SCOUT[©] SUSPENSE TRACKER Version 10.0

USER'S MANUAL For Civilian Personnel Management Service (CPMS)



HPC-COM LLC Help Desk 800-795-1902

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WELCOME

Welcome to SCOUT[©], an easy to use, yet extremely powerful web-based suspense tracking tool that will provide solutions to all of your organization's suspense tracking needs.

FEATURES LIST

With SCOUT[©] you can:

- Create a suspense/task with or without subtasks
- Attach/upload documents or any files to any suspense
- Automatically notify Assignees via email in parallel or chain order
- Track the suspense progress, comments, acceptance, declines, or completions
- Create alerts for short suspense dates or past due suspenses
- Create Executive Summary or Coordination Sheets
- Track status, review, approve, assign, re-assign, info-only
- Get customizable reports, stoplight charts, or metrics.

1. Accessing SCOUT[©]

1.1 User Authentication

New Users normally enter SCOUT[©] for the first time either through a notification email or by accessing the SCOUT[©] application through a furnished URL.

CAC Card Authentication

Users already registered in SCOUT[©] will be prompted to choose a certificate and to enter their CAC PIN number.

SCOUT[©] will compare their CAC Card data against their SCOUT[©] User Profile and then enter them into the website, displaying all currently due tasks.

CAC Card not recognized by SCOUT[©]. If the CAC card data is not recognized by SCOUT[©], Users are asked to enter their email address to ensure against duplicate registration. If SCOUT[®] recognizes their email address, it updates their CAC Card information in SCOUT[®] and brings them into the SCOUT[®] website (See Figure 1).





1.2 Registration Form

The User is then presented with a registration form to complete. The User completes the form, clicks the SAVE button, and is brought into the SCOUT[©] website (See Figure 2).



lease complete the	form below. Mandatory fields marked *	ACTIONS YOU CAN TAKE:
ly Profile		🛃 Save 🛛 🗟 Cancel
First Name*	Alan	
Last Name*	Godsave	View Audit Log
Rank/Title	CHOOSE ONE	
Archive Reader	No	
Archive Editor	No	
Template Reader	Yes	
Template Manager	No	
Master Stand In	No	
E-mail*	Alan.Godsave@suspensetracker.com	
Unit	IRD 💌	
Office Symbol		
(i.e. CC, MXOP, SC, CSS,	etc.)	
Phone	(770) 859-0511	
Base		
State		

Figure 2 – User Registration Form

2. The Home Page

After a User accesses SCOUT[©] using their CAC Card, the default Home Page appears. The default is the "General Tasks" App. On every App's Home Page, the "Assigned To" tab is always the default open tab (See Figure 3).

cpms			Entered	as: HPCCOM Administrator -	CPMS 27-JAN-2011	Search Log out
Civili				New Task	👪 Stand in/Act as	Save as Home
Apps	Assigned To (1) Notified (0)	Created By (5) Completed (0) Closed (0)				
General Tasks (6)	Viewing incomplete General Tasks	assigned to HPCCOM Administrator		0		
Reports Dashboard	Task #	Subject Days Late Due Day		Accept/Reject		
Search	1110-0010461 🗿 觉 Test	ng by the Scout contractor 🛛 🔵 30-NOV-2	010 Scout contract Inquiry	Accepted 29-NOV-2010 10:57		
	•			۱. ۲		
Settings	φ	ed do Page 1 of 1 bb b4	10 💌	View 1 - 1 of 1		
Settings My Profile						
Control Center	 Task Preview - Click the E 	to add or remove a column from the grid.				
	Subject:					
Library	Task #:	Tasked By:	E-mailed Date:			
Templates	Due Date:	Assigned By:	Rejected Date:			
Archives	Type:	Accepted Date:	Rejected Date:			
ANNOUNCEMENTS						
Support						
Gatekeepers						
Help Center User Manual						
Admin Manual						
SCOUT® v 10.0 Suspense Tracking by HPC- COM LLC						

Figure 3 – The Home Page

The default App Home Page can be changed by the User to a different workflow at any time. For example, if the User does most of their work in another App, the User can click that App link in the left-hand navigation menu, then click the SAVE AS HOME (upper right-hand corner of screen), and that App will become that User's default Home Page.

2.1 The Top Banner

The Home Page consists of Information and Action Buttons across the top banner. It contains from left to right:



2.1.1 New Task

By clicking the New Task button, you can create a new Task (See Figure 4).

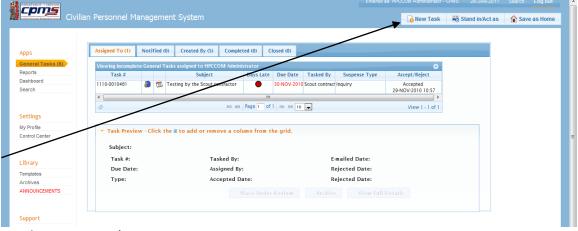


Figure 4 – New Task Button

2.1.2 Stand In/Act as

By clicking the Stand in/Act as button, a pop-up window appears with a drop-down list of personnel or org accounts you have been given permission to stand in for (See Figure 5).

Linter Research Residence Local	ilian Personnel Ma	anageme	nt System				o New Task	🖶 Stand in/Act as	Save as Hon
Apps	Assigned To (1)	Notified (0)	Created By (5) Comple	ted (0) CI	osed (0)				
General Tasks (6)	Viewing incomplet	te General Ta:	sks assigned to HPCCOM Admin	istrator			6		
Reports	Task #		Subject	Days Late	Due Date Tas	ed By Suspense Type	Accept/Reject		
Dashboard Search	1110-0010461	🖏 觉 Т	esting by the Scout contractor	•	30-NOV-2010 Scout	contraci Inquiry	Accepted 29-NOV-2010 10:57		
	<	~		m			P.		

Figure 5 – Stand-in/Act as Window

2.1.3 Search

Clicking the Search button opens up another pop-up window, allowing you to search by Subject, Description, Task Number, Task Type, or Status. (See Figure 6 and Figure 7).

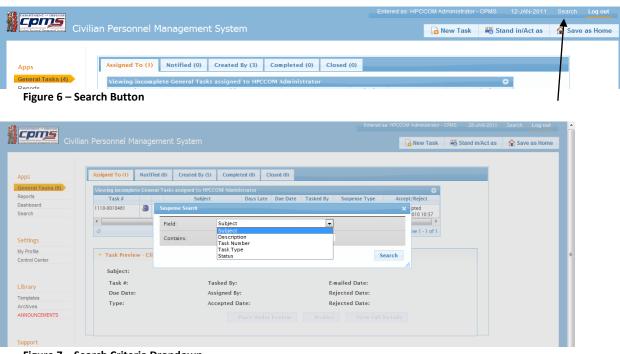


Figure 7 – Search Criteria Dropdown

2.1.4 Save as Home

One of the great features of SCOUT[©] is the ability to set any of the menu items on the Apps Menu as your Home Page. This means that whenever you log into SCOUT[©], that page will always appear (See Figure 8).

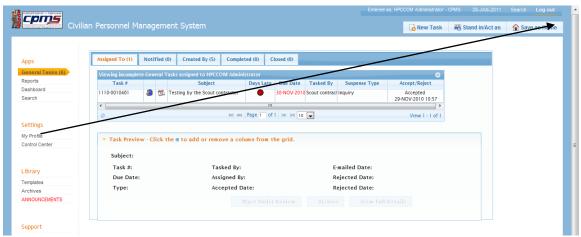
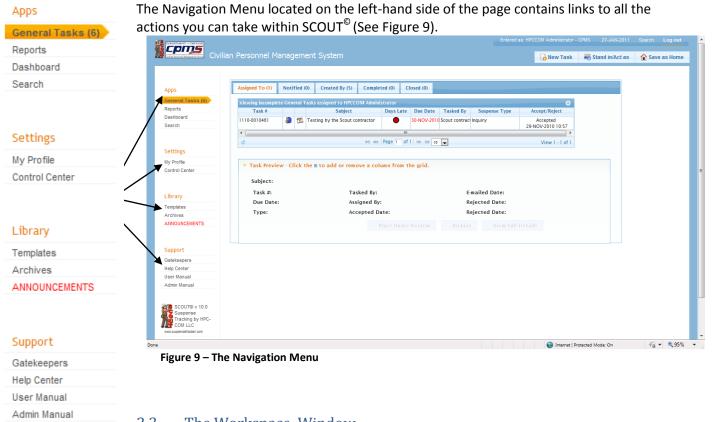


Figure 8 – Save as Home Page Window



2.2 The Left-hand Navigation Menu



2.3 The Workspace Window

When you click on an item from the Navigation Menu, whatever action you choose will appear on the right side of the page in the area called the Workspace. For example, if you click on the General Tasks link, all of your General Tasks will appear in tables in the Workspace window (See Figure 10).

pms						
Civ	ilian Personnel Managemei	nt System		o New Task	👪 Stand in/Act as	Save as Home
	-					
ops	Assigned To (1) Notified (0)	Created By (5) Completed (0) Clo	osed (0)			
neral Tasks (6)	Viewing incomplete General Tax	ks assigned to HPCCOM Administrator		0		
ports	Task #		Due Date Tasked By Suspense Type	Accept/Reject		
shboard	1110-0010461 🏼 🌡 🖽 T	esting by the Scout contractor	30-NOV-2010 Scout contract Inquiry	Accepted		
arch	1			29-NOV-2010 10:57		
	ø	No wo Page 1 of 1	DP DM 10	View 1 - 1 of 1		
ttings						
Profile						
ntrol Center	 Task Preview - Click the 	to add or remove a column from the	e grid.			
	Subject:					
	Task #:	Tasked By:	E-mailed Date:			
irary	Due Date:	Assigned By:	Rejected Date:			
nplates	Type:	Accepted Date:	Rejected Date:			
INOUNCEMENTS						
ipport						

Figure 10 – The Work Space Window

2.4 General Tasks Tool Bar

When you click on the General Tasks link in the Apps Menu, there are five tabs at the top of the Workspace Window (See Figure 11). The first tab "Assigned to" includes all of the general tasks currently assigned to you. The second tab "Notified" lists all tasks that require no action by you but were sent for notification purposes only. The third tab "Created by" lists all the tasks you have created that are currently open and active. The fourth tab "Completed" lists all of your assigned tasks you have completed (but not yet closed by Task Originator). When the Task Originator closes the task, it is removed from Assignees data grid table. The fifth tab "Closed" lists all tasks created by you that you have closed.

Civilian Pers	onnel Management System	COM Administrator -	CPMS 12-JAN-2011	Search Log out
	, , , , , , , , , , , , , , , , , , ,		Ly stand invite as	I care actionic
Apps Assent	ed To (1) Notified (0) Created By (3) Completed (0) Closed (0)			
General Tasks (4) Viewin	ng incomplete General Tasks assigned to HPCCOM Administrator		0	
Figure 11 – General 1	Fasks Toolbar			

2.5 The General Tasks Workspace

There are nine columns of data displayed in the default view of the General Tasks ASSIGNED TO table (See Figure 12).

li cpms	Entered as: HPCCOM Administrator - CPMS 28-JAN-2011 Search Log out	
Civili	lian Personnel Management System 🐻 New Task 🕷 Stand in/Act as 🏠 Save as Home	
Apps	Assigned To (1) Notified (0) Created By (5) Completed (0) Closed (0)	
General Tasks (6)	Viewing incomplete Community	
Reports	Task ≠ Subject Days Late Due Date Tasked By Suspense Type Accept/Reject	
Dashboard Search	1110-0010461 👹 🔟 Testing by the scour contractor 🕒 somovech scour contractinguiry Accepted 29-NOV-2010 10:57	
	φ m μ φ nd 4d0 Page 1 of 1 to to for 10 to 10	
Settings		
My Profile Control Center	▼ Task Preview - Click the 🛚 to add or remove a column from the grid.	
	Subject:	
Library	Task #: Tasked By: E-mailed Date:	
Templates	Due Date: Assigned By: Rejected Date:	
Archives	Type: Accepted Date: Rejected Date:	
ANNOUNCEMENTS		
Support		

Figure 12 – General Tasks Workspace Table

2.5.1 Columns in the Data Grid Table

The columns are explained here (See Figure 13):

- Task #: The first column displays the task number. The column can be sorted by clicking the column heading.
- Task Status Icon: The 2nd column displays "task status" icons. Hovering the cursor over the icon displays a text box with the current status of that task.
- Outlook Calendar Icon: The 3rd column shows an Outlook Calendar icon. Clicking the icon allows the User to import the task into Microsoft Outlook as a calendar activity.
- Subject: The 4th column in General Tasks displays the subject of the task. This will also be the subject of the automated notification email that is sent to task Assignees.



- Days Late: The 5th column has green, yellow, or red balls indicating the number of days the task is due or is past due. Hovering the cursor over the ball displays a text box with current due date status.
- Due Date: The 6th column is the Task Due Date set by the Task Originator.
- Tasked By: The 7th column displays the department or division who originated the task.
- Suspense Type: The 8th column displays the type of suspense it is (Administrative Issue, Inquiry, OPM Issue, General Request, Information, etc.).
- Accept/Reject: The 9th column shows whether you, the Assignee, have Accepted or Rejected the task and the date and time of the action.

Task # Subject Days Late Due Date Tasked By Suspense Type Accept/Reject 1210-0010479 Image: Comparison of the stress o	Subject Days Late Due Date Tasked By Suspense Type Accent/Reject
21-JAN-2011 04:02	Buys tate Bue Bate Tasked by Suspense Type Accept, Reject
1210-0010472 C test 5. Tester RAH O 25-FEB-2011 AED Information	
	Content of the second s
φ This task has not been accepted by you. Click this icon or the subject to view the status. Image: Non-State View 1 - 2 of	This task has not been accepted by you. Circk this foot

2.5.2 Task Preview Pane

Clicking on a Task record in the INBOX will highlight that line in yellow and display details of the task in the Task Preview Pane. Clicking the small blue box in front of a data item in the task preview pane will add or delete that data item from the current view of the Assigned To tab data grid (See Figure 14).

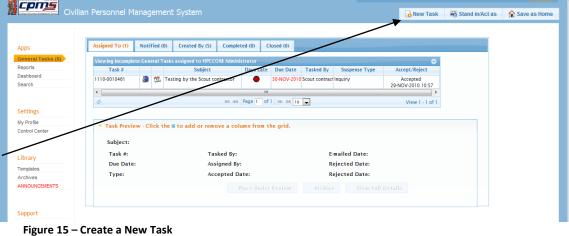


Figure 14 – Task Preview Pane

3. Create a New Task

K cpms New Task Assigned To (1) Notified (0) Created By (5) Completed (0) Closed (0) Apps Gener

By clicking this button, you can create a new Task (See Figure 15).



3.1 Suspense Data Form

Clicking the New Task Action button displays the New Task data input form. To begin, click your cursor in the first input box in the upper left corner labeled Due Date. A calendar will appear, allowing the User to click on a date. Note that the current date is highlighted in yellow. Dates prior to the current date cannot be chosen. The left and right arrows at the top of the calendar allow the User to browse to future calendars to choose the Final Due Date. The Due Date is the date the task must be completed by all Assignees (See Figure 16).

	New Suspense	
Apps	*Due Date: *Received pube: *Created Date:	
General Tasks (6)	28-JAN-2011 10:59	
Reports	January 2011	
Dashboard		
Search	Su Mo Tu We Th Fr Sa	
	A SUSPENSE TYPE	
	2 3 4 5 6 7 8 9 10 11 12 13 14 15 NORIGINATOR	
Settings		
My Profile	23 24 25 26 27 28 29	
Control Center	30 31 dministrator (HPCCOM.Administrator@st 💌	
	*To: 🚯 Add Assignees 🔀 Add from MailSet 🔀 Edit Mailsets	
Library		
Templates		
Archives		
ANNOUNCEMENTS		
Support		
Gatekeepers	Clicking the (३६) next to an assignee's name will remove that assignee. When assigning in a chain, clicking (▲) or (▼) the user up or down in the list.	will move
Help Center		
User Manual	*Subject:	
Admin Manual	v	
	Subject input form limited to 255 characters. 255 remaining.	
	Attachments:	
SCOUT® v 10.0	Actacimients: Add	
Suspense Tracking by HPC-	*Description:	

Figure 16 – Calendar Date Picker

3.1.1 Recurrence Icon

Clicking The Recurrence Icon opens up a pop-up window, which allows you to make this task recur (daily, weekly, monthly, or yearly). Making a task a Recurring task is similar to creating a reminder for that recurring task. SCOUT[©] will send a reminder email with a clickable link. Clicking the link will bring the User to this New Task input page and the input fields will be filled out with the original task's data. The data can be changed as necessary, and the User proceeds to assign the task and send out notification emails. The User can also choose to ignore the reminder if the task does not need to recur (See Figure 17).

*Due Date:	*Rece	*Created Date: 22-JAN-2011 18:07
Record Type:	Suspense	
*Suspense Type:	CHOOSE	Setup a Recurring Task
•Originator:	CHOOSE	Task Recurrence
Workflow: 🕜	Parallel	Never
From:	HPCCOM	Daily
*To:	👪 Add /	 Weekly Monthly Yearly
		Start of recurrence? 22:JAN-2011
Clicking the ()) ne the user up or down		Duration of Recurrence?
*Subject:	Subject input	End after occurrences End by
		Email days before next occurance

Figure 17 – Recurrence Icon

3.1.2 Record Type

Clicking the Record Type dropdown arrow shows all available record types (See Figure 18).

cpms c	ivilian Personnel Mar	nagement System	
Apps	New Suspense	*Received Date:	
General Tasks (6)	25-FEB-2011 17:00	28-JAN-2011 10:59	
Reports	25-PEB-201117.00	26-3AN-2011 10.59	
Dashboard	Preord Type:	Suspense	
Search		Suspense	
	*Suspense Type.	Correspondence	
	Originator:	CHOOSE AN ORIGINATOR	
Settings			
My Profile	Workflow: 🕐	Parallel	
Control Center	From:	HPCCOM Administrator (HPCCOM.Administrator@st	
	*To:	🔏 Add Assignees 🛛 😹 Add from MailSet 🛛 🏹 Edit Mailsets	
Library			
Templates			

3.1.3 Suspense Type

Click the arrow to the right of the words CHOOSE A SUSPENSE TYPE to activate the dropdown menu. Only one Task Type can be chosen. Choosing a task type is required. SCOUT[©] will pop up a

reminder if you fail to make a choice and will not process the task until a choice is made. Remember, TASK TYPES are created globally (for all Users) by Administrators. Users can also create Task Types only visible to that User in the Control Center (See Figure 19).

	New Suspense				
Apps	Due Date:	*Received Date:	*Created Date:		
General Tasks (6)	25-FEB-2011 17:00		28-JAN-2011 10:	59	Recurrence
Reports					
Dashboard	Record Type:	Suspense		•	
Search	*Suspense Type:	O 100SE A SUSPENSE TYPE		-	
Settings	*Originator:	CHOOSE A SUSPENSE TYPE Administrative Issue Inquiry		Â	
My Profile	Workflow: 🥑	OPM Issue General Request			
Control Center	From:	Comments For the File/Record			
Library	•To:	Policy Legislation		Edit M	ailsets
		GAO Report Regulatory Review			
Templates		Coordination			
Archives		NSPS Issue		=	
ANNOUNCEMENTS		FOIA Legislative Proposal IG Agreement			
Support	Clicking the () next to	Legal Congressional Response		g in a c	hain, clicking (▲) or (▼) wiL mov
Gatekeepers	the user up or down in t	Congressional Response		Binde	
lelp Center		Data Pull			
Iser Manual	*Subject:	Audit			A
kdmin Manual	1	Complaint Clearance CPM			Ŧ
SCOUT® v 10.0 Suspense	Attachments:	Invitation Pay Issues SD106 Package			
Tracking by HPC- COM LLC	*Description:	CPP Item of Interest OMB Issue		_	*

Figure 19 – Suspense Type

3.1.4 Choose an Originator

Click the arrow to the right of the words CHOOSE AN ORIGINATOR to activate the dropdown menu. Only one Originator can be chosen. Choosing an Originator is required. SCOUT[©] will pop up a reminder if you fail to make a choice and will not process the task until a choice is made. Remember, Originators are created globally (for all Users) by Administrators. Users can also create ORIGINATORS only visible to that User in the Control Center (See Figure 20).



Apps	New Suspense	*Received Date:	*Created Date:
General Tasks (6)	25-FEB-2011 17:00	Received Date:	28-JAN-2011 10:59
Reports	25-FEB-2011 17:00		28-JAN-2011 10:59
Dashboard	Record Type:	Suspense	•
Search			
	*Suspense Type:	CHOOSE A SUSPENSE TYPE	•
	*Originator:	CHOOSE AN ORIGINATOR	
Settings 📃 🛸		CHOOSE AN ORIGINATOR	
My Profile	Workflow:	0000	
Control Center	From:	BMD FASLABOR	
	From:	WAGE	
	*To:	CARE	Edit Mailsets
Library		DIR	
Templates		FAS	
Archives		JLDD	
ANNOUNCEMENTS		HRBITS CPP	E
		NAF	
		IRD	
Connector		PSSC	
Support	Clicking the (💢) next		g in a chain, clicking (🔺) or (🔻) will move
Gatekeepers	the user up or down in	^{ti} RAD	
Help Center	*Subject:	NSPS	
User Manual	-Subject.	AED	
Admin Manual		RSO Scout contractor	Ť
		AED	
SCOUT© v 10.0	Attachments:	BMD	
Suspense Suspense		CARE CPMS	
Tracking by HPC-	*Description:	CPMS	
COM LLC www.suspensetracker.com		DIR	
	(Instructions)	FAS	

Figure 20 – Choose an Originator

3.1.5 Workflow

You can assign the task in parallel or chained sequence. Sending in Parallel will send all Assignees an email simultaneously. Sending in Chain will send an email to the first Assignee only...and when he/she completes their portion of the suspense, then the next Assignee will receive an email (See Figure 21).

DIPARTMENT ** DEPENSE			
Civ	vilian Personnel M	anagement System	
	New Suspense		
Apps	*Due Date:	*Received Date: *Created Date:	
General Tasks (6)	25-FEB-2011 17:0	0 28-JAN-2011 10:59 😪 Recurrence	
Reports			
Dashboard	Record Type:	Suspense	
Search	*Suspense Type:	CHOOSE A SUSPENSE TYPE	
Settings	Originator:		
<u> </u>	Workflow: (2)	Parallel	
My Profile	(Parallel	
Control Center	1.001	Chained	
	*To:	🚯 Add Assignees 🛛 😹 Add from MailSet 🔀 Edit Mailsets	
Library			
Templates			
Archives			
ANNOUNCEMENTS			
Support			
		xt to an assignee's name will remove that assignee. When assigning in a chain, clicking ($lacksquare$) or ($lacksquare$)	will move
Gatekeepers	the user up or down	in the list.	

Figure 21 – Workflow – Parallel or Chained

The blue ? to the right of Workflow gives an explanation of each choice (See Figure 22).

				Log out	Â
Civil	ian Personnel Ma		🐌 Save	Cancel	
Apps General Tasks (6)	New Suspense	*Received Date: 28-JAN-2011 14:00			
Dashboard Search	Record Type:	Suspense			
	*Suspense Type:	CHOOSE A SUSPENSE TYPE			
Settings	Originator:	CHOOSE AN ORIGINATOR			E
My Profile	Workflow:	Parallel			
Control Center	From:	Parallel workflow allows all assignees to work the task in parallel (at the same time). Chained workflow encourages the assignees to work in			
Library	*To:	sequence in a chained workflow the first assigned completes his task then the next is notified to start work.			
Templates					

Figure 22 – Information Icon

3.1.6 "From" Dropdown

THE KEDONAN		r	1.1.1.		1	(c	F ¹ · · · · ·	221
The "FROM"	aropaown	defaults	to the	person	logged in	See	Figure	23).

New Suspense		
*Due Date:	*Received Date:	*Created Date: 28-JAN-2011 14:00
Record Type:	Suspense	×
*Suspense Type:	CHOOSE A SUSPENSE TYPE	V
*Originator:	CHOOSE AN ORIGINATOR	
Workflow:	Parallel	•
From:	HPCCOM Administrator (HPCC	COM.Administrator@st
	Record Type: *Suspense Type: *Originator: Workflow:	Record Type: Suspense *Suspense Type: CHOOSE A SUSPENSE TYPE *Originator: CHOOSE AN ORIGINATOR Workflow:@ Parallel

Figure 23 – From Dropdown List

3.1.7 Add Assignees

There are 3 ways to choose Assignees:

- 1. Add Assignees: You choose Assignees from the Search Names window.
- 2. Add From Mailset: You choose Assignees from a previously-created SCOUT Mailset/Distro list.
- 3. Edit Mailset: You create a new Mailset or edit an existing one.

Clicking the Add Assignees Action Button displays the Search Names window. You can choose an Organization or search ALL. Type a partial last name and a list of names with that combination of letters in the last names will appear under the Available People column.

Click the GREEN ARROW in front of a name to move that name to the Selected People column. Names can be removed from the Selected People column, by clicking the RED X in front of the name. Click the Done Action Button (See Figure 24).



Apps	*Due Date:			reated Date:				
General Tasks (6)								
Reports Dashboard	Record Type:	Sus	Find an 📃 org account (or)	a 📝 person (or) 🗌	agenc	r		
Search	*Suspense Type:	CH	Partial last name	Organization	<u> </u>			
Settings	*Originator:	CH	A set to be a set of	All Choose One (All) All				
My Profile	Workflow:	Par	Available People	CPMS BMD		Selected People		
Control Center	From:	HP	Mr. HPCCOM Administrator (C	FASLABOR	(=)	💢 😢 Kristen Adkins		
	*To:	# 6	Dermot Antle (BMD)	WAGE				
Library			ight state (Scott Ash (JLDD)	ISD ICUC				
Templates Archives			🛶 Romayne Barclay (FAS)	PSSC				
ANNOUNCEMENTS			📫 Cindy Beeson (HRBITS)	HRSO				
			📦 Julie Bigler (PSSC)	FAS	-			
Support	Clicking the (💢) ne:			AED HRBITS		V Done		
Gatekeepers	the user up or down	in the li		DIR			<i>h</i>	
Help Center				RAD				
User Manual	*Subject:			NSPS		~		
Admin Manual						Ŧ		

Figure 24 – Add Assignees

Clicking the Done action button closes the Search Names window and displays the chosen names in the To Input box. You can delete a chosen name by clicking the RED X beside the name (See Figure 25).

*Originator:	IRD		•	
Workflow:	Parallel		•	
From:	Alan Godsave (Alan.Go	odsave@suspensetracker.c	on 👻	
*To:	👪 Add Assignees	🔀 Add from MailSet	🔀 Edit Mailsets	
Stanley Bradley 💥 Kelly Devaney 💥	>	Christopher Bro	own 🗙	
Clicking the (X) next the user up or down in	-	remove that assignee. When as	ssigning in a chain, click	ing (🏝) or (🔻) will move

Figure 25 – Deleting an Assignee – the Red X

3.1.8 Add from MailSet

You may also choose Assignees by clicking the Add From Mailset Action Button.Clicking the Add From Mailset Action Button will display the Select Users From MailSet window. Choose a previously saved Mailset name from the dropdown list., then click the ADD Action Button. Remember, Mailsets are created by Users in the Control Center. You can also add from any MailSet you've already created, or Edit/Add a MailSet on the fly (See Figure 26).



Apps	*Due Date:	*Rece	eived Date:	*Created Date:	
General Tasks (6)				28-JAN-2011 14:00	Recurrence
Reports					
Dashboard	Record Type:	Suspense		•	
Search	*Suspense Type:	CHOOSE A	SUSPENSE TYP	°E 💌	
	*Originator:	CHOOSE /	AN ORIGINATOR	•	
Settings		Parallel			
My Profile	Workflow:	Parallel		•	
Control Center	From:	HPCCOM 4	dministrator (HP	CCOM.Administrator@st	
	*To:	🚯 Add As	sianees 🔀	Add from MailSet 🔀 Edi	t Mailsets
Library					
Templates	Kristen Adkins 🕽	C	Select users fr	om MailSet	×
Archives			Add users fro	om MailSet:	
ANNOUNCEMENTS			Mailset#1 -	1	
				👪 Add 🛛 🔒 Cancel	
Support	Clicking the (X) ne	vt to an accimen			n, clicking (▲) or (▼) will m
Gatekeepers	the user up or down				n, cucking (=) or (*) will n
Help Center					
User Manual	*Subject:				*
Admin Manual					~

3.1.9 Subject

Add a Subject title to this suspense. Type the name of the suspense you are creating. Notice there is a 255 character limit to this input window, with a countdown window keeping track of the number of characters you have remaining (See Figure 27).

Search	•C	CHOOSE A SUSPENS		•		
	*Suspense Type:	CHOUSE & SUSPENS				
Settings	*Originator:	CHOOSE AN ORIGINA	ATOR			
My Profile	Workflow:	Parallel				
Control Center	From:	HPCCOM Administrate	or (HPCCOM.Administrator@)sl 💌		
	*To:	Add Assignees	Add from Mail Set	K Edit Mailsets		
Library		-	v	-		
Templates	Kristen Adkins 🕽	¢				
Archives						
ANNOUNCEMENTS						
Support						
Support Gatekeepers			consult Mal assigned. When a	ssigning in a chain, clicking (▲) or (▼) will m	nove	
	the user up or down	-m the list.	consultations When a	ssigning in a chain, clicking (\clubsuit) or (\blacktriangledown) will m	nove	
Gatekeepers			convertient and then a	ssigning in a chain, clicking (Å) or (♥) will m	nove	
Gatekeepers Help Center	the user up or down	nn the list. Subject goes here.		ssigning in a chain, clicking (A) or (V) will m	nove	
Gatekeepers Help Center User Manual	the user up or down	nn the list. Subject goes here.	10 Martine - 10 Marca	sciening in a chain, clicking (A) or (V) will m	nove	
Gatekeepers Help Center User Manual	the user up or down	nn the list. Subject goes here.		ssiening in a chain, clicking (A) or (V) will m	nove	

Figure 27 – Add A Subject

3.1.10 Attachments

Click the Add button to browse to documents you wish to add to the suspense. Click the Red X if you change your mind and want to delete the attachment (See Figure 28). Please note that SCOUT has an upload limit of 4 files at a time. If you would like to upload more than 4 files, complete the creation of the task and upload more files after the task has been saved.



SCOUT® Suspense Tracker - Windows Internet Explorer	And the data to have been and be dear of the		
🕒 🗢 👔 http://www.etaskinstall.com/Assignm	ent/New	🔎 🗸 😽 🗙 🚰 Google	- م
<u>F</u> ile <u>E</u> dit <u>V</u> i F <u>a</u> vori <u>T</u> o <u>H</u> e			🗴 🍕 Convert 🔹 🔂 Select
👷 Favorites 🛛 🍰 🔊 SC H 💋 Scou 🔊 DSS	👖 ARMY 👖 EIMP 🤮 HPC 🔊 ShPt 🍂 HPC 🏩 BHW 💿 Quic 🤡 Conn	🔊 VBK 🛃 Goog 👖 etsa 🔊 ETS 🎉 OLI	D •
SCOUT® Suspense Tracker	🚹 Ho <u>m</u> e 🔻 🔊	Feeds () 👻 🖃 Read Mail 🛛 🖶 P <u>r</u> int 👻 <u>P</u> age 🕶	<u>S</u> afety ▼ T <u>o</u> ols ▼ 😢 He <u>l</u> p ▼ [≫]
Archives Archives ANNOUNCEMENTS			ŕ
Gatekeepers the user up or down	it to an assignee's name will remove that assignee. When assigning in a chain, clicking (\clubsuit) or (\P) will in the list.	move	_
Help Center User Manual *Subject: Admin Manual	Subject goes here.		_
SCOUTO y 10.0 Suspense Tracking by HPC Own Lugereterator com	Add		
•Description: Instruction)			÷
	Imited to 3500 characters. 3500 remaining. ions in the automated e-mail? ise as private? Save Cancel		
Done		Internet Protected Mode: On	🖓 🕶 🔍 95% 💌

Figure 28 – Add Attachments

3.1.11 Description

Type instructions or a message further explaining the substance of the suspense. This box allows you to put instructions or messages that will or will not be sent in the email to Assignees. You can click the checkbox to decide whether the message will be included (See Figure 29).

Gatekeepers Help Center	the user up or do	next to an assignee's name will remove that assignee. When assigning in a chain, clicking (\clubsuit) or (\intercal) w wn in the list.
User Manual	*Subject:	Subject goes here.
Admin Manual		
		Subject input form limited to 255 characters. 237 remaining.
SCOUT© v 10.0 Suspense	Attachments:	Add
COM LLC	TEST ATTACH	MENT.txt (0.03KB) - 100%
	*Description:	Type a description of the task here.
	(Instructions)	
	Description input for	rm limited to 3500 characters. 3464 remaining.
	Include instruction	uctions in the automated e-mail?
	1	spense as private? ()
	Mark this Sus	spense as private, w

Figure 29 – Description Box

3.1.12 Default Check boxes

At the bottom of the new suspense input form, there are two choices to make (See Figure 30):

- 1) Include instructions in the automated e-mail? You can choose whether to include the = message in the emails sent to the Assignees.
- 2) Mark this Suspense as private? Clicking the Private icon checkbox determines whether you would like this suspense to appear only in your tasks reports (and the Assignees you choose), but not in upper level reports.



Admin Manual	Subject input form limited to 255 characters. 255 remaining.	
SCOUT© v 10.0	Attachments: Add	
Suspense Tracking by HPC-	*Description:	*
COM LLC	(instructions)	
www.suspensetracker.com		
		-
	Description input form limited to 3500 characters. 3500 remaining.	
	Include instructions in the automated e-mail?	
	Mark this Suspense as private?	
	📑 Save 🔒 Cancel	

Figure 30 – Default Check Boxes – Save or Cancel

3) SAVE. After all fields have been completed, click the SAVE button, (or the Cancel button to discard the form) (See Figure 30).

3.1.13 Assignment Setup – Viewing New Assignees.

After clicking the Save icon, the following window appears where you can choose whether or not to send an Email to each Assignee, change their individual Due Date, or change their role from Assign to Notified. If you choose Assign, then that person is responsible for working the suspense. If you choose Notify, that person cannot work the suspense but can track its progress and status. After choosing roles, you may also change the assigned due date for different Assignees. However, you should never choose a date later than the overall Suspense due date you chose for this suspense. You can then enter a personalized message just to that Assignee, change the order of the Assignees (if in chain), or remove an Assignee. Then to complete the task, click on "Finish and Send Emails" (See Figure 31).

Attac	hments:	Add					
	ription: Assignment Setu		oothy Mooting	Dropping dogun	santr		
5	- Viewing New As	signees					0
	Name	Email?	Due Date	Role	Message	Sequence	Actions
s	Juanita Shanks		28-JAN-2011 17:0	Assign 👻	A	Up / Down	Remove
/				Notified			
						Finish an	d Send Emails
			10 28	ive 👩 C	ancer		

Figure 31 – Assignment Setup Pop-Up Window

After clicking the Finish and Send Emails icon, you will now come to the Status Tabs page where you can now review and edit your input or take action on the task such as upload more files, add additional Assignees, create an executive view, etc. (See Figure 32).



ps	Assignee Status	Summary	Files (1)	Executive Summary Sheet	Comment Log	Coordination Sheet	
eral Tasks (2)	Task Details (T	ask #1110-00)10467) —				
oorts							
hboard	Task	Softwar	′e iest#ibγ	(Contractor			
v Application	Status	Open	Due: 10-D	ec-2010			
arch		· · ·					
	Originator	HPCCOM	M Administra	ator			
ttings				A	🔀 Email Comme	ents	
Profile							
ntrol Center	Assignments and	l Notification	5 🕕 View	All			
		Assignee		Status	R	ole Ac	tion
orary	🔽 Carollyn He	rrion (BMD)		Suspense Accepted on 29- 16:44	NOV-10 Assi	gn <u>Email</u>	
nplates	🕓 Alan Godsa	ve (IRD)		Suspense Emailed on 29-NC	OV-10 Assi		
nives				16:32		Request Exte Complete R	edelegate
NOUNCEMENTS						Redelegate C	Offline Email
	Cla CPP (CP	P)		Suspense Completed on 29	-NOV-10 Noti	fied <u>Email</u>	

Figure 32 – Assignee Status Window

3.1.14 Contact Information for Each Assignee

Contact information for each Assignee is available by clicking on the small green telephone icon in front of each Assignee's name. Information includes Office/Department, Phone number and a clickable email address. "Presence" data can also be available if a Microsoft Office Collaboration Server is online and if the Assignee has installed the necessary Microsoft software (See Figure 33).

Apps	Assignee Status Summary Files	(1) Recurring (no) Executive Summary Sheet	Comment Log	Coordination Sheet			
General Tasks (7)	Task Details (Task #0111-0010	489)	·				
Reports	Task Subject goe						
Dashboard							
Search	Status Open 🔍 Du	e: 28-Feb-2011					
	Originator HPCCOM Ad	ministrator					
Settings	oliginator	↑ ► Empli	Comments				
My Profile		- Zo Emain	comments				
Control Count							
	Assignments and Notifications	dd Assignee(s) 💮 View All					
	Assignee	Status	Role	Action			
Library Templates	Kristen Adkins (ICUC)	Pending completion by previous assignees, 31 days remaining	Assign	Replace Remove Email	L.		
Archives 😣 Kr	risten Adkins (ICUC) Close	Pending completion by previous	Assign	Replace Remove Email	L		
ANNOUNCEME		a signees. 31 days remaining					
703-696-1	1002						
Support							
Gatekeepers	dkins@suspensetracker.com						
Help Center							
Use, Manual		-					
Admin Manuar							
				e e e e e e e e e e e e e e e e e e e	Internet Protected	Mode: On	 a 95%

Figure 33 – OCS Information

3.1.15 Assignee Status Details Icon

Status information for a particular Assignee is available by clicking on the information icon (a small letter "i" in a blue circle) that is in the STATUS column (See Figure 34).



signments and N	U	View All		Actio				
Ass	signee	Status	Status Role					
Carollyn Herric	on (BMD)	Syspense Accepted on 29-NOV-10 16:44	Assign	<u>Em ail</u>				
🔄 Alan Godsav	Details		1	×	Accep			
	This suspense wa	as delegated by HPCCOM Administrator to: Ca	rollyn Herrion —		<u>:qate</u> e <u>Email</u>			
Sa CPP (CPP)	Role	Assign						
	Due Date 10-DEC-2010							
	Emailed Notification email sent to Carollyn Herrion 29-NOV-2010 16:32							
	Accepted	Accepted Last action by Carollyn Herrion on 29-NOV-2010 16:44						
	Complete	No						
	Comments							

Figure 34 – Information Icon

3.1.16 Assignee Status Details for All Assignees

Status information for ALL Assignees is available by clicking on the information icon (a small letter "i" in a blue circle) In the VIEW ALL Action Button (See Figure 35).

Task	Software T	est#1 by Cont	actor							
Status	Open 🛡 D	ue: 10-Dec-201	0							
Originator	HPCCOM A	dministrator								
				*	🄀 Email C	omment	ts			
ssignments and	d Natifications Assignee	👔 View All		Status		Role		Ac	tion	
Carollyn	Assignment Deta	ils				A :		r		
S Alan God	Assignee	Redelegated	Role	Due Date	Emai	led		Accepted	Completed	Message
	Assignee Carollyn Herrion	Redelegated	Role Assign	Due Date	Emai 29-NOV-201			Accepted DV-2010 16:44	Completed No	Messag
	_	-				0 16:32		-	-	Messag

Figure 35 – Assignee Status Details

3.2 Summary Tab

This tab contains the primary summary information for this task. This area is editable if the Logged-in User is the Task Owner/Creator (See Figure 36).



elow are details fo	or this suspe	nse.			
ask Details (Tas	k #1110-00	10467) ——			
Status	Open 🔴	Due: 10-Dec	c-2010		
Subject	Software	e Test#1 by (Contractor		
Record Type	Correspo	ondence			
Create Date	29-Nov-	2010 16:32			
Due Date	10-Dec-2	2010 17:00			
Received Date	29-Nov-	2010 17:00			
Task Type	Coordina	tion			
Tasked By	CPMS				
Instructions private. Including	-		s (Parallel w/attachment).Marke nated email.	d as	
Mark this Sus	pense as pri	vate?			
Entered By		Administrat			

Figure 36 – Summary Window

3.3 Files Tab

This tab shows the number of files attached in parenthesis on the tab. Clicking the file name opens the file for viewing. Clicking the ADD button allows the User to add additional attachments. If there are files available in the template library, they may be loaded from the ADD FROM TEMPLATES button. Only the Task Owner/Creator can remove files (a "REMOVE" link will be visible in the Actions column) (See Figure 37).

Assignee Status	Summary	Files (1)	Executive Summary Sheet	Comment Log C	oordination Sheet	
Task Details (Ta	isk #1110-00)10467) —				
Subject	Softwar	e Test#1 by	Contractor			
Status	Open	Due: 10-D	ec-2010			
Add	Add from	n Templates				
Viewing Uploade	d Files					۵
viewing oploade	Name			Uploaded By	Туре	Actions
(ORIGINAL) TEST AT		1	Uploaded \$ 29-NOV-2010 16:31	Mr. HPCCOM Administrat		

Figure 37 – Files Tab

4. Closed Suspenses

The Task Originator may close their tasks at any time (either because all Assignees have completed the task or it is no longer applicable). When a task is marked closed, it moves from the CREATED BY tab to the CLOSED tab in the General Tasks Workspace window. At this time, the User can choose to place the task UNDER REVIEW or ARCHIVE the task (See Figure 38).



pps	Assigned To (3)	Notified (1) Created By (55)	Completed (9)	Closed (1728)			
eneral Tasks (58)	Viewing closed	General Tasks created by Dir CPMS				0	
eports	Task #	Subio	ot.	Due Date Technol Ru	Suspense Type	Closed	
ashboard	0	🝺 觉 DoDI 1400.25-V410		30-SEP-2010 DIR	SD106 Package	03-NOV-2010 0	
earch	0910-0010452	RSBC-Working Group		20-SEP-2010 DIK	Coordination	21-SEP-2010 00	
	0910-0010439	🔿 📆 Reemployed Annuitant - Bo	erum	24-SEP-2010 DIR	Administrative Issue	23-SEP-2010 00	
ttings	0910-0010431	O 📆 Badge Request		20-SEP-2010 DIR	Administrative Issue	14-SEP-2010 00	
5	0910-0010427	O 🔂 Extension of Appointment		17-SEP-2010 DIR	Administrative Issue	23-SEP-2010 00	
Profile	0910-0010426	NSPS Closeout Appraisal - 1	Mudgett	14-SEP-2010 DIR	Administrative Issue	13-SEP-2010 00	
ontrol Center	0910-0010425	O tongressional - Mr. Antonio	Vicente	17-SEP-2010 DIR	Congressional Response	23-SEP-2010 00	
	0910-0010424	O 🖄 Flu Shots Statement of Wor		17-SEP-2010 DIR	Agreement	20-SEP-2010 00	
brary	0910-0010420	O the Frankie Lane Pentagon Bad		15-SEP-2010 DIR	Administrative Issue	14-SEP-2010 00	
	0910-0010419	C M LPDD Special Act Awards	go aprication	01-IAN-1900 DIR	Administrative Issue	14-SEP-2010 00	
mplates		-		-			
INOUNCEMENTS	φ	н	 Page 1 of 173 	▶> ▶I 10 💌	View	1 - 10 of 1 728	
	 Task Previe 	ew - Click the 🗉 to add or remove	a column from the	arid.			
ipport							
atekeepers	Subject: D	DoDI 1400.25-V410					
alp Center	Task #:	0910-0010457 BTaske	ed By: DIR	🗉 Unus	ed Date: 30-SEP-2010		
ser Manual	Due Dat		ved Date: 30-SEP-2	010 Type	SD106 Packad	ie	
Imin Manual	Type:		ed Date: 30-SEP-2		ord Type: Suspense	-	
	crype.	SD100Tuckage Dereat	eu bate. 50 56 2	uncer	na rype. Suspense		

Figure 38 – Closed Tasks Window

4.1 Place Under Review

If a Task needs to be submitted for review by another Organization, the Task Originator should click the PLACE UNDER REVIEW button, where a popup window appears, allowing them to choose which organization to send the task for review (See Figure 39).

	0910-0010439	0	t	Reemployed Annuitant - Boerum	24-SEP-201	C DIR	Administrative Issue	23-SEP-2010 (
	0910-0010431	0	11	Badge Request	20-SEP-201	C DIR	Administrative Issue	14-SEP-2010 (
My Profile	0910-0010427	0	11	Extension of Appointment	17-SEP-201	C DIR	Administrative Issue	23-SEP-2010 (
Control Center	0910-0010426	0	ī	NSPS Closeout Appraisal - Mudgett	14-SEP-201	C DIR	Administrative Issue	13-SEP-2010 (
	0910-0010425	0	1	Congressional - Mr. Antonio Vicente	17-SEP-201	C DIR	Congressional Respon	23-SEP-2010 (
	0910-0010424	0	11	Flu Shots Statement of Work	17-SEP-201	C DIR	Agreement	20-SEP-2010 (
Library	0910-0010420	0	ii	Frank Place Under Review			iministrative Issue	14-SEP-2010 (
Templates	0910-0010419	0	11	LPDD			iministrative Issue	14-SEP-2010 (
Archives				Choose Reviewing Org:			Viow 1	- 10 of 1 728
Support	▼ Task Preview	v - Cl	ick	CPMS				
Gatekeepers	Subject: Do	DI 14	00.	25-V41				
Help Center	Task #:	09	10-0	01045			Date: 30-SEP-2010	
User Manual	Due Date	: 30	SEP-	2010		- type.	// SD106 Packa	ge
Admin Manual	≡Туре:	SD	106	Package © Created Date: 30-SEP-20	010	Recor	d Type: Suspense	
SCOUT® v 10.0 Suspense Tracking by HPC-				Place Under Revi	ew	Archive	View Full Details	

Figure 39 – Place Under Review – Choose Reviewing Org

After clicking the Save button in the PLACE UNDER REVIEW popup window, the task will now show an icon is the grid table, when hovered over reveals "This task is under review. It may be closed if the review has been successfully completed." In the Task Preview pane, the PLACE UNDER REVIEW button has now changed to CLOSE: Review Approved. When the Reviewing Organization notifies the Task Originator they have finished reviewing the task, the Originator can then Archive the task by clicking the ARCHIVE button (See Figure 40).



	Task #		Tasks created by Dir	Subject	Due Date	Tasked By	Suspense Type	Closed
ashboard				Subject		,		
earch	0910-0010457		DoDI 1400.25-V410		30-SEP-2010	DIR	SD106 Package	03-NOV-2010 0
curch	0910-0010452		RSBC-Working Grou		20-SEP-2010	DIR	Coordination	21-SEP-2010 00
	0910-0010439		his task is under review. It as been sucessfully comp	may be closed if the review leted.	24-SEP-2010	DIR	Administrative Issue	23-SEP-2010 00
ettings	0910-0010431	Ó	📆 Badge Request		20-SEP-2010	DIR	Administrative Issue	14-SEP-2010 00
Iv Profile	0910-0010427	0	Extension of Appoir	tment	17-SEP-2010	DIR	Administrative Issue	23-SEP-2010 00
Control Center	0910-0010426	0	MSPS Closeout App	aisal - Mudgett	14-SEP-2010	DIR	Administrative Issue	13-SEP-2010 00
	0910-0010425	0	觉 Congressional · Mr.	Antonio Vicente	17-SEP-2010	DIR	Congressional Response	23-SEP-2010 00
	0910-0010424	0	💼 Flu Shots Statement	of Work	17-SEP-2010	DIR	Agreement	20-SEP-2010 00
ibrary	0910-0010420	0	觉 Frankie Lane Pentag	on Badge aplication	15-SEP-2010	DIR	Administrative Issue	14-SEP-2010 00
emplates	0910-0010419	0	觉 LPDD Special Act Av	vards	01-JAN-1900	DIR	Administrative Issue	14-SEP-2010 00
rchives	¢			14 05 Page 1 of 173	▶> ►1 10 •		View	1 · 10 of 1 728
NNOUNCEMENTS	▼ Task Previe	w - Cl	ck the 🗉 to add or re	move a column from the	grid.			
upport								
upport	Subject: D	IODI 14	00.25-V410					
upport Gatekeepers Help Center	Subject: D ©Task #:			Tasked By: DIR		• Unuse	ed Date: <u>30-SEP-2010</u>	
atekeepers	-	09	0-0010457	Tasked By: DIR Received Date: 30-SEP-20	010	■Unuse ■Type:		ge
atekeepers lelp Center	∎Task #:	09' e: 30-	0-0010457 B			Type:		ge

Figure 40 – Task is now Under Review

4.2 Archiving a Task

After a task has been REVIEWED or CLOSED, the Task Originator may choose to Archive that task. Clicking the ARCHIVE button opens up a form where decisions such as what files to archive, where to place the archive document, etc., can be made. Clicking the Preview button will open up a PDF document that illustrates what the archived document will look like. When done, click the SAVE button, and the task will be moved into ARCHIVES folder under LIBRARY in the left-hand Navigation Menu (See Figure 41).

1005		below. Mandatory fields marked *		
Apps	Archival Details (Task #0910-	0010457)		
General Tasks (58)	* Unique Record Identifier	10457		
Reports Dashboard	* Subject	DoDI 1400.25-V410		
Search	* Date Filed	28-JAN-2011		
	* Publication Date			
	* Author	CPMS, Dir, DIR,		
Settings	* Originating Organization	DIR		
My Profile	Supplemental Marking List	DIR		
Control Center	Supplemental marking List		*	
	* Media Type	Electronic		
Library	* Format	PDF		
	Date Received	22-SEP-2010		
Templates				
Archives ANNOUNCEMENTS	* Addressees	[David Rude], [James Raney], [Judy Birden], [John Dill]		
ANNO DINCEMENTS	Other Addressees			
	Location			
Support	* Classification	Unclassified	•	
Gatekeepers	*Attachments	21813-EXSUM Format CPP DoDI 1400.25-V410.txt		
Help Center	(Check files to include them in archive)	21813-Vol 410 LOR.txt		
User Manual		21813-RE Issues for DoD Training Regulation .bxt		
Admin Manual		TAB A txt.txt		
		21813-SD Form 106 for DoDI 1400.25 Volume 410.txt		
😥 SCOUT© v 10.0		21813-V410 Comments Matrix.txt		
Suspense Tracking by HPC-		21813-Action Memo to Acting DUSD CPP DoDI 1400.25-V410.bxt		
COM LLC		21813-CPMS Coordination Sheet for DoDI 1400.25-V410.bd		
www.suspensetracker.com		21813-DoDI 1400.25 Volume 410.txt		
		21813-WHS v DoDI 1400-25 V410 10-16-09.txt		
		21813-EXSUM Format CPP DoDI 1400.25-V410.txt		
		21813-Vol 410 LOR.txt		
		21813-RE Issues for DoD Training Regulation .btt		
		21813-Action Memo to USD PR DoDI 1400.25-V410.txt		
		21813-SD Form 106 for DoDI 1400.25 Volume 410.txt		
		21813-V410 Comments Matrix.txt		
		21813-Action Memo to Acting DUSD CPP DoDI 1400.25-V410.txt		
		21813-CPMS Coordination Sheet for DoDI 1400.25-V410.txt		
		21813-DoDI 1400.25 Volume 410.txt		
		21813-WHS v DoDI 1400-25 V410 10-16-09.txt		
	* Include Comment History			
	* PathToDirectory	C:/Scout/Archive		
	* File Name	DoDI 1400.25-V410		

5. Working an Assigned Task

5.1 How to Access a Task

There are two ways an Assignee can begin working on a task. The first way is for an Assignee to open a browser and input the URL and arrive at the Home Page. The Assignee can then highlight a task and click the VIEW DETAILS Action Button, or double-click on the assignment itself to enter the work area page. Clicking VIEW DETAILS will bring the Assignee into the work area (See Figure 42).



DEPARTMENT - DEFENSE	Entered as: Alan Godsave - IRD 20-JAN-2011 Sea	irch Lo
IRD IRD	o New Task 🛛 🐻 Resume Identity 🏠	Save as
Apps	Assigned To (1) Notified (0) Created By (1) Completed (0) Closed (0)	
General Tasks (2)	Viewing incomplete General Tasks assigned to Alan Godsave	
Reports	Task # Subject Days Late Due Date Tasked By Suspense Type Accept/Reject	
Dashboard	1110-0010467 🏭 📩 Software Test#1 by Contractor 🕒 10-DEC-2010 CPMS Coordination	
New Application Search		
	- Tech Barden. Click the second as a second se	
Settings	Task Preview - Click the B to add or remove a column from the grid.	
My Profile	Subject: Software Test#1 by Contractor	
Control Center	© Task #: 1110-0010467 © Tasked By: CPMS © E-mailed Date: 29-NOV-201016:32	
	Due Date: 10-DEC-2010 BAssigned By: HPCCOM Administrator Rejected Date: No date	
Library	Image: Coordination Image: Coordination Image: Coordination Image: Coordination Image: Coordination	
Templates	Place Under Review Archive View Full Details	
Archives		
ANNOUNCEMENTS		

Figure 42 – Working a Task – Enter thru URL/Home Page

The second way an Assignee can begin working on a task is when an Assignee receives an SCOUT[©] notification email, which Assignee can click on the link at the bottom email. Clicking the link will bring the email recipient into the Scout system and directly into the Task work area so the Assignee can immediately begin working the task (See Figure 43).

🕞 🖬 🖤 🗢 🗢 🖄 🚱 🗧 — SCOUT: (Suspense #2781) Assigned - MSGT Hughes, Thomas - Message (Plain Text)								
Message Add-Ins Adobe PDF @								
Reply Reply Forward to All Respond	Delete Move to Create Other Folder * Rule Actions * Actions	Block Not Junk Sender Junk E-mail	Categorize Follow Mark as Up ~ Unread Options	A Find → Related → → Select → Find	Send to OneNote OneNote			
You forwarded this mess	sage on 4/23/2010 12:26 PM.							
From: SCOUT SYSTEM MESSAGE (th scalar bit with a scala								
THIS IS AN AUTOMATED EMAIL. The following Suspense has been submitted to you by Kennard Laviers. Suspense: Attention Training Class: This is a sample task created for you. Suspense: ID: 1857 Instructions: Please review the attachments and provide comments. Your comments should be attached as new documents. If you have questions about this task, please contact me. Also contact me if this is the first tome you have worked a task in Scout and you alve not had any training.								
All of the information you need to take action on this Suspense in available on the SCOUT© website. Please click on the following link: http://localhout81/AssignmentEdw1857								

Figure 43 – SCOUT Notification Email

5.2 Assignee Work Area

There are six tabs in the Assignee Work area:

- 1. Assignee Status
- 2. Summary
- 3. Files
- 4. Executive Summary Sheet
- 5. Comment Log
- 6. Coordination Sheet



5.3 Assignee Status Tab

The Assignee Status Page shows the Task Details (Task Name, Status, and Originator) (See Figure 45).

Apps	Assignee Status	Summary Files (1)	Executive Summary Sheet	Comment Log	Coordination Sheet
General Tasks (2)	rask Details (Ta	ask #1110-0010467)			
Reports Dashboard	Task	Software Test#1 by	Contractor		
New Application	Status	Open \varTheta Due: 10-D	ec-2010		
Search		HPCCOM Administra			

Figure 45 – Assignee Status Tab - Task Details

5.3.1 Assignments and Notifications Window

In this example, there are three Assignees. Only the Logged-in Assignee has Action Links. Actions the Assignee can take:

- 1. Comment Clicking the Comment Action Link opens a window that allows the Assignee to enter a comment about the task. The Task Owner/Originator will receive an email as a result of the comment.
- 2. Refuse Clicking the Refuse Action Link opens a window that allows the Assignee to enter a comment about the reason for refusing the task. The Task Owner/Originator will receive an email as a result of the refusal.
- 3. Accept Clicking the Accept Action Link sends an email to the Task Owner/Originator that you have accepted the Task.
- 4. Request Extension Clicking the Request Extension Action Link opens a window that requires the Assignee to enter a reason for the requested extension and input a requested deadline date.
- 5. Complete Clicking the Complete Action Link opens a window that requires the Assignee to enter a comment describing the work that completed the task. The Task Owner/Originator will receive an email as a result of the completion.
- 6. Redelegate Clicking the Redelegate Action Link opens a window that allows the Assignee to choose other Assignees to work on the task. The Task Owner/Originator may or may not receive an email as a result of the re-delegation, depending on the Owner/Originator's Profile Preferences. Click DONE when finished choosing names.
- 7. Redelegate Offline Email Clicking the Redelegate Offline Action Link opens a window that allows the Assignee to redelegate the task to an Assignee that doesn't have current access to the Scout application. The Assignee will enter an email address and an email will be sent to that person with details of the assignment.
- 8. Email Comments: Users may send comments via email, choosing which recipients will receive the comments by checking the Email checkbox (See Figure 46).



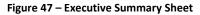
Task Details (Task #1110-00104	467) ———				-					
Task Software Tes	Software Test#1 by Contractor									
Status Open 🛡 Due	Open 🔵 Due: 10-Dec-2010									
Originator HPCCOM Administrator										
TYPE AN EMAIL COMMENT HERE FOR ANY OR ALL ASSIGNEES.										
Choose Recipients X										
Assignments and Notifications	iew All	Email Comments Name		Email?						
Assignee		Carollyn Herrion		V	Action					
Carollyn Herrion (BMD)		Alan Godsave			Email					
S Alan Godsave (IRD)		Cla CPP			Comment Refuse Accept					
			Finish and S	Send Emails	Request Extension Complete Redelegate Redelegate Offlite Email					
Cla CPP (CPP)	CPP (CPP) Suspense Completed on 16:32 - 0 days turnaround tir				Email					

Figure 46 – Email Comments

5.4 Executive Summary Tab

The Executive Summary tab opens a window showing the following form (See Figure 47):

Assignee Status	Summary	Files (1)	Executive Summary Sheet	Comment Log	Coordination Sheet
Executive Summ	ary Sheet (T	ask #1110-(0010467)		
Task	Software	Test#1 by (Contractor		
Purpose					
Background Discussion					
View of Others					
Recommendatio	ns				



5.5 Comment Log Tab

The Comment Log tab allows a User to view ALL comments made on this task by ALL Assignees. Comments are listed by date and time (See Figure 48).

15	Assignee Status	Summary File	es (1) Exe	cutive Summary Sheet	Comment Log	Coordination Sheet
eneral Tasks (2)	Task Details (Tas	k #1110-001046	7) ———			
Reports	Subject	Software Test	#1 by Contra	actor		
Dashboard		•				
New Application	Status	Open 🛡 Due:	10-Dec-2010	0		
Search						
	Date	Comment By	Emailed To	o Comment		
Settings	29-Nov-2010 16:	32 Cla CPP	N/A	COMPLETED: Notified		
My Profile						
Control Center						
Library						
Templates						
Figure 48 – Co	omment Log					

5.6 Coordination Sheet Tab

The Coordination Sheet tab opens up the CPMS Coordination sheet form, allowing you to select actions from the pull-down menus, and filling in various information blocks (See Figure 49).

Reports		то		Suspe ACTION	tnie Due I	DINATION SHEET Date: 28-Feb-2011 TYPED NAM		INIT	DA	
Dashboard	1	TO		ACTION		TTPED NAM		INIT	DA	1E
Search	1		-		-		-			
	2				-					
Settings	3				-					
My Profile	4									
Control Center			-							
	5		•		-		•			
	6		-		-					
Library	7		-		-		-			
Templates	8									
Archives	•		•				•			
ANNOUNCEMENTS	9		-		-					
	10		-		-		•			
Support	11									
Gatekeepers			-		•					
Help Center	12		-		-					
User Manual Admin Manual	13		-		-					
Kurtin Manual	14									
SCOUT® v 10.0	15									
Suspense Tracking by HPC	16				•				_	
-COM LLC	17									
www.auagenaelracker.com					-					
	18		-		•					
	19		•		-		•			
	20				-					
		Action Officer:		Division:	Phor	e Number:	Signa	ture:	Date:	
							Digitally sign	ed on save.	28-Jan-2011	
				Summarize the pu	rpose/co	ntents of your docu	ment here.			
						bject goes here.				
						SECRETARY CHECKE	:0			
		format, including margin								
			(CPMS Corresp	pondence Guide) 📄 C						
		Spelling				stationary				
		Pitch and font			evious ve	rsions, if any, include		de of package		
	Initial		Date: 28-jan-2	2011 ACTS #		ECC	S #:			

Figure 49 – Coordination Sheet

6. Reports

Click the Report link on the Workflows Menu and a Reports Choice Page will appear (See Figure 50).

Report Criteria	Responsible Party
Suspense Status	Responsibility
Open Or Closed	Originated By
Workflow	HPCCOM Administrator
All	••or•• • My Organizations
Sort By	wy urgamizations
Organization Name	Select All Select All
Date	. 🔽 CPMS
Final Due Date	• 🖾 BMD
Date Range	P IRD FASLABOR
All	FASLABUR JIDD
Report's YELLOW stoplight color should indicate a task is due within: -	. 🔍 WAGE
Yellow 30 Days or less	• 🕅 NAF • 🕅 ISD
	• 🖾 ISD
Green 31 Days or more (dictated by Yellow)	. 🖉 PSSC
Red Past due (set to past due by default)	- 🖾 CARE
	- Ø HRSO - Ø CPP
Saved Reports Division Report	• 💌 CPP • 💟 FAS
Suspense Report: Currently Open	• 🖝 FAS • 🕅 timbo 🔻
Suspense Report: Currently Overdue	• Linu tambo
	Generate Report

Figure 50 – Reports Display Choices Page

6.1 Report Criteria

In the left-hand side of the Work Space Window you can create different reports by clicking on the pull down menus:

- Suspense Status (Open or Closed, Archived or Deleted)
- Workflow (All, General Tasks)
- Sort By (Organization Name, Due Date, or Originating Org)
- Date (Final Due Date, Received Date, or Created Date)
- Date Range (All, Within Between)

5.2.1 Stoplight Color Definition

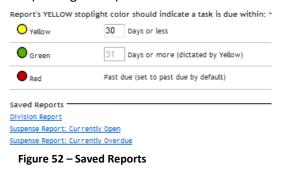
Users may change the yellow stoplight color to indicate a task is due within a certain number of days. Changing the yellow color will automatically change the green stoplight color to reflect all tasks due beyond the date the yellow color expires (See Figure 51).



•
•
-
light color should indicate a task is due within:
30 Days or less
31 Days or more (dictated by Yellow)
Past due (set to past due by default)

5.2.1 Saved Reports

Below the YELLOW STOPLIGHT COLOR DEFINITION section, lies the SAVED REPORTS section. To create a saved report, make the selections to define the report. You may wish to generate the report first to ensure it contains the information you wanted. To save the report, reselect the selections made to refine the report and click the Save Report button. You'll be prompted to give the report a name. These saved reports are only visible to you and are not visible to other Users (See Figure 52).



6.1.1 Responsible Party

In the right-hand portion of the Work Space Window, you can choose whether the reports are originated by, assigned to or delegated by you or different organizations (See Figure 53).



Report Criteria	Responsible Party
Suspense Status	Responsibility
Open Or Closed	Originated By
Workflow	HPCCOM Administrator
All	-or Ø My Organizations
Sort By	
Organization Name	Select All
Date	- V CPMS
Final Due Date	. 🕅 BMD
Date Range	. 🕼 IRD
All	FASLABOR
	- V JLDD
Report's YELLOW stoplight color should indicate a task is due within: -	• 💌 WAGE • 🕅 NAF
Yellow 30 Days or less	ISD ISD
Green 31 Days or more (dictated by Yellow)	. 🔽 ICUC
Green bays or more (dictated by readwr)	• 🗵 pssc
Red Past due (set to past due by default)	CARE
	- HRSO
Saved Reports	• 🗹 CPP
Division Report	- 🕅 FAS
Suspense Report: Currently Open	- 💟 timbo 🔫
Suspense Report: Currently Overdue	
	Generate Report Save Report

Figure 53 – Responsible Party Choices

Your report appears in table form. The User has the option to export reports to Microsoft Word, Excel, or as a PDF document by clicking the buttons at the top of the report (See Figure 54).

1	All suspenses						
Apps							
General Tasks (58)	Created by: Dir	CPMS					
Reports					Wor	d Excel	PD
Dashboard Search							
Search	Custom Repo						
	Task #	Subject	Due Date	Tasked By	Туре	Creat	Dr
Settings		FECA Claims Report for Irag and Afghanistan - June	22-JUL-2010	DIR	General Reques		
5		BRAC Support Memorandum	05-FEB-2010	DIR	General Reques		
My Profile Control Center		Request for Special Retirement Coverage	30-AUG-2010	DIR	Coordination	Ms. Dir CPMS	
Control Center	0410-0009899	EPAT CCB	08-SEP-2010	DIR	Administrative I	s Ms. Dir CPMS	
	0410-0009919	1 PD 29 employees - Dep of Army	30-APR-2011	DIR	Coordination	Ms. Dir CPMS	
Library	0510-0009949	Management Review	17-SEP-2010	DIR	Investigation	Ms. Dir CPMS	
· · · · · · · · · · · · · · · · · · ·	0610-0010010	Improving the Federal Recruitment and Hiring Process	01-NOV-2010	DIR	Policy	Ms. Dir CPMS	
Templates	0610-0010012	Request for Special Retirement Coverage	31-AUG-2010	DIR	Coordination	Ms. Dir CPMS	
Archives ANNOUNCEMENTS	0610-0010016	CPMS Standard Operating Procedures (SOP)	31-AUG-2010	DIR	Administrative I	s Ms. Dir CPMS	
ANNOUNCEMENTS	0610-0010018	Request for Special Retirement	30-SEP-2010	DIR	Coordination	Ms. Dir CPMS	
	0610-0010025	Request for Special Retirement Coverage-GS-07	30-SEP-2010	DIR	Coordination	Ms. Dir CPMS	
Support	0710-0010229	CPMS Express - July	09-SEP-2010	DIR	Information	Ms. Dir CPMS	
Gatekeepers	0710-0010234	DLA - 6 FPS positions	09-DEC-2010	DIR	Coordination	Ms. Dir CPMS	
Help Center	0710-0010244	Veterans Initiative Steering Committee	14-JUL-2010	DIR	Directive	Ms. Dir CPMS	
User Manual	0710-0010253	OIG Follow up	28-JUL-2010	DIR	IG	Ms. Dir CPMS	
Admin Manual	0710-0010260	Note to CPPC - Competency Survey Initiative	28-JUL-2010	DIR	Information	Ms. Dir CPMS	
	0710-0010265	Email Notice to Survey Participants - HRPCF	30-SEP-2010	DIR	Information	Ms. Dir CPMS	
SCOUT© v 10.0	0710-0010273	2010 Federal Employee Viewpoint Survey (FedView) Re	23-JUL-2010	DIR	Information	Ms. Dir CPMS	
Suspense	0710-0010284	2010 Annual Review of Special Rates	08-OCT-2010	DIR	Instructions	Ms. Dir CPMS	
Tracking by HPC-	0810-0010291	Request for Senior Leader (SL) Allocation	09-AUG-2010	DIR	General Reques	Ms. Dir CPMS	
www.suspensetracker.com	0810-0010303	Prohibited Personnel Practices a Study Retrospecitve	13-AUG-2010	DIR	Information	Ms. Dir CPMS	
	0810-0010322	Updated DoD Veterans Initiative Operational Plan	26-SEP-2010	DIR	Administrative I	s Ms. Dir CPMS	
	0810-0010333	Milestone A Decision for ASARS	13-AUG-2010	DIR	Coordination	Ms. Dir CPMS	

Figure 54 – Report Page

7. My Profile

Clicking the left-hand menu item "My profile" allows you to edit your personal information the database (See Figure 55).

Apps	Please complete the f	orm below. Mandatory fields marked *		ACTIONS YO	U CAN TA
General Tasks (6)	My Profile			10 Aug	
Reports	First Name*	HPCCOM		🐞 Save	🛛 🐻 Ca
Dashboard				K View Au	udit Log
Search	Last Name*	Administrator		-D tien w	iun Log
	Rank/Title	Mr.	•		
Settings	Archive Reader	Yes			
My Profile	Archive Editor	Yes			
Control Center	Template Reader	Yes			
	Template Manager	Yes			
Library	Master Stand In	Yes			
Templates	E-mail*	HPCCOM.Administrator@suspensetracker.c	om		
ANNOUNCEMENTS					
	Unit	CPMS	•		
	Office Symbol				
Support	(i.e. CC, MIXOP, SC, CS	i, etz.)			
Gatekeepers	Phone	1234567890			
Help Center					
User Manual Admin Manual	Base				
Aurin Manual	State				
SCOUTO V 10.0	My tasks YELLOW sto	plight color should indicate a task is due within:			
Suspense Tracking	OYellow	30 Days or less			
www.auspensel/acker.com	Oreen	31 Days or more (dictated by your choice for Yell	ow)		
	Red	Past due (set to past due by default)			
	Notify me when a task	I've been assigned			
	Is Due In	1 Days or less No 💌			
	Is Rest Due	Yes	-		
	Net Z	gnee in a Suspense l've created			
	Completes a task		•		
		Yes			
	Refuses a task	Yes	•		
	Reassigns a task	No	•		

Figure 55 – The Edit My Profile page

The items you can edit include your department name or your own name if you are working in SCOUT[©] as an individual rather than an Org account. Notice that for Org account, the rank should be listed as "ORG." This entry helps format the stoplight chart. Other edit items include email address, office symbols, and phone number and address information. This is also where you can change your password. Items Users cannot change themselves include Archive Reader/Writer, Template Reader/Manager and Master Stand-in. If you feel you need these privileges, contact your Gatekeeper.

Users may change the yellow stoplight color to indicate a task is due within a certain number of days. Changing the yellow color will automatically change the green stoplight color to reflect all tasks due beyond the date the yellow color expires.

Users may choose to be notified by email whenever a task they've been assigned is due in X days or is past due.

You can also make choices in the Notification Preferences window about whether to receive emails concerning suspenses you've created.

8. My Control Center

SCOUT[©] allows Users to customize some of the features of their version of SCOUT[©], which will be unique to that User. These functions are available in the Control Center (See Figure 56).

								Log out
DIR								
Apps	Personal Task Types	Originated By List	Stand Ins	MailSet/Distro				
General Tasks (58) Reports	Personal Task Types				Add New Type:	Add		
Dashboard Search	• 💢 CPMS							
Settings								
My Profile								
Control Center	Control Center p							

8.1 Personal Task Types

You can create a Personal Task Type name that will appear only in your version of SCOUT[©] appended to the global list of task types. Other Users cannot see your Personal Task Type names; however, they will be seen in the SCOUT[©] task list by anyone to whom you assign that task type. You can delete any of your Personal Task Types at any time.

8.2 List of your personal "Originated by" Names

You can create a personal list of originators that will appear only in your version of SCOUT[©] appended to the global list of task types.

8.3 List of Stand-Ins

You can designate someone to act as a stand-in for you. Senior officers can designate their executive officer or secretary as a stand-in, for example. Anyone you designate as a Stand-in can assume that role and act as you within SCOUT[©].

8.4 Create a DistroList/MailSet

A DistroList/MailSet is a list of email addresses saved as a unique name so you can choose groups of Assignees during the suspense assignment process. For this test, we recommend you create a MailSet. You can use any name for the MailSet, such as "My group 1." You are free to use apostrophes or special characters in the name. When you create a name and click the **CREATE THIS MAILSET** button, you will see a page that allows you to choose people or organizational accounts to place into this MailSet. Choose at least two names. Do not include your own name in a MailSet, as this could confuse some SCOUT[©] functions.



9. Support Center

The Support section may have several links. In this example there are four (4) links:

- 1. Gatekeepers
- 2. Help Center
- 3. User Manual
- 4. Admin Manual

The Scout logo at the bottom of the navigation menu displays the current version number and the link to the Internet web site (See Figure 57).

Library	Due Date:	Assigned By:	Rejected Date:	
Templates	Туре:	Accepted Date:	Rejected Date:	
Archives		Place Under Review		
ANNOUNCEMENTS				
Support				
Gatekeepers				
Gatekeepers Help Center				
Gatekeepers Help Center User Manual				
Gatekeepers Help Center				
Gatekeepers Help Center User Manual				
Gatekeepers Help Center User Manual Admin Manual				
Gatekeepers Help Center User Manual Admin Manual				
Gatekeepers Help Center User Manual Admin Manual				

Figure 57 – Support Center

9.1 Gatekeepers

The Gatekeepers link takes you to a listing of your unit's Gatekeepers' contact information. If you can't find a Gatekeeper listed for your organization or department, contact the Help Desk 800-795-1902 (See Figure 58).

Apps					
General Tasks (7)	Viewing Local Adr	ministrators			
Reports	Unit 🐁	User		Email	Pho
Dashboard	CPMS	Mr. Administrator, HPCCOM		HPCCOM.Administrator@suspensetracker.com	123456
Search	ISD	Mr. User C, Test	1	test.userc@suspensetracker.com	234567
	ø	10 <	>> Page 1	of 1 III IIII	View 1
Settings	K	1			
My Profile	If you can't find Gat	ekeepers listed for your organization or	department,	, contact the Help Desk at 800-795-1902.	
Control Center					
Control Center					
Control Center					
Library					
Library Templates					
Library Templates Archives					
Library Templates Archives ANNOUNCEMENTS					
Library Templates Archives ANNOUNCEMENTS					
Library Templates Archives ANNOUNCEMENTS					



9.2 Help Center

The Help Center link takes you to a website that contains helpful information such as:

- Lessons
- FAQs
- What's New
- Register for Online Classes

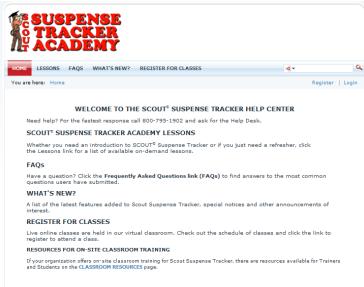


Figure 59 – SCOUT[©] Help Center

9.3 User & Admin Manuals

SCOUT[©] User and Admin Manuals are available for your use as a Microsoft Word document. HPC-COM LLC updates these manuals on a regular basis. Please check back frequently for new features and changes.

10. Miscellaneous Notes

10.1 Session Expiration

If you leave your browser open for a long period of time (approximately an hour) without interacting with SCOUT[©], a security feature will disable the application. If you then try to click any Workflows menu button, an alert will pop up advising you to log out or to close your browser and then re-log into the application.