# DoD Secure Appraisal Administrator Template NV System User Guide

DOD Performance Management and Appraisal Program (DPMAP)

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DoD Secure Appraisal Administrator Template NV_PAA
Responsibility

Introduction

This responsibility is secure which means the user has limited access to records within DCPDS. The responsibility can only view or perform actions for Plans/Appraisals within his secure view and does not have ‘direct’ access to an employee’s performance plan/appraisal. The user is allowed to change such things as the Rating Official (RO)/Higher Level Reviewer (HLR), Appraisal Start/End Date. Update same action to multiple employee plans/appraisals, View the Plan/Appraisal Status, Create a plan template, Delegate a trusted agent authorization for a RO or HLR and View/Print reports.

DCPDS Portal-Logging In

1. To access responsibility, you must first log in to the DCPDS Portal at https://compo.dcpds.cpms.osd.mil, agree to the DoD Notice and Consent Banner. Use your Smart Card (CAC/PIV) or non-Smart Card (non-CAC User ID) and password to log in. From there select the HR MyBiz+ Title and read the Privacy Act Statement and select Accept button. From the MyBiz+ page select DCPDS Navigator Homepage link located under ‘Other DCPDS Tools’.

Privacy Act Statement


Principal Purposes: To allow civilian (appropriated fund and non-appropriated fund) employees in the Department of Defense (DoD) to update personal information.

Routine Uses: None. The DOD ‘Blanket Routine Uses’ set forth at the beginning of OPR’s completion of systems of records notices apply to this system.

Disclosure: Voluntary. However, failure to provide or update your information may require manual HR processing or the absence of some information.

Accessibility/Section 508 | Privacy and Security Policy | System Help Desk Contacts

2. Other DCPDS Tools – select DCPDS Navigator Homepage link.

Functions available to the DoD Secure Appraisal Administrator template NV_PAA are:

- Super User
  - Change Rating Official
  - Change Higher Level Reviewer
  - Change Appraisal Period Start and End Dates
  - Change Status
  - Close Performance Plan
  - Delete Performance Plan
  - Transfer Plan to Rating Official
  - View Track Progress
- Apply Action(s) to Multiple Employees
- Snapshot Printer
  - View/Print Plan, Progress Review, etc.
- Plan Auto-Population Template
  - Add/Update
  - Validate
- Delegate Trusted Agent Authorization
  - Assign Trusted Agent
  - Terminate Trusted Agent Assignment
- View/Print Reports
**Super User**

As Super User you can make changes within the performance/appraisal such as Rating Official or Higher Level Reviewer assignment. You can change the, Appraisal Period Start Date, Appraisal Period End Date and/or Appraisal Status. The Super User can Update, Close, Delete, or Transfer performance plan/appraisal. You also have the ability to track progress of a particular plan/appraisal.

**List of Plans/Appraisals Page**

Following the selection of the Super User Functionality the User must identify criteria for Plans/Appraisal search. There are multiple data fields the user can use to search for records.

1. The Rating Official Name can be used on its own or in combination with other data fields such as Appraisal Year.
2. Select the magnifying glass icon if the name entered does not display.

3. Select Find button

4. Based on the search criteria entered, a list of the plans/appraisals matching the criteria will display on the table.

5. To view the available list of actions for a record, select the drop down arrow under the ‘Action’ column. If updates are to be made, make sure the ‘Update’ is available under the ‘Action’ column, then the Go button.
Update Appraisal Page

The Plan/Appraisal data identified in the boxes can be changed. The data fields that have an ‘*’ are required data fields and can’t be left blank.

Change Rating Official

1. To change the Rating Official, select the Magnifying Glass icon to search for a new Rating Official name. **Note:** All information under the Appraisal Details is the current information for the plan/appraisal selected.

2. On the Search and Select: Rating Official page, enter the new Rating Official Name and select Go button.

3. Select ‘radio button’ or ‘Quick Select’ link for the Rating Official.
4. Select Apply button to save the changes that were made.

**Changing Higher Level Reviewer**

1. To change the Higher Level Reviewer, select the **Magnifying Glass** icon to search for the new Higher Level Reviewer name needed for the change. **Note**: All information under the Appraisal Details is the current information for the plan/appraisal selected.

2. Enter new Higher Level Reviewer Name for change and select **Go** button.
3. Select ‘radio button’ or ‘Quick Select’ link for the Higher Level Reviewer.

4. Select Apply button to save the changes that were made.
Changing Appraisal Period Start/End Date

1. Select the Calendar icon and pick date for change. To save changes, select the **Apply** button. The **Cancel** button is available to select if you decide to not make changes.

---

Changing Appraisal Status

Not all appraisal statuses can be changed. Below is a table depicting what the status can be changed to depending on the current appraisal status.

<table>
<thead>
<tr>
<th>If Current Appraisal Status Equals</th>
<th>Then Status can be changed to</th>
</tr>
</thead>
<tbody>
<tr>
<td>Plan Pending HLR Review</td>
<td>Plan Returned for Change</td>
</tr>
<tr>
<td>Plan Returned for Change</td>
<td>Plan Pending HLR Review</td>
</tr>
<tr>
<td>Progress Review Pending HLR Approval</td>
<td>Progress Review Returned for Change</td>
</tr>
<tr>
<td>Progress Review Returned for Change</td>
<td>Progress Review Pending HLR Approval</td>
</tr>
<tr>
<td>Appraisal Pending HLR Approval</td>
<td>Appraisal Returned for Change</td>
</tr>
<tr>
<td>Appraisal Returned for Change</td>
<td>Appraisal Pending HLR Approval</td>
</tr>
<tr>
<td>Closed</td>
<td>Plan Approved</td>
</tr>
<tr>
<td>Deleted</td>
<td>Plan in Progress</td>
</tr>
<tr>
<td>Appraisal Approved by HLR</td>
<td>Appraisal Pending HLR Approval</td>
</tr>
</tbody>
</table>
Close Performance Plan

Closing a performance plan can only be accomplished on an ‘Approved’ plan. For example, if an employee departs their position before he/she is eligible for a rating and the plan is Approved, the plan can be closed.

1. There are two options for closing an Approved performance plan.

Option 1: Select the drop down arrow and select Close from list. Save changes by selecting the Apply button. **Note:** A new plan can then be created for the new position under the new Rating Official.

Option 2: Return to the ‘Appraisal Search’ and select arrow down under Action column and select Close then select the Go button.

2. Always read warnings carefully. Select Yes button to continue with closing the plan. If you do not want to close the plan at this point, select the No button. Updates cannot be made to a closed plan.
Delete Performance Plan

The delete action is only available if a plan is not approved. For example, if a Rating Official started a plan on one of his/her employee and the employee leaves position for another, that plan can be deleted. Another example would be if there are duplicate plans on an employee and plans have different appraisal start, end or effective dates, then the plan with incorrect dates can be deleted.

1. To delete a plan, select the Delete choice the drop down menu under the ‘Action’ column and Delete the incorrect Plan.

2. Select the Go button. Note: If the ‘Delete’ action is available in list, then the Plan is in progress and has not been approved.

Transfer to Rating Official

1. The ‘Transfer to Rating Official’ action is available. If the plan requires transfer from the Employee or HLR to the RO because the employee or HLR has left the job, and the employee currently owns the plan, select the Transfer to Rating Official from the drop down menu under the Action column.

2. Select the Go button.
3. A confirmation message is received that the plan has been transferred to Rating Official.

Track Progress

Track progress provides a view of the plan/appraisal status throughout the performance cycle.

1. Select the Track Progress from under the Action column.

2. Select the Go button.

3. This screen tracks the progress of the Performance Plan/Progress Review/Appraisal. To print track progress, select the Print button.
Apply Action(s) to Multiple Employees

This functionality allows action to be taken on one or multiple plan/appraisals.

1. Select **Apply Action(s) to Multiple Employees** link under the Navigator.

2. There are three actions available from the list. Select **Change Higher Level Reviewer** option and then select the **Start** button.

3. Enter the Rating Official’s name and select the **magnifying glass icon** or the **Find** button.

4. When a list of employees comes up, select the box(s) for the record(s) requiring change and then select the **Next** button. **Note:** Use the **Select All** link if all records require changes.
5. Enter the new HLR’s name in the box next to the words ‘Higher Level Reviewer’. You may enter a note for the employee about the change of HLR by typing the note in the text box below the ‘Notification Comments’ section. Select the Save button to continue. The Need Help? Link is also available for steps in accomplishing the change.

6. Status Log

The Status log confirms the success of the change. Select the Return to Available Actions button to return to the list of choices you can perform on multiple employees.
Snapshot Printer

The Snapshot Printer function allows you to view and/or print the contents of an employee’s Approved Performance Plan, Progress Review, Narrative Statement and Annual Appraisal. In order to bring up an employee’s plan/appraisal use the search feature by typing in the name of the employee.

Print Snapshot Appraisal Information Page

1. Enter employee name and select the Magnifying Glass icon.
2. On the Search and Select: Employee Name page, the employee name entered in previous step will display. Select Go button to find employee. When the record comes up, select the **radio button** to select record and select the **Select** button.

![Search and Select: Employee Name](image)

3. The next screen shows you all ‘snapshots’ of the employee’s **approved** performance plans, progress reviews, and appraisals for every appraisal year unless additional criteria is used in the search. Note: Enter the Appraisal Year to see snapshots for only appraisal year.

![MyPerformance](image)
4. The screen below is an example for the employee shown in the above screen, but with the additional search parameter of Appraisal Year of ‘2017’. Now it only shows the instances for the original approved Performance Plan, and an instance for the performance plan once it was modified and reapproved.

5. To view or print any one of the snapshots listed, select the printer icon next to the instance you want to see. For example if you wanted to see the original approved performance plan and compare it to the modified and reapproved performance plan to see what was modified, you could select the first printer icon, and print that version, then you could come back to this screen and select the printer icon next to the second instance and print that version.

6. Once you select the printer icon, the message the bottom of the screen will ask you if you want to open or save the instance. You can select the Open button to open the instance on your screen, or you can select the arrow next to the Save button which will show a drop down menu where you can choose to Save, Save As, or Save and Open the instance. You can also cancel this action by selecting the Cancel button.
7. Selected ‘Open’ as an option above, the Performance Plan converts to a Adobe pdf file and displays the form below.
Plan Auto-Population Template

Some information that is similar across DoD is pre-populated within the performance plan when created (i.e., appraisal period start/end date, DoD core values).

The Auto Population Template functionality takes it a step further. It allows the DoD Secure Appraisal Administrator template NV_PAA responsibility the ability to create a plan template that might include Organizational Mission Goals and/or Performance Elements and Standards. The template will be applied to all plans that fall within the DoD Secure Appraisal Administrator secure responsibility level, such as the UIC or the Organization level. Additional criteria, such as the Supervisory Code can be used to identify a smaller group of individuals. Templates created must be validated for the auto population to take place when the Rating Official or Employee creates the plan.

If a validated template is modified by the DoD Secure Appraisal Administrator, the modifications made will not affect any plans created prior to the modified date. Once the modified template is validated, the modified information will auto population when a new plan is created.

This section provides step by step instructions on how to search, add, modify and validate a template.

1. Select Plan Auto-Population Template link

2. On the Secured User Templates page, a template can be added or searched.

3. To search for a template, enter data in any of the open data fields such as the POA, Agency Code, Supervisory Code, etc., and then select Find button.
If Supervisory Code is used for a search and no template is returned, that means templates for the Supervisory Code entered are not available.

**Adding a Template**

Note: Security level is based on the DoD Secure Performance Appraisal Administrator as seen below (NI%)

1. Select Add Template button

2. On the Template Criteria page, there are required data fields. User has the option to use additional data fields. The POA data field auto-populates based on the secure user responsibility.

3. Enter required data fields and select Save button. The required data fields are identified with an asterisk.
4. On the Template Details Page, there are 3 sections, Details, Mission Goals and Elements.

5. Review the Template Details entered for accuracy. If information is ‘not’ correct, select the Cancel button, and make necessary corrections. If information is correct, no action required.

6. Enter Mission Goals. You can also copy and paste information from a word document. To check spelling, select the Spell Check button. A ‘Counter’ is also available.

   **Note:** The maximum amount of characters for this text box is 1000. If you exceed the allowable amount of characters, a ‘truncation’ error message will be received.
7. Select Save button once the Mission Goals have been established.

8. If you want to add a Performance Element, select the Add Performance Element button.

9. On the Performance Element page, both the Performance Element Title and Performance Elements and Standard(s) are required data fields, indicated by the asterisk.
10. Enter the Performance Element Title and Performance Element and Standard(s).

11. Select Save button.

12. Select Preview button. This allows you to review all the information entered at this point for the Performance Element.

13. On the Template Preview Page, there are three action buttons. The ‘Back’ button returns user to previous page, ‘Save’ button saves the template and ‘Print’ will print information on the page.
14. If satisfied with goals and elements, select the Save button, this will return the user back to the Secured User Templates page. The template created now displays on the table. Updates to the template can be made or the template can be deleted.

Templates can now be used to auto-populate data when creating a performance plan by the Rating Official or employee.
Delegate Trusted Agent Authorization

The Delegate Trusted Agent Authorization allows individuals with a DoD Secure appraisal Admin Temp user to delegate trusted agent(s) on behalf of a Rating Official (RO) or Higher Level Reviewer (HLR). Persons using this authorization must first obtain written delegation of authority from the Rating Official or Higher Level Reviewer. Based the written delegation of authority, individuals can be assigned to act as the trusted agent on behalf of the RO or HLR for employees identified by the RO and HLR within MyPerformance for the purpose of documenting their decisions to performance management matters.

1. Select Delegate Trusted Agent Authorization link

Search (Rating Official or Higher Level Reviewer Search Page)

2. Enter the Rating Official or Higher Level Reviewer that authorized the trusted agent assignment.

3. Select the Find button or the ‘magnifying glass’ icon.

4. Under the results table, select the Go button under the Action column for the Rating Official or Higher Level Reviewer.
5. Identify a Trusted Agent Role – use drop down arrow to select role, the role will be Rating Official or Higher Lever Reviewer. Select role and then select Go button.

6. Select Rating Official from list.
   
   Note: Notice the System Type. There could be different views if the hierarchy was changed within the performance tool. If Rating Official or Higher Level Reviewers were changed in the performance tool in addition to Self-Service Hierarchy the user will see DoD Performance Management Appraisal Program. If the hierarchy was changed within the performance tool, the list of values for employee names to select from may be different.

7. Select Show Manage Assignment of Trusted Agent for Selected Employee(s) link. On this page, trusted agent assignments and terminations of existing assignments can be made.
Assign Trusted Agent

1. Enter Trusted Agent Name – this is a required field. This is the name to the individual that is being assigned as Trusted Agent or a current Trusted Agent assignment being modified.
2. Enter Start Date - this date is a required field. The date can be a future date, but not earlier than the current date.
3. Enter End Date. The End Date is optional - An End Date can be entered to limit the assignment period. If entered, the end date cannot be less than the current date or the Start Date, whichever is greater.
4. Select employee(s) under the Select column the Results table for whom you want to assign the Trusted Agent authorization.
5. Select the Apply button.

6. Confirmation message received. Read message and select Acknowledge button.
7. The Results table will display employee records with trusted agent assignments and start date.

```
<table>
<thead>
<tr>
<th>Select All</th>
<th>Select</th>
<th>Employee Name</th>
<th>Employee Number</th>
<th>Organization</th>
<th>Trusted Agent Name</th>
<th>Start Date</th>
<th>End Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Employee One</td>
<td>222209</td>
<td>CNL SW 50000 NY/0209240 1</td>
<td>Trusted Agent Name</td>
<td>20-Jun-2017</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Employee Two</td>
<td>245324</td>
<td>MSCI MANS EAST NY/0209381 01</td>
<td>Trusted Agent Name</td>
<td>20-Jun-2017</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Employee Three</td>
<td>251654</td>
<td>MSCI MANS WEST NY/0209238 01</td>
<td>Trusted Agent Name</td>
<td>20-Jun-2017</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

10. To return to the search page, select the ‘Return to Search Page’ button.

**Terminate Trusted Agent**

The Results table will display employees based the criteria previously entered under Rating Official Name and Role. The trusted agent for each employee can be identified individually or assigned in mass, select the link above the table.

1. Enter End Date - The end date entered will take affect the end of day; therefore, you will not be able to assign a new trusted agent until the day after the identified end date. Once an end date is entered, a new row will be shown for that employee to allow entry of another Trusted Agent assignment.
2. Select employee(s) under the Select column the Results table. **Note:** End Date must be blank.
3. Select the ‘Apply’ button.

```
<table>
<thead>
<tr>
<th>Select All</th>
<th>Select</th>
<th>Employee Name</th>
<th>Employee Number</th>
<th>Organization</th>
<th>Trusted Agent Name</th>
<th>Start Date</th>
<th>End Date</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>Employee One</td>
<td>215716</td>
<td>General Counsel NY/1234567 01</td>
<td>Trusted Agent Name</td>
<td>20-Jun-2017</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Employee Two</td>
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<td>MSCI MANS EAST NY/0209381 01</td>
<td>Trusted Agent Name</td>
<td>20-Jun-2017</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
```

4. Select ‘›’ arrow to see detailed information about the employee and trusted agent history. Select the ‘‹’ arrow to collapse.
5. To return to the search page, select the ‘Return to Search Page’ button.
View/Print Performance Management Reports

There are reports available for the performance plan status, progress review status, annual appraisal, etc.

1. Select **View/Print Performance Management Reports** link located under ‘View/Print Reports’.

2. On the ‘Schedule Request: Define Page’, there are four steps to complete.
   - Select **magnifying glass** icon next to the ‘Program Name’ field
   - On the Search and Select: Program Name Page, select the **Go** button
   - All available reports will display under the Results table. Select **radio button** for the report ordered.
   - Select the **Select** button
3. Once you select a report the screen will display the report name in the box next to the words ‘Program Name’. To assist in distinguishing report from others, enter a request name in the ‘Request Name’ text box. Select **Continue** button.

4. Identify Parameters

The bottom of the screen you will see a ‘Parameters’ section that shows many items you can use to narrow your report down to reflect only those records you are looking for. There is one required parameter for all reports which is the ‘Appraisal Year’. You will not be able to run a report that lists plans, progress reviews or appraisals across appraisal years at this time, you can only choose one year at a time for a report.

Even though there is only one required field, in the blue writing under the word ‘Parameters’, it will tell you that you need to use at least one additional parameter when submitting the report. It then lists all the additional parameters that will meet this requirement. If you use only two parameters and don’t get any results, try using three parameters.

5. Once you fill in all the parameters you want, select the **Continue** button or the **Cancel** button to cancel out of running the report.

Listed below this screen shot is a detailed explanation of the parameters.
- **Appraisal Effective Year (YYYY):** This is the four digit year that represents the Appraisal year. **This is a required parameter for every report.**

- **Rating Official:** If you want a report that lists all plans for the Performance Plan Status Report, or all progress review for the Progress Review Status Report, or all appraisals for the Performance Appraisal Status Report, that are under a particular rating official, enter their name in this parameter using last name, first, middle initial.

- **Higher Level Reviewer:** If you want a report that lists all plans for the Performance Plan Status Report, or all progress review for the Progress Review Status Report, or all appraisals for the Performance Appraisal Status Report, that are under a particular higher level reviewer, enter their name in this parameter using last name, first, middle initial.

- **Current Status Equals:** If you want a report that shows all appraisals in a particular status such as ‘Annual Appraisal in Progress’, or ‘Annual Review Approved by RO’, then you could choose this parameter and use only one status for the Performance Appraisal Status Report. The statuses may be different depending on which report you have chosen to run.

- **Current Status DOES NOT EQUAL:** If you want a report that shows all appraisals EXCEPT those that are in a particular status such as ‘Annual Appraisal in Progress’, or ‘Annual Review Approved by RO’, then you could choose this parameter for the Performance Appraisal Status Report, and you would get all appraisals EXCEPT the status you entered. The statuses may be different depending on which report you have chosen to run.

- **Performance Plan Status EQUALS:** If you want a report showing only those performance plans that are in one particular status such as ‘PENDING’ or ‘APPROVED’, you would use this parameter.

- **Appraisal Assessment and Rating Status:** If you want a report showing only those appraisals that are in one particular assessment and rating status such as ‘Completed’ or ‘In Progress’, you would use this parameter.

- **Employee Name:** If you want a report on only one employee, enter the employee’s last, first, and middle initial into the box.

- **Employee Number:** This is a unique number assigned to every employee in the Defense Civilian Personnel Data System (DCPDS) that is generally only used by the personnel community. It is NOT the DoD ID, EDIPI, or SSN.
- **SOID**: This is a two digit code that represents the servicing Human Resources Office for personnel records. If you wanted a report for employees that are in a particular HRO, you would use this 2 digit parameter.

- **Agency Group**: This is a two digit code that represents the agency such as ‘NV’ for Navy or ‘DD’ for Department of Defense. If you wanted to pull only those employees in a particular Agency you would use this code.

- **Organization Name**: This is the official clear text wording that is associated with a particular Unit Id Code. It is recommended that you NOT use this parameter unless you know exactly what this wording is. Instead use the ‘UIC’ parameter below if you want to run a report for a particular UIC.

- **UIC**: This is the six digits Unit Identification Code. If you want to pull a report for only one UIC, then you would use this parameter and enter the UIC.

- **PAS Code**: This is a four digit code that is a combination of the agency code and certain digits of the UIC. Do not use this parameter.

- **Organization Structure ID**: This is a code that can be from one to seven digits that represents the levels of the organization below the UIC level. If you want to pull a report for just a particular division, branch, section, etc. below the UIC level you would use this parameter with the code that represents that particular level of the organization.

**Schedule Request Review Page**

6. After you have chosen which parameters you want for this report and selected the Continue button, the next screen shows what you chose for search parameters.

7. If they are correct, select the **Submit** button. If they are not correct, you can go back to the parameters screen by selecting the Back button, or you can cancel the entire process of running the report by selecting the Cancel button:

![Department of Defense Schedule Request Review](image)

**Information Message Received** – report has been requested and has been scheduled to run.
8. Select the **OK** button

The next screen lists the name of the report you ran under the ‘Process Name’ column. When you first see this screen the report might be in a ‘Pending’ or ‘Running’ phase under the ‘Phase’ column. If that is the case, select the **Refresh** button until you see the words change to Completed under the ‘Phase’ column.

9. Report has completed - select **Output** icon under the ‘Phase’ column to open the report in PDF format.

This is an example of what the report looks like once it’s open. You can Save or Print the report using the Adobe Acrobat icons.
View Previous Reports

The view previous reports functionality allows you to view or print reports that were previously submitted.

1. Select View Previous Reports

2. Select Output icon to open report.

A list of all the reports previously ordered will display the report name you entered when you initiated the report and the report title in parenthesis.