu (this process is described below).

Printing NPAs

Notifications of Personnel Actions (NPAs) can be printed using one of the following options:

- You can print an NPA from the RPA once the action has been processed and the effective date has arrived, using the Print icon on the toolbar). However, you must use the Civilian Inbox, not the Workflow Inbox, to do this (you cannot view a closed action using the Workflow Inbox). See *Two Inboxes Available*, p. 47.
- You can select "Notification of Personnel Action" from the Processes and Reports selection on the Navigator menu (this process is described below).

Printing with Ghostview

In order to print directly from DCPDS, users must have an IP-addressable, post-script enabled printer that is registered with the DCPDS server. Ghostview allows you to view a NPAs or RPAs on screen and print it to a local printer. Instructions in this section assume that you are using Ghostview.

The Request for Personnel Action (RPA)

Contents

This section covers the following topics:

Introduction

The Request for Personnel Action (RPA) enables supervisors and managers to request employee and position actions. It enables the CSO to record staffing and classification actions, as well as make personnel record changes.

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.

Terms

The following terms are used in this section:

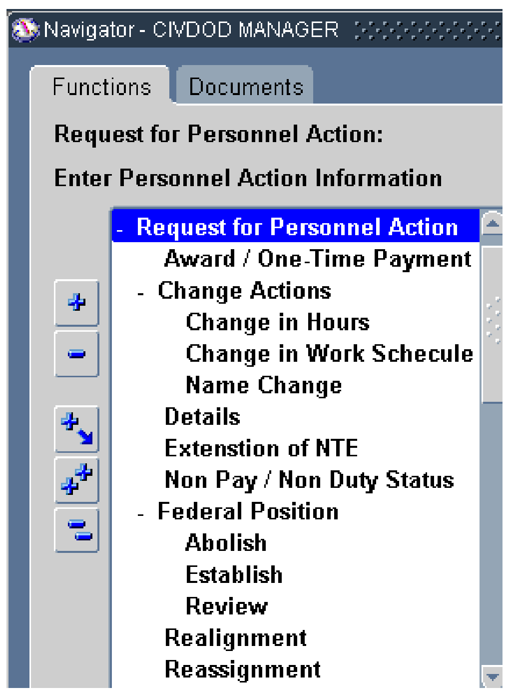
Term	Description
RPA	Request for Personnel Action (also known as the Standard Form 52).
NPA	Notification of Personnel Action (also known as the Standard Form 50)
NOA	Nature of Action. A code that identifies a specific type of personnel action such as promotion (702), resignation (317), etc.

Types of Personnel Actions

Types of Actions

The "Request for Personnel Action" heading on the Navigator menu shows the types of actions 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. It is important that the correct type of action be selected. If you have questions about the correct type of action to select, contact your servicing CSO.



The following sections provide general information about these types of actions.

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

Initiating a Request for Personnel Action

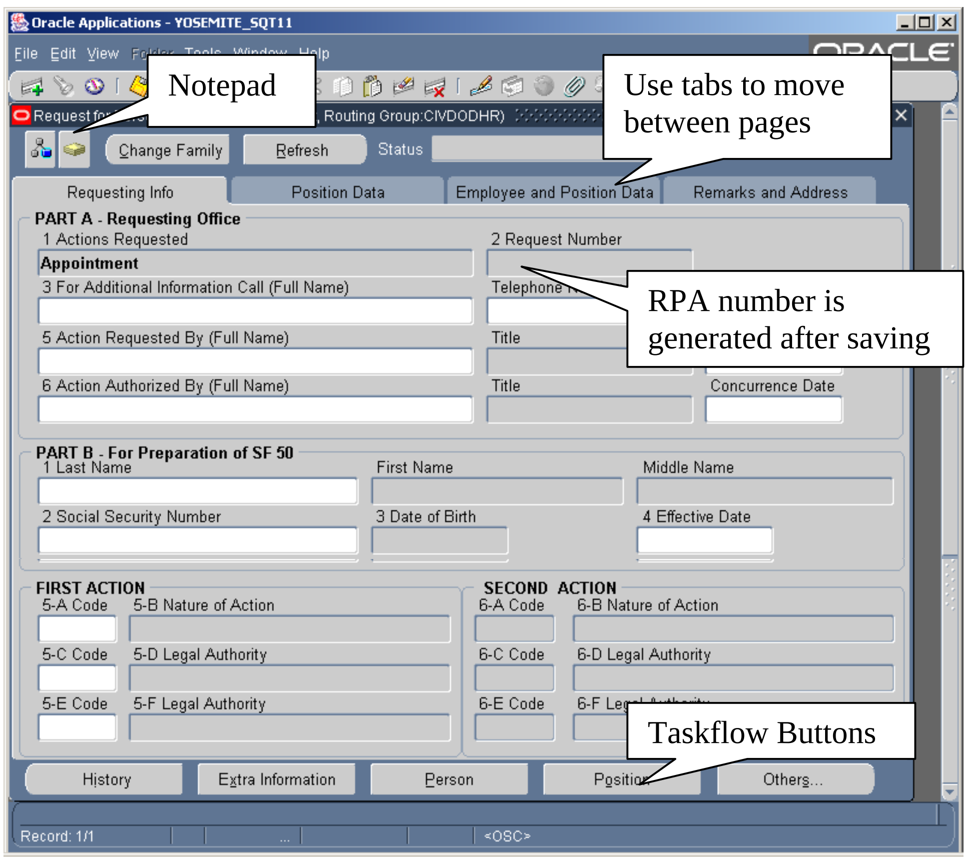
Accessing the Request for Personnel Action

From the **Navigator** Window, follow this path to access Page 1 of the **RPA** Window to create an RPA.

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 – Page 1** Window. *Recruit/Fill* is used in this guide as an example.

Request for Personnel Action Window

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



Types of data fields

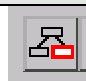
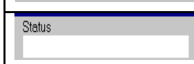
Data fields on the RPA are colored to represent levels of access:

- 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.

Explanation of selected fields on the RPA, p. 1

A description of the buttons located on the **RPA –Page 1** are discussed below. See the window above for the location of these buttons.

Buttons	Description/Function
	**Routing Group Button** is not used by DLA.
	**Note Pad Button** permits you to make comments about the action that you are processing. Other recipients of the RPA can read the note, change, amend, and delete it. See *Attaching a note to the RPA*, page 33
	**Change Family Button** allows you to change the Nature of Action family to a different action (used in the CSO).
	The **Status** block indicates the current status for the RPA. This is displayed after the action has been saved.
	**Taskflow Buttons**. These buttons are at the bottom of each page of the RPA and are used to view additional information about the RPA or the employee or position.

Explanation of selected fields on the RPA, p. 1

A description of key data fields on page 1 of the RPA is provided below.

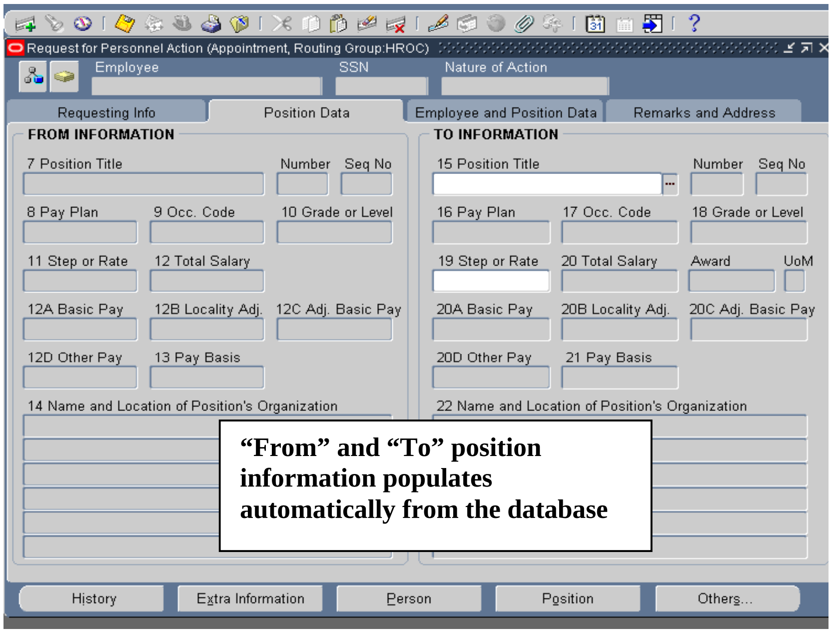
Data Field	Description/Action
Part A - Requesting Office of RPA – Page 1	
1. Actions Requested	The data field is automatically populated based on the action selected from the Navigator menu.

2. Request Number	Each RPA is assigned an RPA number by DCPDS for identification. The format is YYMMM / 2-char CPOID/ 2-char Activity Code/ 2-char Org code/ 6-Digit sequence number. The data field number will populate after the first time the RPA is saved. **Example**: 00MARJ8H9DC000156
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 As Soon As Possible. **Note**: You can **not** 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*** 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.

Part B - For Preparation of SF 50 – Page 1	
1. Last Name	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.
2. Social Security Number	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).
Effective Date, Nature of Action, Authority codes	These entries are completed by the CSO.

Request for Personnel Action - Page 2

The **Request for Personnel Action - Page 2 (Position Data)** is shown here:

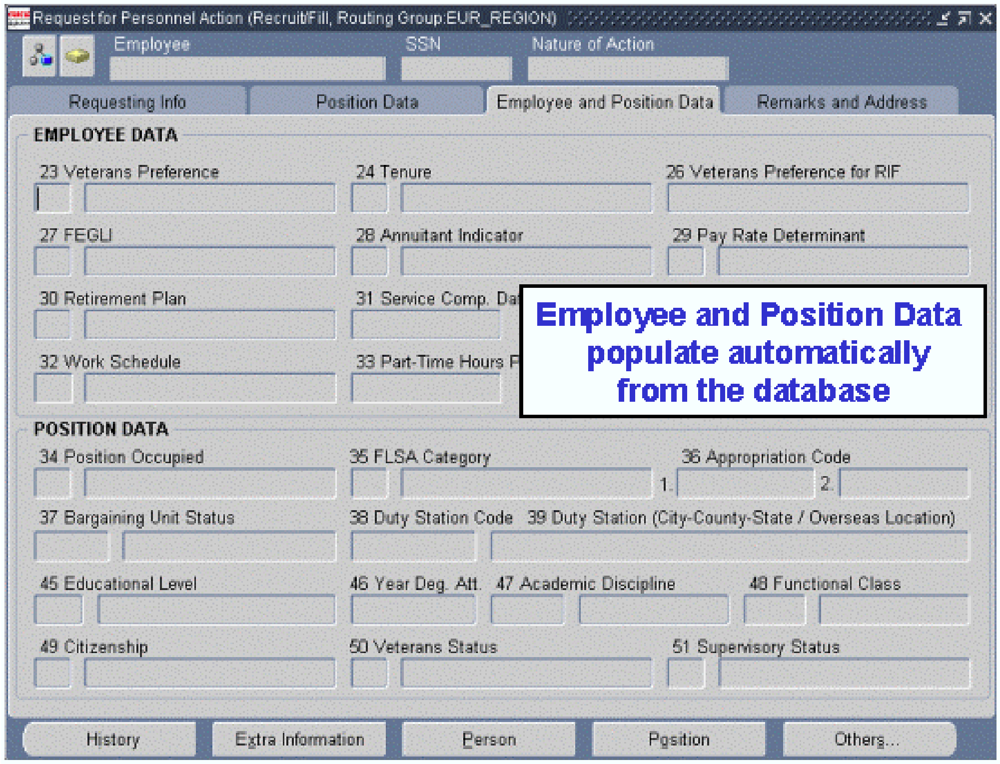


Page 2 notes:

- Employee and SSN fields are automatically populated on 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 Information data fields are automatically populated (or not populated) based on the action requested. The To Information data fields may also be populated (or not) based on the action.

Request for Personnel Action – Page 3

The **Request for Personnel Action – Page 3 (Employee and Position data)** is shown here:

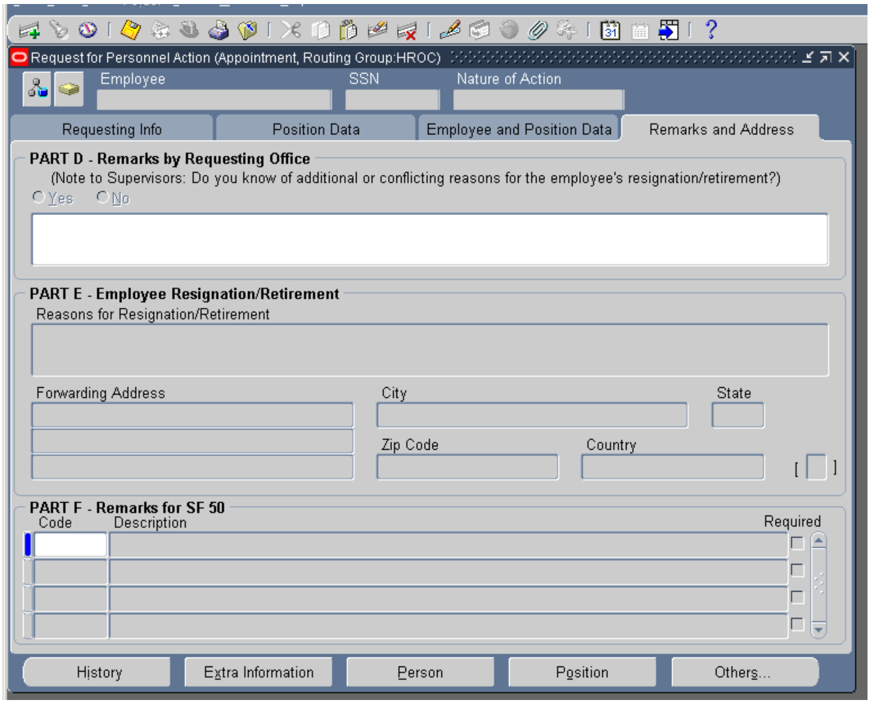


Page 3 Notes:

- 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.

Request for Personnel Action - Page 4

The **Request for Personnel Action - Page 4 (Remarks and Address)** is shown here:

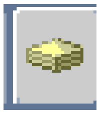


Page 4 Notes:

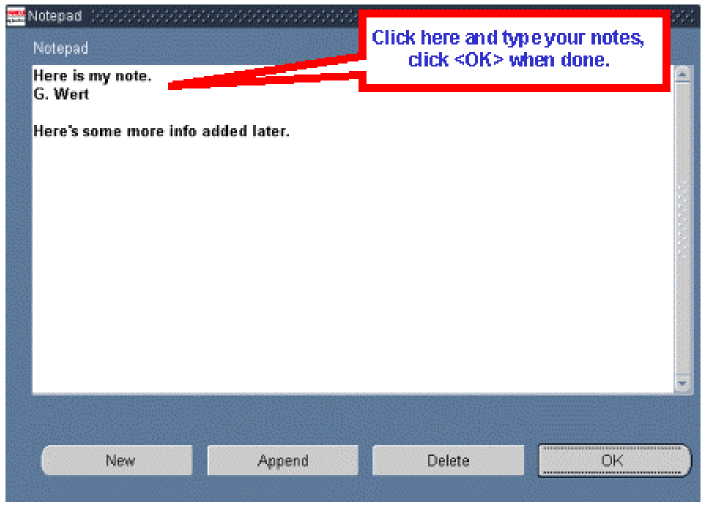
- Remarks by Requesting Office (Part D): It is provided to include additional information about the action.

Attaching a Note to an RPA

Attaching a note to the RPA



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



Information about 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 make it a habit to 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*, page 40.

Saving your RPA

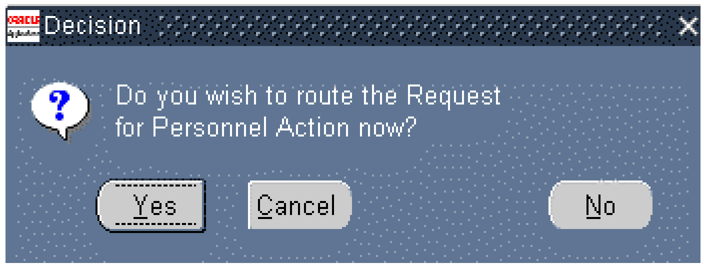
When you are done working on the RPA, click the Save button on the toolbar to save your RPA action, or click ***File → Save*** from the main menu bar, then proceed with the routing instructions (see *Routing the RPA*, page 34).

Routing and Tracking an RPA

Routing an RPA

Routing the RPA

Once you click the save icon, a dialog box is displayed:

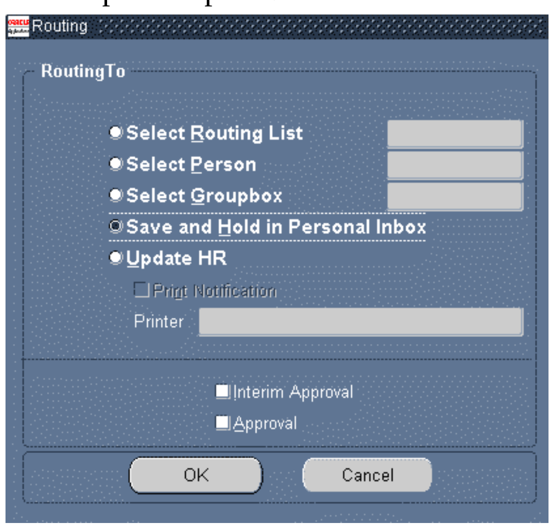


- Click **<Cancel>** to return to the RPA.
- Click **<No>** to save your action and return to the RPA (without routing it).
- Click **<Yes>** to display the **Routing** Window.

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 group box by using the "Select Groupbox" option.



Routing Options

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*, page 36.

Routing To	Description/Function
Select Routing List	Not used by DLA.
Select Person	This option routes the action to a particular individual. DLA does not route to individuals, we use **ONLY Groupboxes.**
Select Groupbox	This option sends the RPA to a "groupbox," which is an inbox shared by a group of people. Groupboxes serve as general "in boxes" for actions coming into the CSO. Click *Select Groupbox* to display a listing of established groupboxes (contact your servicing CSO 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. DLA does recommend using the Personal Inbox, there are times when RPA's cannot be retrieved.
Update HR	This selection generates a Notification of Personnel Action (SF50) and is done at the CSO after all authorizations are done and processing is completed.
Interim Approval, Approval	These blocks are used by the CSO.
<Cancel>	Click **<Cancel>** to stop the routing 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 groupbox (see *The Inbox*, p. 46, 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 any more. 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

Two options

There are two ways of tracking an RPA:
- Within DCPDS, you can track any RPA that has been in your groupbox using the **<History>** button on the RPA itself. This process is explained in this section.
- Use the SF52 Tracker available on the DLA HR website, www.hr.dla.mil, under the heading HR Automated System/Tools, then More…, Request for Personnel Action (RPA) Tracker.

Accessing the RPA

To view the RPA history within DCPDS, you must first retrieve the RPA. This can be done whether the RPA is currently in your civilian inbox (active) or in someone else's inbox – as long as it has been in your groupbox at some time in the past. The procedure for doing this varies somewhat depending on which inbox you are using (see *The Inbox*, p. 46, 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 <**Routing History**> 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 <**Routing History**> icon to display the RPA history.

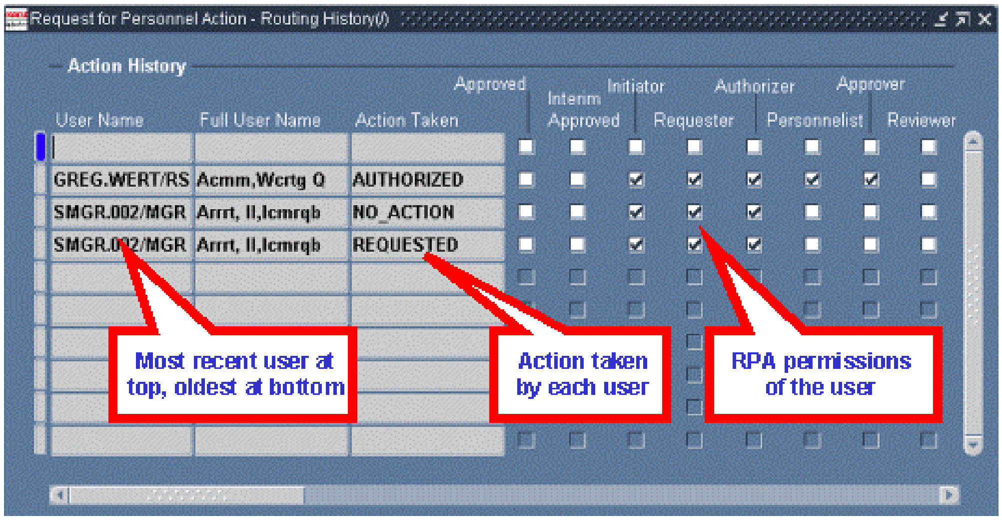
History button

Clicking the <**History>** 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.

- This window scrolls to the right to provide additional tracking information.
- No information can be changed in this window. It is for viewing only.

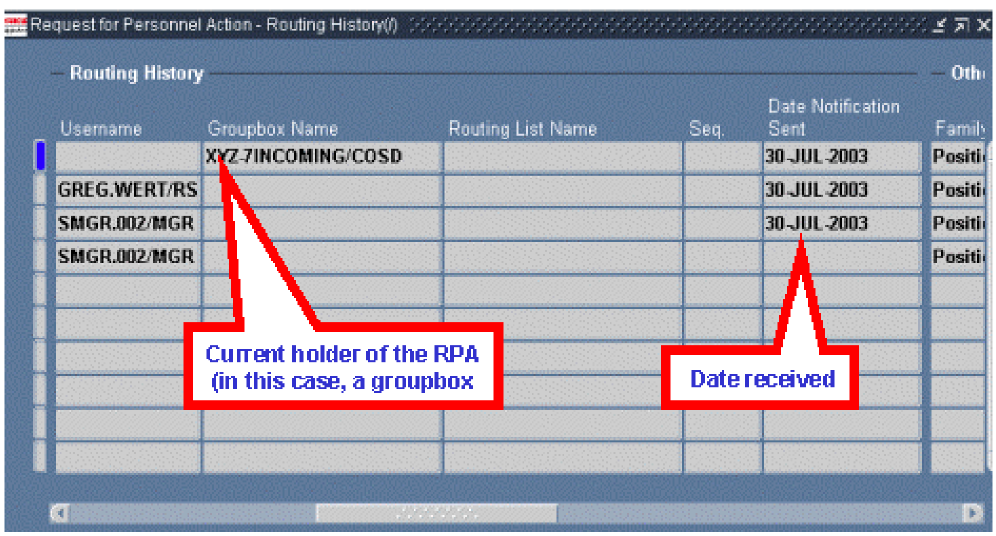
Action history

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



Routing history

As you scroll to the right, the "Routing History" section displays, showing 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.



Additional information is shown as you continue to scroll right.

Printing an RPA or NPA

Printing an RPA

To print a hard copy of the RPA, click **Action → Print** on the Menu Bar while the RPA is displayed on your screen, or click the Print button 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 *The Inbox*, p. 46).
- No printer name will show in the "Printer" block, click in that block to display the list of values and select the printer you want to use. Using the dummy printer (000NO_LAN_PRINTER) allows you to both display the RPA on your screen, and print a hard copy.
- Click **<OK>** on the **Printing** Window to print the action.

Other printing options

- Besides printing the RPA from the RPA itself, you can also print RPAs and NPAs individually, or for a specific employee, or you can print NPAs using *Ghost* View

---

Attaching Documents to an RPA

Purpose

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,* page 33.

Attaching Documents or Comments to an RPA

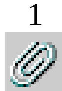
Accessing the Request for Personnel Action

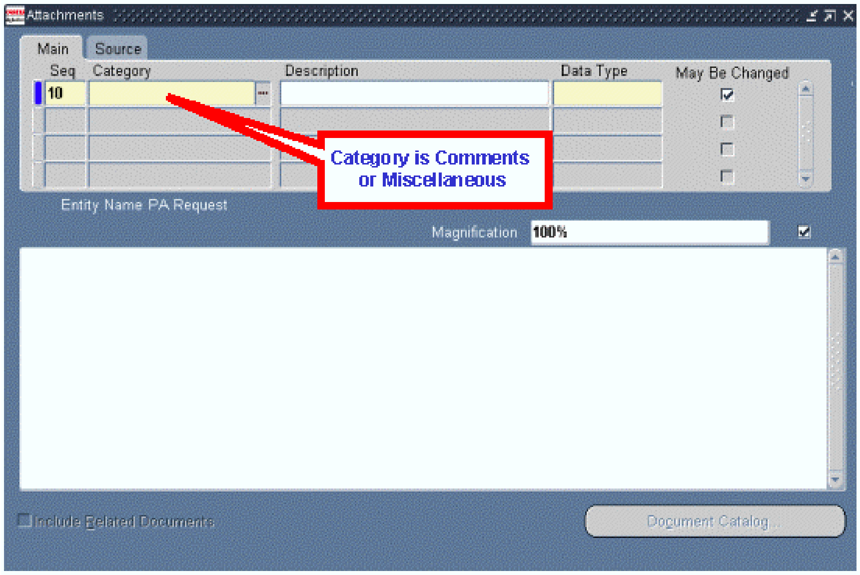
You can attach a document or note to an RPA that you are creating, or to an RPA that has already been created and is in your inbox.

- See *Initiating a Request for Personnel Action,* page 26, for instructions for creating an RPA; you can then use the processes in this section to attach a document to that RPA.
- See *The Inbox,* page 46, 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 your groupbox). 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,* page 44.

Attaching a Document

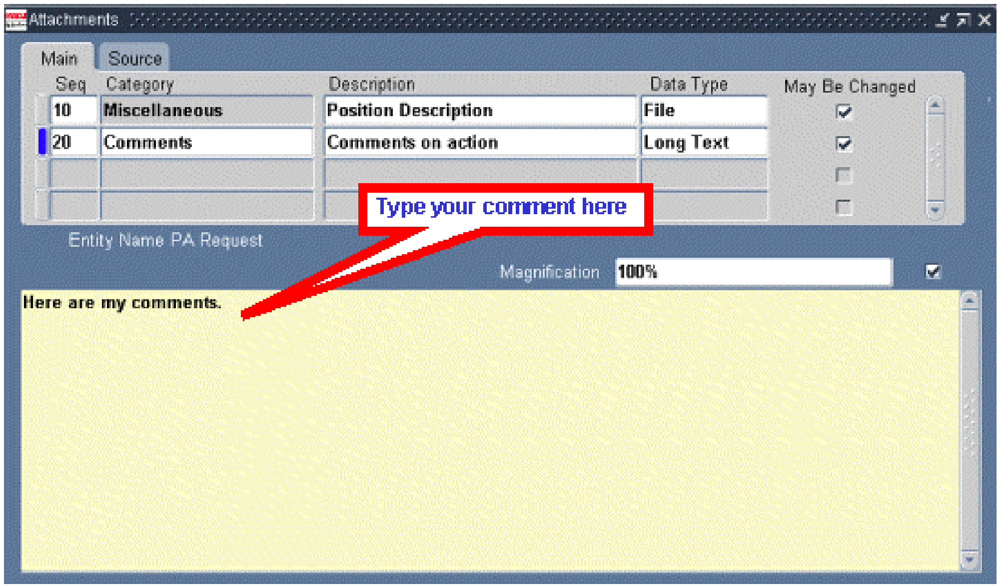
Follow these steps to attach a document to an RPA:

Step	Action
1 	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.

2	The **Attachment** Window is displayed: 
3	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. • *Comments* 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. • *Miscellaneous* is used to attach an existing document from another application such as Microsoft Word, Excel, etc.
4	Type a description of the information to be attached in the Description data field 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*, p. 43. • 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 (long or short* text), p. 42. • 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 Continue at *Adding a comment (long or short* text), p. 42.

Adding a comment (long or short text)

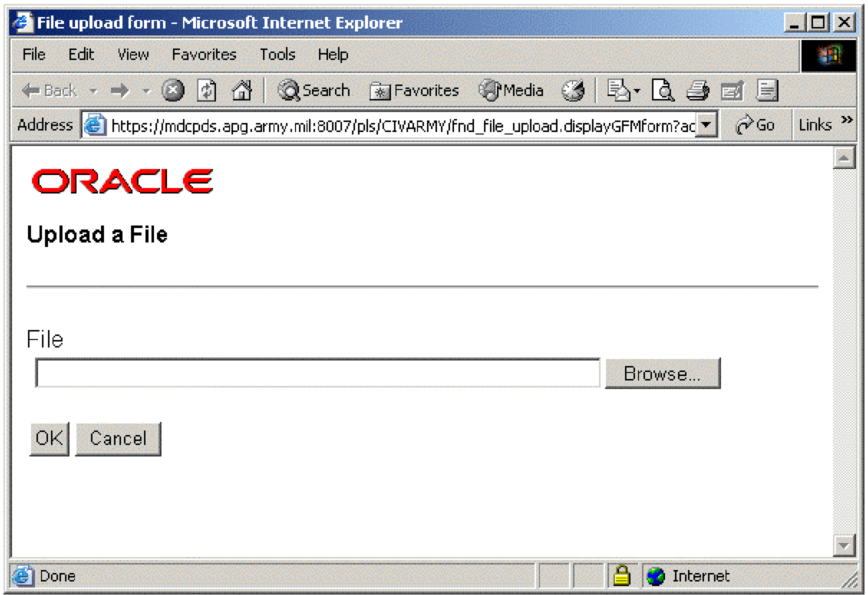
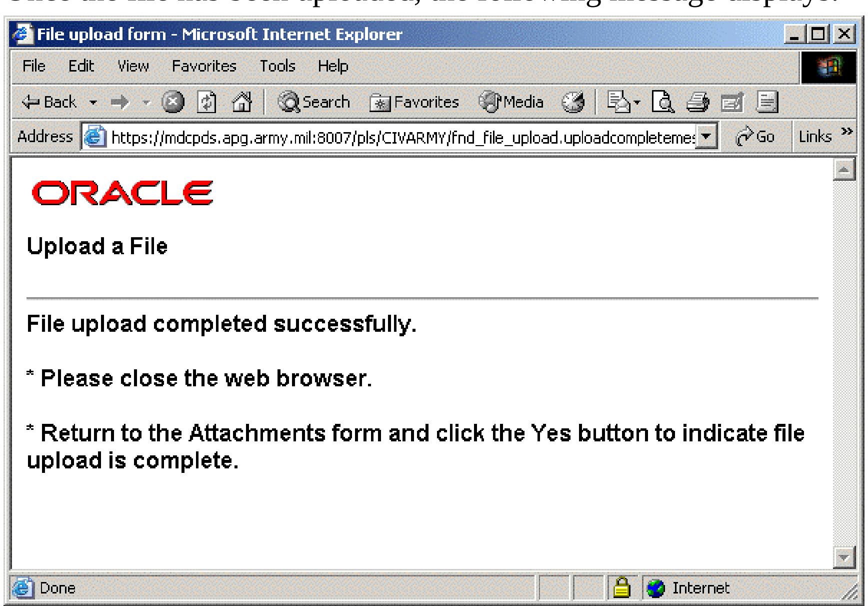
Click in the large white area and type your comments:

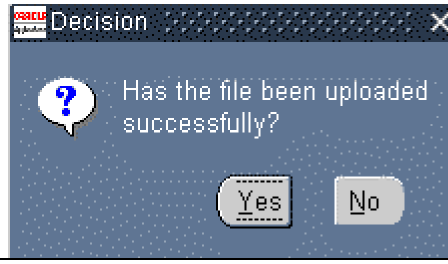


When you are done typing the comments, click the **Save** button on the toolbar to save the attachment information. You can then close the attachment window to return to the RPA, or add another attachment if desired.

Attaching a file

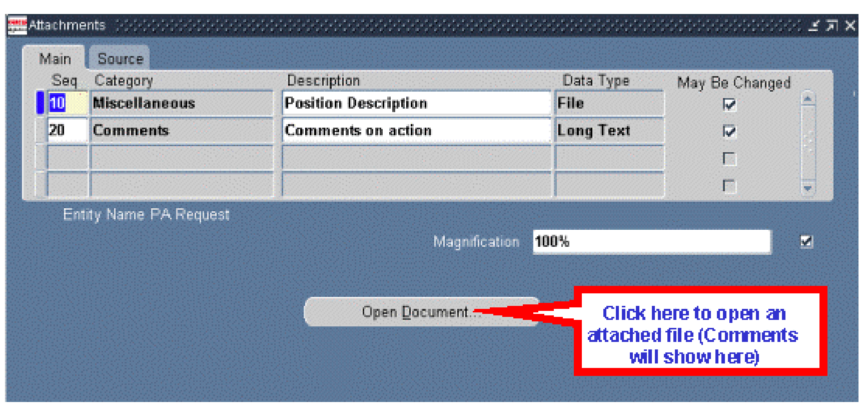
Follow these steps to attach a file (Word document, Excel spreadsheet, or other computer file):

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 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. 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.

Delete an Attachment

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

Step	Action
1 	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 icon 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.]
5	Click the <**Save**> icon on the toolbar to save your changes to the **Attachment** window.

The Inbox

Contents

This section covers the following topics:

Purpose of the inbox

This chapter explains how to access and act on Requests for Personnel Actions (RPAs) from the inbox. Your Inbox displays the following:

- actions you have saved to your Inbox;
- actions sent to you by others; and
- actions residing in any groupbox to which you belong.

From the inbox, you can access Requests for Personnel Actions that have been saved in or received in your inbox. When an RPA is displayed, you can:

- make changes to the action,
- review or approve the action,
- route the action to another groupbox, and/or
- view the status of an action and its routing history.

You should check your Inbox frequently since it can contain actions sent to you by other users, awaiting action by you. This is particularly true if you are an authorizing official for personnel actions.

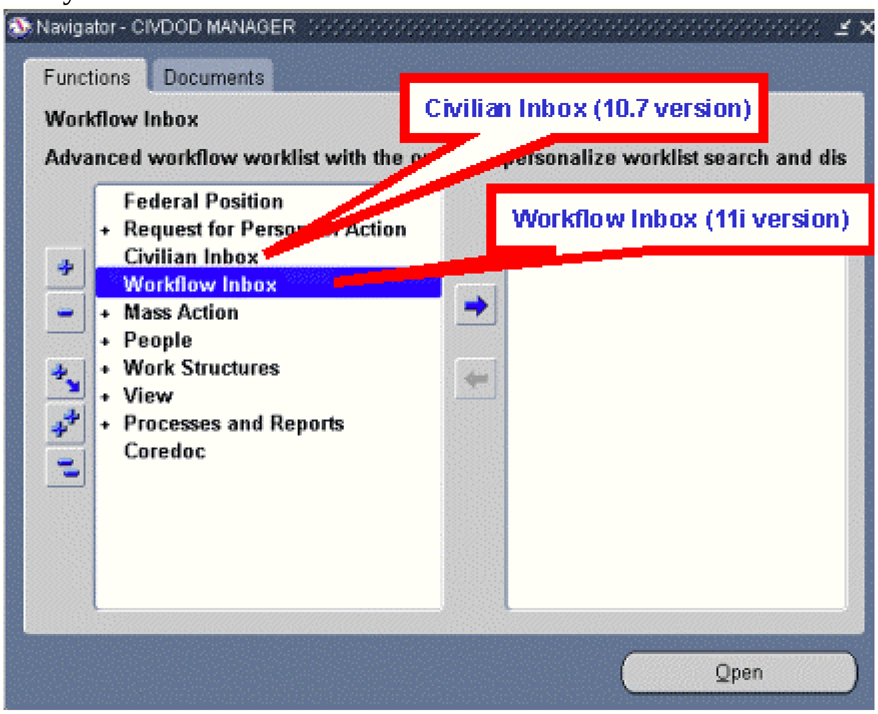
Two Inboxes Available

Two inboxes

There are two inboxes available on the Oracle 11i navigator menu. Both have the same function and either one can be used.

- The **Civilian Inbox** is the Oracle 11i equivalent of the Oracle 10.7 inbox.
- The **Workflow Inbox** is new to Oracle 11i

The reason for the two inboxes is because the new 11i Workflow inbox does not have all the features that some users wanted, so the older 10.7 version of the inbox (the civilian inbox) was also brought over to Oracle 11i. Improvements will be made to the 11i Workflow inbox and eventually it will be the only one available.



Inbox identifiers on the Top Ten list

If you move either of the inboxes to your top ten list, they will display as follows:

- **Civilian Inbox** shows as "Civilian Workflow Inbox" on the Top Ten list.
- **Workflow Inbox** shows as "Customizable Workflow Worklist" on the Top Ten list.

Which to use?

The two different inboxes each have their own advantages (and disadvantages). Select the one that is best for you. You do not need to stick to one at all times – you can use one during one session and the other during another session if desired, although you should not have both inboxes open at the same time.

General rule: Frequent users (e.g., at the CSOs) or users who have many personnel actions in their inbox should use the older 10.7 Civilian Inbox.

Civilian Inbox (10.7)	Workflow Inbox (11i)
Already familiar to users.	New, unfamiliar look.
Provides more columns of information about items in the inbox (e.g., pay plan-grade).	Has only limited information about items.
Replaces the navigator window when opened.	Opens in a separate browser window so you can have it open at all times even when performing other DCPDS tasks.
Allows you to set up "views" with different selection and sorting criteria but the process is not user-friendly.	Provides an easier process for setting up different "views" with different selection and sorting criteria.
Can only select one item at a time. Can only route one action at a time.	Allows you to select more than one action at once. May allow mass routing of actions (not currently working).
Can view and print open or closed actions.	Cannot view (or print) closed actions.
The <Respond> button (to display the RPA) is available from the inbox screen.	Must "open" an action in order to access the <Respond> button to display the RPA.
Can export data from the inbox.	Cannot export data from the inbox.
Will eventually not be available.	Will eventually be the only inbox available.

Coverage

The two inboxes are addressed separately in this chapter:

See *Workflow Inbox (11i version)*, p. 50.
See *Civilian Inbox (10.7 version)*, p. 58.

Open vs. closed actions

Both inboxes indicate whether an action is Open or Closed:

- **Open RPAs** are those that are active in your inbox, meaning that you can update them and then route them.
- **Closed RPAs** are RPAs that have been in your inbox in the past, but are now active in someone else's inbox or groupbox.
- **Closed RPAs** also include RPAs that have been completed – the action has been processed and the effective date has arrived. Completed actions are in a closed status to everyone.
- An RPA is only open in one groupbox at a time.

Acting on RPAs sent to you

Many of the people involved in the RPA process receive RPAs in their inboxes that have been routed to them by other users and initiators. This includes authorizing officials (management officials who approve the personnel action), resource management staffs (who review personnel actions and evaluate impact on manpower and budget), and others.

These users should make it a point to check their inbox regularly so that actions routed to them do not sit for long periods of time waiting for their action.

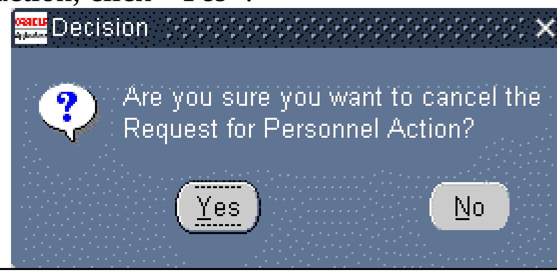
- The general procedure for users who receive RPAs routed to them by others is to open the action from the inbox (using the <Respond> button), perform any review necessary, then route the action on to the next groupbox in the routing chain.
- Users can add supplementary information about the action using the Notepad (see Attaching a Note to an RPA), or can attach longer comments or a document to the action using the Attach Document feature (see Attaching Documents or Comments to an RPA).

Deleting an RPA

Occasionally you may need to delete an RPA. This should be a rare occurrence, for instance, if you created an RPA by mistake. RPAs that have been processed cannot be deleted. If a RPA needs to be deleted and you were not the creator, please contact your CSO System Administrator for assistance.

The RPA must be in your inbox in order to delete it. Follow these steps:

Step	Action
1	Display the RPA from your inbox (either the workflow inbox or the civilian inbox). • See *Displaying an RPA using the workflow inbox*, p. 50, for instructions for doing this using the Workflow Inbox. • See *Displaying an RPA using the civilian inbox*, p. 58, for instructions for doing this using the Civilian Inbox.

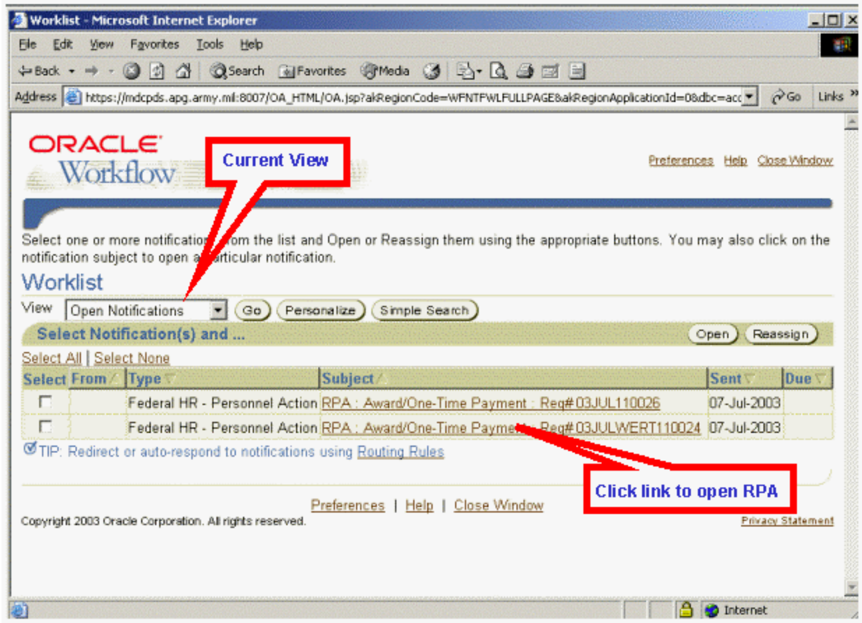
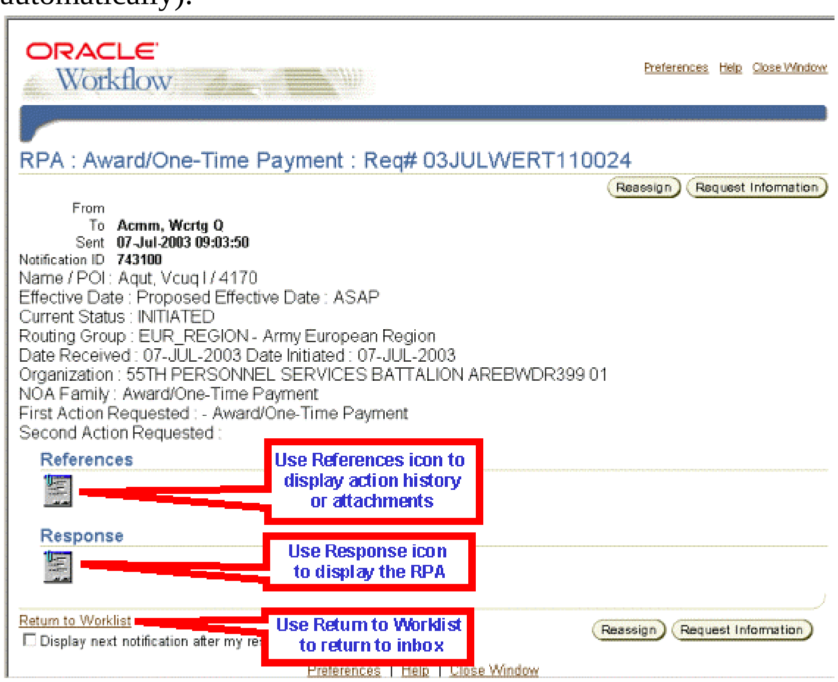
2 	When the RPA is displayed on your screen, click the Delete icon on the toolbar (the "red X").
3	A **Decision** window displays, asking you to verify that you want to cancel the action; click <Yes>. 
4	A "Transaction complete, 1 records applied and saved" message displays. Click <**OK**>. The RPA will disappear. • If using the Workflow inbox, you will be returned to the **Navigator** window. The **Notification** window is still open and can be accessed by clicking the "Notification" taskbar button at the bottom of your screen. From there, click on <**Return to Worklist**> to return to the inbox. The deleted RPA will be gone (no need to refresh). • If using the Civilian inbox, you will be returned to the inbox. You will need to refresh the inbox using **Ctrl-[F11]** in order for the action to disappear from the inbox.

Workflow Inbox (11i version)

Displaying an RPA using the workflow inbox

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

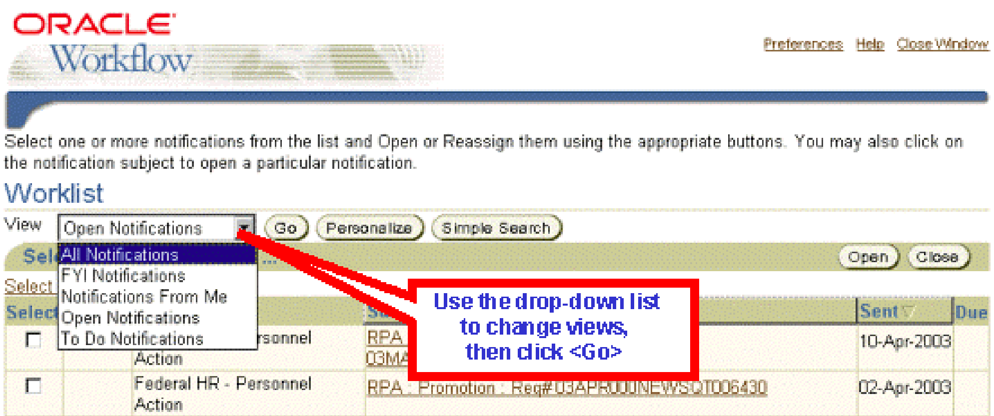
Step	Action
1	Select *Workflow Inbox* from the Navigator menu (note, if you move this item to your "Top Ten" List, it will show as *Customizable Workflow Worklist).*

2	When you select this, your "Worklist" displays in a separate window: 
3	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.
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:

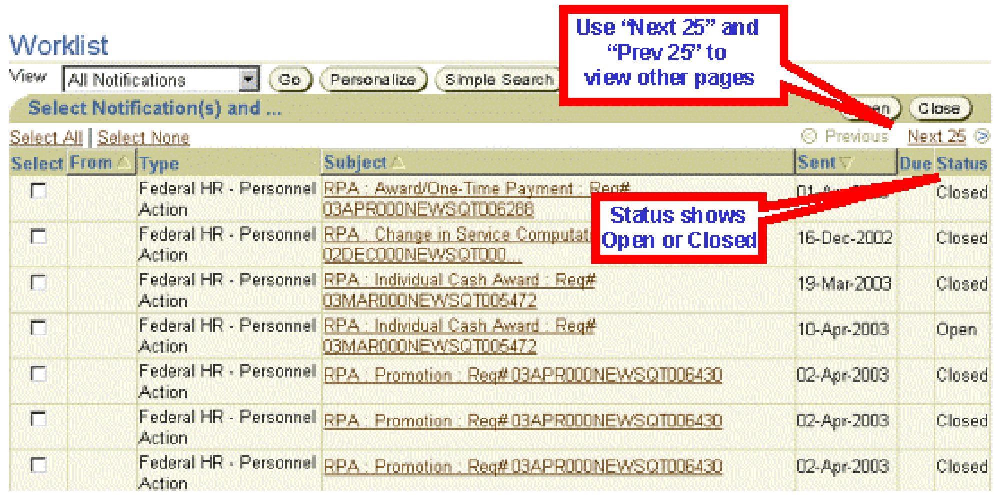


The most commonly used views are "Open Notifications" (the default view) and "All Notifications" which will display all actions that have ever been in your inbox.

- You can create your own views with different columns, sorts, and filtering criteria. See *Personalizing inbox views*, p. 55.

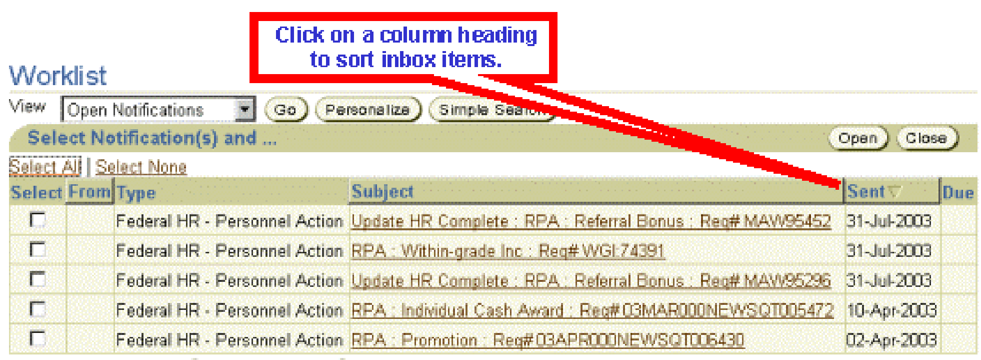
Closed actions

- Use the "All Notifications" view to search for a closed action (one that is no longer 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. To view a closed RPA, use the Civilian Inbox (see *Viewing closed actions*, p. 59).



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.



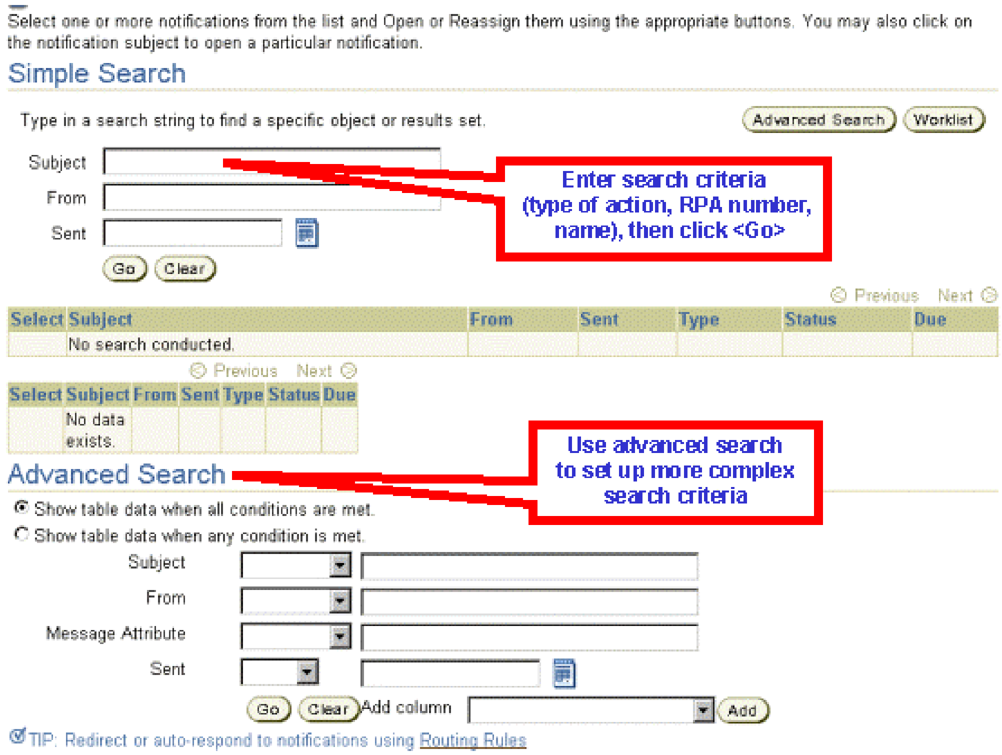
Searching the workflow inbox

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:

The Simple Search window

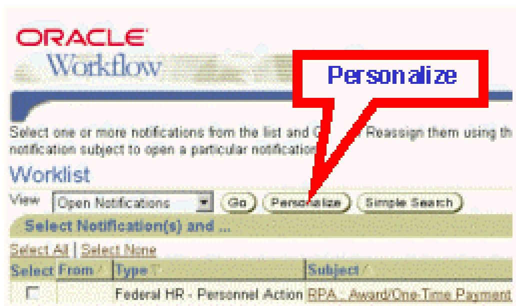
On the Simple Search screen, enter your search criteria.

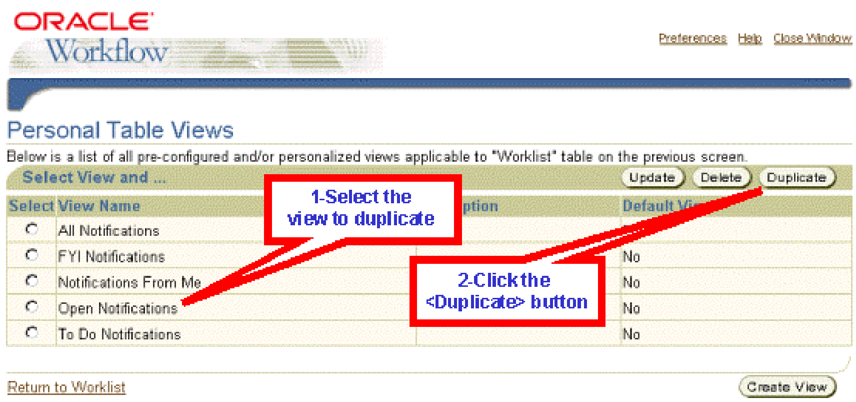
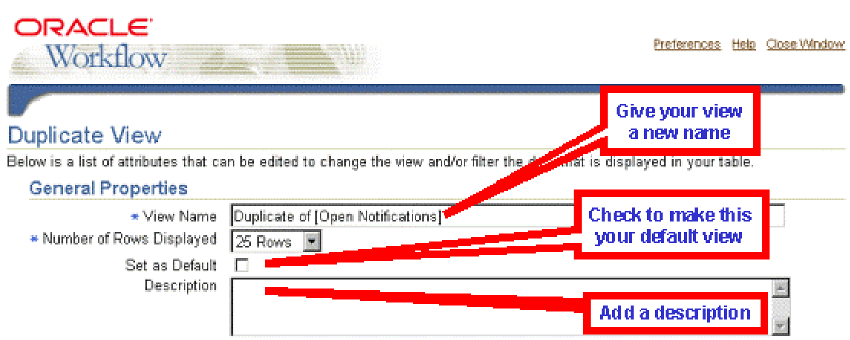
- In the "Subject" line, you can search for an RPA number, a type of action (e.g., Promotion), or an employee name.
- Search criteria is not case sensitive and does not require use of wild cards. To search for an action for John Smith for example, you can just enter "smith" or "SMITH".
- Use the "From" 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.



Personalizing inbox views

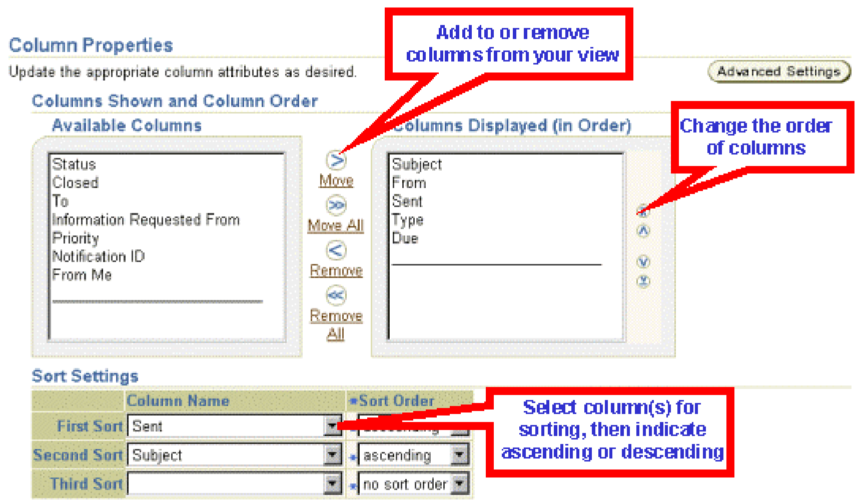
You can create your own "personalized" views of your inbox which allows you to specify what columns to display, how the actions should be sorted, and what filtering criteria to use (if any). Follow these steps to create a custom view:

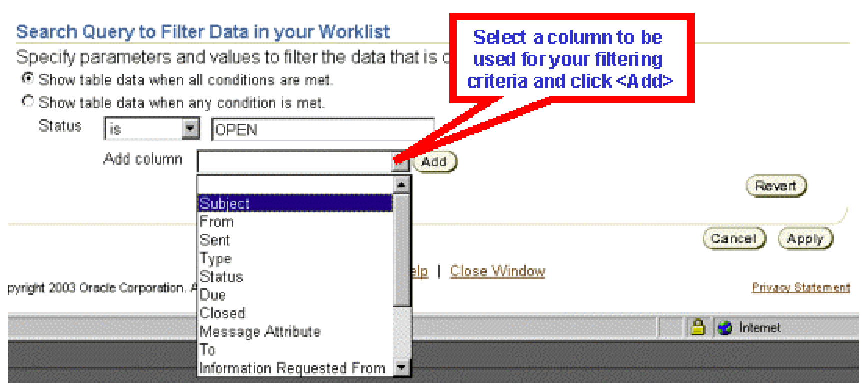
Step	Action
1	Click the <**Personalize**> button on the inbox window. 

2	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: 
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. 

<table>
<tr>
<td>4</td>
<td>In the "Column Properties" area, you can identify what columns to include in your view, and what sort order to use.

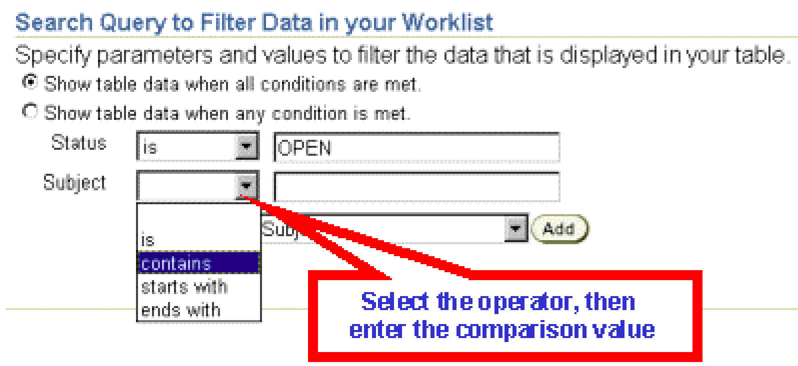
To add a new column, select (click on) the column from the left side ("Available Columns") and click the right <Move> arrow to add it to the right side ("Columns Displayed"). To remove a column, select it from the right and click the left <Remove> arrow.
Use the up- and down-arrows at the right side 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).



</td>
</tr>
<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> button.


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

<table>
<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.



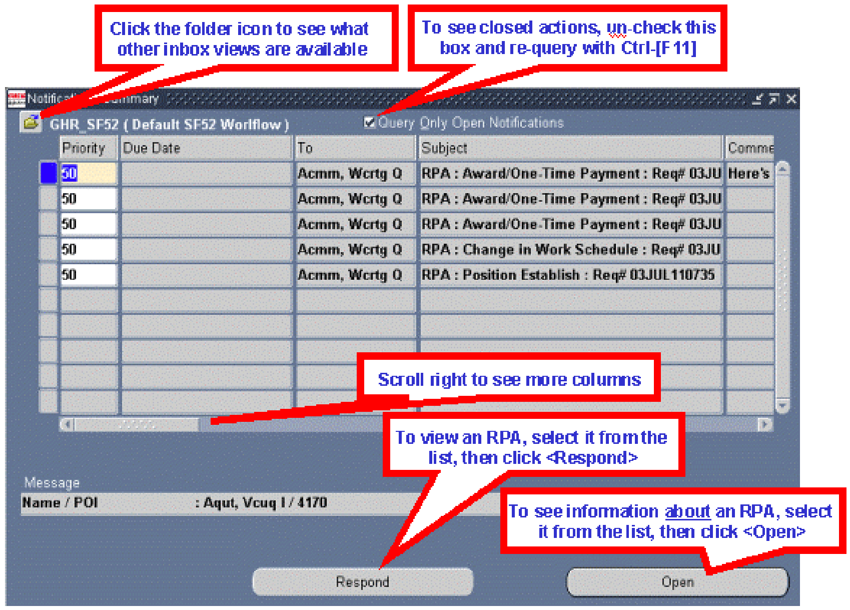
You can add other data fields to your filtering criteria if desired by repeating steps 5 and 6.</td></tr>
<tr><td>7</td><td>When you are done, click the <Apply> button at the bottom of the window. Your new view will be available on the list of views for the inbox.</td></tr>
</table>

Civilian Inbox (10.7 version)

Displaying an RPA using the civilian inbox

The "Civilian Inbox" is the Oracle 11i equivalent of the Oracle 10.7 Civilian Inbox. Follow these steps to display an RPA from this 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).*

<table>
<tr><td>2</td><td>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:


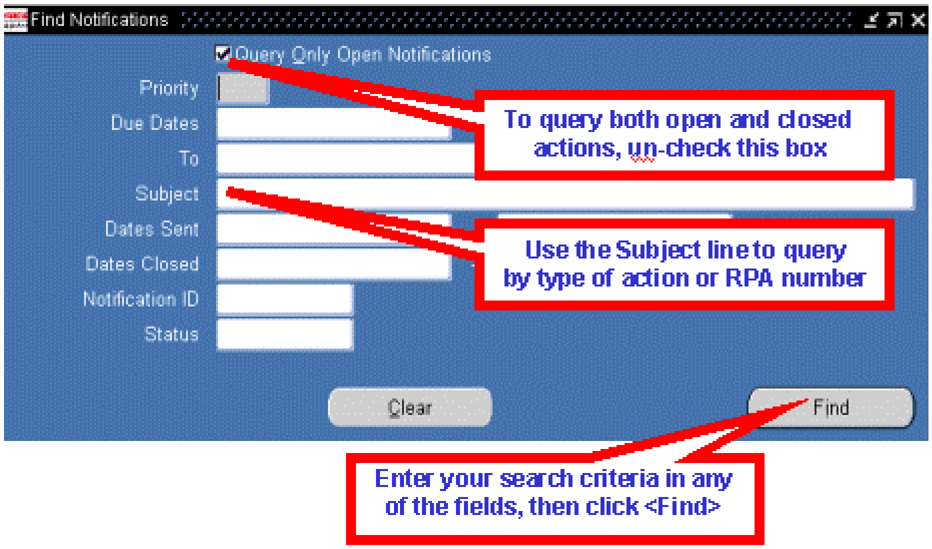
Note: the inbox window is substantially longer than one screen; to see other columns, use the scroll bar at the bottom of the window to move to the right. You can customize the display of your Civilian Inbox by rearranging the order of columns or displaying actions in a different sequence; see Customizing the civilian inbox, p. 62.</td></tr>
<tr><td>3</td><td>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.</td></tr>
</table>

Viewing closed actions

By default, whenever you open your inbox, you will see only open actions. In order to see closed actions (those that have been in your inbox in the past), click the **Query Only Open Notifications** block to clear the "✓", then push **Ctrl-[F11]** on your keyboard to refresh your inbox.

Searching the civilian inbox

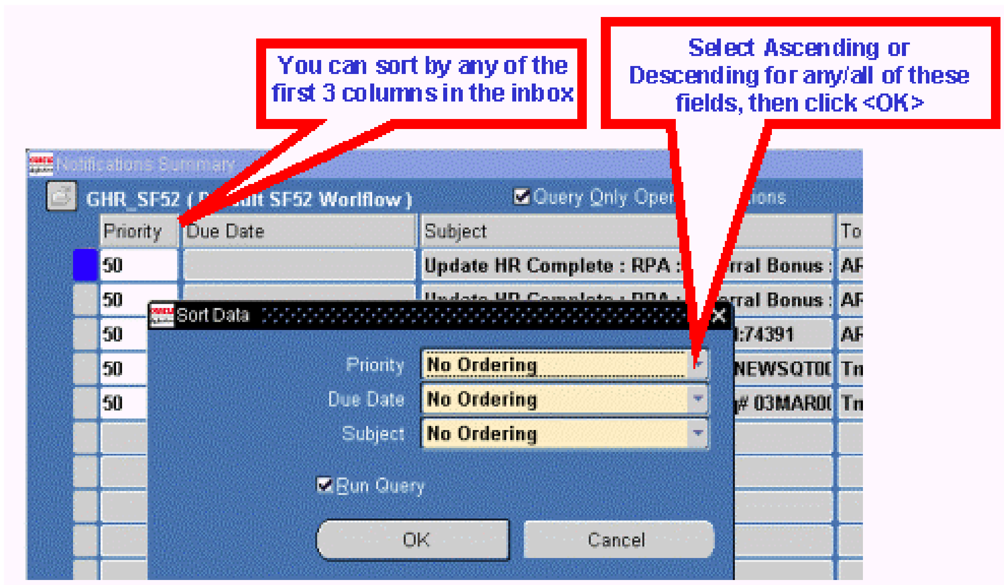
If you have lots of actions in your inbox (e.g., if you are looking at both open and closed actions) and want to search for a specific action, use the "Find" function by clicking the Find icon (the flashlight) or selecting *View → Find* from the top line menu. The Find window displays:



Sorting the inbox

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

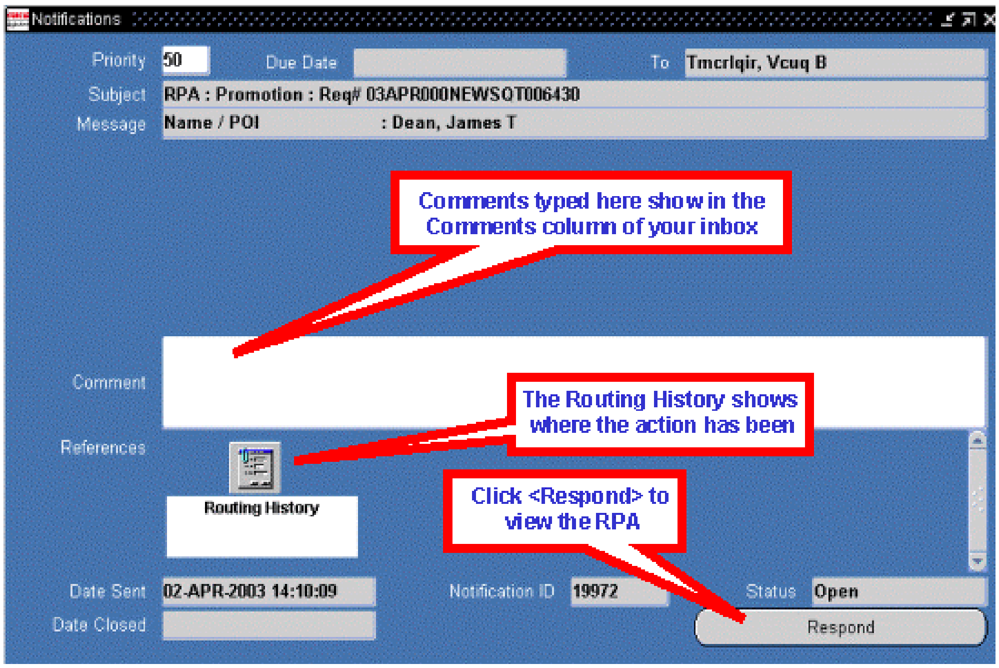
- If you want to sort on a different column (not one of the first three), you must move that column to make it one of the first three. See *Customizing the civilian inbox*, p. 62. By setting up and saving a custom view, you can also set it up to sort the way you want.
- Select *Folder → Sort Data* from 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 (see *History button*, p. 37).
- Click the <**Respond**> button to display the actual RPA form itself.



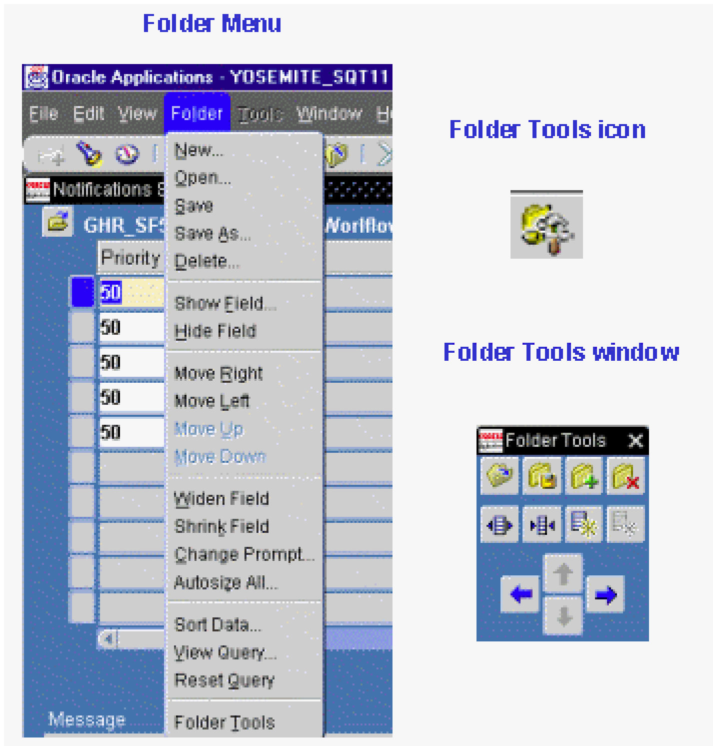
Customizing the civilian inbox

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

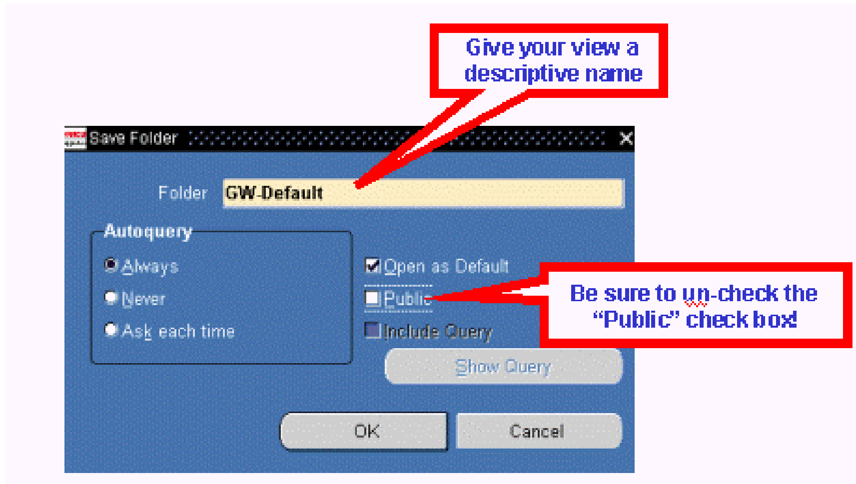
The folder tools menu lets you change the appearance of your inbox. You can use the Folder menu or the Folder Tools window that displays when you click the Folder Tools icon. When using the folder tools window, hover your mouse over a button to display its function.



- 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 "Auto query" 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 in the region 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.