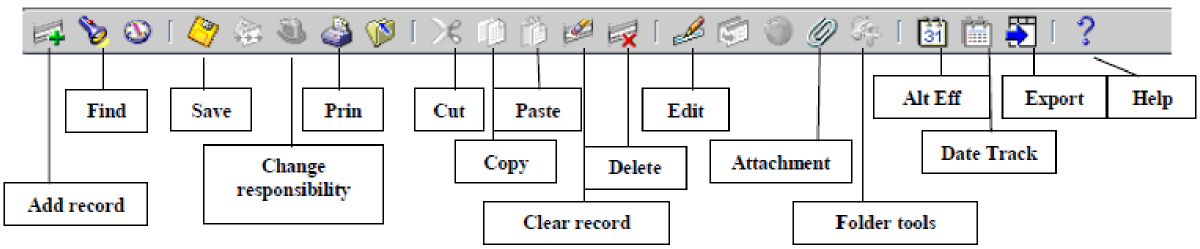
The Toolbar

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

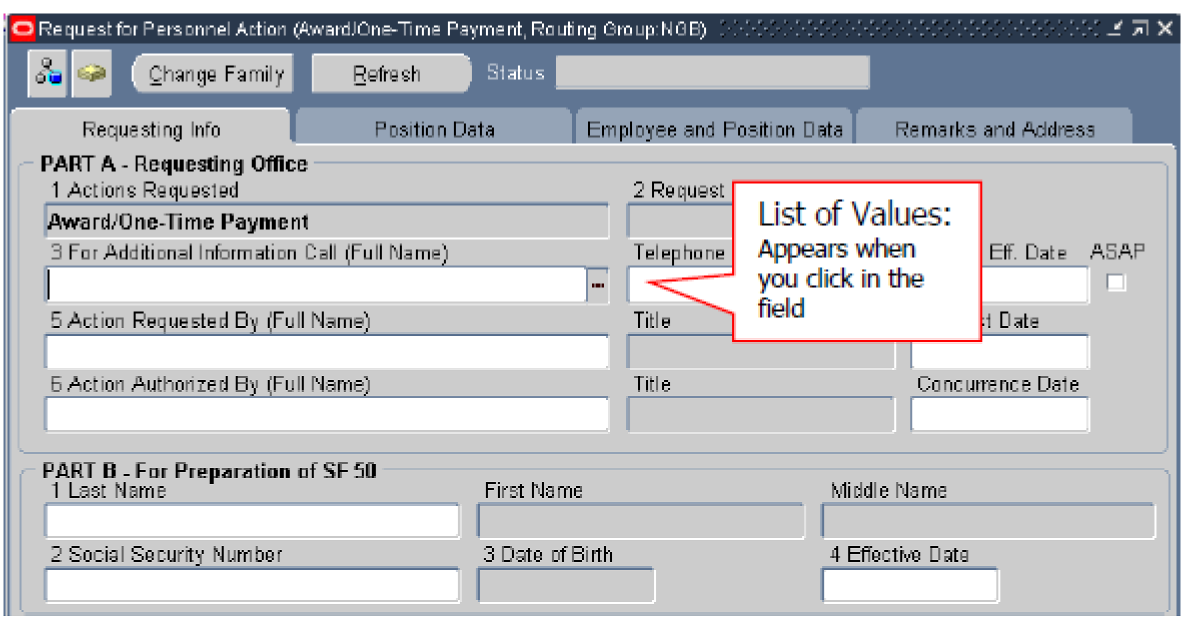
- Toolbar buttons will vary between screens depending on what functions are available; also, some may be displayed but "grayed out."
- To display the function of a button, move your mouse over it and an identifier will display briefly.

Toolbar Button Functions



List of Values

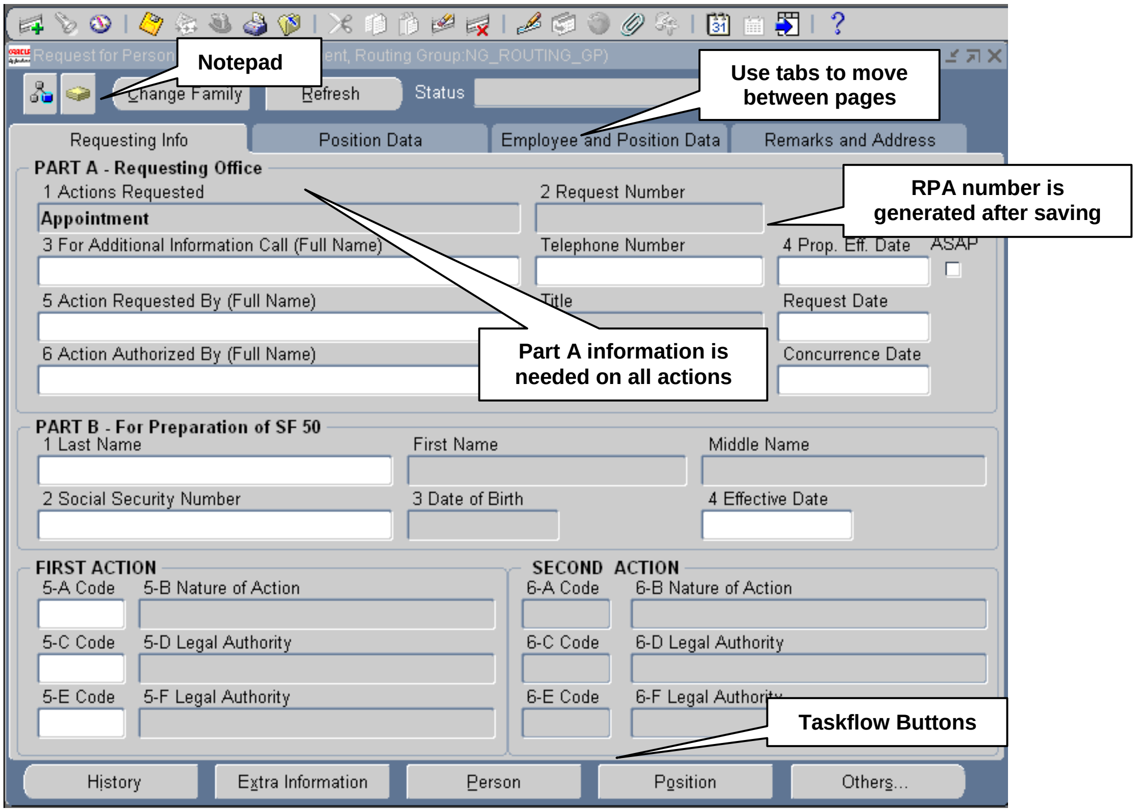
Lists of values are embedded in each field for which there is a list, and the list can be accessed by clicking on the down arrow (or a button containing three dots) at the right side of the field. Note, the LOV button is not visible until you have actually clicked in the field.



Keyboard Shortcuts

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

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



Types of Data Fields

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

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

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

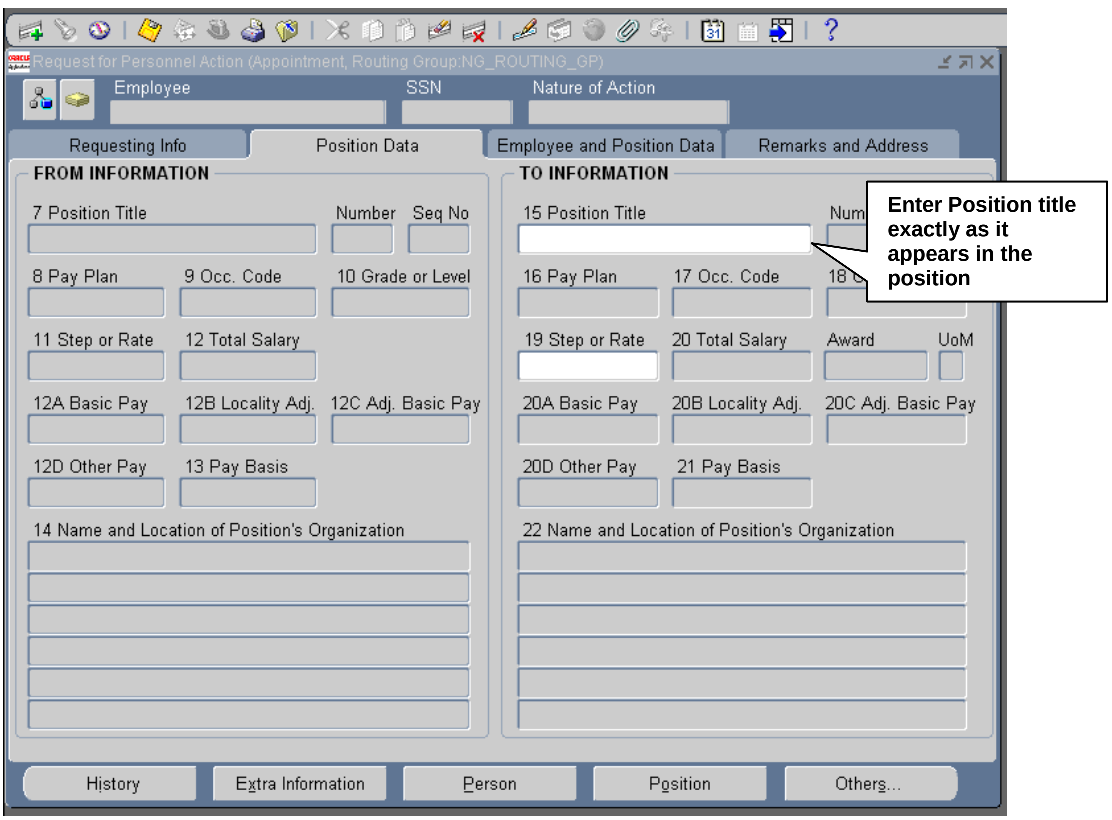
Explanation of Selected Fields on the RPA, p. 1

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

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

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

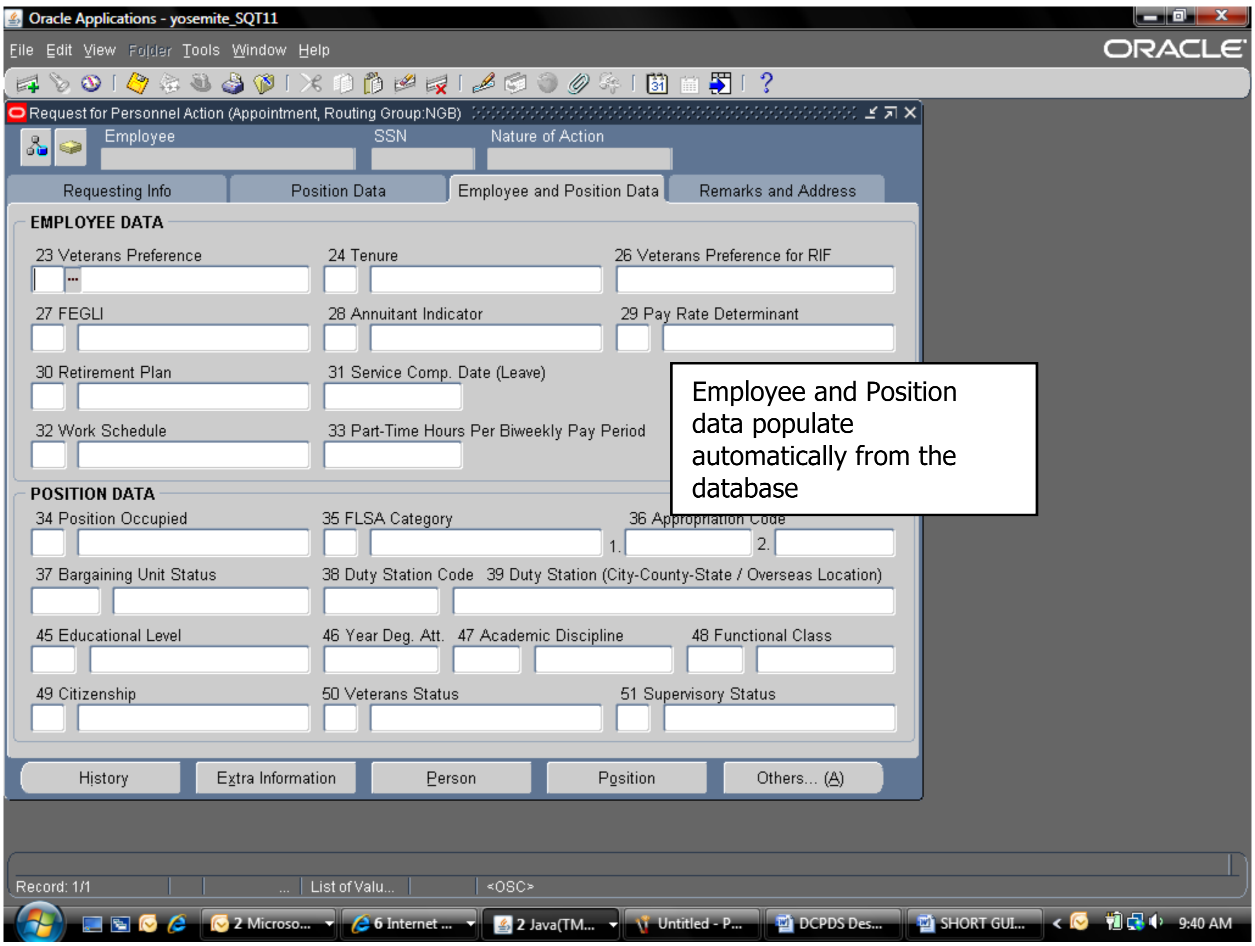
Request for Personnel Action - Page 2 (Position Data)



Page 2 Notes:

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

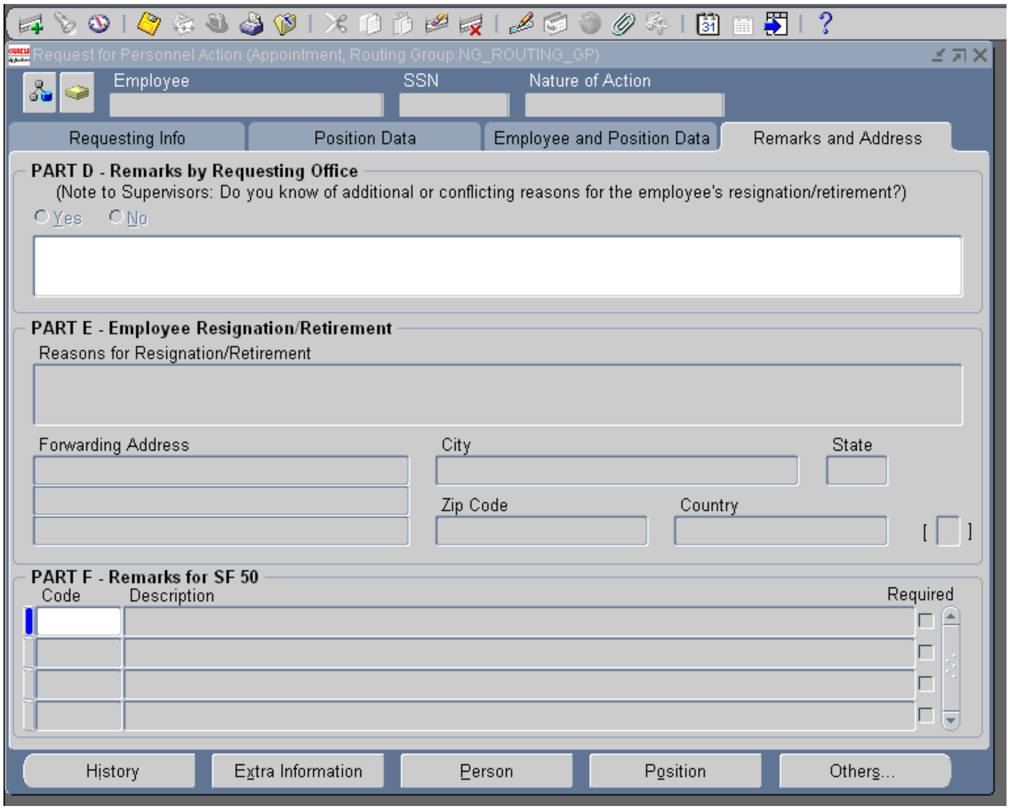
Request for Personnel Action – Page 3 (Employee and Position Data)



Page 3 Notes:

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

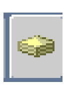
Request for Personnel Action - Page 4 (Remarks and Address)



Page 4 Notes:

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

Attaching a Note to the RPA



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

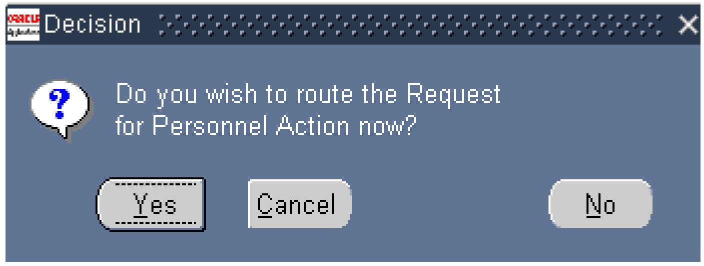
- You can use the notepad to write any notes pertinent to the action. Click in the white text area and begin typing to start a new note. If there is already information in the notes section (that is, the action was sent to you from someone else who added a note), add your notes to the bottom. (You do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

Saving your RPA

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

Routing an RPA

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

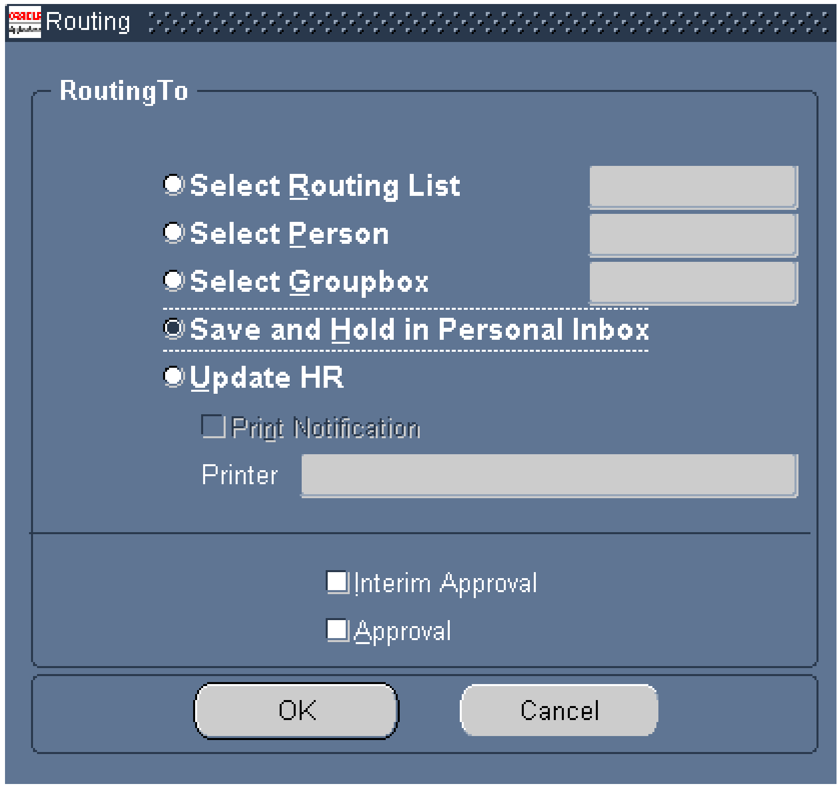


- Click **<Yes>** to display the **Routing** Window (including routing it to your inbox).
- Click **<Cancel>** to return to the RPA.
- Click **<No>** to save your action and return to the RPA (without routing it).

The Routing Window

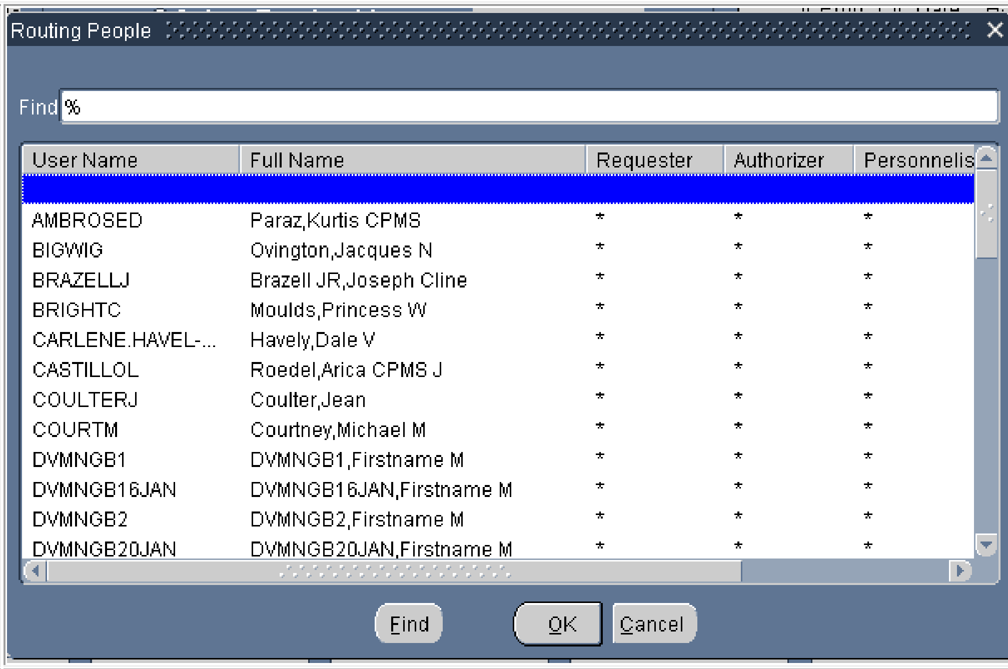
When you click <**Yes**> on the routing decision window, the **Routing** window is displayed. This window gives you several options for processing your RPA.

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



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

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

<table>
<tr><td></td><td>
</td></tr>
<tr><td>Select Groupbox</td><td>This option sends the RPA to a "groupbox" which is an inbox shared by a group of people. Groupboxes are most commonly used at the HRO, serving as general "in boxes" for actions coming into the HRO. Often, the last person to review an RPA before it goes to the HRO will send the action to a designated HRO groupbox.

Click Select Groupbox to display a listing of established groupboxes (contact your servicing HRO if you are not sure of the correct groupbox to select). Then click the groupbox and click <OK> to populate the data field on the Routing Window. Finally, click <OK> on the Routing Window to route the action to the selected groupbox.</td></tr>
<tr><td>Save and Hold in Personal Inbox</td><td>This is the default option; it saves the RPA in your own inbox.

Important: If you are the initiator of an RPA, you should <u>always</u> select this option before sending the RPA to another user. This will allow you to track and view the action later. In addition, the RPA <u>must</u> be in <u>your</u> inbox in order to access the gatekeeper checklist for that action.

You can also select this option if you have not finished working on the RPA action. You can then access the action from your inbox later and complete it (see <i>Inboxes</i>).

Click <OK> to save the RPA to your Inbox.
If you are the initiator of the RPA, the system will generate the RPA number and display it in a window; click <OK> to close this window.
The RPA that you saved will be accessible in your inbox and a blank RPA will be on your screen; close the RPA window to return to the Navigator window or to the inbox (depending on how you accessed the</td></tr>
</table>

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

Refreshing Your Inbox After Routing - IMPORTANT

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

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

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

Tracking an RPA

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

Accessing the RPA

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