



USER MANUAL



Manual Version 2
August 1, 2012

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USER MANUAL

Introduction

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Introduction

Overview

IMETS stands for Installation Management Employee Tracking System. IMETS is a multi-tiered system with modular design, created with the intent of “pulling” data from both the Defense Civilian Personnel Data System (DCPDS) and the Mini Master Employee Record File (MinMER) from the Non- appropriated Funds (NAF) payroll systems to form a common manning document for all Morale, Welfare and Recreation (MWR) personnel. It provides an automated MWR manning document that is available in near-real time and assists in managing and tracking the MWR workforce.

IMETS assists managers in tracking Appropriated Fund (APF) to NAF conversions, and provides an audit trail under the Uniform Funding and Management (UFM) initiative (For more information on UFM go to www.ArmyUFM.com). IMETS centralizes and enforces standardized data while delivering it in a hierarchical organizational style, from region to location code or activity.

Purpose

The purpose of this manual is to provide all IMETS users, regardless of access level, a basic understanding of the tasks that IMETS can perform and how to complete those tasks.

Passwords

IMETS is a web delivered application that requires both authorization and authentication. It is a member of the MIS application suite delivered from the MWR MIS Portal. Permissions and credentials (user names, passwords, etc.) will be assigned, maintained, and managed by FMRC Information Management (FMWRC-IM). Access will be granted only after the appropriate information is provided to and vetted by FMWRC-IM, FMWRC-FM and regional points of contact as listed in the IMETS Standard Operating Procedures (SOP).

Users will only see garrison and/or region data that their account has access to.

Support

For online IMETS training, visit the MWR Academy online at <http://www.mwraonline.com>. The training is available to all users who register.

For technical support and non-technical, manning document and Uniform Funding Management (UFM) questions contact imets@fmwrc.army.mil. (On-site assistance may be required in certain instances and can be made available as needed.)

Additional support, frequently asked questions, current SOPs, training documents, and UFM Briefings can be found online at <http://www.armyufm.com>.

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Section 1

IMETS Access and Layout

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1:1 Logging In

To access IMETS, users need both an MWR Portal Account and an IMETS Account. An MWR Portal Account may be obtained by first visiting <https://www.mwrportal.army.mil> and submitting the New User Request Form. An IMETS account may then be obtained through the regional IMETS POC as outlines in the IMETS Standard Operating Procedures.

Steps to Logging in:

1. Go to the following website:
<https://www.mwrportal.army.mil> .
2. When prompted, select EMAIL certificate.
3. Click on the **Applications** Link.
4. Click on the link under Terminal Services that says '**Click here for SMIRF, FMBS, IMETS etc....Citrix Applications.**'
 - Username will be automatically populated with AKO username.
 - Ensure that FMWRC is entered in the Domain field.
 - Enter MWR Portal Password, click **logon**, and select the **IMETS** Folder.
5. There are two IMETS icons.
 - The production database is where actual data is maintained, monitored and reports are run.
 - The training database is where any testing or practice work should be conducted.

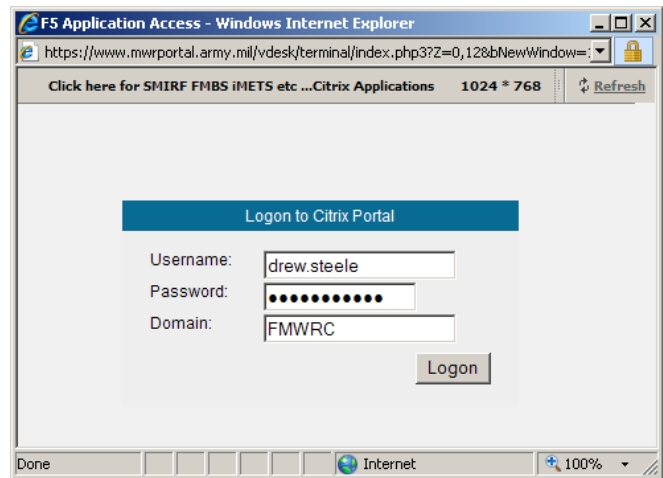


Fig 1-1: Logon to Citrix Portal



Fig 1-2: IMETS Icons

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1:2 Welcome Screen

When users log into IMETS, they will see the interface displayed below. The interface will be the same in both the production database and the training database.

The **Welcome Screen** displays:

- Personal Greeting and last login information
- Manning Document Conformance glossary lists the percentage of manning document data that matches DCPDS and MinMER by garrison. Users will only see the conformance rating of the garrisons they have been assigned permissions to. Conformance rates for IMA and ALF are listed separately.
 - o *In the below example, 97% of Fort Service's IMA manning document data matches both DCPDS and MinMER data.*
- Last data import date and time – allowing the user to easily see the DCPDS and MinMER file transfer dates.

The menu bar gives you access to all the program features.

The toolbar offers shortcuts to frequently used operations.

The left navigational pane allows you to drill through the context tree by Organization, Standard NAFI, or UIC.

The Data View will list the data that is selected in the context tree.

(For example, if Pacific Region is clicked on in the context tree – a listing of Pacific Region data will appear in the Data View.

The current context is displayed in the status panel.

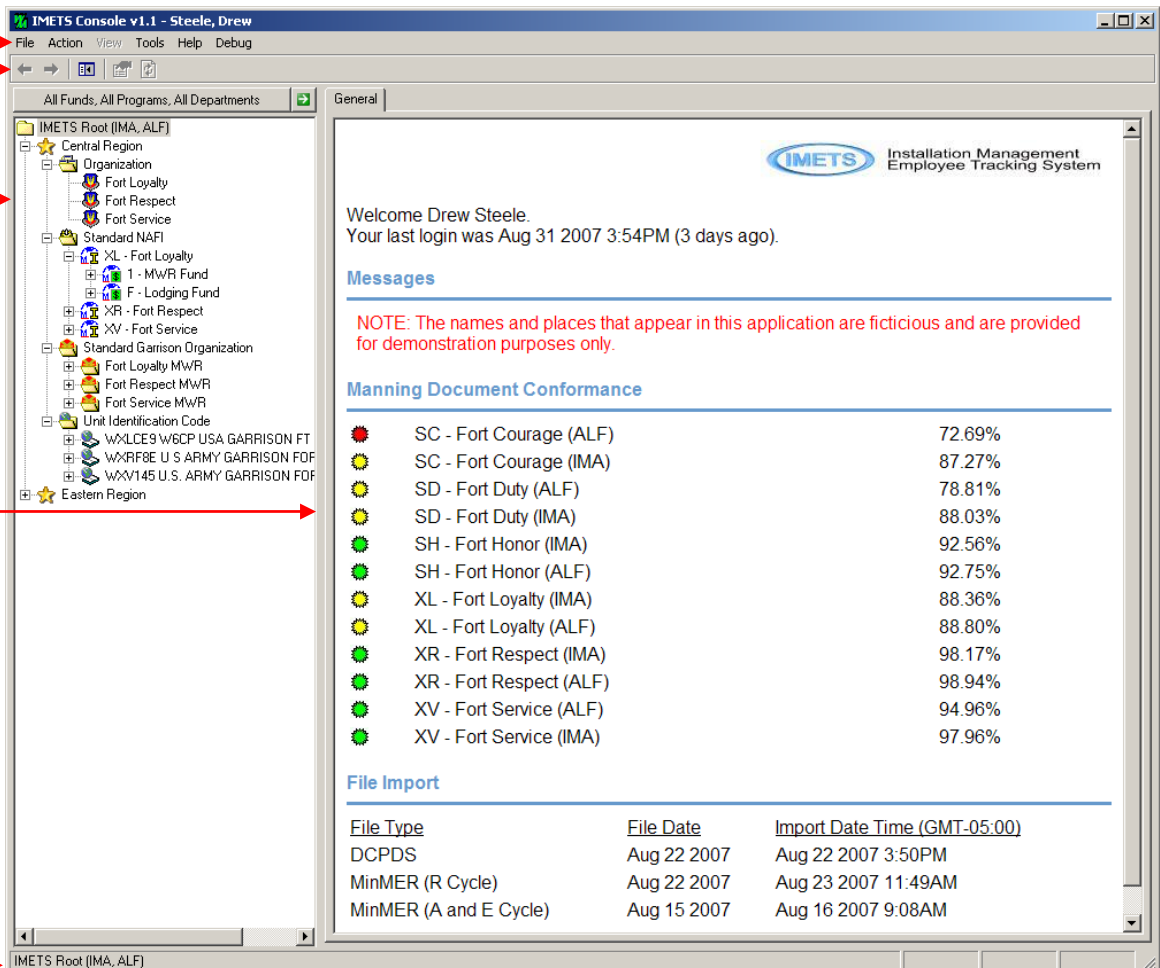


Fig 1-3: Standard IMETS Interface

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1:3 Context Tree

Region(s) and garrison(s) are displayed in the left panel. Only the regions and garrisons that a user has access to will be displayed. This is called the **context tree**. The user can 'drill' into the tree by clicking the '+' at each level.

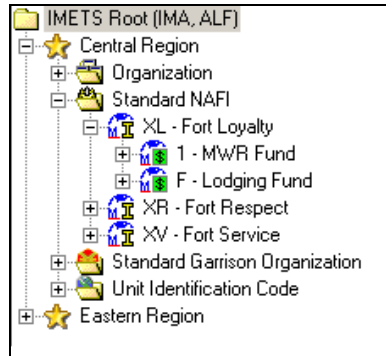


Fig 1-4: Context Tree

The context tree begins at the IMETS Root level. Data is organized in the context tree by Garrison, Standard NAFI, Standard Garrison Organization and Unit Identification Code. A users access level may begin at any level of the tree depending on what level of access is required for the particular user.

Clicking on an icon in the context tree sets the current context to that point. The context will determine the data that appears in the display pane. The current context will be displayed in the status panel below the context tree.

IMETS Root - The IMETS Root is the start of the context tree.

Organization Branch - The Organization Branch of the context tree will display physical location and activity data by garrison. (This branch is an optional branch available by request through the IMETS Helpdesk.)

Standard NAFI Branch - The Standard NAFI Branch of the context tree will display data by Standard NAFI. When the branch is expanded, the next level displayed would be program codes. Each program code can then be expanded to display the location codes within. The location codes may then also be expanded to display the available department codes.

- *Using the Standard NAFI part of the tree below the installation code level (such as fund level or program level) will ONLY return records which have been assigned a Standard NAFI. All records should be assigned to a Standard NAFI – including APF and LN records.*

Standard Garrison Organization Branch - The Standard Garrison Organization (SGO) branch of the context tree will display data by SGO Grouping. Example of SGO groupings are 'NAF Support Management' and 'Child and Youth'. The SGO branch allows data from multiple program codes within the same organizational element to be displayed together. (This branch is an optional branch available by request through the IMETS Helpdesk.)

Unit Identification Code Branch - The Unit Identification Code Branch of the context tree will display data by UIC. When the branch is expanded, the next level displayed would be the UIC. Each UIC can then be expanded to display the paragraphs within. The paragraphs may then also be expanded to display the position lines and even sublines. (This branch is an optional branch available by request through the IMETS Helpdesk.)

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1:4 Data View

The Data View will show the views and data that are available to the user at the current context. As a user navigates through the context tree the Data View will display records related to the current context. The record types displayed depend upon which view is selected.

Using the Standard NAFI part of the tree will ONLY return records which have been assigned a Standard NAFI. All records should be assigned to a Standard NAFI – including APF and LN records.

As a user navigates through the context tree the Data View will display records related to the current context. The record types displayed depend

In Figure 1-5, the user has navigated to the Central Region, Fort Loyalty, 1 – MWR Fund (this is the context) and has selected the Position View. IMETS displays all position records belonging to Fort Loyalty 1 MWR Fund in the data view.

IMETS Console v1.1 - Steele, Drew

File Action View Tools Help Debug

All Funds, All Programs, All Departments

IMETS Root (IMA, ALF)

- Central Region
 - Organization
 - Standard NAFI
 - XL - Fort Loyalty
 - 1 - MWR Fund (Selected)
 - F - Lodging Fund
 - XR - Fort Respect
 - XV - Fort Service
 - Standard Garrison Organization
 - Unit Identification Code
 - Eastern Region

Location Codes		Std. NAFI Numbers		Standard Garrison Organization		
General	Reports	Positions	Employees	Individuals	DCPDS	MINMER
Position		UIC-Para-Line (S/L)	Std NAFI	Employ		
YC-0030-02 SUPV SPORTS SPEC		WXLCE9-013K-01 (1)	XL1HBSPL	1		
YB-1702-02 SUPV EDUCATION AND TRAINING TECH		WXLCE9-014F-07 (1)	XL1JGCDGL	1		
GS-0303-06 ADMINISTRATIVE SUPPORT ASSISTANT (OA)		WXLCE9-022-02 (1)	XL1PCCYGL	1		
NF-1701-04 SUPV CHILD DEVELOPMENT SERVICES DIR		WXLCE9-022F-03 (1)	XL1JGCDGL	1		
YA-1701-02 SUPV CHILD DEVELOPMENT SERVICES DIR		WXLCE9-022F-03 (1)	XL1JGCDGL	0		
GS-1701-09 EARLY CHILDHOOD TRAINING & CURRICULUM SPEC		WXLCE9-022F-04 (1)	XL1JGCDGL	1		
GS-1701-09 FAMILY CHILD CARE DIRECTOR		WXLCE9-022F-04 (2)	XL1PDFCGL	1		
GS-1702-05 LEAD EDUCATIONAL TECHNICIAN		WXLCE9-022F-08 (1)	XL1JGCDGL	2		
GS-1702-05 LEAD EDUCATIONAL TECHNICIAN		WXLCE9-022F-08 (2)	XL1JGCDGL	1		
GS-1702-05 LEAD EDUCATIONAL TECHNICIAN		WXLCE9-022F-08 (3)	XL1JGCDGL	1		
GS-1702-05 LEAD EDUCATIONAL TECHNICIAN		WXLCE9-022F-08 (5)	XL1JGCDGL	1		
GS-1702-04 CHILD DEVELOPMENT PROGRAM ASSISTANT		WXLCE9-022F-10 (3)	XL1JGCDGL	1		
GS-1702-04 CHILD DEVELOPMENT PROGRAM ASSISTANT		WXLCE9-022F-10 (4)	XL1JGCDGL	1		
GS-1702-04 CHILD DEVELOPMENT PROGRAM ASSISTANT		WXLCE9-022F-10 (5)	XL1JGCDGL	1		
GS-1702-04 CHILD DEVELOPMENT PROGRAM ASSISTANT		WXLCE9-022F-10 (6)	XL1JGCDGL	1		
GS-1702-04 CHILD DEVELOPMENT PROGRAM ASSISTANT		WXLCE9-022F-10 (7)	XL1JGCDGL	1		

Page: 1 of 1 (Records 1 - 555 of 555)

Central Region; XL - Fort Loyalty; 1 - MWR Fund

Fig 1-5: Display Pane

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1:5 Manning Document Conformance

The Manning Document Conformance displayed on the Welcome Screen lists the conformance ratings of the garrison(s) the user has access to. Conformance rates for IMA and ALF are listed separately. The Manning Document Conformance Rate represents, in real-time, how well a garrison's manning document conforms to the data found in DCPDS and the MinMER.

- 100%-91% is considered GREEN
- 90%-75% is considered YELLOW
- 74%-0% is RED.













Manning Document Conformance		
	SC - Fort Courage (ALF)	72.69%
	SC - Fort Courage (IMA)	87.27%
	SD - Fort Duty (ALF)	78.81%
	SD - Fort Duty (IMA)	88.03%
	SH - Fort Honor (IMA)	92.56%
	SH - Fort Honor (ALF)	92.75%
	XL - Fort Loyalty (IMA)	88.36%
	XL - Fort Loyalty (ALF)	88.80%
	XR - Fort Respect (IMA)	98.17%
	XR - Fort Respect (ALF)	98.94%
	XV - Fort Service (ALF)	94.96%
	XV - Fort Service (IMA)	97.96%

Fig 1-6: Manning Document Conformance

Note: Users will only see the conformance rating of the garrisons they have been assigned permissions to!

The formula for conformance ratings is: $\text{conformance rate} = ((\text{total number of conflicts and missing references}) / (\text{total number of employee, DCPDS, and MinMER records}))$. This formula is based on a percentage allowing equal evaluation of large, medium, and small garrisons.

Manning Document Conformance Ratings should be monitored frequently and are used to report the overall region status to IMCOM and serve as an indicator of how well a region or particular garrison is maintaining their data and resolving data conflicts. FMWRC has visibility of all conformance ratings for all garrisons.

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1:6 Toolbar

The toolbar offers shortcuts to frequently used operations. Different buttons will display in the toolbar depending on which view is active.

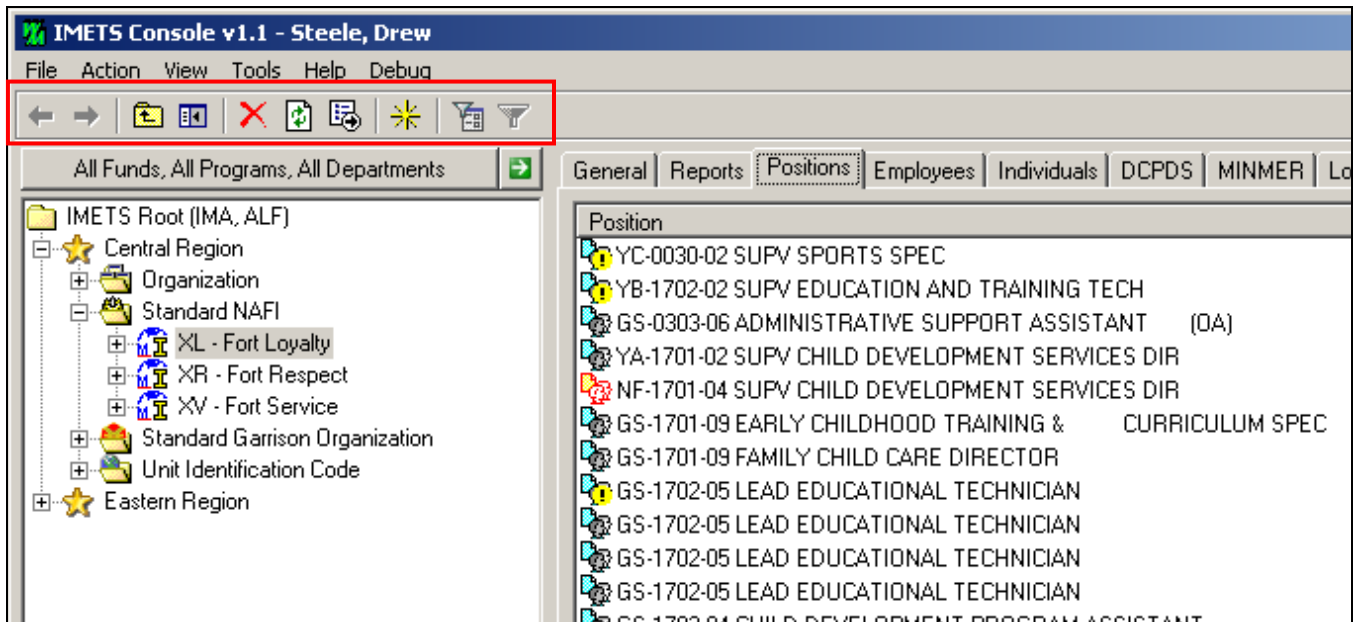











Fig 1-7: Manning Document Conformance

-  'Up One Level' - This button will navigate to one level up in the context tree.
-  'Show/Hide Console Tree' - This button hides the context tree.
-  'Delete' - This button will delete a position.
-  'Properties' - This button will open the properties window of the selected record.
-  'Refresh' - This button will refresh the active window.
-  'Export List' - This button will export the data in the current view to a .txt or .csv file that can be saved locally.
-  'New...' - This button will create a new record.
-  'Define Filter' - This button will launch the filter properties.
-  'Toggle Filter' - This button will toggle the filter on and off.

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Section 2

Manning Document Module Views and Record Types

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2:1 About the Manning Document Module

In section 2 we review the Manning Document Module. The Manning Document Module is the module primarily used in IMETS. This module contains the views, records and tools needed to directly manage and maintain the MWR Manning document.

Each view displays records based on the current context and if any filters or scopes are being used. The Views that make up the Manning Document Module are:

- Positions View
- Employees View
- DCPDS View
- MinMER View
- Individuals View

Once the user begins to drill through the organizations or Standard NAFI in the context tree, IMETS will return data in various **views** that allow the user to review, sort, update, and filter the data in different ways.

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2:2 Manning Document Icons

Manning Document icons are used in IMETS to identify the position type and to identify a problem. An undecorated icon indicates a congruent record (no disconnects or conflicts) – this is one of the goals in managing the manning document. The ratio of congruent icons (non-error) to error icons relates directly to the conformance percentage within a garrison. The goal of a garrison should be to have all congruent icons which would reflect a conformance rating of 100%.

	Congruent Icons		Error Icons					
	Position	Employee	Disconnect		Conflicts		Both	
NAF								
APF								
LN								
Individual	-		-		-		-	

Fig 2-1: IMETS Icons (Diagram should be viewed in color.)

1. Icons identify position type:

- Blue icons are used for APF records
- Yellow icons are used for the NAF records
- Orange icons are used for the Local National (LN) records
- All individual icons are green regardless of position type

2. Icons alert a disconnect:

A **red outline** indicates an employee **disconnect** – the employee, or an employee in the position, is missing from one or more document types. Possible disconnect errors:

- Employee has no reference to DCPDS
- Employee has no reference to MinMER
- Employee has no reference to DCPDS or MinMER
- Individual found on DCPDS and MinMER, but not found on Manning Document
- Individual found on DCPDS, but not found on Manning Document
- Individual found on MinMER, but not found on Manning Document

3. Icons alert a conflict:

A **yellow exclamation point** indicates a **position conflict** – something in the position does not match one or more of the document types. (for example, the manning document shows the position as Regular Full Time (RFT) but DCPDS shows the position as flex.) Possible conflict errors:

- Position conflicts with DCPDS
- Position conflicts with MinMER
- Position conflicts with DCPDS and MinMER

An icon COULD have a red outline, a yellow exclamation point, both or neither.

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2:3 Positions View

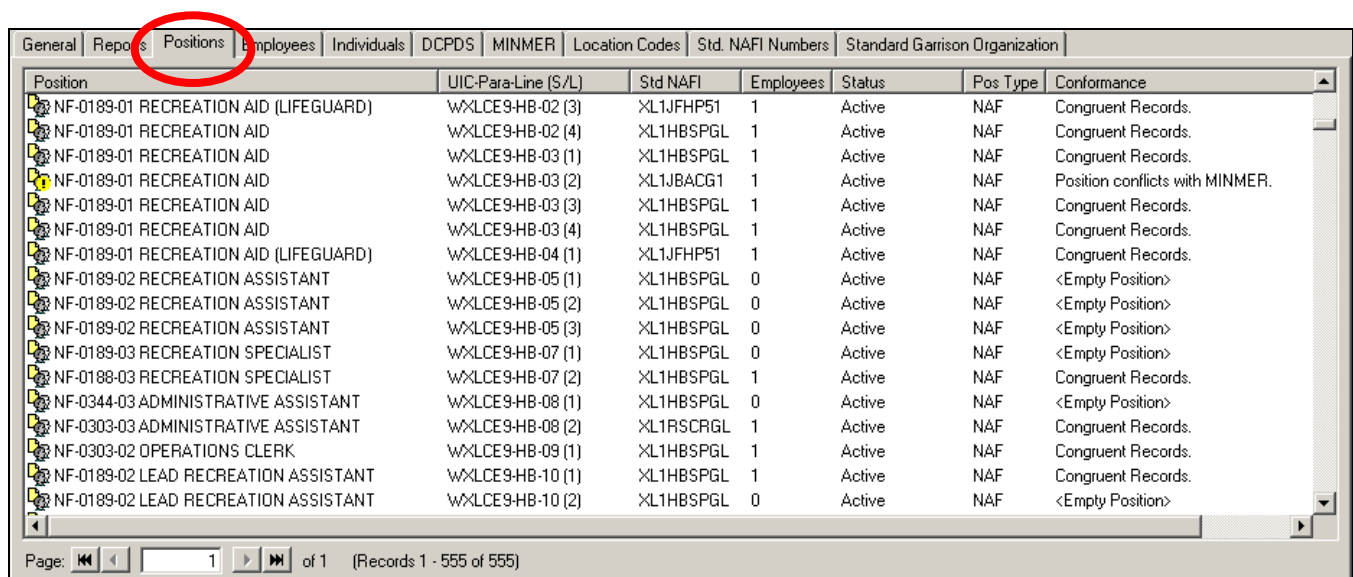
Lists positions within the current context and is primarily managed at the garrison level.

Positions in IMETS can be created directly from DCPDS and MinMER data. Missing references and conflicts are easily identified using the icon or the conformance column,

Filters may be used in conjunction with the Positions view to display data by many different criteria such as employee, position type, position status, UIC, para, line, pay plan, series, grade, position title, appoint cat, Std NAFI, employee count, attribute flags, conformance, job number, UFM, MDEP and/or LDP.

Data may be sorted by any of the columns within the view by clicking on the column header field.

- *Position column* - Position is listed as "Pay Plan-Series-Grade Job Title"
- *UIC-Para-Line (S/L) column* - Shows the positions UIC- Paragraph, Line & SubLine number
- *Std NAFI* - Lists the standard NAFI assigned to the position
- *Employees* - Indicates if the position is filled or not
 1. 1 indicates the position is filled
 2. 0 indicated the position is vacant
- *Status* - Displays if the position is Active, Inactive, or UFM Converted
- *Pos Type* - Displays if the position is NAF, APF, or LN
- *Conformance* - Displays conflicts, if any, against DCPDS or MinMER



Position	UIC-Para-Line (S/L)	Std NAFI	Employees	Status	Pos Type	Conformance
NF-0189-01 RECREATION AID (LIFEGUARD)	WXLCE9-HB-02 (3)	XL1JFHP51	1	Active	NAF	Congruent Records.
NF-0189-01 RECREATION AID	WXLCE9-HB-02 (4)	XL1HBSPGL	1	Active	NAF	Congruent Records.
NF-0189-01 RECREATION AID	WXLCE9-HB-03 (1)	XL1HBSPGL	1	Active	NAF	Congruent Records.
NF-0189-01 RECREATION AID	WXLCE9-HB-03 (2)	XL1JBACG1	1	Active	NAF	Position conflicts with MINMER.
NF-0189-01 RECREATION AID	WXLCE9-HB-03 (3)	XL1HBSPGL	1	Active	NAF	Congruent Records.
NF-0189-01 RECREATION AID	WXLCE9-HB-03 (4)	XL1HBSPGL	1	Active	NAF	Congruent Records.
NF-0189-01 RECREATION AID (LIFEGUARD)	WXLCE9-HB-04 (1)	XL1JFHP51	1	Active	NAF	Congruent Records.
NF-0189-02 RECREATION ASSISTANT	WXLCE9-HB-05 (1)	XL1HBSPGL	0	Active	NAF	<Empty Position>
NF-0189-02 RECREATION ASSISTANT	WXLCE9-HB-05 (2)	XL1HBSPGL	0	Active	NAF	<Empty Position>
NF-0189-02 RECREATION ASSISTANT	WXLCE9-HB-05 (3)	XL1HBSPGL	0	Active	NAF	<Empty Position>
NF-0189-03 RECREATION SPECIALIST	WXLCE9-HB-07 (1)	XL1HBSPGL	0	Active	NAF	<Empty Position>
NF-0188-03 RECREATION SPECIALIST	WXLCE9-HB-07 (2)	XL1HBSPGL	1	Active	NAF	Congruent Records.
NF-0344-03 ADMINISTRATIVE ASSISTANT	WXLCE9-HB-08 (1)	XL1HBSPGL	0	Active	NAF	<Empty Position>
NF-0303-03 ADMINISTRATIVE ASSISTANT	WXLCE9-HB-08 (2)	XL1RSCRL	1	Active	NAF	Congruent Records.
NF-0303-02 OPERATIONS CLERK	WXLCE9-HB-09 (1)	XL1HBSPGL	1	Active	NAF	Congruent Records.
NF-0189-02 LEAD RECREATION ASSISTANT	WXLCE9-HB-10 (1)	XL1HBSPGL	1	Active	NAF	Congruent Records.
NF-0189-02 LEAD RECREATION ASSISTANT	WXLCE9-HB-10 (2)	XL1HBSPGL	0	Active	NAF	<Empty Position>

Fig 2-2: Positions View

All data shown is fictional. Manual best viewed in color.

Please send comments or corrections to: Rachel.s.kennedy.naf@mail.mil

2:4 Position Records

Contain detailed data which represent a position on the Manning Document.

Position records in IMETS are managed by the garrison. Position records in IMETS make up the MWR Manning Document and should be kept up to date at all times. Any changes to a position record are automatically tracked in the positions history tab, keeping an audit trail.

Employee records are associated with positions. Here are a few things to remember about the position/employee relationship:

- Positions will have MANY employees over time.
- When a new employee comes on board it is usually into a pre-existing position.
- It is not necessary to create new positions for each new employee; IMETS is designed to use the same positions to track history.

1. General Tab

Position Properties - NF-0030-03 SPORTS SPECIALIST

General | Details | Additional Info | UFM | History

Position Type: Pay Plan: Grade:

Position Title:

Occ Series:

Position Status: Appointment Category: Hours Sch'd per Week:

Employees (Displaying 1 of 1 employees) [Refresh](#)

Employee	Conformance
Haynes, Bonnie	Congruent Records.

☐ Display Inactive Employees

Fig 2-3: Position Record – General Tab

- **Position Type:** This field is set when a position is created and once set can not be changed.
- **Pay Plan:** This drop down field can be changed and data is compared against both DCPDS and MinMER.
- **Grade:** This field can be changed and data is compared against both DCPDS and MinMER.
- **Position Title:** This field can be changed and data is compared against DCPDS. (The position title is not contained in the MinMER File.)
- **Occ Series:** This drop down field can be changed and data is compared against DCPDS.)
- **Position Status:** This drop down field can be changed to Active or InActive. If the positions is marked InActive, it will not, by default appear in the positions view. To view inactive positions, use a Filter.
- **Appointment Category:** This drop down field can be changed to RFT, RPT, FLX, RFT- Limited Tenure, RPT-Limited Tenure, RFT-Seasonal, RPT-Seasonal. Data is compared against both DCPDS and MinMER.

- **Hours Scheduled Per Week :** The number of hours an employee is scheduled per week is entered here. IMETS will not allow a value greater than 40.
- **Employees:** This section will display employees currently occupying the position. By default, only Active employees will display. To view inactive employees, tick the check box ' Display Inactive Employees'. Employees may be added and removed here as well.

All data shown is fictional. Manual best viewed in color.

2. Details Tab

Fig 2-4: Position Record – Details Tab

- **UIC:** Drop down menu allows user to select UIC existing within installation. This field is compared against DCPDS data and if it does not match, the position will be marked with a conflict.
- **Paragraph/Line Number:** User may edit these fields to assign the appropriate paragraph and line number. If the DCPDS record contains Para and line data it will be compared against these fields.
- **Sub Line:** The Sub Line is automatically assigned as 1 unless there are more than one position with the same para and Line. If more than one position with the same para and line exist, IMETS will automatically assign the next available sub line. To adjust the order of the sub lines, click on the Sub Line link and using the arrows to move positions up or down in the numbering sequence.
- **Std. NAFI:** Each position must have a Standard NAFI assigned. The Std. NAFI may be entered into the field and then verified by clicking 'Check NAFI', or the Standard NAFI can be selected by clicking the 'Browse for NAFI' button. This field is compared against DCPDS and MinMER data and if it does not match, the position will be marked with a conflict.

- **Job Number:** This field is not required, however, if data is input, it will be compared against DCPDS and marked as a conflict if it does not match.
- **LDP:** Drop down menu allows user to select LDP designation. This field is only visible on NF-4 or NF-5 position records.
- **Funded By: (Not shown above)** Drop down menu allows users to select Funded By source (APF or NAF) for LN position record.
- **Pay and Benefits:** This data is displayed only if the user account has access to sensitive information.
- **Remarks:** This section is available to type any notes about the position. Once notes are entered, they are visible by any other user with access to the record.

All data shown is fictional. Manual best viewed in color.

2:4 Position Records (cont.)

3. Additional Info Tab & Custom Fields

Position Properties - NF-0030-03 SPORTS SPECIALIST

General | Details | **Additional Info** | UFM | History

Name	Value

Add... Remove

Attribute Flags:

- ☐ Pending Position Action
- ☐ Follow Up
- ☐ Office Review
- ☐ Work Flag 1
- ☐ Work Flag 2
- ☐ IMETS Admin Review
- ☐ SGO

OK Cancel Apply

Fig 2-5: Position Record – Additional Info Tab

Custom Fields: Custom Fields can be used to record and track unique information used by the local garrison. There are several different types of fields available: Text Fields, Numeric Fields, Name Fields. Date Fields, Yes/No Fields.

Adding Custom Fields are covered in section 3:11.

Attribute Flags: Attribute Flags can be used to mark position records to be used in association with a filter. There are several different Attribute Flags available and any combination may be used at one time. The use of Attribute flags is optional.

- Pending Position Action
- Follow Up
- Office Review
- Work Flag 1
- Work Flag 2
- IMETS Admin Review**
- SGO Data
- Incomplete Data

**If this flag is checked it will alert the IMETS Administrator that assistance is needed with the record. Add remarks in the Details Tab to let the Administrator know what the problem is.

4. History Tab

Position Properties - NF-0030-03 SPORTS SPECIALIST

General | Details | Additional Info | UFM | **History**

User	Date	Event
L.Marquez	1/16/2007 11:07:25 AM	MDEP changed from (UNKNOWN) to QYDP
J.Olson	3/15/2006 9:21:29 AM	Job Number changed from "NF123" to "AM41"
J.Olson	2/1/2006 2:57:08 PM	Paragraph changed from "JG" to "JH"
J.Olson	1/27/2006 1:05:59 PM	Paragraph changed from "06C" to "JG"

History Events: 4
[Refresh](#) Print

OK Cancel Apply

Fig 2-6: Position Record - History Tab

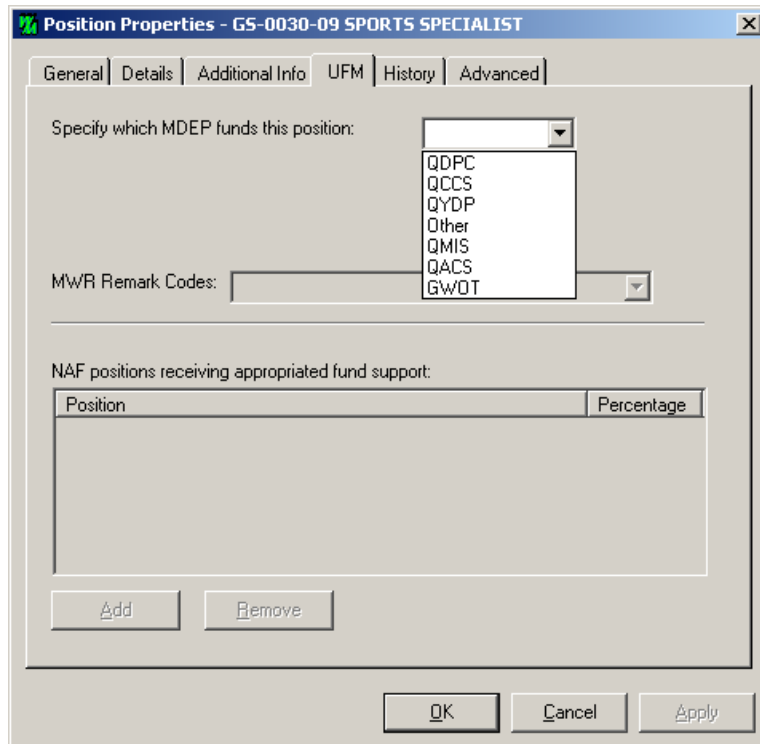
Every Position Record has a **History Tab**. The History Tab contains a record of all edits made to the position, including the date the edit was made and who made the edit.

- The History tab is automatically updated every time a change is made to a position record.
- Entries in the History tab cannot be deleted by any user.

There is a print button allowing the History data to be printed.

All data shown is fictional. Manual best viewed in color.

5. UFM Tab (APF Positions)



Position Properties - GS-0030-09 SPORTS SPECIALIST

General | Details | Additional Info | **UFM** | History | Advanced

Specify which MDEP funds this position:

MWR Remark Codes:

NAF positions receiving appropriated fund support:

Position	Percentage
----------	------------

Add Remove

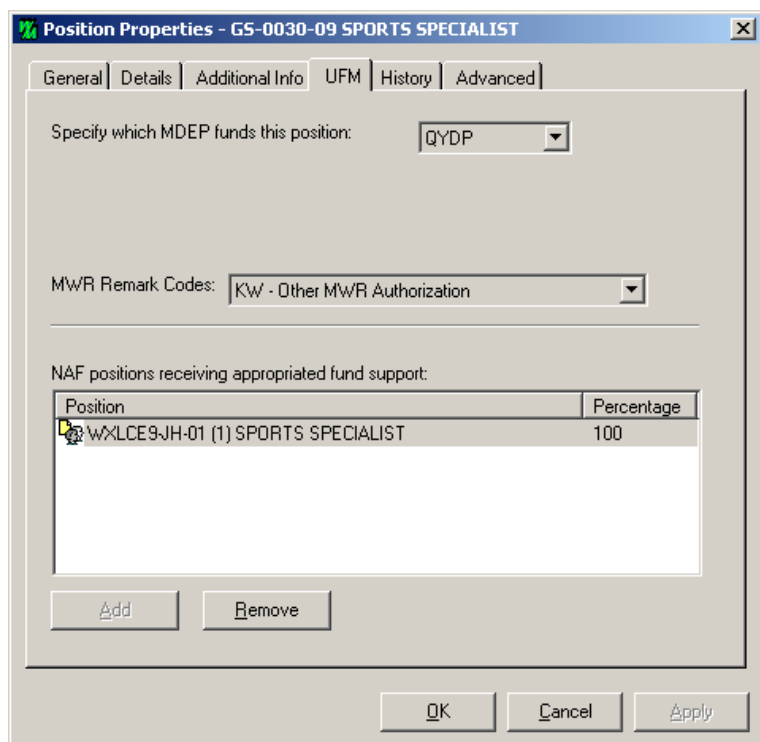
OK Cancel Apply

Fig 2-7: Position Record – UFM Tab

APF Position, Unconverted:

Here is an example of an active APF position. The MDEP field is active. The MDEP can be selected (or changed by using the drop down menu.)

Since the position has not been converted all other fields are grayed out.



Position Properties - GS-0030-09 SPORTS SPECIALIST

General | Details | Additional Info | **UFM** | History | Advanced

Specify which MDEP funds this position:

MWR Remark Codes:

NAF positions receiving appropriated fund support:

Position	Percentage
WXLCE9JH-01 (1) SPORTS SPECIALIST	100

Add Remove

OK Cancel Apply

Fig 2-8: Position Record – UFM Tab

APF Position, Converted:

Here is an example of a APF position that has been converted. The MDEP is selected, and the MWR Remark code has been set. These fields were determined during the UFM Conversion process and are now locked in place. (If these values need to be changed, contact an IMETS Administrator.)

The UFM Tab also displays the NAF Position (or positions) that are receiving the appropriated fund support as a result of the UFM Conversion.

All data shown is fictional. Manual best viewed in color.

6. UFM Tab (NAF Positions)

Fig 2-9: Position Record – UFM Tab

Active NAF not link to Conversion:

Here is an example of an active NAF position. The UFM Tab asks:

- 'Is this position is authorized APF support in accordance with AR 215-1?' and
- 'Is this position currently identified for funding under the current MOA?'.

There is also a drop down to specify which MDEP fund the position.

The UFM Tab also displays the APF Positions providing appropriated fund support, but since this position is not linked to a UFM Conversion, this area is grayed out.

Fig 2-10: Position Record – UFM Tab

Active NAF, Linked to a UFM Conversion:

Here is an example of an active NAF position that is linked to a UFM Converted APF position. The UFM Tab asks:

- 'Is this position is authorized APF support in accordance with AR 215-1?' and
- 'Is this position currently identified for funding under the current MOA?'.

There is also a drop down to specify which MDEP fund the position.

The UFM Tab also displays the APF Position (s) providing appropriated fund support.

All data shown is fictional. Manual best viewed in color.

7. Advanced Tab

Position Properties - GS-0030-09 SPORTS SPECIALIST

General | Details | Additional Info | UFM | History | **Advanced**

Return Rights

Return Rights Individual: [Clear Name](#)

Smith, Alex

DEROS: 1 May 2008

Remarks:

This person is currently at Fort Courage in the Eastern Region.

The **Advanced Tab** exists on APF positions only. It tracks if any individual has return rights to the position.

To add a person as having return right to a position, type the name in the 'Return Rights Individual' field and click the **Check Name** button.

A DEROS date and any related remarks may also be entered.

Fig 2-11: Position Record – APF Advanced Tab

All data shown is fictional. Manual best viewed in color.

2:5 Employees View

Lists employees within the current context and is primarily managed at the garrison level.

Each employee is associated with exactly one position. Over time, a person may have multiple employee records reflecting their employment history in the organization. Unless an individual is dual, there should be only ONE active employee record for a person at one time.

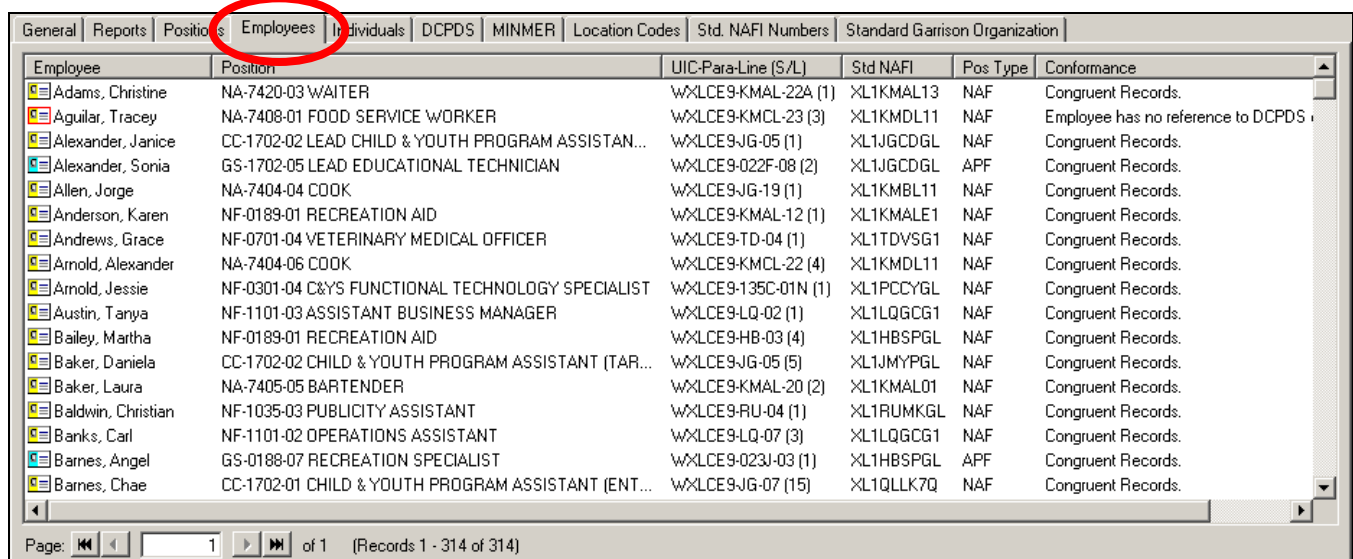
Missing references and conflicts with DCPDS and MinMER are easily identified in IMETS using either the icons or the conformance column.

Filters may be used in conjunction with the Employees view to display data by any of the following criteria: employee, position type, position status, employee status, active status, UIC, paragraph, line, pay plan, series, grade, position title, appointment cat, Std NAFI, attribute flags, and/or conformance.

Data may be sorted by any of the columns within the view by clicking on the column header field.

- *Employee column* – Employee name is listed: Last name, First Name, MI
- *Position column* - Position is listed as "Pay Plan-Series-Grade Job Title"
- *UIC-Para-Line column* - Shows the positions UIC- Paragraph & Line number
- *Pos Type* – Displays if the position is NAF, APF, or LN
- *Conformance* – Displays conflicts, if any, against DCPDS or MinMER

By default, the Employees View displays Active employees only. A filter can be used to display inactive employee records.



Employee	Position	UIC-Para-Line (S/L)	Std NAFI	Pos Type	Conformance
Adams, Christine	NA-7420-03 WAITER	WXLCE9-KMAL-22A (1)	XL1KMAL13	NAF	Congruent Records.
Aguilar, Tracey	NA-7408-01 FOOD SERVICE WORKER	WXLCE9-KMCL-23 (3)	XL1KMDL11	NAF	Employee has no reference to DCPDS
Alexander, Janice	CC-1702-02 LEAD CHILD & YOUTH PROGRAM ASSISTAN...	WXLCE9-JG-05 (1)	XL1JGCDGL	NAF	Congruent Records.
Alexander, Sonia	GS-1702-05 LEAD EDUCATIONAL TECHNICIAN	WXLCE9-022F-08 (2)	XL1JGCDGL	APF	Congruent Records.
Allen, Jorge	NA-7404-04 COOK	WXLCE9-JG-19 (1)	XL1KMBL11	NAF	Congruent Records.
Anderson, Karen	NF-0189-01 RECREATION AID	WXLCE9-KMAL-12 (1)	XL1KMALE1	NAF	Congruent Records.
Andrews, Grace	NF-0701-04 VETERINARY MEDICAL OFFICER	WXLCE9-TD-04 (1)	XL1TDVSG1	NAF	Congruent Records.
Arnold, Alexander	NA-7404-06 COOK	WXLCE9-KMCL-22 (4)	XL1KMDL11	NAF	Congruent Records.
Arnold, Jessie	NF-0301-04 C&YS FUNCTIONAL TECHNOLOGY SPECIALIST	WXLCE9-135C-01N (1)	XL1PCCYGL	NAF	Congruent Records.
Austin, Tanya	NF-1101-03 ASSISTANT BUSINESS MANAGER	WXLCE9-LQ-02 (1)	XL1LQGCG1	NAF	Congruent Records.
Bailey, Martha	NF-0189-01 RECREATION AID	WXLCE9-HB-03 (4)	XL1HBSPGL	NAF	Congruent Records.
Baker, Daniela	CC-1702-02 CHILD & YOUTH PROGRAM ASSISTANT (TAR...	WXLCE9-JG-05 (5)	XL1JMYPL	NAF	Congruent Records.
Baker, Laura	NA-7405-05 BARTENDER	WXLCE9-KMAL-20 (2)	XL1KMAL01	NAF	Congruent Records.
Baldwin, Christian	NF-1035-03 PUBLICITY ASSISTANT	WXLCE9-RU-04 (1)	XL1RUMKGL	NAF	Congruent Records.
Banks, Carl	NF-1101-02 OPERATIONS ASSISTANT	WXLCE9-LQ-07 (3)	XL1LQGCG1	NAF	Congruent Records.
Barnes, Angel	GS-0188-07 RECREATION SPECIALIST	WXLCE9-023J-03 (1)	XL1HBSPGL	APF	Congruent Records.
Barnes, Chae	CC-1702-01 CHILD & YOUTH PROGRAM ASSISTANT (ENT...	WXLCE9-JG-07 (15)	XL1QLLK7Q	NAF	Congruent Records.

Fig 2-12: Employees View

All data shown is fictional. Manual best viewed in color.

Please send comments or corrections to: Rachel.s.kennedy.naf@mail.mil

2:6 Employee Records

Contain detailed data which represent an employee on the Manning Document.

An employee record is created when a MinMER or DCPDS record is associated to a position. Employee records are never deleted from the system, but simply inactivated when an employee leaves a position. By default, only active employees are displayed in the Employee View. A filter can be used to view inactive employee records at any time.

It is possible for a person to have multiple employee records. If a person is a dual employee they will have an employee record for each of their two positions. Or, if a person leaves one position in the organization for another position in the same organization - they will have two employee records: one active employee record and one inactive employee record.

1. General Tab

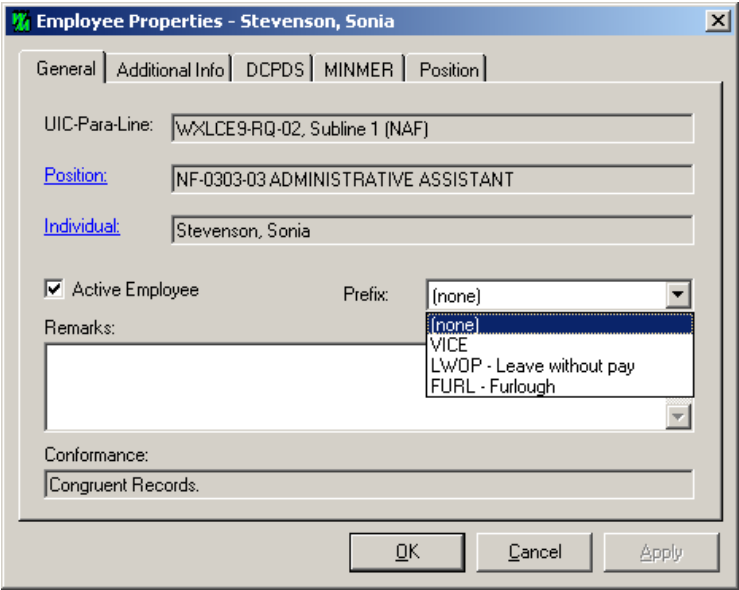


Fig 2-13: Employee Record – General Tab

UIC-Para-Line: Displays the UIC, paragraph, line, subline and position type (APF or NAF) of the position the employee occupies.

Position: Clicking the link will launch the position properties of the position the employee occupies. The field displays the full position title, including the position type, series, grade and title.

Individual: Clicking the link will launch the individual properties of the individual the employee record is associated with. The field displays the individual name.

Active Employee: If this check box is checked the employee is considered active and will display, by default, in the employees view and display in the employees section of the position record. When an employee leaves a position, this check mark should be removed to Inactivate the employee record.

Prefix: A prefix can be selected to display in front of an employees name such as VICE, LWOP or FURL.

Remarks: This section is available to type notes about the employee. Remarks are visible to any user with access to the record.

Conformance: This read-only field will display the conformance of the employee.

All data shown is fictional. Manual best viewed in color.

2:6 Employee Records (cont.)

2. Additional Info Tab

Fig 2-14: Employee Record – Additional Info Tab

Custom Fields: Custom Fields can be used to record and track unique information used by the local installation. There are several different types of fields available: Text Fields, Numeric Fields, Name Fields. Date Fields, Yes/No Fields.

Adding Custom Fields are covered in section 3:11.

Attribute Flags: Attribute Flags can be used to mark position records to be used in association with a filter. There are several different Attribute Flags available and any combination may be used at one time. The use of Attribute flags is optional.

- Pending Position Action
- Is Deployed
- Command Sponsored
- Is OverHire
- Office Review
- WorkFlag1
- IMETS Admin Review**

**If this flag is checked it will alert the IMETS Administrator that assistance is needed with the record. Add remarks in the Details Tab to let the Administrator know what the problem is.

3. DCPDS and MinMER Tabs

Fig 2-15: Employee Record – DCPDS/MinMER Tab

The **DCPDS Tab** and **MinMER Tab** display the referenced DCPDS or MinMER Record.

The **Establish Reference** button will associate the employee record with it's DCPDS or MinMER record is a relationship does not exist.

The **Remove Reference** button will remove the relationship to the MinMER or DCPDS record.

The **Conflicts*** section will display any conflicts that may exist between the MinMER or DCPDS record and the employees position data. Placing a checkmark next to a conflict and clicking 'OK' will update the position record data to match the DCPDS or MinMER Record data.

**For more on resolving conflicts see Section 3::3.*

All data shown is fictional. Manual best viewed in color.

4. Position Tab

Name	Value
UIC	WXLCE9 (W6CP USA GARRISON FT LOYALTY)
Paragraph	RQ
Line Number	02
Sub Line	01
Position Type	NAF
Pay Plan	NF
Occupational Series	0303 - Miscellaneous Clerk and Assistant Series
Grade	03
Position Title	ADMINISTRATIVE ASSISTANT
Pay Rate	0.00
Appt Category	RFT - Regular Full Time. Regular workweek is 40 hours.
Job Number	AL835
Standard NAFI	XL1RQ0DGL

The **Positions Tab** displays the Manning Document position data that the employee belongs to.

Fig 2-16: Employee Record – DCPDS/MinMER Tab

All data shown is fictional. Manual best viewed in color.

Please send comments or corrections to: Rachel.s.kennedy.naf@mail.mil

2:7 DCPDS View

Lists DCPDS records being imported into IMETS within the current context.

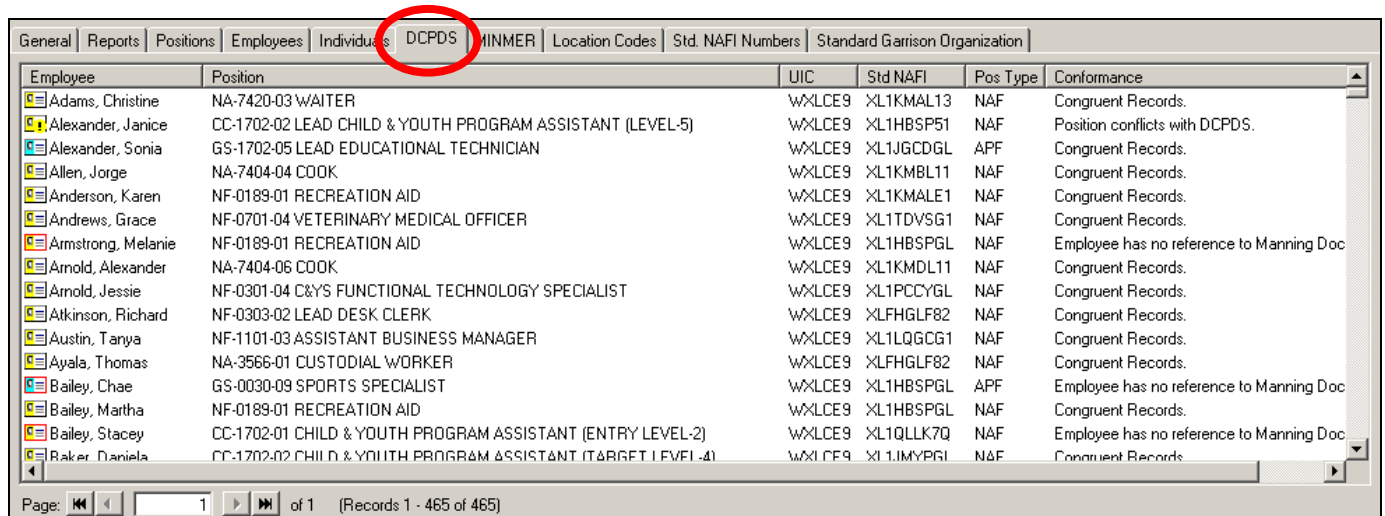
The DCPDS view contains a listing of people/employees (no vacancies) imported directly from Defense Civilian Personnel Data System (DCPDS). Missing references and conflicts with DCPDS and MinMER are easily identified in IMETS using either the icons or the conformance column.

- The Welcome Screen displays the date of the last import.

Filters may be used in conjunction with the DCPDS view to display data by any of the following criteria: duty title, employee name, UIC, position type, pay plan, series, grade, position title, and/or conformance.

Data may be sorted by any of the columns within the view by clicking on the column header field.

- *Employee column* – Employee name is listed: Last name, First Name, MI
- *Position column* - Position is listed as "Pay Plan-Series-Grade Job Title"
- *Std NAFI column* - Shows the positions Standard NAFI (Installation code, Fund code, Program code, Location Code, Department Code)
- *Conformance* – Displays conflicts, if any, against the Manning Document or MinMER



Employee	Position	UIC	Std NAFI	Pos Type	Conformance
Adams, Christine	NA-7420-03 WAITER	WXLCE9	XL1KMAL13	NAF	Congruent Records.
Alexander, Janice	CC-1702-02 LEAD CHILD & YOUTH PROGRAM ASSISTANT (LEVEL-5)	WXLCE9	XL1HBSP51	NAF	Position conflicts with DCPDS.
Alexander, Sonia	GS-1702-05 LEAD EDUCATIONAL TECHNICIAN	WXLCE9	XL1JGCDGL	APF	Congruent Records.
Allen, Jorge	NA-7404-04 COOK	WXLCE9	XL1KMBL11	NAF	Congruent Records.
Anderson, Karen	NF-0189-01 RECREATION AID	WXLCE9	XL1KMALE1	NAF	Congruent Records.
Andrews, Grace	NF-0701-04 VETERINARY MEDICAL OFFICER	WXLCE9	XL1TDVSG1	NAF	Congruent Records.
Armstrong, Melanie	NF-0189-01 RECREATION AID	WXLCE9	XL1HBSPGL	NAF	Employee has no reference to Manning Doc
Arnold, Alexander	NA-7404-06 COOK	WXLCE9	XL1KMDL11	NAF	Congruent Records.
Arnold, Jessie	NF-0301-04 C&YS FUNCTIONAL TECHNOLOGY SPECIALIST	WXLCE9	XL1PCCYGL	NAF	Congruent Records.
Atkinson, Richard	NF-0303-02 LEAD DESK CLERK	WXLCE9	XL1FHGLF82	NAF	Congruent Records.
Austin, Tanya	NF-1101-03 ASSISTANT BUSINESS MANAGER	WXLCE9	XL1LQCG1	NAF	Congruent Records.
Ayala, Thomas	NA-3566-01 CUSTODIAL WORKER	WXLCE9	XL1FHGLF82	NAF	Congruent Records.
Bailey, Chae	GS-0030-09 SPORTS SPECIALIST	WXLCE9	XL1HBSPGL	APF	Employee has no reference to Manning Doc
Bailey, Martha	NF-0189-01 RECREATION AID	WXLCE9	XL1HBSPGL	NAF	Congruent Records.
Bailey, Stacey	CC-1702-01 CHILD & YOUTH PROGRAM ASSISTANT (ENTRY LEVEL-2)	WXLCE9	XL1QLLK7Q	NAF	Employee has no reference to Manning Doc
Baker, Daniela	CC-1702-02 CHILD & YOUTH PROGRAM ASSISTANT (TARGET LEVEL-4)	WXLCE9	XL1IMYPGL	NAF	Congruent Records.

Fig 2-17: DCPDS View

All data shown is fictional. Manual best viewed in color.

Please send comments or corrections to: Rachel.s.kennedy.naf@mail.mil

2:8 MinMER View

Lists MinMER records being imported into IMETS within the current context.

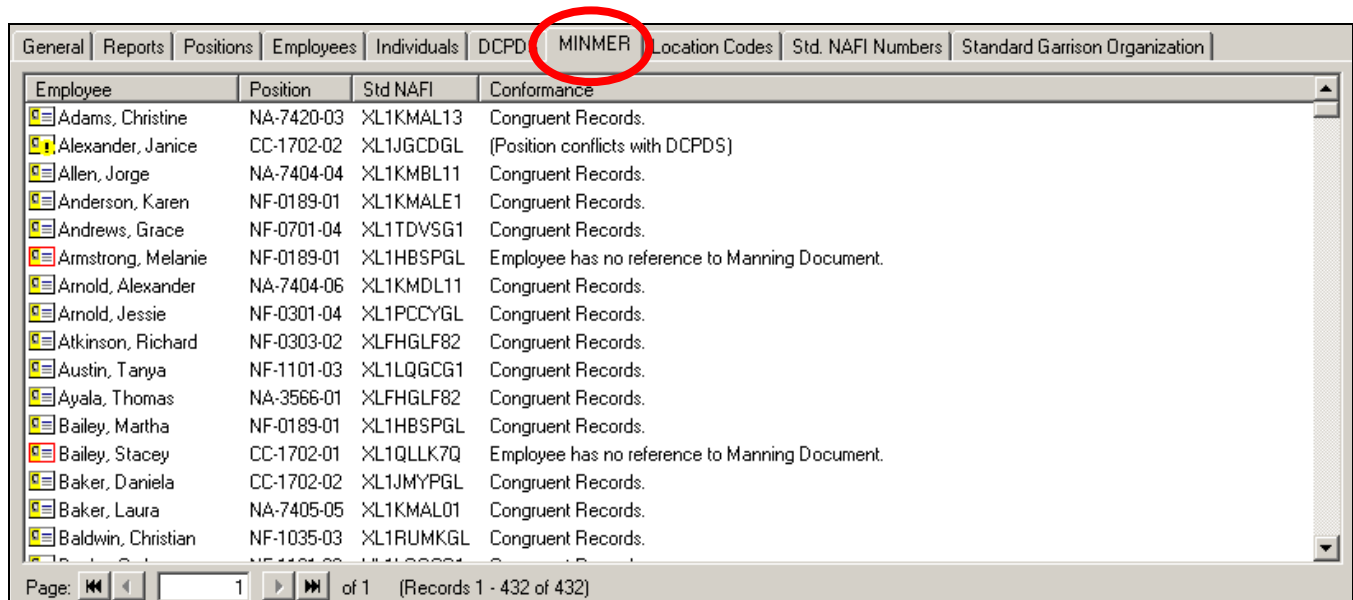
Contains a listing of people/employees (no vacancies) who are U.S. citizens imported directly from the NAF Payroll System. Missing references and conflicts with DCPDS and MinMER are easily identified in IMETS using either the icons or the conformance column.

- The Welcome Screen displays the date of the last import.

Filters may be used in conjunction with the MinMER view to display data by any of the following criteria: duty title, employee name, standard NAFI, pay plan, series, grade, conformance, and/or override count.

Data may be sorted by any of the columns within the view by clicking on the column header field.

- *Employee column* – Employee name is listed: Last name, First Name, MI.
- *Position column* - Position is listed as "Pay Plan-Series-Grade Job Title"
- *Std NAFI column* - Shows the positions standard NAFI Number (SNN)
 - Installation code, Fund code, Program code, Location Code, Department Code
- *Conformance* – Displays conflicts, if any, against the Manning Document or MinMER



Employee	Position	Std NAFI	Conformance
Adams, Christine	NA-7420-03	XL1KMAL13	Congruent Records.
Alexander, Janice	CC-1702-02	XL1JGCDGL	(Position conflicts with DCPDS)
Allen, Jorge	NA-7404-04	XL1KMBL11	Congruent Records.
Anderson, Karen	NF-0189-01	XL1KMALE1	Congruent Records.
Andrews, Grace	NF-0701-04	XL1TDVSG1	Congruent Records.
Armstrong, Melanie	NF-0189-01	XL1HBSPGL	Employee has no reference to Manning Document.
Arnold, Alexander	NA-7404-06	XL1KMDL11	Congruent Records.
Arnold, Jessie	NF-0301-04	XL1PCCYGL	Congruent Records.
Atkinson, Richard	NF-0303-02	XLFHGLF82	Congruent Records.
Austin, Tanya	NF-1101-03	XL1LQGCG1	Congruent Records.
Ayala, Thomas	NA-3566-01	XLFHGLF82	Congruent Records.
Bailey, Martha	NF-0189-01	XL1HBSPGL	Congruent Records.
Bailey, Stacey	CC-1702-01	XL1QLLK7Q	Employee has no reference to Manning Document.
Baker, Daniela	CC-1702-02	XL1JMYPG1	Congruent Records.
Baker, Laura	NA-7405-05	XL1KMAL01	Congruent Records.
Baldwin, Christian	NF-1035-03	XL1RUMKGL	Congruent Records.

Fig 2-18: MinMER View

All data shown is fictional. Manual best viewed in color.

2:9 DCPDS and MinMER Records

Contain detailed data as exists in the external DCPDS or NAF Payroll system.

DCPDS and MinMER records in IMETS are imported directly from DCPDS and NAF Financial Services. DCPDS and MinMER Data cannot be changed in IMETS. If changes need to be made to DCPDS or MinMER data the proper personnel actions must be completed to make those changes. DCPDS records are updated weekly and MinMER data is updated every two weeks. The date of the last import can be checked on the Welcome Screen under the File Import Section.

Here are a few things to remember about the DCPDS and MinMER Records:

- If an employee is dual they will have more than one DCPDS and MinMER record.
- When a new employee is hired, a disconnected MinMER and/or DCPDS record will appear in the DCPDS and MinMER views.
- DCPDS and MinMER records cannot be deleted or changed.

1. General Tab

DCPDS Properties - Stephens, Darrell

General | Manning Document Reference | Conflicts | Additional Info | Overrides

DCPDS Record:

Name	Value
Position Seq Num	1037984
UIC	WXLCE9 (W6CP USA GARRISON FT LOYALTY)
Paragraph	
Line Number	
Position Type	NAF
Pay Plan	CC
Occupational Series	1702 - Education and Training Technician Series
Grade	01
Position Title	CHILD & YOUTH PROGRAM ASSISTANT (ENTRY LEV...
Pay Rate	0.00

Print

Conformance:

Position conflicts with DCPDS and MINMER.

OK Cancel Apply

The **General Tab** displays the data contained in the DCPDS record imported into IMETS. The data displayed here cannot be edited in IMETS. If changes need to be made to this data it must be made in the DCPDS system.

The conformance field at the bottom displays any conformance issues that may exist with the record.

Fig 2-19: DCPDS/MinMER Record - General

All data shown is fictional. Manual best viewed in color.

2. Manning Document Reference Tab

DCPDS Properties - Stephens, Darrell

General | Manning Document Reference | Conflicts | Additional Info | Overrides

Referenced Manning Document Record:

Name	Value
UIC	WXLCE9 (W6CP USA GARRISON FT LOYALTY)
Paragraph	QL
Line Number	05
Sub Line	01
Position Type	NAF
Pay Plan	CC
Occupational Series	1702 - Education and Training Technician Series
Grade	03
Position Title	CHILD & YOUTH PROGRAM ASSISTANT (ENTRY LEV...
Pay Rate	0.00

☐ Ignore this DCPDS Record

Print

Manning Document Wizard Remove Manning Document Reference

OK Cancel Apply

Fig 2-20: DCPDS/MinMER Record – M.D. Ref

The **Manning Document Reference Tab** displays data from the position record the DCPDS record is connected to on the Manning Document. This is the data that is compared to the DCPDS or MinMER data on the General Tab for discrepancies.

The **Ignore this DCPDS/MinMER Record** can be used if the record belongs to an employee that no longer works at the organization and has not yet dropped form the import or if it is a non-MWR record being imported into IMETS by mistake.

The **Manning Document Wizard** button can be used to establish a reference between the DCPDS record and a Manning Document position.

The Manning Document Wizard is covered in more detail in Section 3:6..

The **Remove Manning Document Reference** will disassociate the DCPDS record with the Manning Document Position it is linked to.

3. Conflicts Tab

DCPDS Properties - Stephens, Darrell

General | Manning Document Reference | Conflicts | Additional Info | Overrides

Conflicts With Manning Document:

Field	DCPDS	Manning Document
<input type="checkbox"/> Grade	01	03

Place a checkmark on each item to synchronize Manning Document data with DCPDS

OK Cancel Apply

Fig 2-21: DCPDS/MinMER Record – Conflicts

The **conflicts tab** displays any data fields that do no match when the DCPDS or MinMER Record data is compared by IMETS to the Position Record .

In the example to the left, the DCPDS record has the grade for this person as a 01, but the Manning Document position this DCPDS record is associated with is a grade 03.

Resolving Conflicts is covered in section 3:3.

All data shown is fictional. Manual best viewed in color.

4. Additional Info Tab

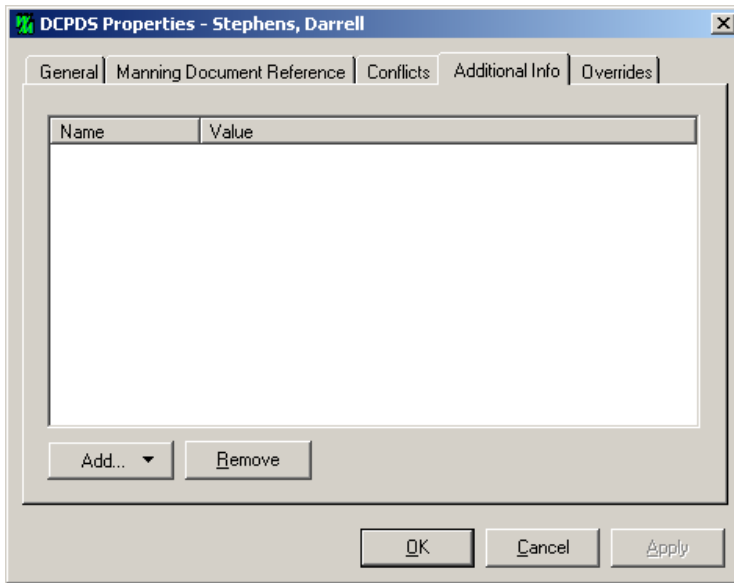


Fig 2-22: DCPDS/MinMER Record – Add Info

The **Additional Info Tab** is used to create **Custom Fields**. Custom Fields can be used to record and track unique information used by the local installation. There are several different types of fields available: Text Fields, Numeric Fields, Name Fields, Date Fields, Yes/No Fields.

Adding Custom Fields is covered in section 3:11.

5. Overrides Tab

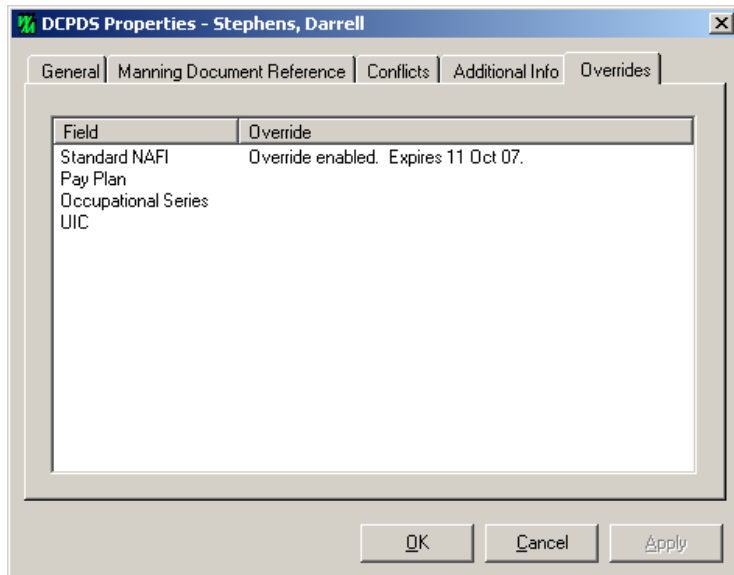


Fig 2-23: DCPDS/MinMER Record – Overrides

The **Overrides Tab** displays any overrides that have been added to the record. Temporary overrides may be added by users with permissions. Permanent overrides may be added by and IMETS Administrator Only.

The following field may contain overrides in DCPDS or MinMER records:

- Standard NAFI
- Pay Plan
- Occupational Series
- UIC (DCPDS Records Only)

Overrides are covered in section 3:10.

All data shown is fictional. Manual best viewed in color.

2:10 Individuals View

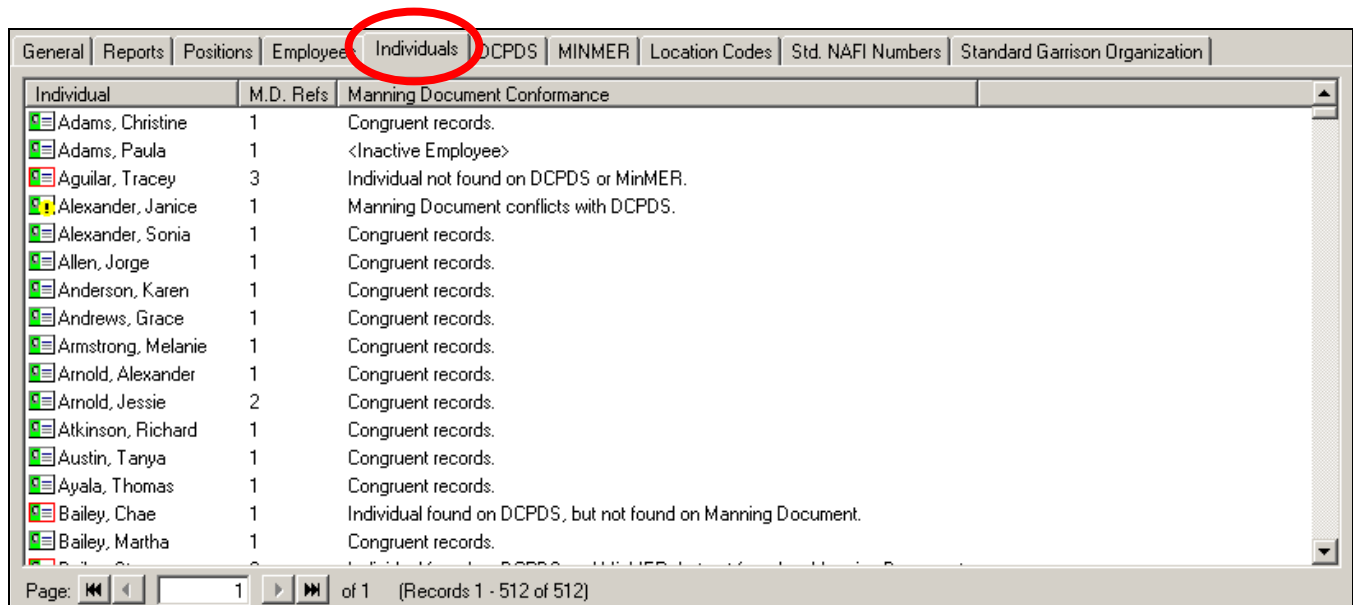
Lists active and inactive Individuals records within the current context. Is auto-populated as DCPDS and MinMER records are imported into the system. Records may also be manually created.

Contains a listing of individuals (persons) associated within the current context. A person can have references to many employment records (useful for employment history). Added to IMETS (but only once per unique social security number) from DCPDS and MinMER, or may be added manually. Missing references and conflicts with DCPDS and MinMER are easily identified using either the icons or the conformance column.

Filters may be used in conjunction with the Individuals view to display data by any of the following criteria: Employee Name or Manning Document Conformance.

Data may be sorted by any of the columns within the view by clicking on the column header field.

- *Individual column* – Individual name is listed: Last name, First Name, MI
- *M.D. Refs* – Shows the number of places the individual is referenced on the Manning Document.
- *Employee Comments* – Displays conflicts, if any, against the Manning Document, DCPDS or MinMER



Individual	M.D. Refs	Manning Document Conformance
Adams, Christine	1	Congruent records.
Adams, Paula	1	<Inactive Employee>
Aguilar, Tracey	3	Individual not found on DCPDS or MinMER.
Alexander, Janice	1	Manning Document conflicts with DCPDS.
Alexander, Sonia	1	Congruent records.
Allen, Jorge	1	Congruent records.
Anderson, Karen	1	Congruent records.
Andrews, Grace	1	Congruent records.
Armstrong, Melanie	1	Congruent records.
Arnold, Alexander	1	Congruent records.
Arnold, Jessie	2	Congruent records.
Atkinson, Richard	1	Congruent records.
Austin, Tanya	1	Congruent records.
Ayala, Thomas	1	Congruent records.
Bailey, Chae	1	Individual found on DCPDS, but not found on Manning Document.
Bailey, Martha	1	Congruent records.

Page: 1 of 1 (Records 1 - 512 of 512)

Fig 2-24: Individuals View

All data shown is fictional. Manual best viewed in color.

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2:11 Individual Records

Contain detailed data which represent a single person.

An Individual Record represents a single person that exists in the database. There should only ever be ONE individual record per person – even if it is a dual employee.

1. General Tab

Fig 2-25: Individual Record - General

The **General Tab** contains the employees Last Name, First Name, Middle Name and Generational Qualifier. Only if an employee has a LEGAL name change (for example through marriage) should the name fields be edited. Name changes here will be reflected in all associated IMETS records.

Associated with Installation displays what garrison the individual belongs to. This may be changed if necessary by clicking on the pick list button to the left of the field.

Email and Phone fields provided places for IMETS users to store contact information for the employee. This data is not imported from an external source.

The **Active** checkbox may be checked or unchecked depending on an individuals status. IMETS will not allow an individual record to be marked as inactive if there is active employee data in the system.

2. Personal Info Tab

Fig 2-26: Individual Record – Personal Info

The **Personal Tab** contains for following employee data:

- Home Address
- Sex
- Social Security Number
- Date of Birth

This data can only be seen if a user has been specifically granted rights to see sensitive data. Otherwise these fields will not return data.

All data shown is fictional. Manual best viewed in color.

3. Employee Data Tab

Individual Properties - Oconnor, Stacy

General | Personal Info | **Employee Data** | Additional Info

All Manning Document References (Active and Inactive):

Position	Conformance
NA-7408-02 FOOD SERVICE WORKER	<Inactive Employee>
NF-1601-03 ASSISTANT EXECUTIVE HOU...	Congruent Records.

DCPDS:

Position	Conformance
NF-1601-03 ASSISTANT EXECUTIV...	Congruent Records.

MINMER:

Position	Std NAFI	Conformance
NF-1601-03	XLFHGLF82	Congruent Records.

OK Cancel Apply

Fig 2-27: Individual Record – Employee Data

The **Employee Data Tab** is broken into three sections.

- **All Manning Document References** will display any position records (active and inactive) that the person is associated with. Double-clicking on a record will launch the position properties record.
- The **DCPDS** section will display any DCPDS records being imported into IMETS for that individual. If an employee is dual, they should have more than one active DCPDS record appearing here.
- The **MinMER** section will display any MinMER records being imported into IMETS for that individual. If an employee is dual, they should have more than one active MinMER record appearing here.

4. Additional Info Tab

Individual Properties - Oconnor, Stacy

General | Personal Info | Employee Data | **Additional Info**

Name	Value

Add... Remove

Attribute Flags:

☐ Display full middle name

OK Cancel Apply

Fig 2-28: Individual Record – Additional Info

The Additional Info Tab is used to create **Custom Fields**. Custom Fields can be used to record and track unique information used by the local installation. There are several different types of fields available: Text Fields, Numeric Fields, Name Fields, Date Fields, Yes/No Fields.

Adding Custom Fields are covered in section 3:11.

The **Attribute Flags** section contains the option to **Display Full Middle Name**. If this flag is checked the full middle name will display instead of the initial.

All data shown is fictional. Manual best viewed in color.

2:12 Standard Garrison Organization View

Lists Standard Garrison Organization records within the current context and is primarily managed at the garrison level.

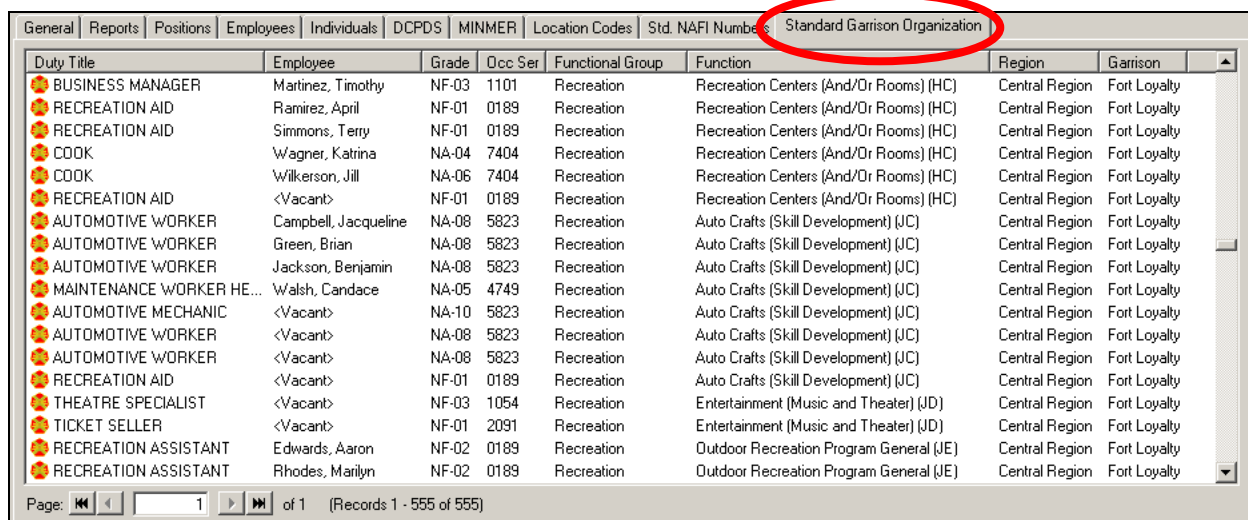
The Standard Garrison Organization (SGO) View displays positions and employees with functional group information. In addition, the Duty Title in this view may be changed to something OTHER than the official duty title. For example, if you have a Senior Financial Manager and you wish for it to display as 'Fund Manager' instead. Missing references and conflicts with DCPDS and MinMER are NOT displayed in this view.

Filters may be used in conjunction with the SGO view to display data by any of the following criteria: duty title, employee name, position type, pay plan, grade, series, functional group, function and/or conformance.

Data may be sorted by any of the columns within the view by clicking on the column header field.

- *Duty Title* – This column lists the positions duty title. It can be changed to something different from the position title in the position view.
- *Employee* – This column shows the employees name or <Vacant> if the position is empty.
- *Grade* – This column displays position pay plan and grade.
- *Occ Series* – This column displays position occ series.
- *Functional Group* – This column displays the functional group that the position belongs to. A functional group encompasses multiple program codes from the same organizational element.
- *Function* – This column displays the function as determined by the program code.
- *Region* – This column displays the region name.
- *Garrison* – This column displays the garrison name.

Here is an example of what the SGO View looks like in IMETS:



Duty Title	Employee	Grade	Occ Ser	Functional Group	Function	Region	Garrison
BUSINESS MANAGER	Martinez, Timothy	NF-03	1101	Recreation	Recreation Centers (And/Or Rooms) (HC)	Central Region	Fort Loyalty
RECREATION AID	Ramirez, April	NF-01	0189	Recreation	Recreation Centers (And/Or Rooms) (HC)	Central Region	Fort Loyalty
RECREATION AID	Simmons, Terry	NF-01	0189	Recreation	Recreation Centers (And/Or Rooms) (HC)	Central Region	Fort Loyalty
COOK	Wagner, Katrina	NA-04	7404	Recreation	Recreation Centers (And/Or Rooms) (HC)	Central Region	Fort Loyalty
COOK	Wilkerson, Jill	NA-06	7404	Recreation	Recreation Centers (And/Or Rooms) (HC)	Central Region	Fort Loyalty
RECREATION AID	<Vacant>	NF-01	0189	Recreation	Recreation Centers (And/Or Rooms) (HC)	Central Region	Fort Loyalty
AUTOMOTIVE WORKER	Campbell, Jacqueline	NA-08	5823	Recreation	Auto Crafts (Skill Development) (JC)	Central Region	Fort Loyalty
AUTOMOTIVE WORKER	Green, Brian	NA-08	5823	Recreation	Auto Crafts (Skill Development) (JC)	Central Region	Fort Loyalty
AUTOMOTIVE WORKER	Jackson, Benjamin	NA-08	5823	Recreation	Auto Crafts (Skill Development) (JC)	Central Region	Fort Loyalty
MAINTENANCE WORKER HE...	Walsh, Candace	NA-05	4749	Recreation	Auto Crafts (Skill Development) (JC)	Central Region	Fort Loyalty
AUTOMOTIVE MECHANIC	<Vacant>	NA-10	5823	Recreation	Auto Crafts (Skill Development) (JC)	Central Region	Fort Loyalty
AUTOMOTIVE WORKER	<Vacant>	NA-08	5823	Recreation	Auto Crafts (Skill Development) (JC)	Central Region	Fort Loyalty
AUTOMOTIVE WORKER	<Vacant>	NA-08	5823	Recreation	Auto Crafts (Skill Development) (JC)	Central Region	Fort Loyalty
RECREATION AID	<Vacant>	NF-01	0189	Recreation	Auto Crafts (Skill Development) (JC)	Central Region	Fort Loyalty
THEATRE SPECIALIST	<Vacant>	NF-03	1054	Recreation	Entertainment (Music and Theater) (JD)	Central Region	Fort Loyalty
TICKET SELLER	<Vacant>	NF-01	2091	Recreation	Entertainment (Music and Theater) (JD)	Central Region	Fort Loyalty
RECREATION ASSISTANT	Edwards, Aaron	NF-02	0189	Recreation	Outdoor Recreation Program General (JE)	Central Region	Fort Loyalty
RECREATION ASSISTANT	Rhodes, Marilyn	NF-02	0189	Recreation	Outdoor Recreation Program General (JE)	Central Region	Fort Loyalty

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Fig 2-29: Standard Garrison Organization View

All data shown is fictional. Manual best viewed in color.

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2:13 Standard Garrison Organization Records

Contain detailed data which represent an employee and their position within the Standard Garrison Organization.

SGO records are primarily managed by the garrison. An SGO record is created when a MinMER or DCPDS record is associated to a position.

1. General Tab

SGO Member Properties - MANAGEMENT SERVICES SPEC

General | Manning Document Position | Additional Info

Duty Title:
ADMINISTRATIVE OFFICER

Standard Garrison Organization Function: [Adjust Sort Order...](#)

☐ Not a member of the Standard Garrison Organization

Employee: Hopkins, Tammy Grade & Rank: YA-02 Occ Series: 0341

Region: Eastern Region

Garrison: Fort Duty

OK Cancel Apply

Fig 2-30: SGO Record - General

- **Duty Title:** This field displays the duty title. This can be the same as the position record title or it may be edited to reflect a title that is more meaningful in the context of the organization.
- **Standard Garrison Organization:** This drop down field allows users to select the functional group the SGO record belongs to. It is also possible to place a check mark next to the field '**Not a Member of the Standard Garrison Organization**' to remove them from a functional group.
- **Employee:** This read only field displays employee name.
- **Grade & Rank:** This read only field displays the positions Grade and Rank.
- **Occ Series:** This read only field displays the occupational series of the position.
- **Region:** This field displays the region the position belongs to.
- **Garrison:** This field displays the garrison the position belongs to.

2. Manning Document Position Tab

SGO Member Properties - ADMINISTRATIVE OFFICER

General | Manning Document Position | Additional Info

[Manning Document Position](#)

Name	Value
UIC	WSD515 (U S ARMY GARRISON FT DUTY HQ)
Paragraph	014
Line Number	03
Sub Line	02
Position Type	APF
Pay Plan	YA
Occupational Series	0341 - Administrative Officer Series
Grade	02
Position Title	MANAGEMENT SERVICES SPEC
Appt Category	RFT - Regular Full Time. Regular workweek is 40 hours.
Job Number	
Standard NAFI	SD1RCD1GL
Position Status	Active

Conformance:
Congruent Records.

OK Cancel Apply

Fig 2-31: SGO Record – M.D. Position Tab

All data shown is fictional. Manual best viewed in color.

3. Additional Info

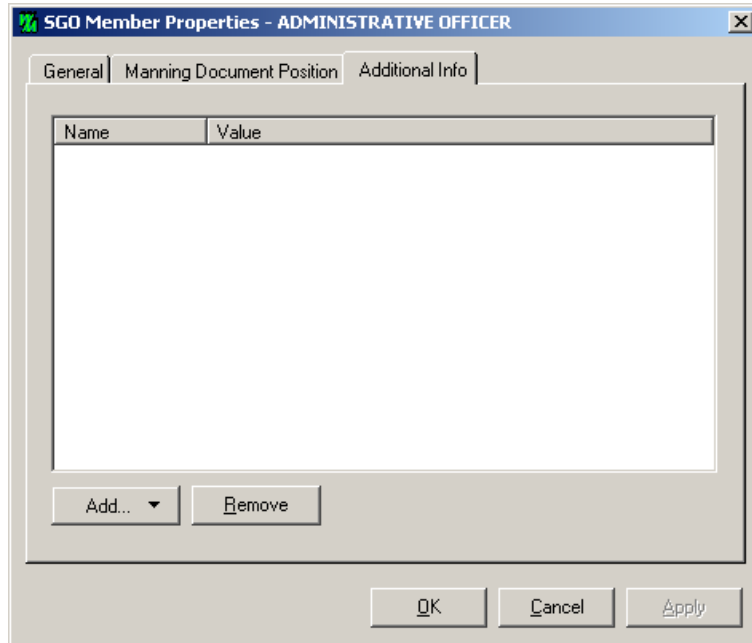


Fig 2-32: SGO Record – Additional Info

The Additional Info Tab is used to create **Custom Fields**. Custom Fields can be used to record and track unique information used by the local installation. There are several different types of fields available: Text Fields, Numeric Fields, Name Fields, Date Fields, Yes/No Fields.

Adding Custom Fields are covered in section 311.

Fig 2-21: DCPDS/MinMER Record – Conflicts

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USER MANUAL

Section 3

Working in the Manning Document Module

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3:1 Getting Started

There are many steps to managing the MWR Manning Document in IMETS. The below diagram provides a strategic plan for maintaining IMETS data. Start with reviewing the conformance rate and then use built in reports to review problem areas. Lastly, use System tools and methods covered in this section to resolve conflicts and disconnects.

This section will review the tasks you can perform while using the Manning Document Module.

- Editing a Position Standard NAFI
- Resolving Conflicts
- Conflict Resolution Tool
- Manning Document Wizard
- Adding Positions
- Deleting Positions
- UFM Conversion wizard
- Overrides
- Custom Fields
- Funded By
- LDP Designation
- VICE, LWOP, FURL

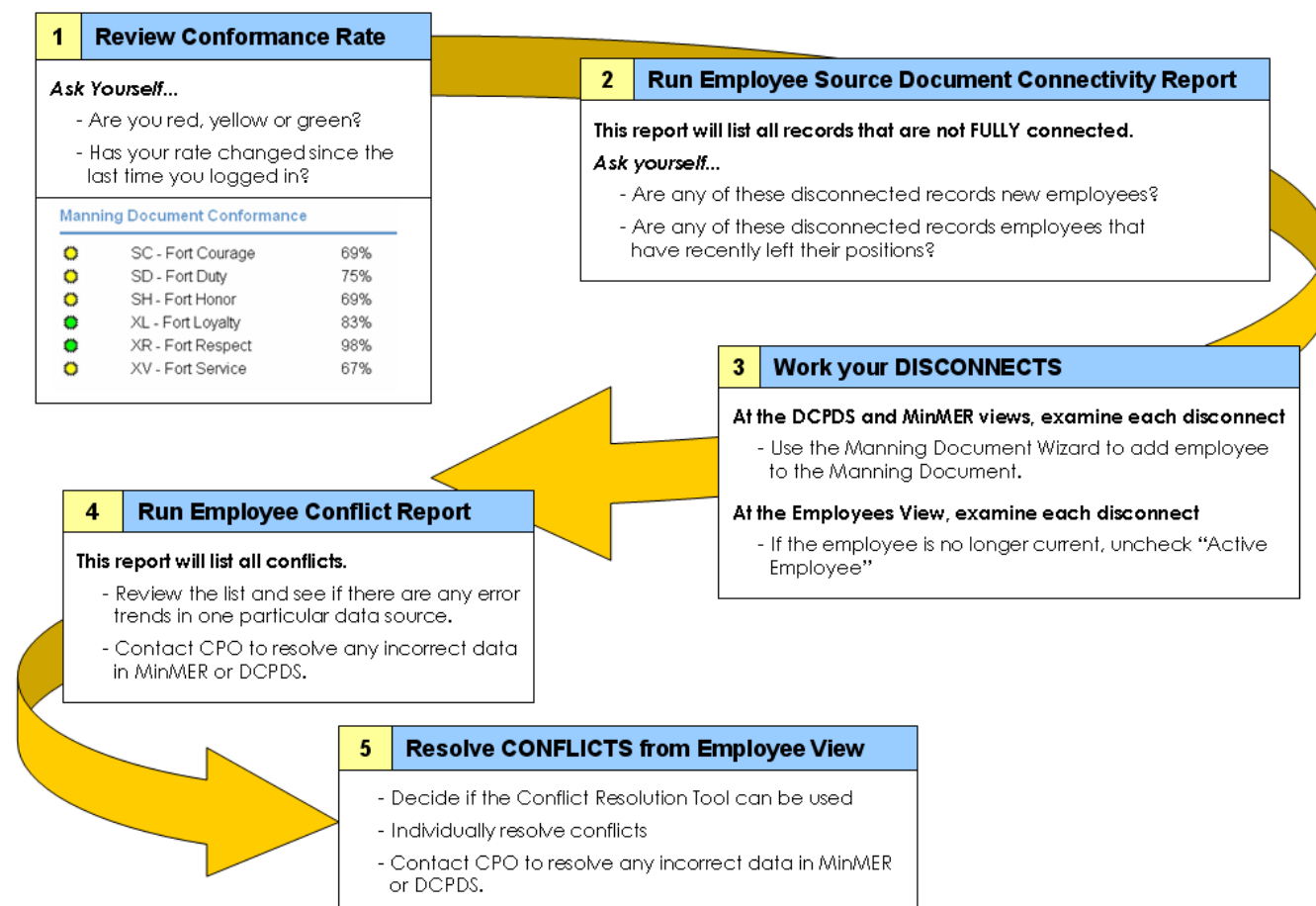


Fig 3-1: IMETS Workflow Diagram

All data shown is fictional. Manual best viewed in color.

3:2 Editing a Position Standard NAFI

All positions in IMETS must be assigned a Standard NAFI Number (SNN)– both NAF and APF Positions!

The two ways to edit the Standard NAFI to a position:

1. Type in the Standard NAFI

- To open the Position Properties, double-click on the position from the positions view.
- From **Position Properties**, type in the full SNN and click **Check NAFI**.
- IMETS will verify it is a valid Standard NAFI, and then underline it.

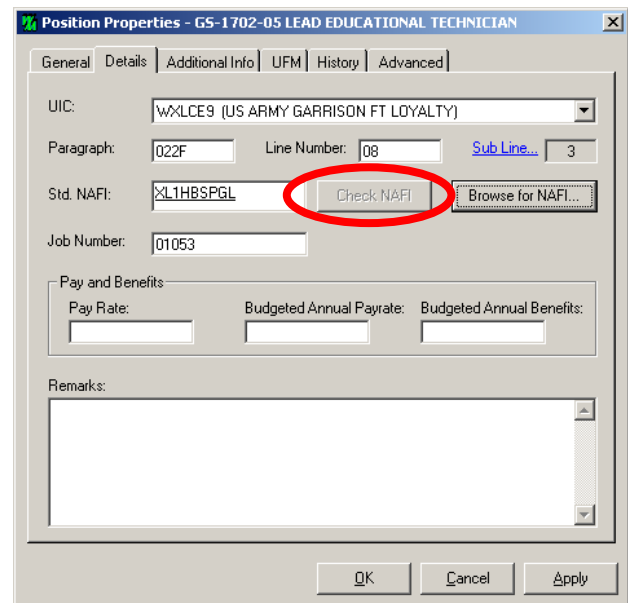


Fig 3-2: Check NAFI

2. Browse for the Standard NAFI

- From Position Properties, click **Browse for NAFI**.
- IMETS will launch a browse window.
- Drill through the tree.
- When the department code is selected, click **OK**.

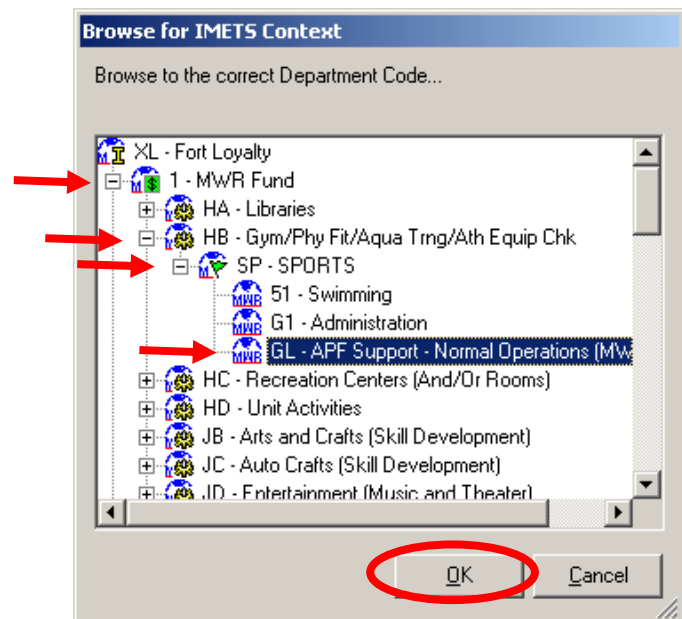


Fig 3-3: Browse for Standard NAFI

All data shown is fictional. Manual best viewed in color.

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3:3 Resolving Conflicts

Position icons (👤) or employee icons (👤) with a yellow exclamation point, indicate that the position has a conflict between the data on the manning document and one or more references to DCPDS (and/or NAF payroll system MinMER.)

Steps to Resolve a Conflict:

1. From the **Position View**, double click the position to resolve
2. Next, click on the employee in the Position Properties window – the Employee Properties window will launch.
 - It is also possible to resolve conflicts directly from the Employees View, DCPDS View, MinMER View, or Individuals View.
3. Conflicts (if any) are displayed in the DCPDS tab, MinMER tab, or both.
4. Select the MinMER tab (or DCPDS tab). The MinMER (or DCPDS) record data displays at the top, and the conflicts are listed below.
 - In the example, the MinMER lists the positions occ series as 1601 while the series is 1173 on the Manning document.
5. Select which conflicts to resolve by marking the appropriate check box and click **Apply**.
 - The user must FIRST determine the conflict cause. If the manning document is incorrect, then a check may be placed in the field to sync with DCPDS (or MinMER). If the DCPDS/ MinMER data is incorrect, then established procedures to update those external systems must be followed.

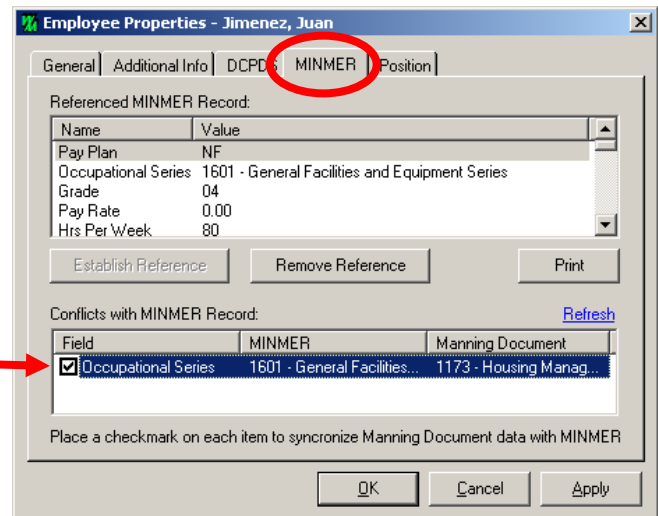


Fig 3-4: Employee Properties, MinMER Tab

6. After clicking apply, the window will display the message **No conflicts!**
 - The manning document has been updated to match MinMER.
7. Click **OK** to close the window.

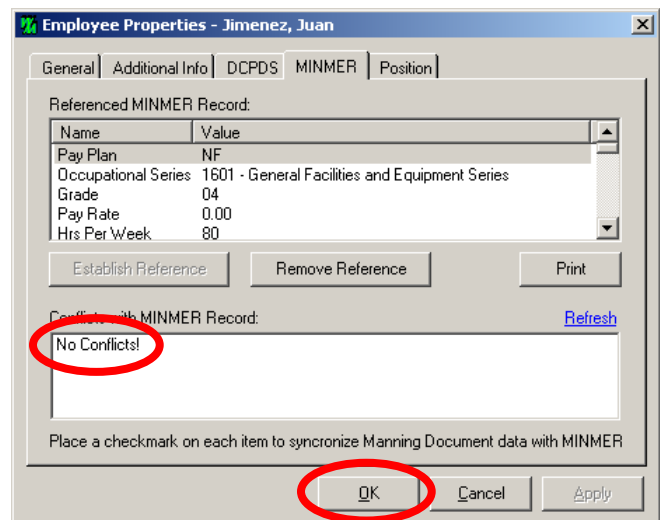


Fig 3-5: Employee Properties, MinMER Tab

All data shown is fictional. Manual best viewed in color.

3:4 Conflict Resolution Tool

The Conflict Resolution Tool (CRT) is accessible from the **Employee View** only. It will update any conflicting fields on the manning document to match data with DCPDS or MinMER, and assumes those systems are correct and current.

On an established Manning Document the CRT would rarely be used, if ever. The CRT is most commonly used for newly established Manning Documents or mass changes (such as a Standard NAFI change or UIC Change) at an installation.

Steps to using the Conflict Resolution Tool:

1. Select **Action** from the drop down menu, **All Tasks**, **Conflict Resolution Tool**.
2. A screen will launch listing the possible errors to resolve with a check box next to each.
3. Check which conflicts to resolve, and click **Next**.
 - *Specific conflicts may be chosen for resolution or all conflicts may be chosen by clicking Check All.*
 - *It is important to keep in mind that when using the CRT – IMETS assumes that DCPDS and/or MinMER are correct and current.*

Also keep in mind that the CRT is irreversible. There is no “undo”!

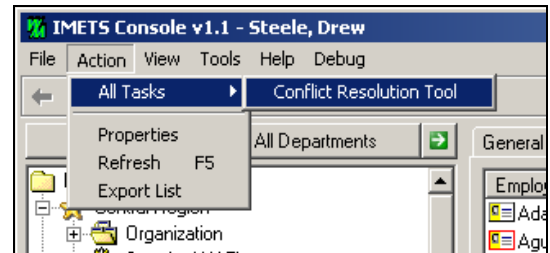


Fig 3-6: Launching the Conflict Resolution Tool

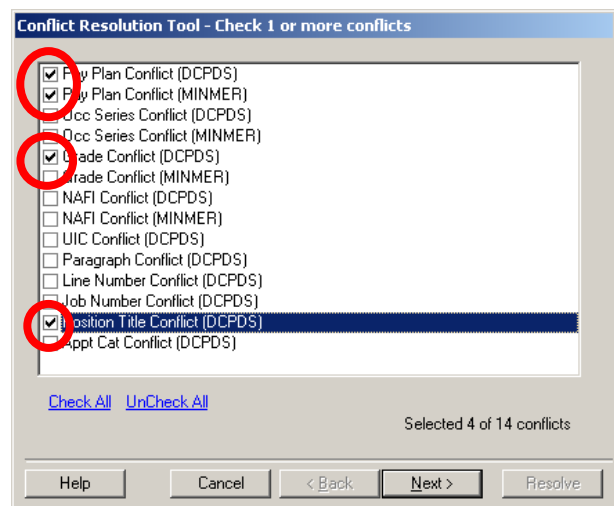


Fig 3-7: CRT Check 1 or more conflicts

4. IMETS displays the list of employees that have one or more of the selected conflicts.
5. Check off which employees to resolve and click **Resolve**.
 - *Specific employees may be chosen for resolution or all conflicts may be chosen by clicking Check All.*
6. Depending on how many conflicts are being resolved it may take a minute or two.
7. When the conflicts are resolved the resolve button will change to a close button – click **close**.

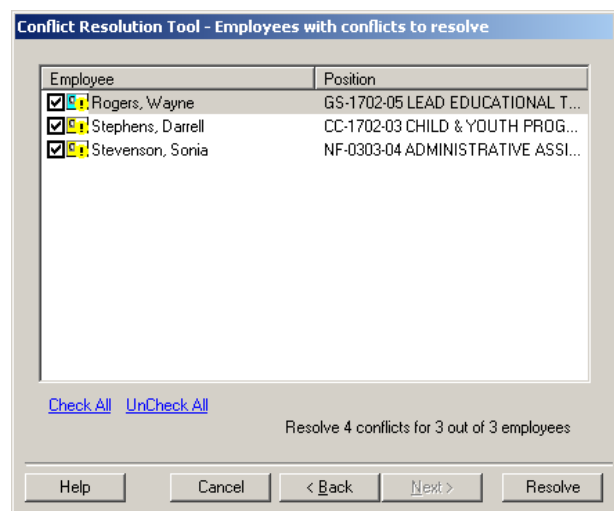




Fig 3-8: CRT Employees with Conflicts to Resolve

All data shown is fictional. Manual best viewed in color.

3:5 Resolving Disconnects

Position icons () or employee icons () with a red border, indicate a missing reference between the Manning Document Employee and DCPDS (and/or MinMER for all NAF.)

An employee record may be disconnected from DCPDS and/or MinMER for the following reasons:

- *New employee has not been input into DCPDS or MinMER.*
- *Employee has vacated the position and there is no longer a DCPDS and/or MinMER record being imported.*
- *Employee has changed positions, but IMETS has not been updated.*

A name might exist in the DCPDS and/or MinMER view but not on the Employee View for the following reasons:

- *The DCPDS or MinMER record has not been linked to a Manning Document Position.*

Steps to Resolving Disconnects:

1. From the Position View, double click the position to resolve.

2. Next, double click on the employee record in the Position Properties window – the Employee Properties window will launch.

- *It is also possible to resolve conflicts by going to the Employee View and clicking on the employee record directly.*

3. Select the tab that is missing the reference and click **Establish reference**

- *By clicking Establish Reference – IMETS is searching DCPDS or MinMER records for a possible match.*

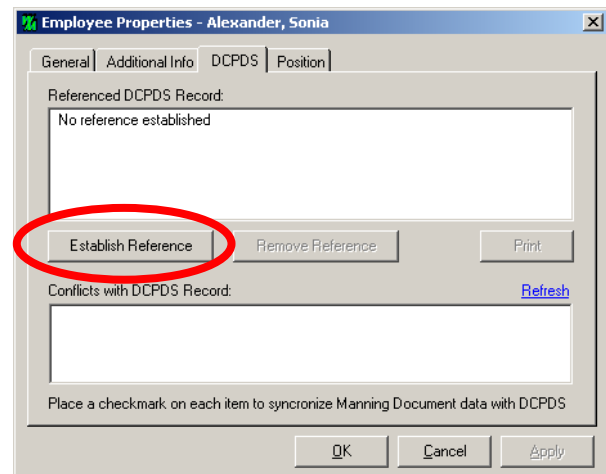


Fig 3-9: Establish Reference

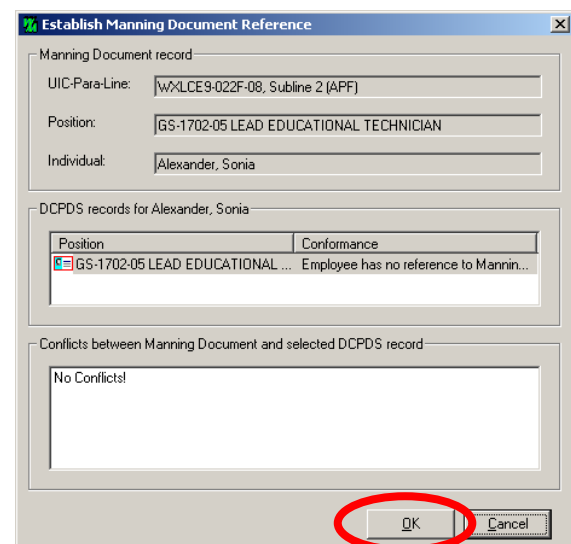
4. If IMETS finds the appropriate position, select it & click **OK**.

- In the lower half of the window, IMETS displays any conflicts that will occur after establishing the reference. If conflicts occur, it will be necessary to resolve conflicts after establishing the reference.

5. If IMETS cannot find a corresponding record:

- Double check that the employee is still active.

If the employee is new, it may not yet have been entered into DCPDS. (If the employee does not appear after 2-3 weeks, & the employee is definitely active, contact CPO.)



All data shown is fictional. Manual best viewed in color.

3:6 Manning Document Wizard

If a DCPDS or MinMER record lists **No Reference to Manning Document** in the comments column (red border icon), the Manning Document Wizard can be used to connect the DCPDS or MinMER record to the Manning Document.

The Manning Document Wizard will walk users through the steps of either associating the DCPDS or MinMER record with either an existing position on the Manning Document, OR if the position doesn't already exist, the Manning Document Wizard will allow a new position to be created.

Using the Manning Document Wizard:

1. Double click the DCPDS or the MinMER record with the missing Manning Document Reference.
2. At the DCPDS or MinMER properties window, select the **Manning Document Reference** tab.
 - o Text should state **No reference to Manning Document**.

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3. Click the button **Manning Document Wizard**.
4. When the Manning Document Wizard launches, the DCPDS record is displayed on the right hand side and the lower left window describes the options that can be taken with the record.
5. IMETS will allow users to **Create a New Position on the Manning Doc OR Select Existing position** from the Manning document

Select Existing Position should almost always be the option selected. The only time Create New Position should be used is if the employee is being hired into a newly established position to the organization, otherwise duplicate positions will be created on the Manning Document.

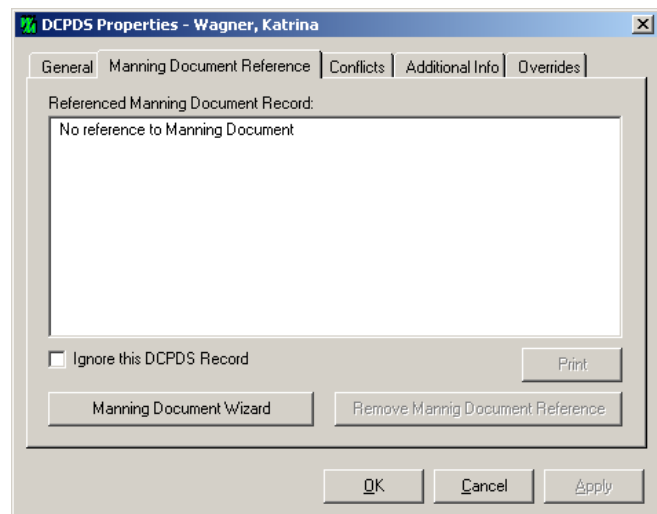


Fig 3-11: DCPDS Properties, MD Reference Tab

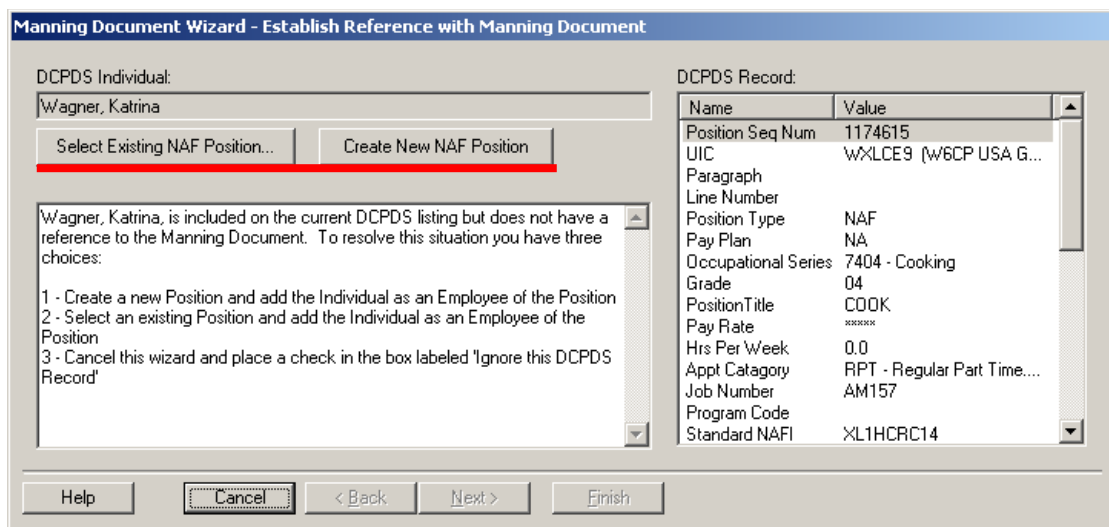


Fig 3-12: Manning Document Wizard

3:6 Manning Document Wizard Tool (cont.)

6 a. When **Select Existing NAF Position** is selected:

- A** IMETS gives the option to select from vacant positions* with the same series, if any were found, OR...
- B** Browse for a position by UIC to select the position.
- C** Once a position is selected, but before the wizard is complete, IMETS will display the list of conflicts that will occur against DCPDS if that position is used. Ideally this window should display **'No Conflicts!'**

* Unencumbered positions are displayed by default. Encumbered positions of the same series may be displayed by unchecking the box next to 'Unencumbered Positions Only'.

All data shown is fictional. Manual best viewed in color.

Existing Series 7404 Manning Document Positions: (20)

Position	Status	Emp Cnt
WXLCE9-HC-03 (2) NA-7404-04 COOK	Active	0
WXLCE9-KMAL-24 (5) NA-7404-04 COOK	Active	0
WXLCE9-KMAL-24 (7) NA-7404-04 COOK	Active	0

☒ Unencumbered Positions Only

Selected Manning Document Position:
WXLCE9-KMAL-24 (5) NA-7404-04 COOK

Conflicts between Manning Document and selected DCPDS record (2)

Field	DCPDS	Manning Document
Standard NAFI	XL1HCRC14	XL1KMBL11
Appt Category	RPT	FLX

DCPDS Record:

Name	Value
Position Seq Num	1174615
UIC	WXLCE9 (w6CP USA G...
Paragraph	
Line Number	
Position Type	NAF
Pay Plan	NA
Occupational Series	7404 - Cooking
Grade	04
Position Title	COOK
Pay Rate	XXXXXX
Hrs Per Week	0.0
Appt Category	RPT - Regular Part Time...
Job Number	AM157
Program Code	
Standard NAFI	XL1HCRC14

Buttons: Help, Cancel, < Back, Next >, Finish

Fig 3-13: MDW Select Existing Position

- When a position is selected (A), click **Next**.
- IMETS will display the position properties; click **OK** to close the record.

6 b. When **Crate New NAF Position** is selected:

- A new **Position Properties** window will appear.
- IMETS will populate the New Position Record with the information in the DCPDS (or MinMER) Record.
- The employee record will be automatically created and associated with the new position.
 - Before committing the new position, click the **Details** tab and input **Para**, **Line**, & **Standard NAFI**.
 - This information is generally not included in the DCPDS record and so must be input manually.*
- Click **OK** - the position has been added to the Manning document!
 - If any data is missing, an IMETS warning message will appear stating which information is missing. It is necessary to add the missing information or the position will not be added to the Manning document.

Position Properties - New Position

General | Details | Additional Info | UFM | History

Position Type: NAF Pay Plan: NA Grade: 04

Position Title: COOK

Occ Series: 7404 - Cooking

Position Status: Active Appointment Category: RPT Hours Sch'd per Week:

Employees (Displaying 1 of 1 employees)

Employee	Conformance
WXLCE9-KMAL-24 (5) NA-7404-04 COOK	Congruent Records.

Buttons: Add, Remove, Display Inactive Employees, OK, Cancel, Apply

Fig 3-14: MDW, Position General Tab

3:7 Adding Positions

New positions should be created in IMETS with care to avoid creating duplicate. On an established MWR Manning Document, the create New Position function should only be used when a new position is created at an installation through the proper FMD and CPO channels.

Important information pertaining to Positions:

- Positions will have **MANY** employees over time
- When a new employee comes on board it is usually into a pre-existing position

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- Not necessary to create new positions for each new employee, IMETS is designed to use the same positions to track history

Steps to Adding a New Position:

1. Drill down to the appropriate garrison to create the position in – it is not possible to create a new position at the region level of the tree.



2. Click  from the toolbar.
3. A blank Position Properties window will appear. Fill in all applicable fields on the General Tab and the Details Tab - click **Apply**.
 - The **Add Employee** button becomes active after clicking **Apply**.
4. Click **Add** in the Employees window – an Employee Properties window appears.
5. Type the first few letters of the last name and click **Check Name**.

- If more than one name is found, a pick list will allow the user to select the correct individual.
- **Hint:** enter the first letter of last name followed by the last 4 of social security number (SSN) for a more positive name selection.

6. Add the appropriate individual from the list and click **Apply**.
7. The full employee name should now display in the individual field. The name should be underlined – indicating that the name is a recognized IMES individual.
8. Click **OK** to complete the employee selection process..

Fig 3-15: Position Properties – New Position

Fig 3-16: Position Properties – Check Name

3:7 Adding Positions(cont.)

9. The user is returned to the Position Properties window where the individual is now listed as an Employee.

All data shown is fictional. Manual best viewed in color.

10. Every Position Tab has a **History Tab**.

- The History Tab contains a record of all edits made to the position, including the date the edit was made and who made the edit.

Position Properties - NF-1410-04 LIBRARIAN

General | Details | Additional Info | UFM | History

Position Type: NAF Pay Plan: NF Grade: 04

Position Title: LIBRARIAN

Occ Series: 1410 - Librarian Series

Position Status: Active Appointment Category: RFT Hours Sch'd per Week: 40

Employees (Displaying 1 of 1 employees) [Refresh](#)

Employee	Performance
Aguiar, Tracey	Employee has no reference to DCPDS or MINMER.

[Add](#) [Remove](#) ☐ Display Inactive Employees

[OK](#) [Cancel](#) [Apply](#)

Fig 3-17: Position Properties – Employee

Position Properties - NF-1410-04 LIBRARIAN

General | Details | Additional Info | UFM | History

User	Date	Event
D. Steele	9/16/2007 8:44:54 PM	Added employee: Aguiar, Tracey
D. Steele	9/16/2007 2:52:36 PM	Created Position: W:\L0D6-HA-03, Subline 1 (NAF)

History Events: 2 [Refresh](#) [Print](#)

[OK](#) [Cancel](#) [Apply](#)

Fig 3-18: Position Properties – History

3:8 Deleting Positions

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Positions should only be deleted from the positions view if the position was created in error. A position cannot be deleted if it has been UFM Converted or if it is a UFM NAF position. (*Contact an IMETS Administrator for assistance with UFM positions.*) A position with active or inactive employees can only be deleted if the employee records are first relocated to a different position.

A position that was at one time an active position at the installation and will no longer be filled, should be marked as InActive. This allows the system to retain a history of positions over time. The InActive status should not be used to hide positions which were created in error.

Steps to Deleting Positions:

Deleting Positions without Employees:

1. From the Positions View, highlight the position to delete and click the **Delete** Button from the toolbar.

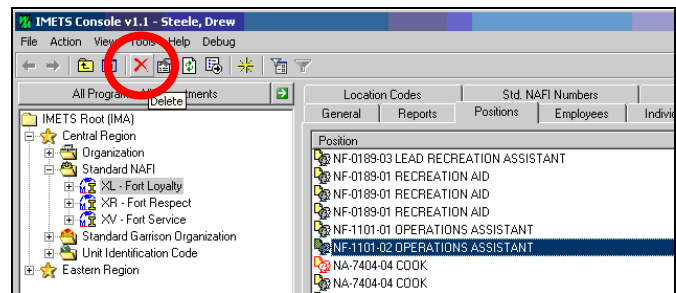


Fig 3-19: Delete Position

2. IMETS will ask if you are sure you want to delete the selected position and warn you that this action cannot be undone. If you are sure this is the position you want to delete, click **Yes**.
3. Once you click **Yes**, the position is deleted and you are returned to the Position View.

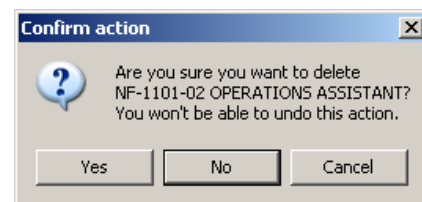


Fig 3-20: Delete Position - Message

Deleting Positions with Employee(s):

1. From the Position View, highlight the position you wish to delete and click the Delete Button from the toolbar.
2. Again, when we click delete, IMETS will ask you if you are sure you want to delete the selected position, click **Yes**.
3. A window will appear stating that the positions contains one or more employees, either active or inactive and you must relocate the employees before deleting the position. If you would like to relocate the employees click **Yes**.

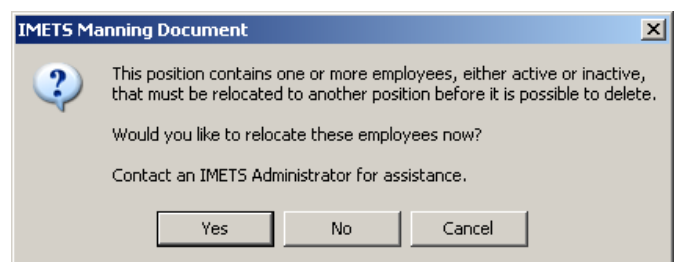


Fig 3-21: Delete Position - Relocate Message

3:8 Deleting Positions (cont.)

All data shown is fictional. Manual best viewed in color.

4. The **Relocate Employees** Window appears. The window displays the following:
 1. The current position being deleted.
 2. The standard NAFI of the position being deleted.
 3. The active or inactive employee(s) that are currently in the position.
 4. Similar positions to the position being deleted, including the employee (if occupied), SNN and position status.
5. To perform the relocation, first select the employee to relocate by placing a check in the box to the left of the name.

Position	Employee	SNN	Status
WXLCE9-013K-01 (1) YC-0030-02 SUPV SPORTS S...	Medina, Dorothy	XL1HBSPGL	Active
WXLCE9-013K-01 (2) GS-0030-12 SUPERVISORY S...	<Vacant>	XL1HBSPGL	InActive

Fig 3-22: Relocate Employees

6. Next, highlight the position to relocate the employee too.
7. Click the button **Reassign Selected Employees**.
 - If the employee record is active, it will appear as an active employee in the position it is relocated to.
 - If the employee record is inactive it will appear as an inactive in the position it is relocated to.
 - If the employee record is active and the position it is being relocated to is inactive, the employee record will be inactivated when it is relocated to the inactive position.

Fig 3-23: Relocate Employees

8. A message box will appear to confirm the relocation. Click **Yes** to continue relocating the employee record.

Fig 3-24: Relocate Employees Confirm

3:8 Deleting Positions (cont.)

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9. When the relocation is complete a confirmation will appear: **'Relocated 1 employee(s)'**. Click **OK**.

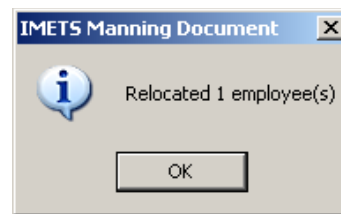


Fig 3-25: Relocated Employees

10. Users are returned to the Relocate Employees window, click **close** if the employee window is empty or relocate any remaining employees until employee window is empty.
11. Users are returned to the Positions View. The deleted position is no longer there.

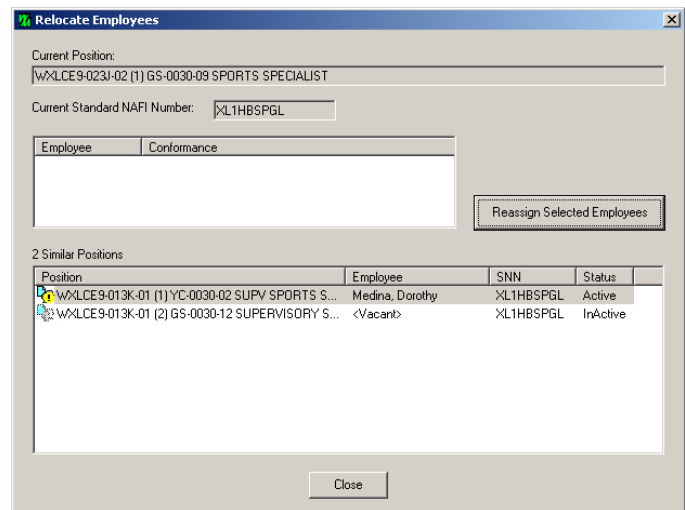


Fig 3-26: Relocated Employees

3:9 UFM Conversion Wizard

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All UFM Conversions are tracked in IMETS. When an APF position is converted to NAF, the UFM Conversion Wizard must be used to properly track the conversion in IMETS.

The IMETS UFM Conversion Wizard will:

- Associate the APF position with a new or existing NAF position
- Move the employee to the selected NAF position
- Mark the APF position as 'UFM Converted'.

An existing position might be converted under for the following situations:

- *Voluntary conversion by incumbent*
- *A former APF position can be converted into one or more NAF positions*

Using the UFM Conversion Wizard:

1. To use the tool, go to the Positions View and highlight the position to be converted and then select, **Tools, All Tasks, UFM Conversion Wizard**.
 - Right clicking on the selected position will also give the option to begin the UFM Conversion Wizard.

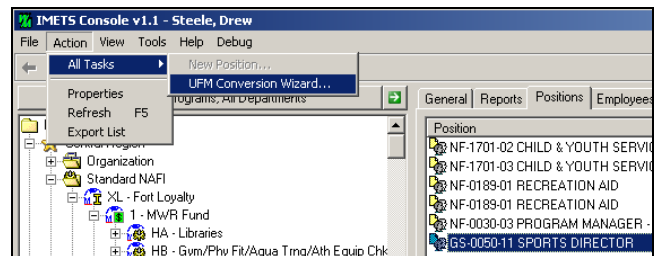


Fig 3-27: Launching the UFM Conversion Wizard

2. The UFM Conversion Wizard launch with an information window. Click **Next**

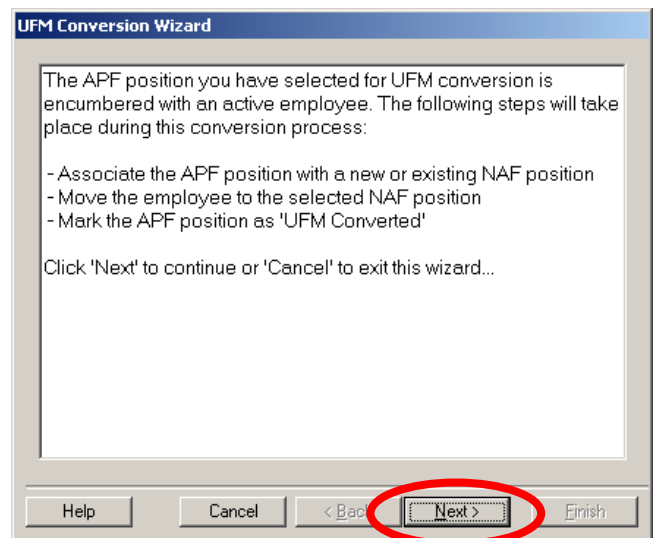


Fig 3-28: UFM Conversion Wizard

3:9 UFM Conversion Wizard (cont.)

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3. IMETS gives the choice **Create New NAF Position** or **Select Existing Position**.

Select Existing Position should almost always be the option selected. The only time Create New Position should be used is if the employee is being hired into a newly established position to the organization, otherwise duplicate positions will be created on the Manning Document.

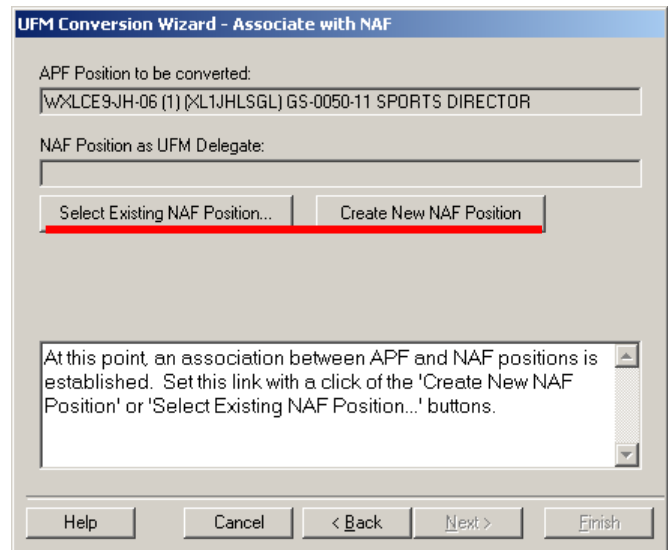


Fig 3-29: UFM Conversion Wizard

4. When **Select Position** is used, IMETS will prompt the user to select an existing position by drilling down the UIC tree.
5. Navigate the UIC tree and select the position to convert to and click **OK**.

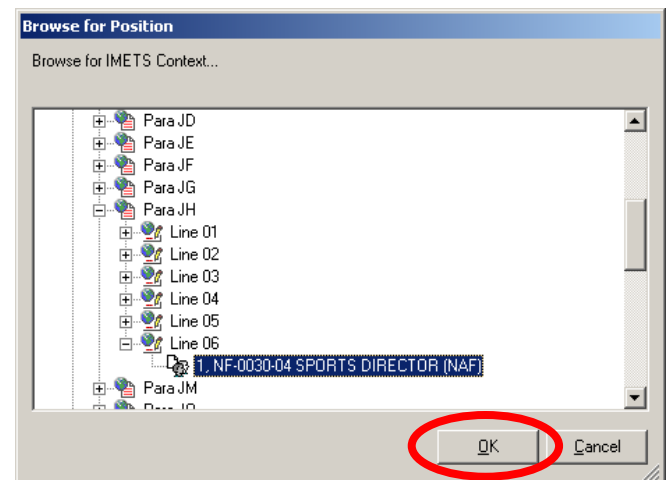


Fig 3-30: Browse for Position

6. Next, IMETS prompt the user to select and **MDEP**. Use the drop down menu to select the correct MDEP.
7. Use the drop down menu to select the **MWR Remark Code**.
8. When both the MDEP and MWR Remark Code have been select the **Finish** button becomes active at the bottom of the window. Click **Finish**.
9. Users will be returned to the Positions View, the UFM Conversion is complete.
10. The APF position that was converted now shows a status of **UFM converted** with an employee count of 0. *(These positions are not lost or deleted from the IMETS database.)*
11. The new NAF position now appears filled by the employee from the converted APF authorization.

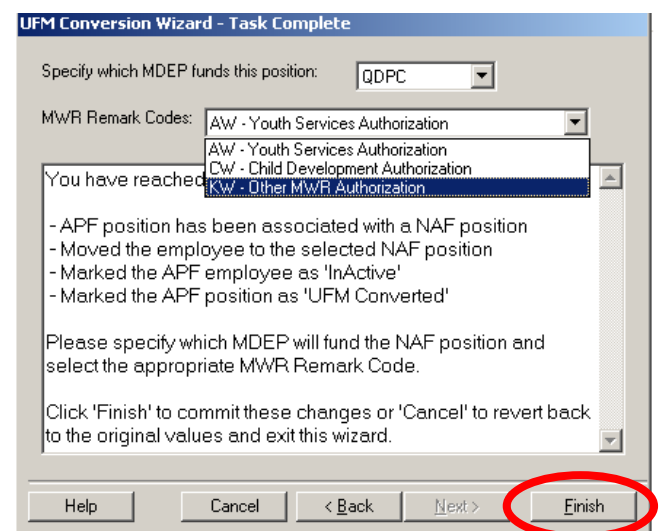


Fig 3-31: MDEP and MWR Remark Code

3:9 UFM Conversion Wizard (cont.)

All data shown is fictional. Manual best viewed in color.

12. When **Create New NAF Position** is used, IMETS will create a new position record. The position record will be automatically populated with as much information as possible from the APF Position, however certain fields will still need to be completed manually.

- Assign a **pay plan** by clicking the drop down menu, then enter a **grade**.
- Click **OK**.

13. The Wizard will prompt to assign an **MDEP Code** and **MWR Remark Code** – select from the pick lists and click **Finish**

14. Users will be returned to the Positions View, the UFM Conversion is complete.

15. The APF position that was converted now shows a status of **UFM converted** with an employee count of 0. *(These positions are not lost or deleted from the IMETS database.)*

16. The new NAF position now appears filled by the employee from the converted APF authorization.

Fig 3-32: Position Properties

Position	UIC-Para-Line (S/L)	Std NAF	Employees	Status	Pos Type
GS-0030-11 SPORTS DIRECTOR	WXLCE9JH-06 (1)	XL1JH SGL	0	UFM Conversion	APF
NF-0030-04 SPORTS DIRECTOR	WXLCE9JH-06 (1)	XL1JHLSGL	1	Active	NAF

Fig 3-33: Position Status – UFM Conversion

3:10 Overrides

All data shown is fictional. Manual best viewed in color.

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Overrides temporarily resolve manning document conflicts and are primarily used when personnel actions are in process with Human Resources. For example, MinMER may have an occupational series wrong. The correction has been submitted to NFS (Texarkana, TX), but in the meantime a conflict is still appearing in IMETS. With appropriate permissions, an override can be created to resolve the conflict. Overrides will expire in 30 days. If the original problem has not been corrected then the conflict will reappear.

Setting an Override:

- 1. From the DCPDS View (or MimMER view for a MinMER override), double click the conflicted record.

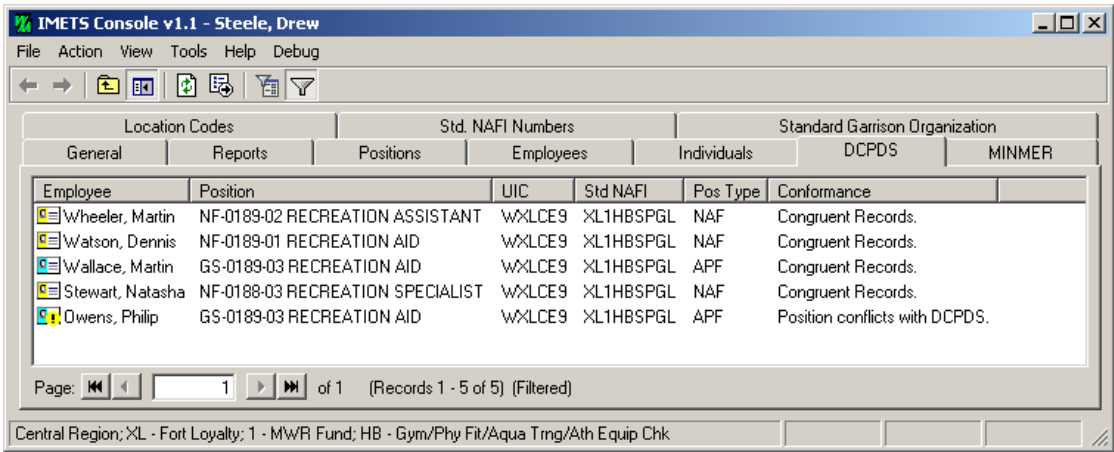


Fig 3-33: DCPDS View - Override Example

- 2. The DCPDS Properties window launched. Conflicts can be reviewed on the Conflicts Tab.
 - In the example, DCPDS lists the occ series as 0189 and the Manning Document lists it as 0188.
 - Assume, in this example, that the Manning Document is correct and DCPDS is wrong. A request has been made to update the data through CPO in the DCPDS database, but the update will not be imported into IMETS until the weekly import. **We can create a temporary override to resolve the conflict.**

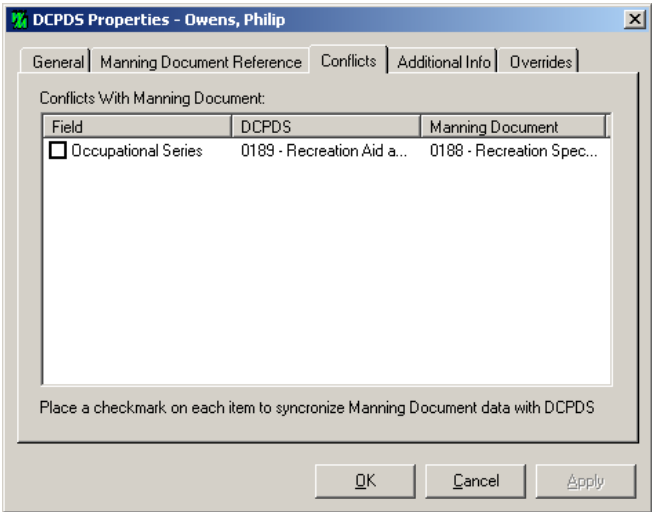


Fig 3-34: DCPDS Properties – Conflicts Tab

3:10 Overrides (cont.)

All data shown is fictional. Manual best viewed in color.

3. Click on the **Overrides Tab**.
 - A List of fields that are available to override are displayed.
 - If an override is already in place, the text 'Override Enabled' will display with the expiration date .
4. Double click on the field to override.

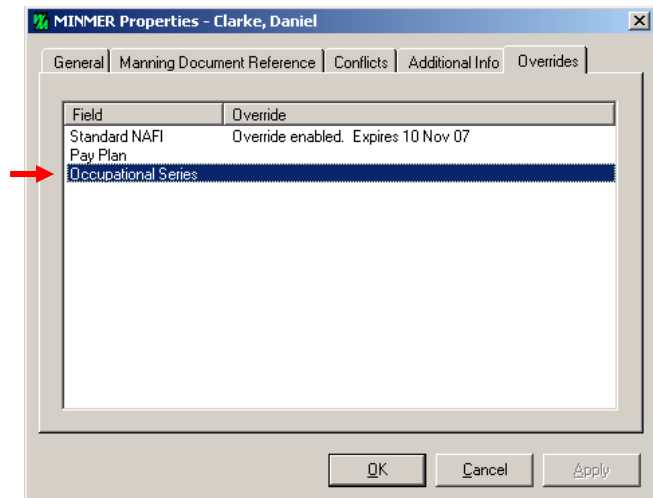


Fig 3-35: MinMER Properties – Overrides Tab

5. The Override Data Field will launch.
 - **Data Field:** Displays which field is being overridden.
 - **Original Value:** Displays the actual value being imported from DCPDS or MinMER.
 - **Override Value:** Drop Down Menu that allows the selection of the override value. (This is not always a drop down value depending on which field is being overridden.)
 - **Override By:** This will display the user that created the override once the override has been saved.
 - **Override Expiration Date:** Displays the date the override will expire. (30 days after it was created.)

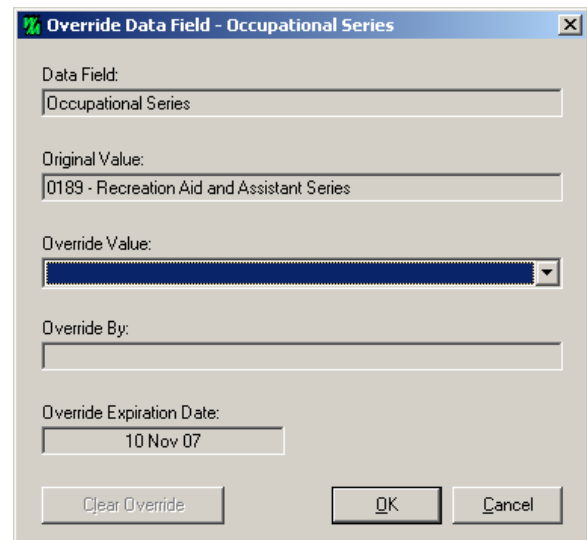


Fig 3-37: Override Data Field

6. Use the drop down menu to select the override value. In the example 0188 is selected.
7. Click **OK**.

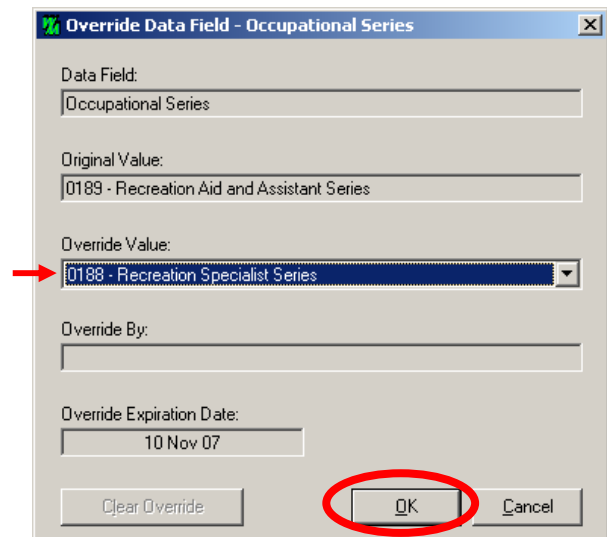


Fig 3-38: Select Override Data Value

3:10 Overrides (cont.)

All data shown is fictional. Manual best viewed in color.

- 8. Returned to the DCPDS Properties, Override Tab the override now shows as enables with an expiration date.
- 9. Click **OK** to close the record.

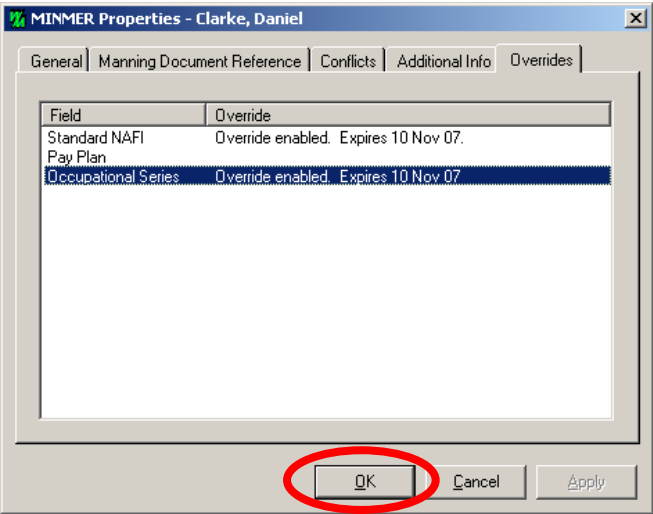


Fig 3-39: Override Enabled

- 10. At the DCPDS View, the record now shows as congruent and the series displays as 0188.

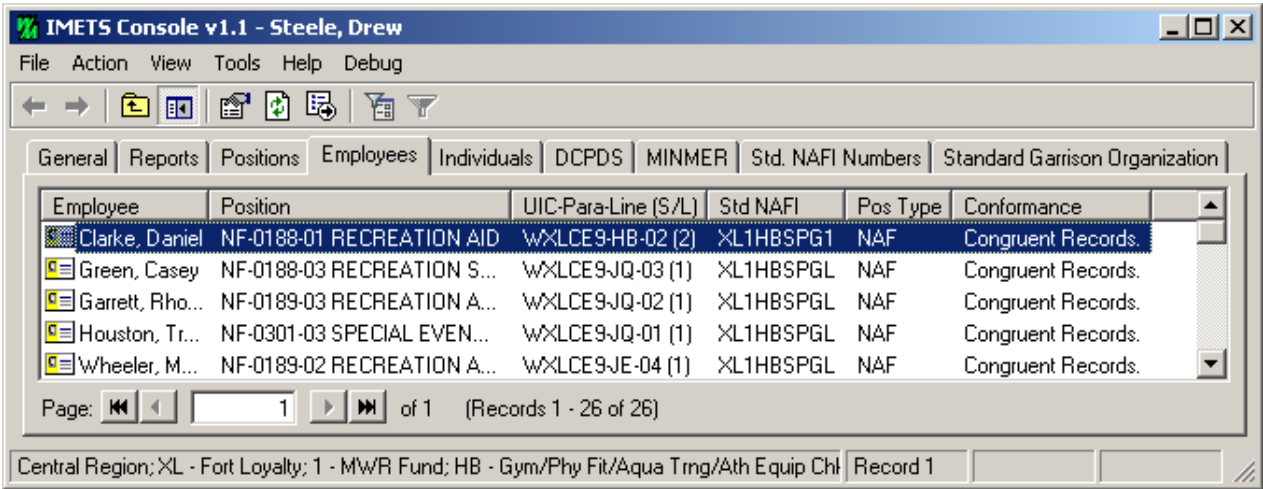


Fig 3-40: DCPDS View - Congruent with Override

3:11 Custom Fields (Additional Info Tabs)

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Positions, Employees, and Individual Records all contain an Additional Info Tab. The Additional Info Tab provides a way for users to associate an unlimited amount of miscellaneous data with a record using custom fields. There are a variety of data types available to suit most purposes. (*Text, numeric, date, yes/no.*)

Adding Custom Fields in the Additional Info Tab:

1. Open the Position, Employee or Individual to add additional info to.
2. Click on the **Additional Info** Tab.
3. Select the type of Value to create by clicking the **Add drop down menu**. (*In our example we are creating a New Text Value.*)

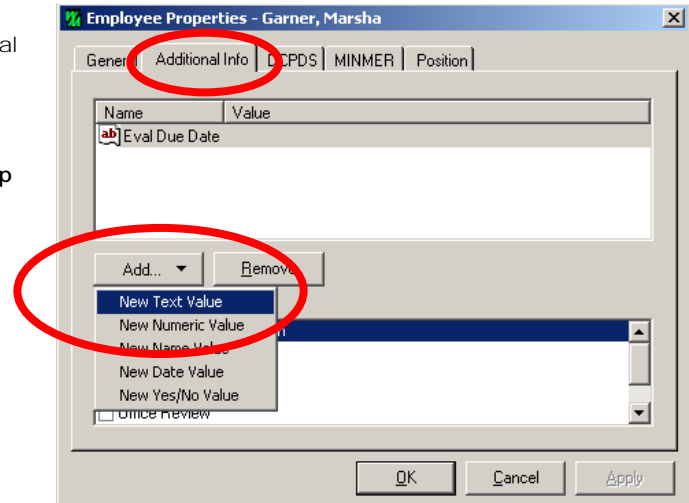


Fig 3-41: Additional Info Tab

4. A **New Text Block** will appear, allowing the user to title the new data field.
5. Type the Title of the new custom field in the box.

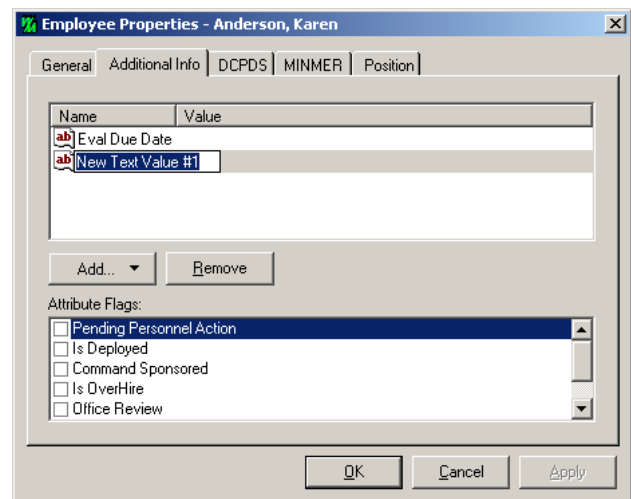


Fig 3-42: New Text Value

3:11 Custom Fields (cont.)

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6. In the example, the Custom Field is titled '**Supervisor**'.
7. Once the text field is named & created, **double click** on it to input the data.

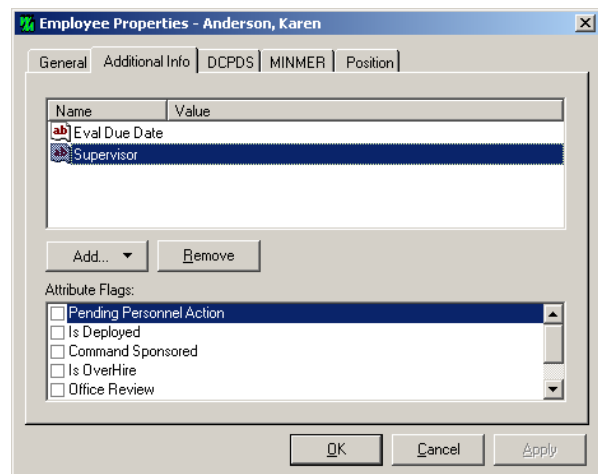


Fig 3-43: Additional Info Tab

8. Users may then be allowed to edit text in the **Value Data Field**.

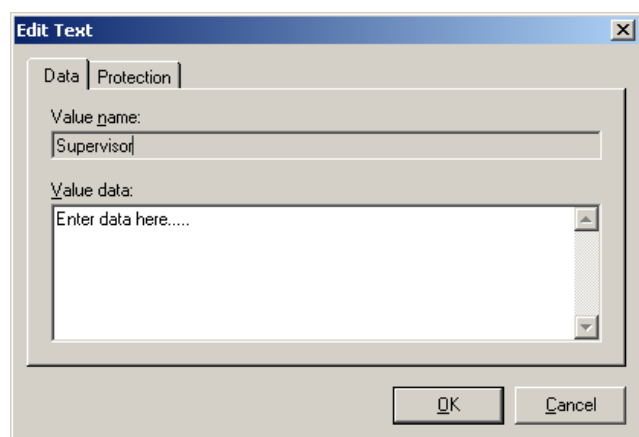


Fig 3-44: Value Data Field

9. The **Protection** tab sets permissions (optional). The permissions apply to other users with access to the position, employee or individual record being edited. By default, custom field values are open for editing and deleting by any other user with access to the record..
10. Click **ok** when finished.

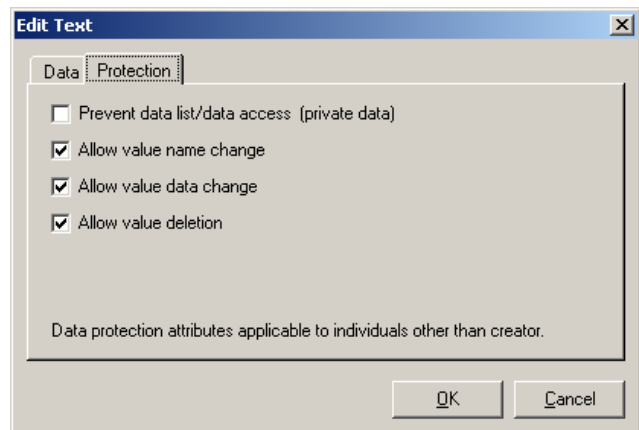


Fig 3-45: Protection

3:11 Custom Fields (cont.)

All data shown is fictional. Manual best viewed in color.

11. The notes are now stored on the **Additional Info** Tab.

- They will be visible to any user with access to the record.

The dialog box shows the 'Additional Info' tab for 'Anderson, Karen'. It contains a table with two rows: 'Eval Due Date' and 'Supervisor John Smith'. Below the table are 'Add...' and 'Remove' buttons. Under 'Attribute Flags', there are checkboxes for 'Pending Personnel Action', 'Is Deployed', 'Command Sponsored', 'Is OverHire', and 'Office Review'. At the bottom are 'OK', 'Cancel', and 'Apply' buttons.

Name	Value
ab Eval Due Date	
ab Supervisor	John Smith

Fig 3-46: Employee Properties - Additional Info

Other Custom Field Types:

1. The **Date Field** type will allow a date to be stored. IMETS provides a calendar to select the date. Simply click on the day from the calendar, or use the right and left arrows to move to a different month. Click **OK** to store the date.

The 'Edit Date' dialog box has 'Data' and 'Protection' tabs. The 'Value name' field contains 'Date Field'. The 'Value data' section shows a calendar for September 2007. The date 9/18/2007 is selected and circled in red. Below the calendar, it says 'Today: 9/18/2007'. At the bottom are 'OK' and 'Cancel' buttons.

Fig 3-47: Date Value

2. The **Numeric Field** type will allow a number to be stored. Enter the number in the value data field and click **OK**.

The 'Edit Number' dialog box has 'Data' and 'Protection' tabs. The 'Value name' field contains 'New Numeric Value #1'. The 'Value data' field contains the number '8'. At the bottom are 'OK' and 'Cancel' buttons.

Fig 3-48: Number Value

3:11 Custom Fields (cont.)

All data shown is fictional. Manual best viewed in color.

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3. The **Name Field** type will allow an IMETS name to be stored. Type the first few letters of the last name and click **Check Name**.

- If more than one name is found, a pick list will allow the user to select the correct individual.
- **Hint:** Enter the first letter of last name followed by the last 4 of social security number (SSN).

Fig 3-49: Name Value

4. The **Yes/No Field** type will allow 'Yes', 'No', or 'Undetermined' value to be stored. Click the radial button next to the value and click **OK**.

- Only one value may be selected.

Fig 3-50: Yes/No Value

3:12 Funded By Source on LN Records

All data shown is fictional. Manual best viewed in color.

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All Local National (LN) position records in IMETS need to have a 'Funded By' source specified, either APF or NAF. The 'Funded By' field only exists in LN Position records.

Selecting the 'Funded By' Source on LN Records:

1. From the Position View, double-click the LN position to launch the Properties window. Select the **Details Tab**.
2. Use the drop down menu to select the **Funded By** source – either APF, NAF, or Other.
3. Click **OK** to close the record.

The screenshot shows the 'Position Properties - New Position' dialog box with the 'Details' tab selected. The 'Funded By' dropdown menu is open, displaying the options 'APF', 'NAF', and 'Other'. The 'UIC' field is set to 'WXL006 (FORT LOYALTY, EAST SIDE)', 'Paragraph' is 'HC', 'Line Number' is '03', and 'Std. NAFI' is 'XL1HCRCG1'. The 'Pay and Benefits' section includes fields for 'Pay Rate', 'Budgeted Annual Payrate', and 'Budgeted', all of which are currently empty. The 'Remarks' field is a large text area at the bottom. The 'OK', 'Cancel', and 'Apply' buttons are located at the bottom right of the dialog.

Fig 3-51: LN Funded By

3:13 Leader Development Program Designation

All data shown is fictional. Manual best viewed in color.

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IMETS is used to identify and document positions subject to the MWR and Career Field (CF) 51, Morale, Welfare and Recreation (MWR), Leader Development Program (LDP). Regular Full-Time positions in grades NF-4 through NF-5 in MWR, Lodging, Armed Forces Recreation Centers and Army Recreation Machine Program NAFs should be assigned one of the following LDP designations:

- Not LDP
- Junior Position
- Senior Position
- Key Position.

Assigning an LDP Designation to a Position:

1. From the Position View, double-click the position to launch the Properties window. Select the **Details Tab**.
2. Use the drop down menu to select the **LDP** source – either 'Not LDP', 'Junior Position', 'Senior Position', or 'Key Position'.
3. Click **OK** to close the record.

Hint: To just look at position records that require a LDP designation, use a Filter. Click the **Define Filter** button from the tool bar and set a filter LDP equals NF04/NF05.

The screenshot shows the 'Position Properties' window for 'NF-0701-04 VETERINARY MEDICAL OFFICER'. The 'Details' tab is active. The 'LDP' dropdown menu is open, displaying the following options: 'Not LDP', 'Junior Position' (which is highlighted), 'Senior Position', and 'Key Position'. Other visible fields include 'UIC' set to 'WXLCE9 (US ARMY GARRISON FT LOYALTY)', 'Paragraph' set to 'TD', 'Line Number' set to '04', 'Std. NAFI' set to 'XL1TDVSG1', and 'Job Number' set to 'AL620'. The 'Pay and Benefits' section shows 'Pay Rate' and 'Budgeted Annual Payrate' fields. At the bottom, there are 'OK', 'Cancel', and 'Apply' buttons.

Fig 3-52: LDP Designation

3:14 VICE, LWOP, FURL Designations

IMETS allows for an employee to be marked with the prefixes, VICE, LWOP or FURL.

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- VICE - Prefix indicates the last active employee to fill a position. Useful in Manning Document Reporting to track vacancies according the actual person that is being replaced.
- LWOP – Prefix indicates an employee is on Leave Without Pay.
- FURL - Prefix indicates and employee is on Military Furlough.

Setting an employee prefix:

1. From the Employees View, double-click the employee to launch the Employee window.
2. Use the drop down menu to select the **Prefix** – either 'VICE', 'LWOP', or 'FURL'.
3. Click **OK** to close the record.

Fig 3-53: Prefix

4. The employee name will now display with the prefix in front of it, whether it is being viewed from the employees view or from the position itself.

Employee	Position	UIC-Para-Line (S/L)	Std NAFI	Pos Type	Conformance
Baker, Daniela	CC-1702-02 CHILD & YOUTH PROGRAM ASSISTANT (TARGET LEVEL-4)	WXLCE9-JG-05 (5)	XL1JMYPGL	NAF	Congruent Record
Benson, Ronnie	NF-1701-03 CHILD & YOUTH SERVICES ASSISTANT DIRECTOR	WXLCE9-JM-09 (1)	XL1JMYPGL	NAF	Congruent Record
VICE: Ellis, Damaris	CC-1702-02 CHILD & YOUTH PROGRAM ASSISTANT (TARGET LEVEL-4)	WXLCE9-JM-02 (1)	XL1JMYPGL	NAF	Employee has no
Jennings, Derrick	CC-1702-02 CHILD & YOUTH PROGRAM ASSISTANT (TARGET LEVEL-4)	WXLCE9-JM-03 (1)	XL1JMYPGL	NAF	Congruent Record
Johns, Ricardo	NA-3566-02 CUSTODIAL WORKER	WXLCE9-JM-08 (1)	XL1JMYPGL	NAF	Congruent Record

Fig 3-54: LDP Designation

Note: When a prefix is used the employee record remains active until the record is manually inactivated. For example, if the prefix VICE is used, the employee will show and an active employee in the position. Once the replacement is hired, the employee marked VICE, should be inactivated and the prefix should be removed from the record. This will ensure that only one active record is appearing in each position at any one time.

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USER MANUAL

Section 4

Organization Module Views and Record Types

4:1 About the Organization Module

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In section 4 we review the Organization Module. This module contains the views, records and tools needed to directly manage and maintain the physical and geographical locations as well as Standard NAFIs.

Each view displays records depending on where the user has navigated in the context tree and if any filters or scopes are being used. The Views that make up the Organization Module are:

- Military Communities View
- Facilities View
- Activities View
- Standard NAFI View
- Location Code View

4:2 Organization Icons

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Organization icons are used in IMETS to identify different record types. Unlike the Manning Document Module, records in the Organization Module are not compared to outside data sources so there is no need for conflict or disconnect flags.



Military Community Icon



Facility Icon



Activity Icon



Location Code Icon



Standard NAFI Icon

4:3 Military Communities View

All data shown is fictional. Manual best viewed in color.

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Lists Military Communities within the current context and is primarily managed at the garrison level.

The Military Communities view is visible from the Organization Branch of the Context tree. Users can create Military Communities to represent the geographical location(s) of an installation. Data may be sorted by any of the columns within the Military Communities View simply by clicking on the column header field.

- *Military Community* – The title of the Military Community is displayed.
- *Installation* - Displays the title of the garrison the Military Community belongs to.

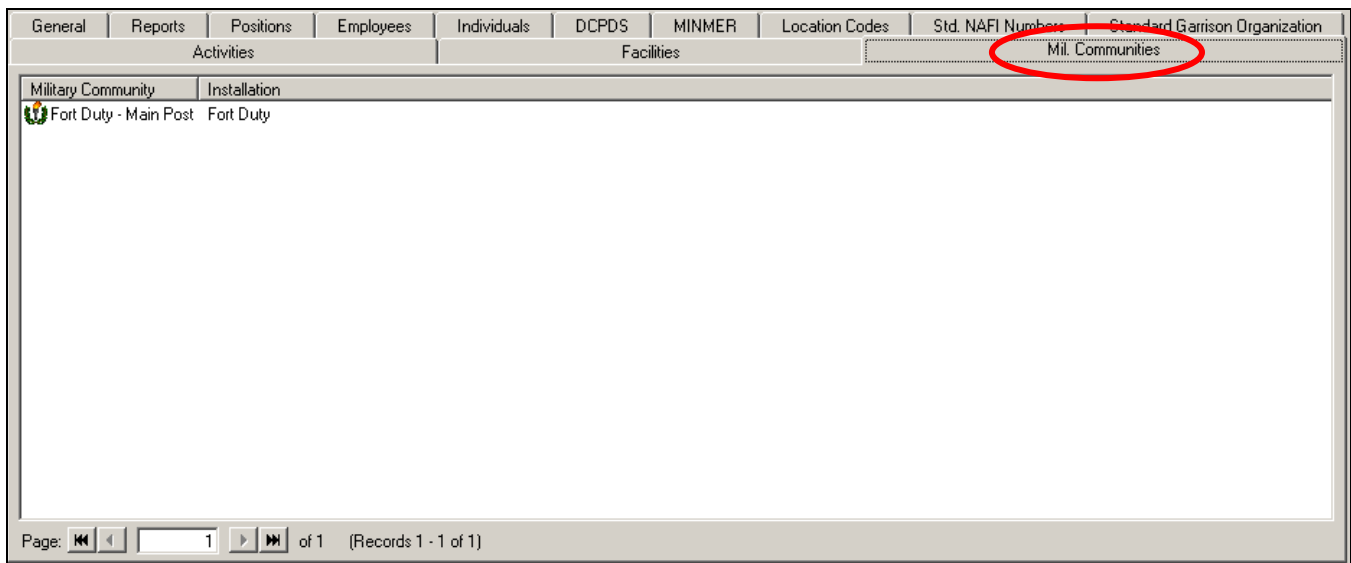


Fig 4-1: Mil. Communities

4:4 Military Community Record

All data shown is fictional. Manual best viewed in color.

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Contains detailed data representing a geographical military community.

Military Community records in IMETS are managed by the garrison. Military Communities make up a garrison. Military Community records may have multiple facilities.

1. General Tab

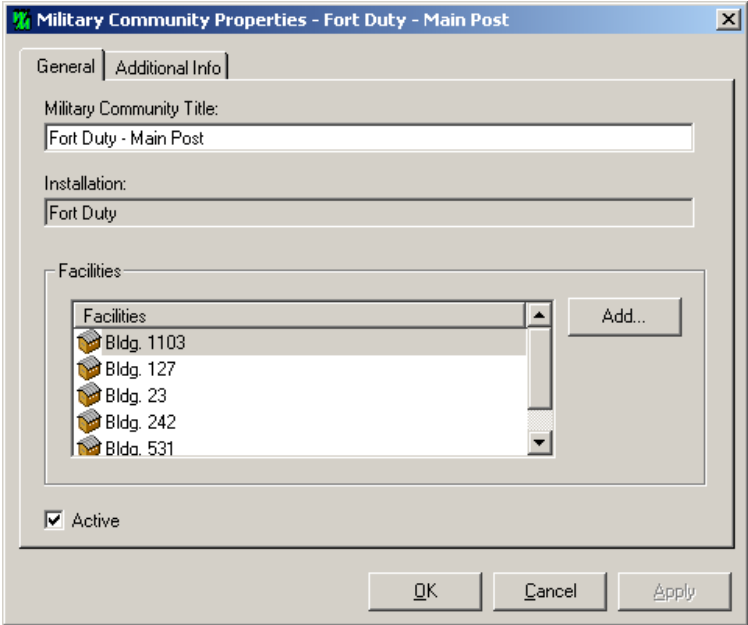


Fig 4-2: Mil. Community – General Tab

- **Military Community Title:** This field is editable at any time and displays the title of the Military Community.
- **Installation** This field is set when a record is created and once set can not be changed. It displays the garrison that the Mil Community belongs to.
- **Facilities:** This section displays a list of facilities that make up a Mil Community. There is an Add button to Add more facilities if necessary.
- **Active:** This check box will toggle the active status of the Military Community. The default is set to Active.

2. Additional Info Tab

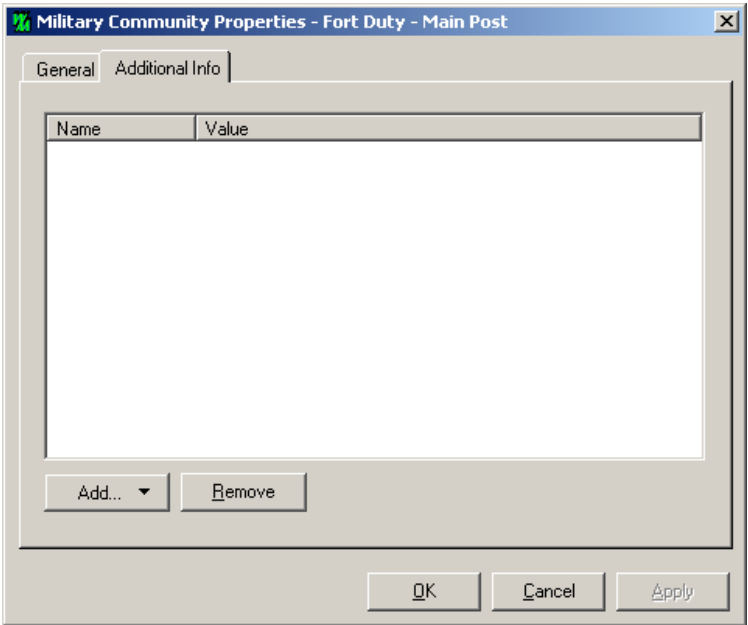


Fig 4-3: Mil. Community –Additional

The Additional Info Tab is used to create **Custom Fields**. Custom Fields can be used to record and track unique information used by the local installation. There are several different types of fields available: Text Fields, Numeric Fields, Name Fields. Date Fields, Yes/No Fields.

Adding Custom Fields are covered in section 3:11.






4:5 Facilities View

All data shown is fictional. Manual best viewed in color.

Lists Facilities within the current context and is primarily managed at the garrison level.

The Facilities view is visible from the Organization Branch of the Context tree. Users can create Facilities to represent the structures within a military Community where Activities reside. Data may be sorted by any of the columns within the Facilities View simply by clicking on the column header field.

- *Facility Name* – The title of the Facility – most often a building number, however a pool or golf course could also be a facility.
- *Street Address* - Displays the street address of the Facility.
- *Mil. Community* – Displays the installation and military community the Facility belongs to.

General	Reports	Positions	Employees	Individuals	DCPDS	MINMER	Location Codes	Std. NAFI Numbers	Standard Garrison Organization
Activities				Facilities			Mil. Communities		
Facility Name	Street Address	Mil. Community							
 Bldg. 1103	Main Street	Fort Duty - Main Post, Fort Duty							
 Bldg. 127	Park Lane	Fort Duty - Main Post, Fort Duty							
 Bldg. 23	Long Street	Fort Duty - Main Post, Fort Duty							
 Bldg. 242	Park Lane	Fort Duty - Main Post, Fort Duty							
 Bldg. 531	Vicroy Street	Fort Duty - Main Post, Fort Duty							





Page:   1   of 1 (Records 1 - 5 of 5)

Fig 4-4: Facilities View

4:6 Facility Record

All data shown is fictional. Manual best viewed in color.

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Contains detailed data representing a physical structure within a Military Community.

Facility records in IMETS are managed by the installation. Facilities make up Military Community. Facility records may have multiple activities.

1. General Tab

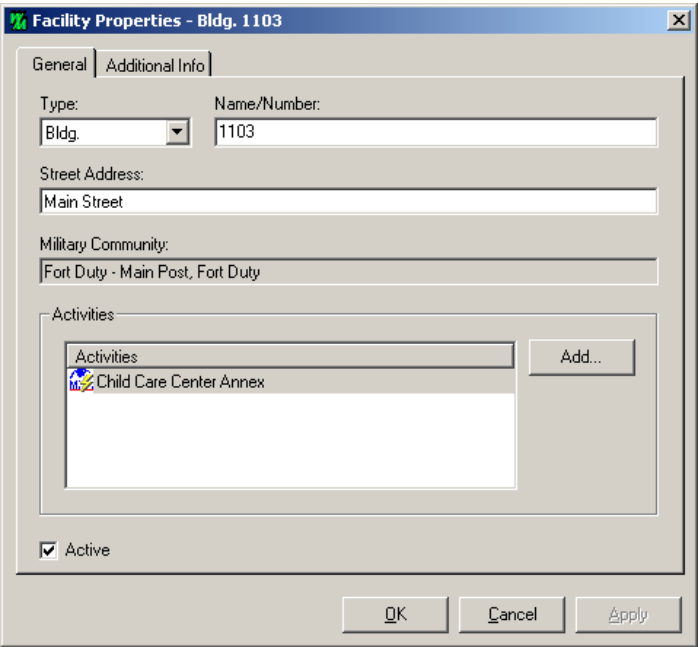


Fig 4-5: Facility – General Tab

- **Type:** This drop down field displays the type of facility, such as Building.
- **Name/Number:** This field displays the name of the building or building number.
- **Street Address:** This field displays the street address of the facility.
- **Activities:** This section displays a list of activities that make up a Facility. There is an Add button to Add more activities if necessary.
- **Active:** This check box will toggle the active status of the Facility. The default is set to Active.

2. Additional Info Tab

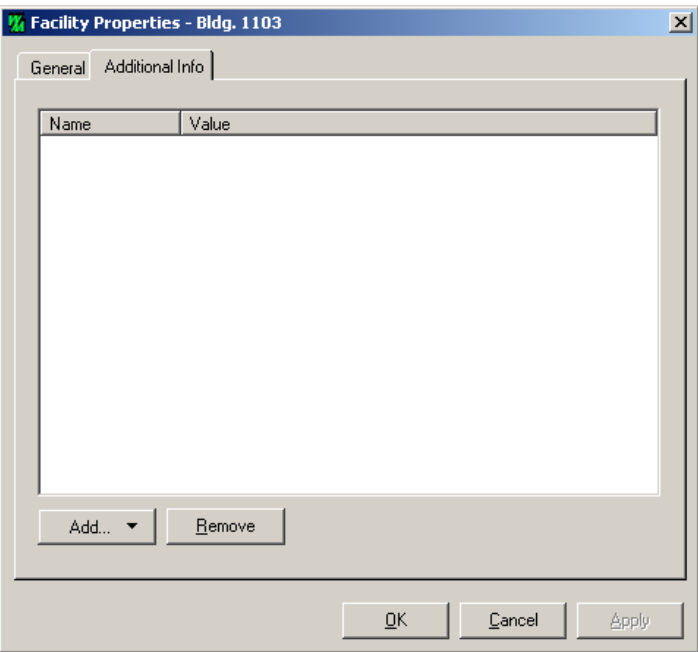


Fig 4-6: Facility –Additional Info

The Additional Info Tab is used to create **Custom Fields**. Custom Fields can be used to record and track unique information used by the local installation. There are several different types of fields available: Text Fields, Numeric Fields, Name Fields. Date Fields, Yes/No Fields.

Adding Custom Fields are covered in section 2:X.









4:7 Activities View

All data shown is fictional. Manual best viewed in color.

Lists Activities within the current context and is primarily managed at the garrison level.

The Activities view is visible from the Organization Branch of the Context tree. Users can create Activities to represent an organizational department or MWR Activity within a Facility. Data may be sorted by any of the columns within the Activity View simply by clicking on the column header field.

- *Activity* – The title of the organizational department or MWR Activity.
- *Num Departs* – Lists the number of department codes (G1, GL, 01 etc.) associated with the Activity.

General	Reports	Positions	Employees	Individuals	DCPDS	MINMER	Location Codes	Std. NAFI Numbers	Standard Garrison Organization
Activities				Facilities				Mil. Communities	
Activity		Num Depts							
 Central Child Care Center		8							
 Child Care Center Annex		8							
 Strike Zone Bowling		7							
 DCA		9							
 Automation		6							
 Marketing		6							
 Hoot Owl Club		7							
 Victory Lane Auto Crafts		14							





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Fig 4-7: Activities View

4:8 Activity Record

All data shown is fictional. Manual best viewed in color.

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Contains detailed data representing an organizational activity within a facility.

Activity records in IMETS are managed by the installation. Activities make up Facilities. Activities records may have multiple departments.

1. General Tab

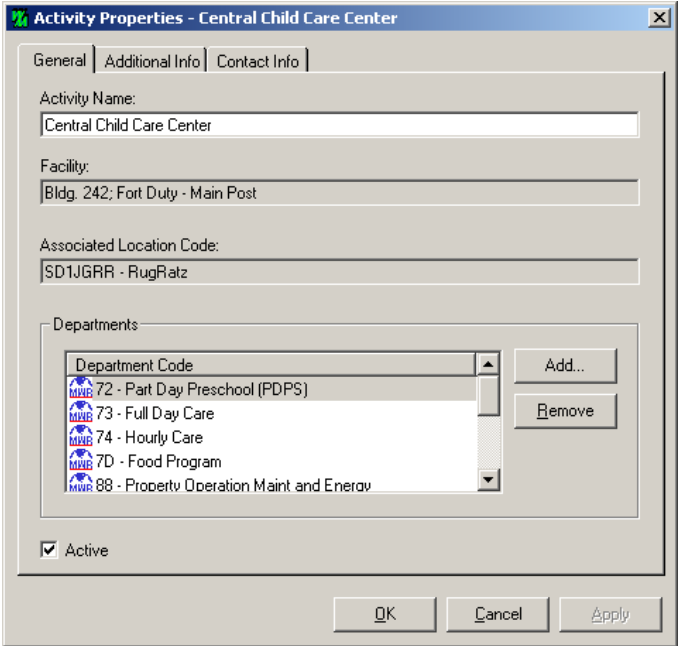


Fig 4-8: Activity – General Tab

- **Activity Name:** The name of the activity is displayed here.
- **Facility:** This field displays facility type and number, as well as the military community name the activity belongs to.
- **Associated Location Code:** This field displays Location Code and description.
- **Department:** This section displays a list of departments that make up an Activity. There are Add and Remove buttons to Add and Remove departments if necessary.
- **Active:** This check box will toggle the active status of the Activity. The default is set to Active.

2. Additional Info Tab

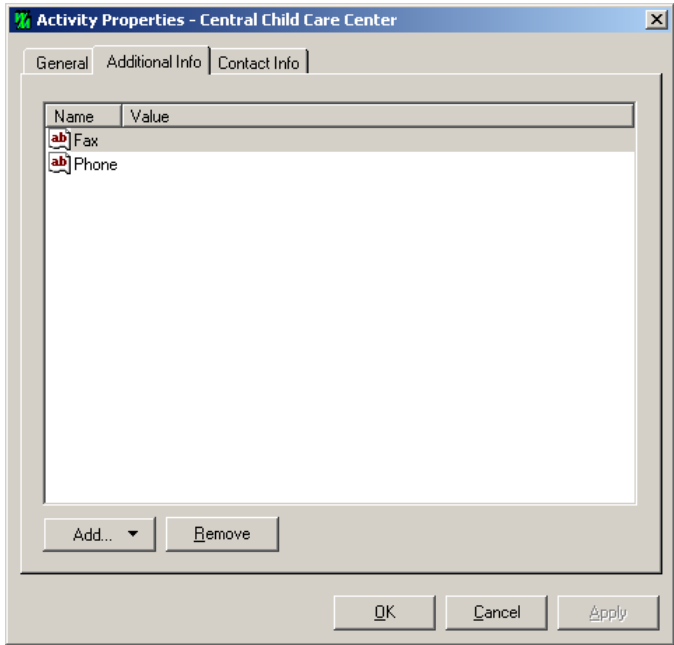


Fig 4-9: Activity –Additional Info

The Additional Info Tab is used to create **Custom Fields**. Custom Fields can be used to record and track unique information used by the local installation. There are several different types of fields available: Text Fields, Numeric Fields, Name Fields. Date Fields, Yes/No Fields.

There are two default custom fields already created to store the **Fax** and **Phone** number of the Activity.

Adding Custom Fields are covered in section 3:11.

4:8 Activity Record (cont.)

All data shown is fictional. Manual best viewed in color.

3. Contact Info Tab

Fig 4-10: Activity – Contact Info

- **Manager:** This field will allow an IMETS name to be stored. Type the first few letters of the last name and click **Check Name**.
 - If more than one name is found, a pick list will allow the user to select the correct individual.
 - **Hint:** Enter the first letter of last name followed by the last 4 of social security number (SSN).
- **DSN:** This field displays the DSN telephone number of the Activity.
- **Civilian Phone Number:** This field displays the civilian telephone number of the Activity.
- **Fax Phone Number:** This field displays the civilian fax number of the Activity.

4:9 Location Code View

All data shown is fictional. Manual best viewed in color.

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Lists Location Codes within the current context and is primarily managed at the garrison level.

The Location Code view is visible from either the Organization Branch or the Standard NAFI Branch of the Context tree. Users can create Location Codes in this view as needed. Data may be sorted by any of the columns within the Location Code View simply by clicking on the column header field.

- *Location Code and Title* – The Location Code and the title are displayed.
- *Inst Code* – Lists the Installation code the location code belongs to.
- *Fund Code* – Lists the fund code the location code belongs to.
- *Inst Code* – Lists the Installation code the location code belongs to.
- *Dept Code* – Lists the number of department codes associated with the location code.
- *Status* – Displays if the location code is Active or InActive.

General Reports Positions Employees Individuals DCPDS MINMER Location Codes Std. NAFI Numbers Standard Garrison Organization					
Location Code and Title	Inst Code	Fund Code	Prg Code	Dept Codes	Status
AC - ARTS & CRAFTS	XL	1	JB	3	Active
AD - OFFICE OF THE MWR DIRECTOR	XL	1	RC	4	Active
AD - NO DESCRIPTION	XL	1	RP	2	Active
AL - REGIMENTAL CLUB	XL	1	KM	7	Active
AS - AUTO SHOP	XL	1	JC	2	Active
AU - NO DESCRIPTION	XL	1	RE	2	Active
AU - IT OFFICE	XL	1	RI	4	Active
BC - BOWLING CENTER	XL	1	LE	7	Active
BK - LIBRARY	XL	1	HA	1	Active
BL - REGIMENTAL CLUB	XL	1	KM	1	Active
CC - SUPPLEMENTAL PROGRAMS & SERVICES	XL	1	PG	4	Active
CD - CHILD DEVELOPMENT CENTER	XL	1	JG	10	Active
CF - No Description	XL	1	RR	1	Active
CL - LEE CLUB	XL	1	KM	4	Active
CN - NO DESCRIPTION	XL	1	KF	8	Active
CO - NO DESCRIPTION	XL	1	KE	10	Active
CP - NAF HUMAN RESOURCES OFFICE	XL	1	RH	2	Active
CR - Community Recreation	XL	1	RS	1	Active

Page: 1 of 1 (Records 1 - 68 of 68)

Fig 4-11: Location Code View

4:10 Location Code Record

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Contains detailed data related to a specific location code.

The Location Code is part of the Standard NAFI that is managed by installations. Where the other parts of the Standard NAFI such as the Installation Code, Fund Code, Program Code and Department Code are all standardized codes – Location Codes are created at the installation level and may change over time. Each location code generally represents a single activity or organizational element. Location codes belong to one program code and may have multiple department codes.

1. General Tab

Fig 4-12: Location Code – General Tab

- **Installation Code:** This read only field displays the installation code the location code belongs to.
- **Fund Code:** This read only field displays the fund code the location code belongs to.
- **Program Code:** This read only field displays the program code the location code belongs to.
- **Location Code and Title:** The first field displays the location code, once created it cannot be edited. The second field displays the location code title and may be edited as needed.
- **Department Codes:** This section displays a list of department codes associated with the location code. There is an Add button to Add more department codes if necessary.
- **Active:** This check box will toggle the active status of the Location Code Record. The default is set to Active.

2. Additional Info Tab

Fig 4-13: Location Code –Additional Info

The Additional Info Tab is used to create **Custom Fields**. Custom Fields can be used to record and track unique information used by the local installation. There are several different types of fields available: Text Fields, Numeric Fields, Name Fields, Date Fields, Yes/No Fields.

Adding Custom Fields are covered in section 3:11.

4:11 Standard NAFI Numbers View

All data shown is fictional. Manual best viewed in color.

Lists Standard NAFI Numbers (SNNs) within the current context and is primarily managed at the garrison level.

The SNN View is visible from either the Organization Branch or the Standard NAFI Branch of the Context tree. The SNN view is populated as Location Code records are added to the system.

- *NAFI Code* –Displays the full SNN
- *Managing Activity* – If a location code is associated with an Activity Record, the Activity name will display here.
- *Agency Cnt* – Lists the number of Agency Associations the SNN has.
- *Status* – Displays if the location code is Active or InActive.
- *Fiscal Years in Service*: Displays the fiscal years the SNN has been used according to SMIRF.

General Reports Positions Employees Individuals DCPDS MINMER Location Codes Std. NAFI Numbers Standard Garrison Organization				
NAFI Code	Managing Activity	Agency Cnt	Status	Fiscal Years in Service
XL1 HA BK GL		2	Active	
XL1 HB SP 51		2	Active	04, 01
XL1 HB SP G1		2	Active	06, 05, 04, 03, 02, 01
XL1 HB SP GL		2	Active	06, 05, 04, 03, 02, 01
XL1 HC RC 14		2	Active	06, 05
XL1 HC RC 7L		2	Active	06, 05
XL1 HC RC E1		2	Active	05
XL1 HC RC G1		2	Active	06, 05, 04, 03, 02, 01, 00, 99
XL1 HC RC GL		2	Active	06, 05
XL1 HC SS 9F		2	Active	00, 99
XL1 HC SS G1		2	Active	
XL1 HD UF 5J		2	Active	06, 05, 04, 03, 02, 01, 00, 99
XL1 JB AC 93		2	Active	06, 05, 04, 03, 02, 01, 00, 99
XL1 JB AC G1		2	Active	00, 99
XL1 JB AC GL		2	Active	06, 05, 04
XL1 JC AS 94		2	Active	06, 05, 04, 03, 02, 01, 00, 99
XL1 JC AS GL		2	Active	06, 05, 04, 03
XL1 JD LP B3		2	Active	06, 05, 04, 03, 02, 01, 00

Page: 1 of 1 (Records 1 - 211 of 211)

Fig 4-14: Std. NAFI Numbers View

4:12 Standard NAFI Number Record

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Contains detailed data related to a specific Standard NAFI Number

Standard NAFI Number records in IMETS are managed by the installation. Standard NAFI records are created when new Location Codes are added to the system. These records are mostly read only once created.

1. General Tab

Fig 4-15: Standard NAFI – General Tab

- **Installation Code:** The Installation Code and installation code title are displayed here.
- **Fund Code:** This field displays the Fund Code and description.
- **Program Code:** This field displays Program Code and description.
- **Location Code:** This field displays Location Code and description.
- **Department Code:** This field displays Department Code and description.
- **Assigned to Activity:** This field is the activity the Standard NAFI is assigned to (if any). In addition to the Activity Title, the post name and building number are also displayed.. There is a **Browse For..** button to add a new activity association, and a **Clear Activity** to remove an Activity association.
- **Active:** This check box will toggle the active status of the Standard NAFI Record. The default is set to Active.

2. Details Tab

Fig 4-16: Standard NAFI – Details Tab

- **Fiscal Years in Service:** This section displays which years the Standard NAFI has been in service. This data is based on actuals from SMIRF.
- **Agency Association:** This section displays which Agencies the Standard NAFI number is associated with.

4:12 Standard NAFI Number Record (cont.)

3. Additional Info Tab

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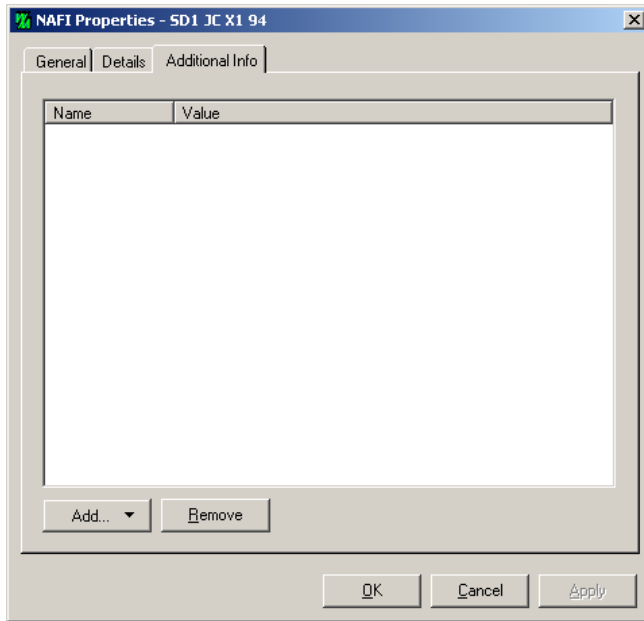


Fig 4-17: Activity – Contact Info

The Additional Info Tab is used to create **Custom Fields**. Custom Fields can be used to record and track unique information used by the local installation. There are several different types of fields available: Text Fields, Numeric Fields, Name Fields, Date Fields, Yes/No Fields.

There are two default custom fields already created to store the **Fax** and **Phone** number of the Activity.

Adding Custom Fields are covered in section 2:X.

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USER MANUAL

Section 5

Working in the Organization Module

5:1 Getting Started

The Organization Module contains two parts:

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1. The Organization Branch of the context tree which allows personnel data to be viewed by geographical location as well as activity.
2. Standard NAFI Management is part of the Organization Branch. Although the Org Module is where these records are managed, Standard NAFIs are key to ALL records in IMETS regardless of what module they are part of.

Figure 5-1 is a diagram of how the Organization Branch works. Military communities represent physical post locations – one installation may have more than one post. A community is made up of multiple facilities (buildings) and each facility houses one or more activity. An activity is directly linked to a location code which allows IMETS to display personnel records of the same location code as they relate to physical communities or structures.

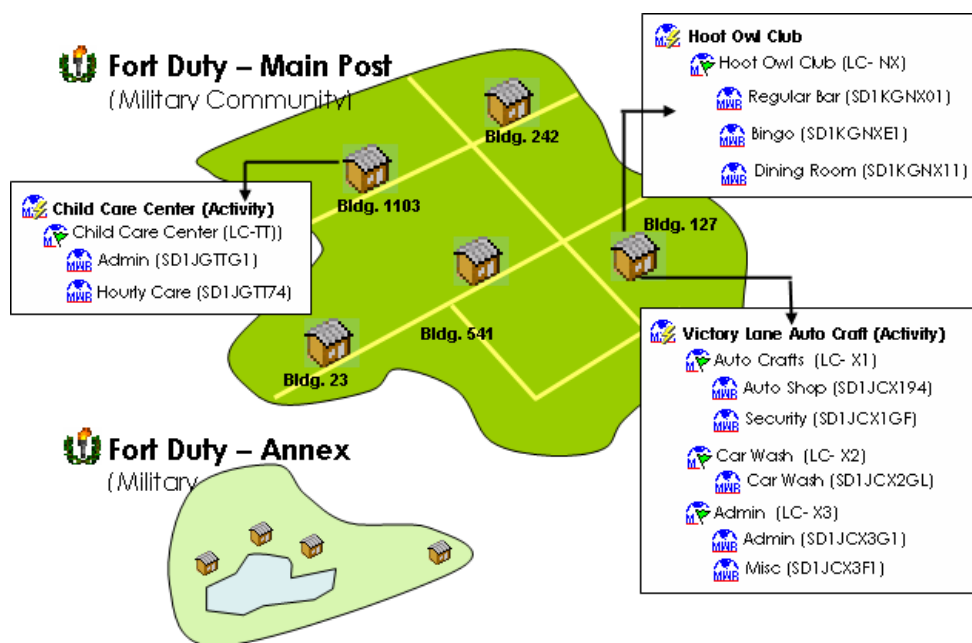


Fig 5-1: Fort Duty Diagram

In this section we will cover different types of tasks required to set up and manage the Organization Branch in IMETS as well as to manage Standard NAFI numbers.


- Adding a Facility
- Adding an Activity
- Adding a Military Community
- Adding a Location Code and Departments
- Editing Location Codes
- Inactivating Standard NAFIS

5:2 Adding a Facility

Facilities represent physical structures or buildings which house activities. They may be added to IMETS as needed. Facilities are only visible from the Org Branch of the context tree.

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Steps to Adding a New Facility:

1. In the Org Branch of the context tree, Drill down to the military community where the facility should be created – then click on the **Facilities View**.
2. Click  from the toolbar.
3. A blank Facilities Properties window will appear. Fill in all applicable fields on the General Tab and the Details Tab - click **Apply**.
 - The **Add Activities** button becomes active after clicking **Apply**
4. Click **Add** in the Activities window to create a new Activity – a Browse for IMETS Context Window appears.
5. Select the location code of the activity that is housed in the facility being creating. Click **OK**.

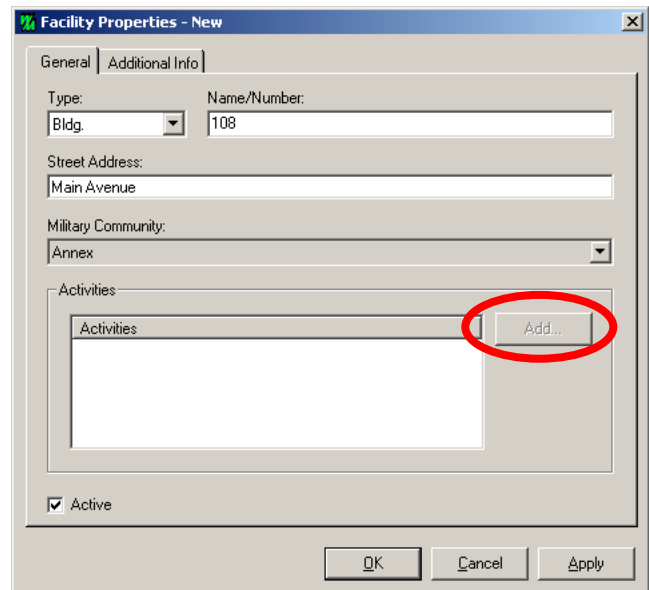


Fig 5-2: New Facility - Facility Properties

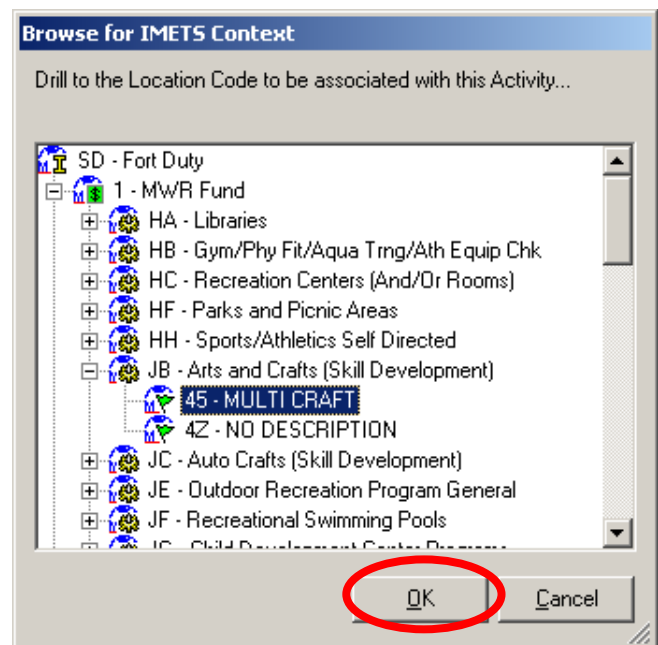


Fig 5-3: New Facility – Browse for IMETS Context

5:2 Adding a Facility (cont.)

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6. A message window appears stating that the Location Code title was used as the Activity name. It also informs the user how many department codes were automatically added to the activity. Any department codes within the location code are automatically added to the activity.

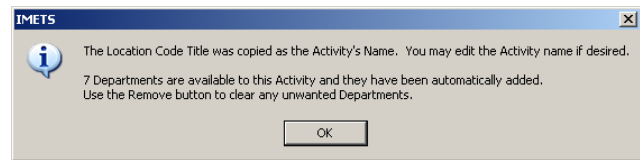


Fig 5-4: New Facility- Location Title Message

7. The user is returned to the Activity Properties window. It is possible to edit the Activity name or remove departments if necessary. Click **OK**.

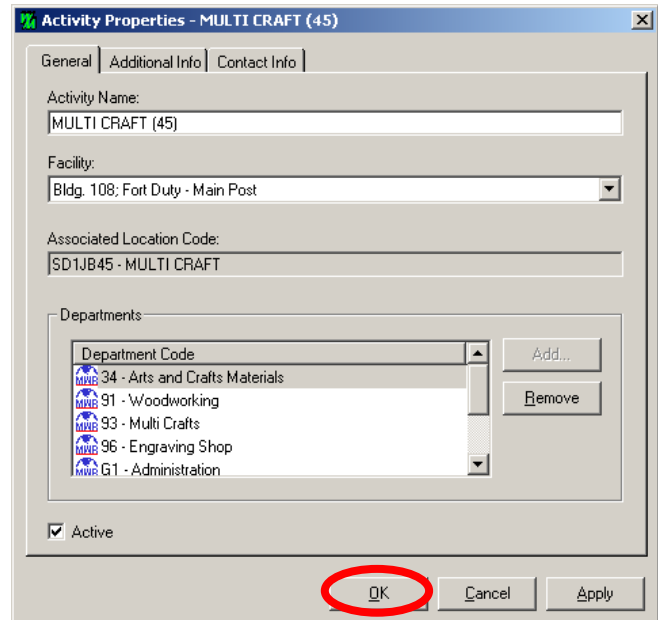


Fig 5-5: New Facility - Activity Properties

8. The user is returned to the Facility Properties window. It is possible to add move activities if necessary. Click **OK** to close.

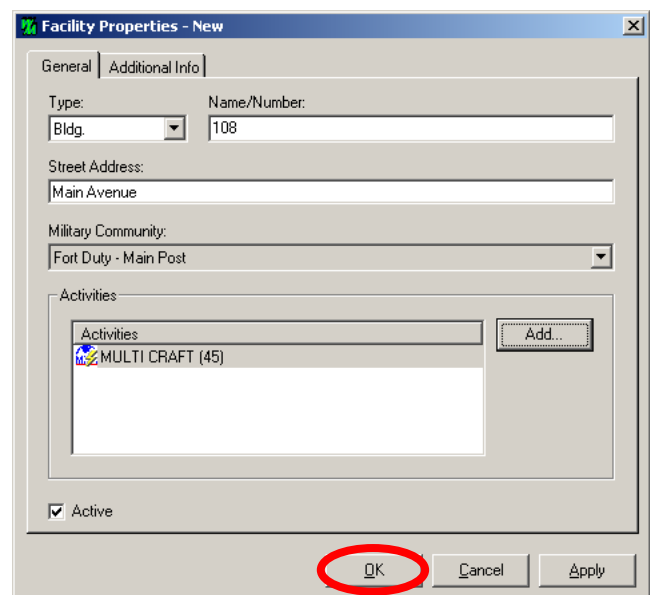


Fig 5-6: New Facility - Facility Properties

5:2 Adding a Facility (cont.)

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9. At the main display window, the new facility now appears in the Facilities View.

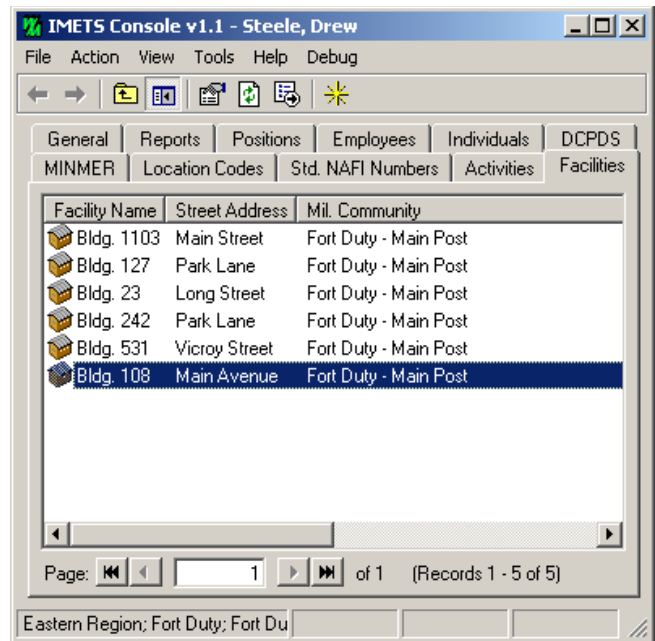



Fig 5-7: New Facility - Facility View

5:3 Adding an Activity

All data shown is fictional. Manual best viewed in color.

Activities represent an organizational department or Activity within a Facility. They may be added to IMETS during the creating of a facility, as covered in the previous section, or directly from the Activities View as covered in this section. Activities are only visible from the Org Branch of the context tree.

Steps to Adding a New Activity:

1. In the Org Branch of the context tree, Drill down to the facility where the activity should be created – then click on the **Activities View**.
2. Click  from the toolbar.
3. The Browse for IMETS Context Window appears with a blank Activities Properties window behind it. Select the Location Code of the Activity being created and click **OK**.

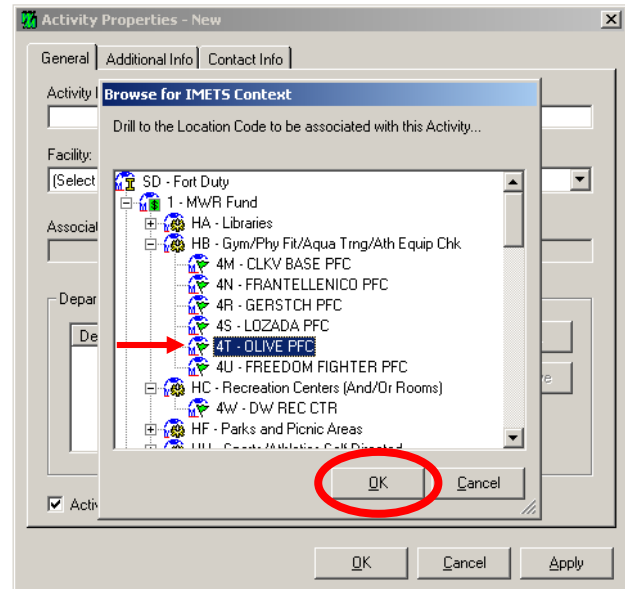


Fig 5-8: New Activity -Browse for IMETS Context

4. A message window appears stating that the Location Code title was used as the Activity's Name. It also informs the user how many department codes were automatically added to the activity. Any department codes within the location code are automatically added to the activity.

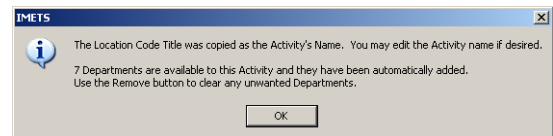


Fig 5-9: New Activity -Location Title Message

5. The user is returned to the Activity Properties window. It is possible to edit the Activity name or remove departments if necessary. Click **OK**.

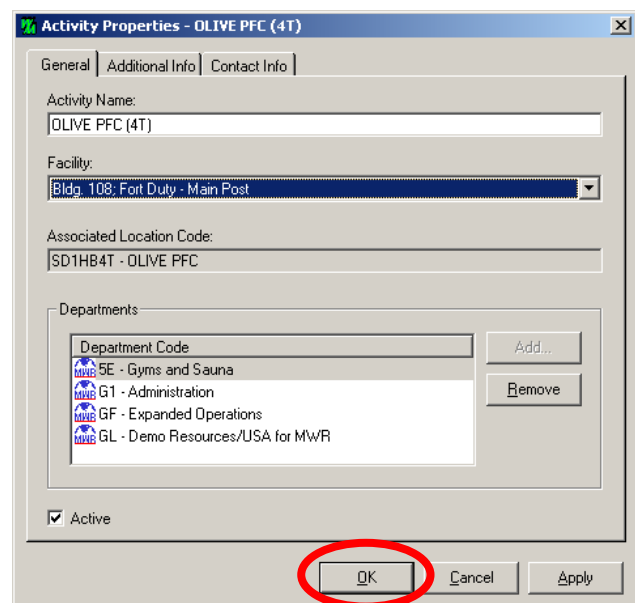



Fig 5-10: New Activity - Activity Properties

5:4 Adding a Military Community

All data shown is fictional. Manual best viewed in color.

Military Communities represent different geographical location(s) within a single installation. They may be added to IMETS from the Mil Communities View. Military Communities are only visible from the Org Branch of the context tree.

Steps to Adding a New Military Community:

1. In the Org Branch of the context tree, Drill down to the installation the Mil Community should be created in – then click on the **Mil Communities View**.
2. Click  from the toolbar.
3. A blank Mil Communities Properties window will appear. Fill in the **Military Community Title** on the General Tab and the Details Tab - click **OK**.
 - Click **Add** in the Facilities window to create a new Facility.
 - See section 5:2 for more information on adding Facilities.

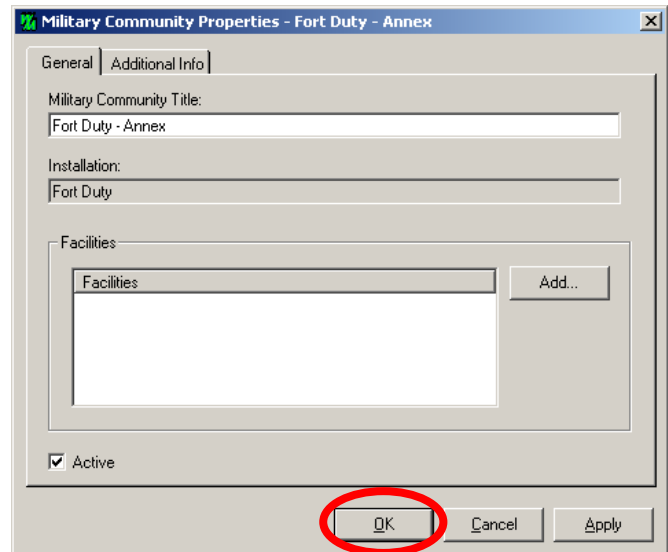


Fig 5-11: New Mil Community –Mil Community Properties

4. At the main display window, the new Military Community now appears in the Mil Communities View.

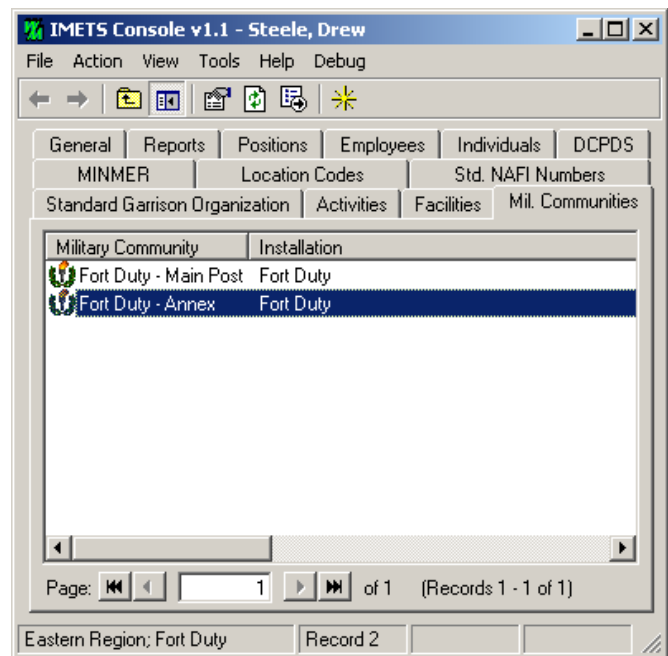



Fig 5-12: New Mil Community –Mil Community View

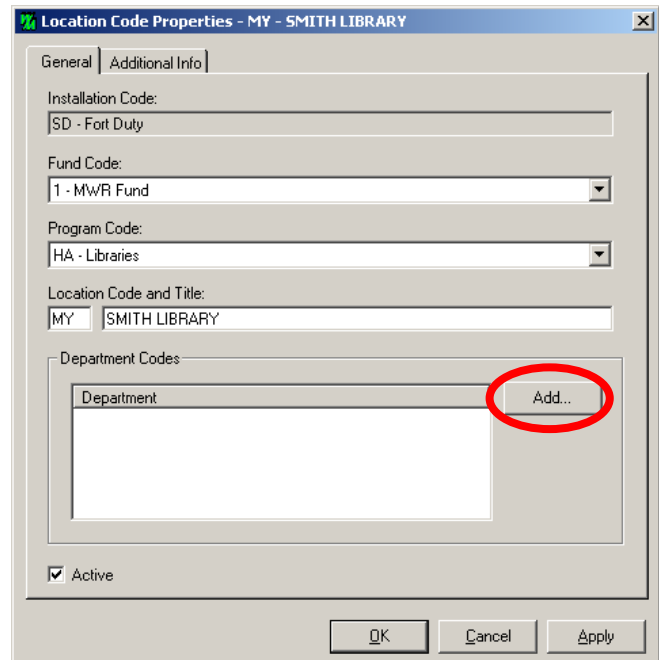
5:5 Adding a Location Code

Each location Codes represent an activity or organizational element. Location Codes are visible from the Org Branch and the Standard NAFI branch of the context tree.

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Steps to Adding a Location Code:

1. In the Standard NAF Branch of the context tree, Drill down to the Program Code the Location Code should be created in Code in – then click on the **Location Code View**.
2. Click  from the toolbar.
3. A blank Location Code Properties window will appear. Fill in the **Location Code and Title** on the General Tab and the Details Tab.
 - *Clicking OK at this point will prompt a message stating that departments must be added.*
4. Click **Add** in the Department Code window to add a department code to the location.
5. The **Select a Department Code** window appears. Select the correct department code and click **OK**.

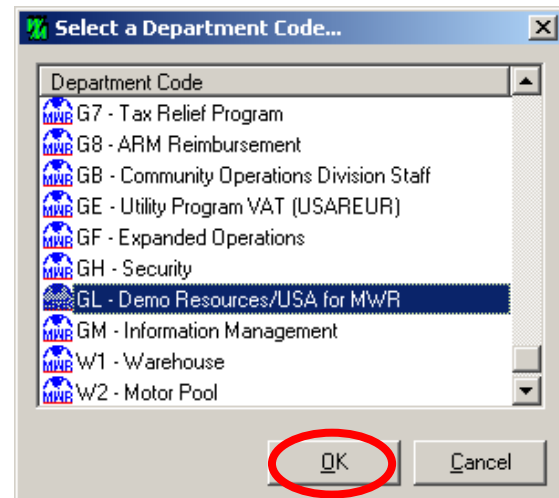


The dialog box is titled "Location Code Properties - MY - SMITH LIBRARY". It has two tabs: "General" and "Additional Info". The "General" tab is active. It contains the following fields:

- Installation Code: SD - Fort Duty
- Fund Code: 1 - MWR Fund
- Program Code: HA - Libraries
- Location Code and Title: MY SMITH LIBRARY
- Department Codes: A list box with an "Add..." button circled in red.
- Active: ☒

Buttons at the bottom: OK, Cancel, Apply.

Fig 5-13: New Location Code – Location Code Properties



The dialog box is titled "Select a Department Code...". It contains a list box with the following items:

- G7 - Tax Relief Program
- G8 - ARM Reimbursement
- GB - Community Operations Division Staff
- GE - Utility Program VAT (USAREUR)
- GF - Expanded Operations
- GH - Security
- GL - Demo Resources/USA for MWR
- GM - Information Management
- W1 - Warehouse
- W2 - Motor Pool

The "GL - Demo Resources/USA for MWR" item is selected. Buttons at the bottom: OK (circled in red), Cancel.

Fig 5-14: New Location Code – Select a Dept Code

5:5 Adding a Location Code (cont.)

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6. The user is returned to the Location Code Properties window. The Department Code just added now appears in the Department Code section.
 - Add more department codes at this time if necessary.
7. Click **OK** to close.
 - *To see the new location code in the context tree, click on the IMETS root at the top of the tree and click the refresh button.*

The screenshot shows a Windows-style dialog box titled "Location Code Properties - MY - SMITH LIBRARY". It has two tabs: "General" and "Additional Info". The "General" tab is selected. Inside, there are several input fields and a list box. The "Installation Code" field contains "SD - Fort Duty". The "Fund Code" is a dropdown menu showing "1 - MWR Fund". The "Program Code" is a dropdown menu showing "HA - Libraries". The "Location Code and Title" section shows "MY" in a small box and "SMITH LIBRARY" in a text field. Below this is a "Department Codes" section with a list box containing one item: "GL - Demo Resources/USA for MWR" with a small icon to its left. To the right of the list box is an "Add..." button. At the bottom left of the dialog is a checked checkbox labeled "Active". At the bottom right are three buttons: "OK", "Cancel", and "Apply". The "OK" button is circled in red.

Fig 5-15: New Location Code -Location Code Properties

5:6 Editing & Inactivating Location Codes

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Existing Location Codes need to be edited on occasion. Not all users have access to perform these functions, but access may be granted upon request. With proper access, location descriptions may be edited, department codes may be added, and location codes may be inactivated so that they no longer appear in the Context Tree.

Edit a Location Code:

- From the **Location Code View**, double click the Location code to be edited to launch the location code properties window. The following tasks may be performed:
 - Edit the title:** This field may be edited at anytime. Any changes will be reflected in the standard NAFI branch of the context tree.
 - Add a New Department:** Use the Add button to add new department codes to the Standard NAFI. (For screen shots see section 5:5 steps 4 through 7.)

Fig 5-16: Location Code – Location Code Properties

Inactivating Location Codes:

- From the **Std NAFI View** double click the Standard NAFI to inactivate (Each NAFI in the location to be inactivate need to be inactivated.)
- Uncheck the **Active NAFI** check box. And click **OK**.
- Go to the **Location Codes** View and double Click the Location code to edit.
- In the location code properties window, uncheck the **Active** box to inactivate the location code.

Fig 5-17: NAFI Properties

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USER MANUAL

Section 6 Data Analysis Methods

6:1 Filtering Data

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IMETS contains filters which allow users to view data which meet specified criteria identified by the user. For example, if a user wanted to only view NAF records, or records from a specific occ series a filter makes this possible. Filters can be created from any view in IMETS. The filter hot buttons are displayed in the toolbar:



Define Filter



Apply/Remove Filter

Fig 6-1: Filter Icons

Using Filters:

1. To **Create a Filter**, select the **Define Filter** icon to create a filter – the Filter Creation Window launches.
2. Any number of fields may be filtered simultaneously
3. Filterable fields are listed in the first column
4. **Condition** options are listed in the middle column in drop down format. There are different condition options available depending on which data field is being filtered.
 - Some commonly used conditions are: **begins with**, **contains**, **is exactly**
5. Once a condition for a field is selected – the **Value** field becomes active.
 - Depending on the field being filtered the Value field may be open for free edit or it may be a drop down menu
6. When all filter criteria are set, click the **Apply Filter** button (or close and click the Apply Filter icon from the tool bar.)

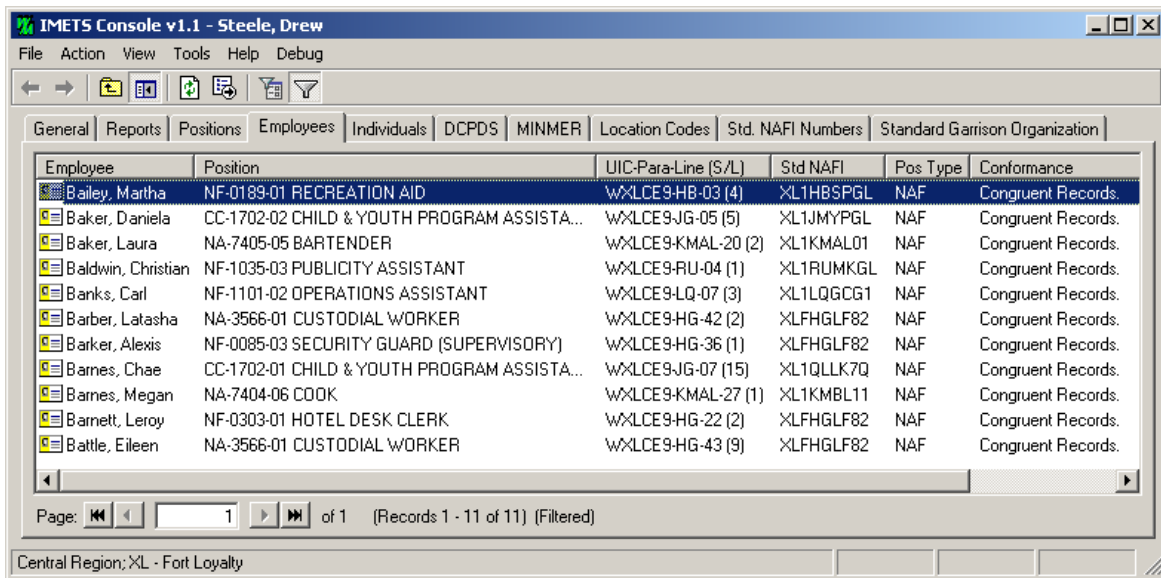
Fig 6-2: Filter Window

Fig 6-3: Filter Selection

6:1 Filtering Data (cont.)

7. Data matching the criteria in the filter is displayed in the main window.

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Employee	Position	UIC-Para-Line (S/L)	Std NAFI	Pos Type	Conformance
Bailey, Martha	NF-0189-01 RECREATION AID	WXLCE9-HB-03 (4)	XL1HBSPGL	NAF	Congruent Records.
Baker, Daniela	CC-1702-02 CHILD & YOUTH PROGRAM ASSISTA...	WXLCE9-JG-05 (5)	XL1JMYPL	NAF	Congruent Records.
Baker, Laura	NA-7405-05 BARTENDER	WXLCE9-KMAL-20 (2)	XL1KMAL01	NAF	Congruent Records.
Baldwin, Christian	NF-1035-03 PUBLICITY ASSISTANT	WXLCE9-RU-04 (1)	XL1RUMKGL	NAF	Congruent Records.
Banks, Carl	NF-1101-02 OPERATIONS ASSISTANT	WXLCE9-LQ-07 (3)	XL1LQGC1	NAF	Congruent Records.
Barber, Latasha	NA-3566-01 CUSTODIAL WORKER	WXLCE9-HG-42 (2)	XLFHGLF82	NAF	Congruent Records.
Barker, Alexis	NF-0085-03 SECURITY GUARD (SUPERVISORY)	WXLCE9-HG-36 (1)	XLFHGLF82	NAF	Congruent Records.
Barnes, Chae	CC-1702-01 CHILD & YOUTH PROGRAM ASSISTA...	WXLCE9-JG-07 (15)	XL1QLLK7Q	NAF	Congruent Records.
Barnes, Megan	NA-7404-06 COOK	WXLCE9-KMAL-27 (1)	XL1KMBL11	NAF	Congruent Records.
Barnett, Leroy	NF-0303-01 HOTEL DESK CLERK	WXLCE9-HG-22 (2)	XLFHGLF82	NAF	Congruent Records.
Battle, Eileen	NA-3566-01 CUSTODIAL WORKER	WXLCE9-HG-43 (9)	XLFHGLF82	NAF	Congruent Records.

Page: 1 of 1 (Records 1 - 11 of 11) (Filtered)

Central Region; XL - Fort Loyalty

Fig 6-4: Filter Results

8. Click the  Apply/Remove Filter button to remove the filter.
9. The same filter settings may be toggled on and off using the Apply/Remove Filter button, as the filter settings will remain throughout an IMETS session until they are changed by clicking on the define filter button and editing the settings.

6:2 Exporting Data

Another useful tool that IMETS provides is the ability to export data from any of the views into an Excel document or text document. This can be used in conjunction with filters to export just the data you

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need out of IMETS. The Export feature is available in all IMETS views. The Export List hot button is displayed in the toolbar:



Export List

Fig 6-5: Export List hot buttons

Steps to Export Data:

1. Use the context tree to navigate to the level of the tree to be reflected in the Export and select the view to export, such as positions or employees.
2. Define any filters if necessary. (For example, only export NAF employees.)
3. When the data in the display window is the data to export, click the **Export List** Button.
4. Navigate to the location on the hard drive to save the file.

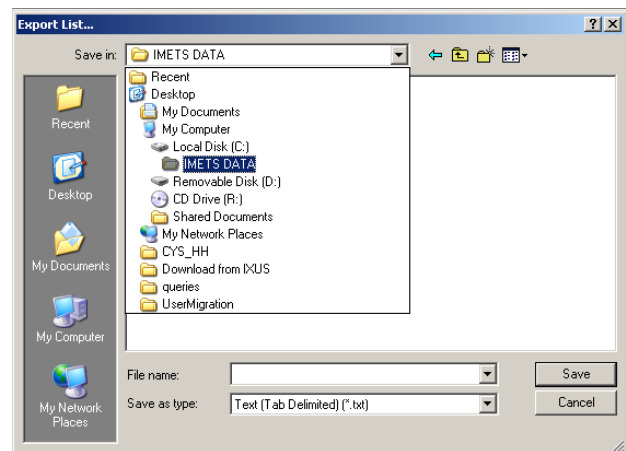


Fig 6-6: Save As

5. Enter a **File Name**.
6. Select the **Save as type** *.csv
7. Click **Save**.

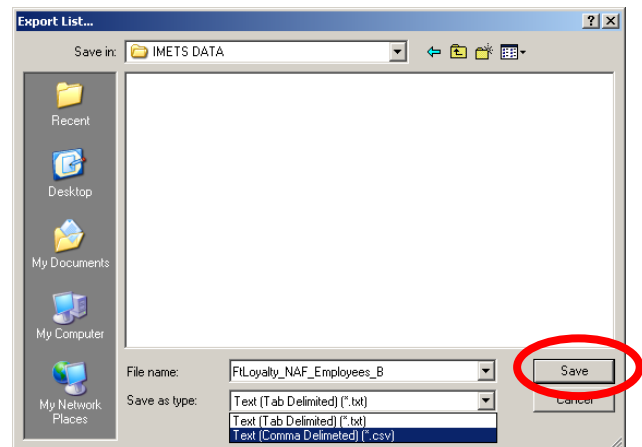


Fig 6-7: Save As File Type

6:2 Exporting Data (cont.)

8. Navigate to the place on the hard drive where the export file was saved, then open it.

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	A	B	C	D	E	F
1	Employee	Position	UIC-Para-Line (S/L)	Std NAFI	Pos Type	Conformance
2	Bailey, Martha	NF-0189-01 RECREATION AID	WXLCE9-HB-03 (4)	XL1HBSPGL	NAF	Congruent Records.
3	Baker, Daniela	CC-1702-02 CHILD & YOUTH PROGRAM ASSISTANT	WXLCE9-JG-05 (5)	XL1JMYPGL	NAF	Congruent Records.
4	Baker, Laura	NA-7405-05 BARTENDER	WXLCE9-KMAL-20 (2)	XL1KMAL01	NAF	Congruent Records.
5	Baldwin, Christian	NF-1035-03 PUBLICITY ASSISTANT	WXLCE9-RU-04 (1)	XL1RUMKGL	NAF	Congruent Records.
6	Banks, Carl	NF-1101-02 OPERATIONS ASSISTANT	WXLCE9-LQ-07 (3)	XL1LQGCC1	NAF	Congruent Records.
7	Barber, Latasha	NA-3566-01 CUSTODIAL WORKER	WXLCE9-HG-42 (2)	XLFHGLF82	NAF	Congruent Records.
8	Barker, Alexis	NF-0085-03 SECURITY GUARD (SUPERVISORY)	WXLCE9-HG-36 (1)	XLFHGLF82	NAF	Congruent Records.
9	Barnes, Chae	CC-1702-01 CHILD & YOUTH PROGRAM ASSISTANT	WXLCE9-JG-07 (15)	XL1QLLK7Q	NAF	Congruent Records.
10	Barnes, Megan	NA-7404-06 COOK	WXLCE9-KMAL-27 (1)	XL1KMBL11	NAF	Congruent Records.
11	Barnett, Leroy	NF-0303-01 HOTEL DESK CLERK	WXLCE9-HG-22 (2)	XLFHGLF82	NAF	Congruent Records.
12	Battle, Eileen	NA-3566-01 CUSTODIAL WORKER	WXLCE9-HG-43 (9)	XLFHGLF82	NAF	Congruent Records.
13						
14						

Fig 6-8: Exported Excel Document

- The data can now be edited, formatted, emailed, or printed as needed allowing users to share IMETS data with non IMETS users easily.

6:3 Scope

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The scope feature adds even more flexibility in how data can be viewed in IMETS. The scope allows users to manage data displayed in the context tree and as a result the display pane. With the scope users can look at Program groupings (for example All CAT A programs), different funds (for example Army Lodging), or even specific department codes (for example all GL records installation or even region wide.)

Using the Scope:

1. The Scope button can be found directly above the context tree. By default it displays All Fund, All Programs, All Departments'.
2. Click the **Scope** button to edit.

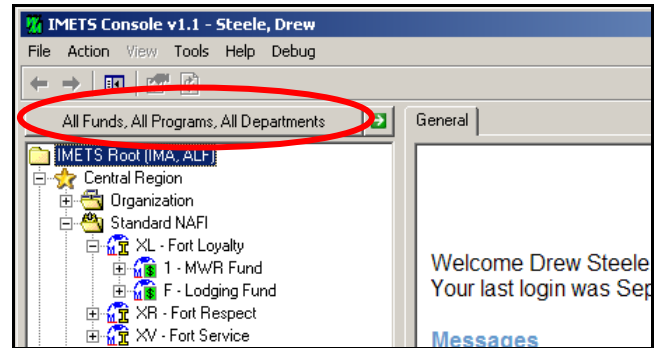


Fig 6-9: Scope Button

3. The **IMETS Data Scope** window launches.
 - **Funds:** The scope can be set to display a specific fund.
 - **Programs:** The scope can be set to display a specific program or program group.
 - **Departments:** The scope can be set to display a specific department or department group.
 - **Agencies:** The scope can be set to display a specific agency.

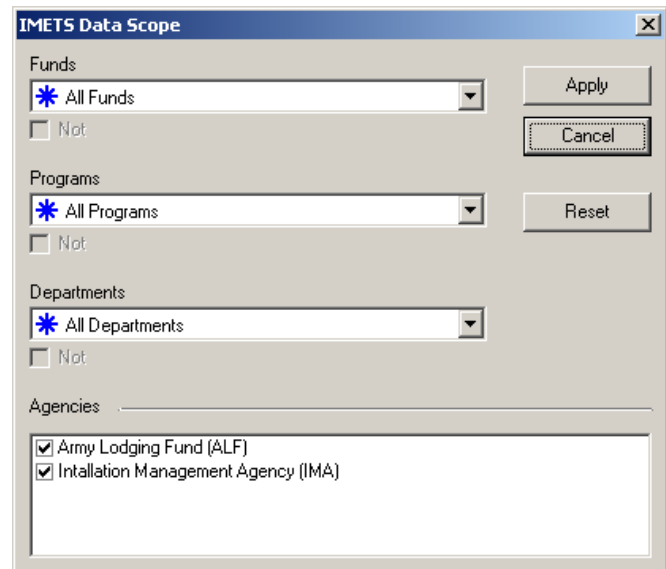


Fig 6-10: Data Scope

6:3 Scope (cont.)

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4. We select '**Child and Youth Programs**' from the program group and click **Apply**.

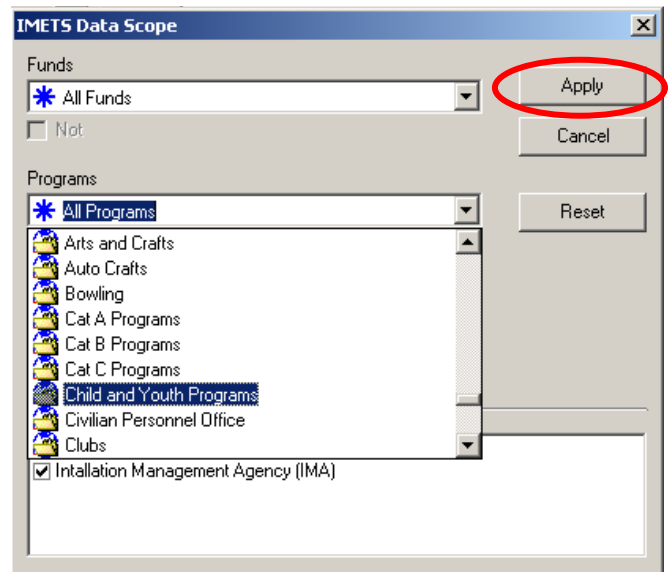


Fig 6-11: Data Scope- Program Group

5. The Context Tree refreshes, and the Scope Button now reads '**All Funds, Child and Youth Programs, All Departments**'.

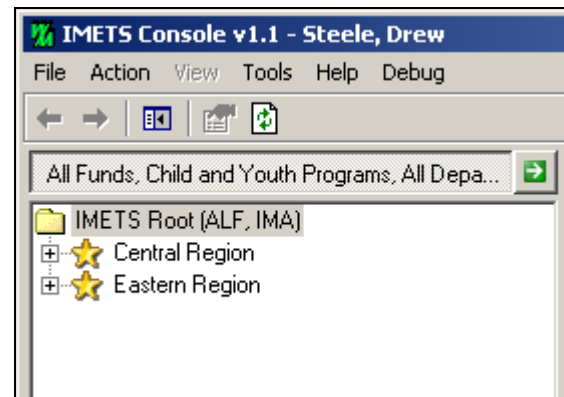



Fig 6-12: Data Scope -Context Tree

6. When we drill into the context tree we see that the tree now only displays program codes that relate to Child and Youth.
7. It is now possible to view from any of the views only data relating to Child and Youth.
8. Leaving the scope turned on, reports can be run as well that will only return data based on the program group. In our example it would be possible to print a Manning Document Report for Fort Loyalty (or Central Region) that returned JUST Child and Youth positions.
9. Click the  button to turn the scope off.

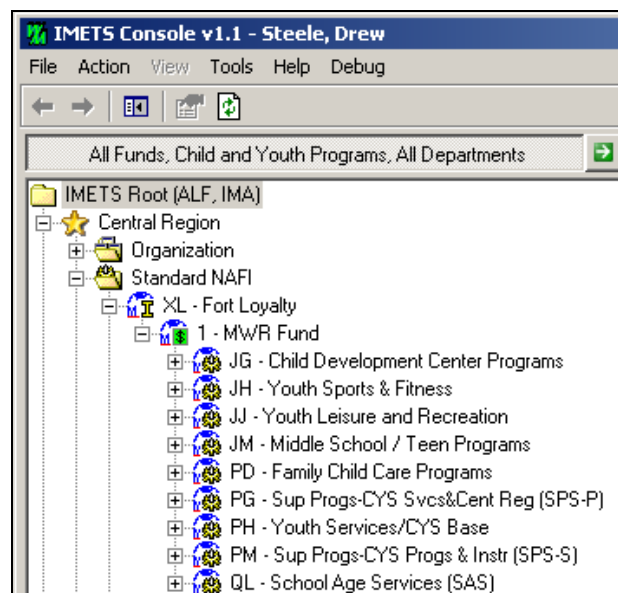


Fig 6-13: Data Scope - Context Tree Expanded

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6:4 Reports

IMETS provides users with a number of report options in the Reports View. The report data will reflect what is selected in the context tree – if a region is selected, the report will show data for the whole region, (if user has proper permissions!), whereas if a installation is selected, only the data for that installation will display in the report. For detailed information on the available reports in IMETS, please refer to the IMETS Reports Guide.

How to run a report:

1. Use the context tree to navigate to the level of the tree to be reflected in the Report.
2. Define any filters if necessary. (For example, only report on only NAF employees.)
3. Click the **Reports View**. On the display screen each available report is listed with a description.

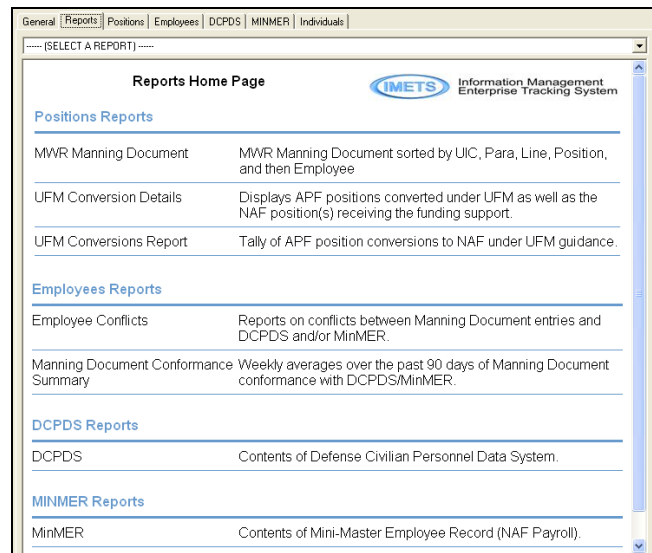


Fig 6-13: Reports View

4. To run a report – select the report from the drop down menu at the top.

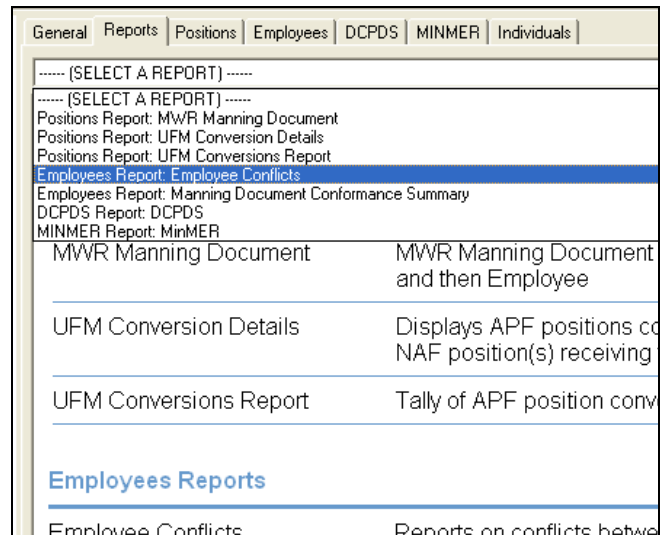


Fig 6-14: Reports View – Select a Report

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6:4 Reports (cont.)

- The report will display on in the display pane and may be printed or saved as a pdf.

For more detailed information on Reports, please see the IMETS Reports Guide.

General Reports Positions Employees DCPDS MINMER Individuals

Employees Report: Employee Conflicts

1 / 37 83%

IMETS Information Management Enterprise Tracking System

Employee Conflicts

Report Context: Central Region; Fort Loyalty

Report Description:
Reports on conflicts between Manning Document entries and DCPDS and/or MinMER.

UIC-Para-Line	Position	Employee
WXL050-08-01, Subline 1 (NAF)	NF-0201-04 NAF HUMAN RESOURCES OFFICER	Ewing, Im O.
Position Remarks: Position data as it appeared on UFM datacall document: Region: NERO Location: LEE Para/Line: 08 01 Employee Remarks:		
Position conflicts with DCPDS. Job Number DCPDS: AM035 Manning Document: NF130		
WXL050-08-03, Subline 1 (NAF)	NF-0203-03 NAF HUMAN RESOURCES ASSISTANT	Christensen, Kyra E.
Position Remarks: Position data as it appeared on UFM datacall document: Region: NERO Location: LEE Para/Line: 08 03 Employee Remarks:		
Position conflicts with DCPDS. Job Number DCPDS: AM044		

Fig 6-15: Report View, Report Display

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USER MANUAL

Section 7 Frequently Asked Questions

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Frequently Asked Questions

In this section questions that frequently arise for both new and experienced users are discussed. For additional IMETS support email the IMETS Helpdesk usarmy.jbsa.imcom-hq.mbx.financial-management@mail.mil.

FAQ #1: Is there training available for IMETS?

Yes, online training is available at <http://www.mwraonline.com>. Registration is open to anyone and the training take approximately one hour. For additional training needs, please email the IMETS Helpdesk.

FAQ #2: An employee has moved to a new job within the installation, how do I handle this in IMETS?

When an employee leaves a position, the employee record should always be inactivated – even if they are moving to another position at the same installation. The employee record represents the relationship between the person and the job. We want to maintain a record of that relationship in the database for history tracking purposes, but the record can be inactivated. To inactivate the employee record, open the employee properties and uncheck the ‘Active Employee’ check mark.

When an employee moved to a new job, the old MinMER and DCPDS record should drop out of the system, and NEW records should appear with their new position information. The Manning Document Wizard should be used to connect the DCPDS and/or MinMER Records to the new position, as if they were brand new and had never worked at the installation before.

In the end, there will be two employee records for the person – one inactive record pointing to their original position, and one active record pointing to their new position.

A filter can be used on the employee view, set to active status exists, to display ALL employee records both inactive and active.

FAQ #3: One of my MinMER Records is displaying the wrong program code, how do I fix this?

An IMETS Administrator can correct this when this occurs. The MinMER import file does not contain the program code, only the installation, fund, location and department codes. IMETS uses logic to determine what the program code should be so that it can be properly aligned in IMETS. In instances where the same location code and department code combination exist within two different program codes, IMETS can sometimes assign the wrong program code.

For example MinMER Record for Joan Smith is imported into IMETS as Installation code XL, Fund 1, Location code AA, Department code GL. IMETS checks the database to find and Standard NAFIs with the following XL1_ _ AAGL. If there happen to be more than one program code that match the criteria, (for example XL1HAAAGL and XL1JCAAGL) then IMETS may assign the wrong program code.

This should not occur often as generally location codes are only used one time within an organization and not across multiple program code. If it does occur, email the IMETS Helpdesk for a correction.

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7:1 Frequently Asked Questions (cont.)

FAQ #4: I noticed that the Standard NAFI assigned to a position that has already been converted is wrong, but the field is grayed out – how do I change it?

Once a position has been converted it is locked from editing. However, if something needs to be changed such as a Standard NAFI or an MDEP please email the IMETS Helpdesk. Include the position grade, series, title and paragraph and line as well as which data needs to be corrected.

FAQ #5: I have a record that I am unable to resolve. As soon as I resolve the DCPDS record, the MinMER record is conflicting. How do I fix this?

This occurred when there is a discrepancy between a MinMER data field and a DCPDS data field. For example, MinMER lists the occ series of a record as 0189 and DCPDS lists the occ series as 0188. The Manning Document Position Record is always going to conflict with ONE of these records. If the position data is resolved to match DCPDS as 0188 then it will conflict against MinMER and vice versa.

To correct this problem, it is necessary to look at the data and make a determination which is correct. In our example it would be necessary to determine if the occ series 0189 or 0188 is correct. This may mean checking with the appropriate people locally, such as FM or CPO. Once the correct data is determined it is then necessary to make the correction in the system that is incorrect using normal personnel channels. If the data in MinMER is incorrect, then a correction must be faxed to Texarkana. If the data in DCPDS is incorrect then a correction must be made by the local CPO office. Remember it may take a pay period or two for the correction to be made and then imported into IMETS.

FAQ #6: I am missing one or more DCPDS (or MinMER) Records, they don't appear in the DCPDS view!

First check and see if the records are set to ignored. To do this, go to the DCPDS (or MinMER) view and click the Define Filter button. Set the filter to Conformance Equals Ignored and click apply. If the record you are looking for appears, double click the record and uncheck the Ignored check mark on the Manning Document Reference Tab. If the record does not appear email the IMETS Helpdesk so the Administrator can determine what is causing the problem.

FAQ #7: I am seeing a name discrepancy between the DCPDS record and the MinMER Record and can't connect the records.

If you notice this, email the IMETS Helpdesk with the persons name(s) so this can be resolved. The Administrator can make the name correction for you and merge any records associated with different names together.

FAQ #8: How do I change the subline for a position?

IMETS Automatically creates the sublines on positions that are created on the same para/line. The first position is always 01, the second 02 and so on. It will not allow for any numbers to be skipped and it will not allow for that field to be edited directly. It is possible to rotate positions subline order within the same para and line grouping. Open the position properties and click the details tab. Click the subline link and a window will display listing all the positions on the same para and line. Use the up and down arrows to rotate the subline assignments.

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7:1 Frequently Asked Questions (cont.)

FAQ #9: I am seeing DCPDS records that are not part MWR and they are bringing down my conformance rate, how can I get rid of these records?

Occasionally records that are not part of MWR get imported into the system inadvertently. If you happen to notice any of these records they can simply be set to ignored so that they no longer count towards conformance rate. To do this, double click on the DCPDS record to launch the DCPDS properties and click on the Manning Document Reference Tab. Place a check mark in the box to Ignore DCPDS record. Then click OK. When returned to the DCPDS view the record is grayed out.

FAQ #10: I need a new Standard NAFI added to the system.

If you do not have access to add location codes to the system, or if the program code itself is not available, email the IMETS Helpdesk. Include the entire Standard NAFI that is needed as well a description of the location code.

FAQ #11: I am trying to add a new Standard NAFI and getting the message that the Standard NAFI already exists, but I don't see it anyplace.

If this occurs, first check the Location Code View and Standard NAFI view to see if the Standard NAFI exists but is inactive. If the Standard NAFI is inactive, double click the record and place a check mark in the box to activate the record. Otherwise, email the IMETS Helpdesk.

FAQ #12: I tried to log in and IMETS is telling me my account is inactive. How to I get my account reactivated?

IMETS Accounts inactivate after 60 days of inactivity. Email the IMETS Helpdesk to have your account reactivated.

FAQ #13: I accidentally duplicated an employee in the same position, how do I get rid of the duplicate record?

Email the IMETS Helpdesk to delete any duplicate records from the system.

FAQ #14: I converted a GS position to NAF and used select existing. Now that I finished I realize I converted to the wrong position – how do I fix this?

Email the IMETS Helpdesk to delete any duplicate records from the system.

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7:1 Frequently Asked Questions (cont.)

FAQ #15: Our organization has decided to convert a regular full time GS position in to TWO separate part time positions – how do I complete the conversion so that the funding is tracked to the two new positions?

First, perform a regular UFM conversion from the APF position to one of the NAF RPT positions. Once the conversion is complete, open the position properties for the NAF position and click on the UFM Tab. Double click on the APF position to launch the 'Fund Distribution' Window. Change the 'Allocation of Fund Support' from 100 to 50. Click Ok to close. Now create the second NAF RPT position if it doesn't already exist. On the UFM Tab, check the appropriate UFM related boxes in the upper half of the window and select the MDEP. In the lower half of the window click the Add button. Click the top 'Browse For' button to select your APF position that has already been converted. Once selected, change the 'Allocation of Fund Support' from 100 to 50 then click Ok to close.

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USER MANUAL

Section 8 Glossary of Terms

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Glossary of Terms

A

Activity View: lists Activities within the current context and is primarily managed at the garrison level

Activity Record: Contains detailed data representing an organizational activity within a facility.

APF: Appropriated Fund

Appointment Category: full time, part time, summer hire or flex.

Attribute Flags: used to mark position or employee record to be used in association with a filter.

C

Conflict: occurs when something in the position does not match one or more of the document types. (For example, the manning document shows the position as Regular Full Time (RFT) but DCPDS shows the position as flex.)

Conflict Resolution Tool (CRT): tool available from the Employee View used for mass changes, will allow users to resolve multiple conflicts for multiple records simultaneously.

Conformance: see *Manning Document Conformance*.

Congruent: occurs when no conflicts or disconnects exist against a record.

Context Tree: navigational tool that allows a user to drill into IMETS data by Standard NAFI, UIC, Organization or Standard Garrison Organization.

CPO: Civilian Personnel Office.

D

Data View - displays the views and data that are available to the user at the current context.

DCPDS: Defense Civilian Personnel Data System

DCPDS Record: contain detailed data as exists in the external DCPDS system.

Disconnect: a record is missing a reference to one of more record types. For example, an employee record could be missing a reference to a DCPDS record.

E

Employee Record: contain detailed data which represent an employee on the Manning Document.

Employee View: lists employees within the current context and is primarily managed at the garrison level.

F

Facility Record: Contains detailed data representing a physical structure within a Military Community.

Facility View: Lists Facilities within the current context and is primarily managed at the garrison level.

Fund Code: 1 digit code to represent the fund which makes up part of the SNN.

G

Grade: represents a pay level within a pay plan.

I

IMETS Root: the start of the context tree.

Individuals Record: represents a single person that exists in the database.

Individuals View: Lists active and inactive Individuals records within the current context. Is auto-populated as DCPDS and MinMER records are imported into the system.

J

Job Number:

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DCPDS View: lists DCPDS records being imported into IMETS within the current context.

Department Code:

L

Location Code: two digit alpha-numeric code which is part of the standard NAFI number. Assigned by the installation and used to identify an activity.

Location Code Record: Contains detailed data related to a specific location code.

Location Code View: Lists Location Codes within the current context and is primarily managed at the garrison level.

LDP: Leader Development Program.

Line: Used to sequentially number positions within the same paragraph on the manning document.

LN: local national

M

Manning Document: Document which lists position data for all authorized positions, vacant or encumbered.

Manning Document Conformance: percentage of manning document data that matches DCPDS and MinMER.

Manning Document Module: module which contains the views, records and tools needed to directly manage and maintain the MWR Manning document.

Manning Document Wizard (MDW): tool that will associate a DCPDS record or MinMER record with either an existing position on the Manning Document, OR if the position doesn't already exist, the MDW will allow a new position to be created.

MDEP: Management Decision Execution Packages, represent categories of APF support that support soldiers MWR (QDPC), child development (QCCS) and youth development (QYDP).

Military Community View: Lists Military Communities within the current context and is primarily managed at the garrison level.

Military Community Record: Contains detailed data representing a geographical military community.

MinMER: Mini Master Employee Record File maintained by NAF Financial Services.

MinMER Record: contain detailed data as exists in the external NAF Payroll system.

N

NAF: Non Appropriated Fund

O

Occupational Series: A numerical code used to identify positions. A series corresponds to a recognized occupation in the Federal service and includes all positions at the various grade levels in that particular kind of work.

Organization Branch: branch of the context tree will display physical location and activity data by garrison.

P

Paragraph: used in combination with the line and subline to uniquely identify a position on the manning document.

Pay Plan:

Positions View: lists positions within the current context and is primarily managed at the garrison level.

Position Record: contain detailed data which represent a position on the Manning Document.

Position Type: APF, NAF or LN

Program Code: a 2-digit code representing a MWR program area that makes up part of the SNN.

S

Standard Garrison Organization Branch - branch of the context tree will display data by SGO Grouping.

Standard Garrison Organization Record: contain detailed data which represent an employee and their position within the Standard Garrison Organization.

Standard Garrison Organization View: lists Standard Garrison Organization records within the current context and is primarily managed at the garrison level.

Standard NAFI Number (SNN): A 12-digit SNN is assigned to each Army NAFI and used for administrative purposes. DA assigns the first three digits. The remaining digits are assigned by the installation to reflect the management and financial structure of the NAFI.

Standard NAFI Branch: branch of the context tree will

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MinMER View: lists MinMER records being imported into IMETS within the current context.

MWR Remark Code:

display data by Standard NAFI.

Standard NAFI Number Record: Contains detailed data related to a specific Standard NAFI Number.

Standard NAFI Number View: Lists Standard NAFI Numbers (SNNs) within the current context and is primarily managed at the garrison level.

Status Panel: displays the current context

Subline: Used to sequentially number positions within the same paragraph and line on the manning document.

U

Uniform Funding Management: the merging of appropriated funds (APF) with nonappropriated funds (NAF) for the purpose of providing MWR services using NAF rules and procedures.

UFM Conversion Wizard: tool that will convert APF positions to NAF and reassign affected employee records.

Unit Identification Code (UIC): A six digit alphanumeric code used by the Department of the Army (DA) to identify an organization within the MACOM

Unit Identification Code Branch:- The Unit Identification Code Branch of the context tree will display data by UIC.

W

Welcome Screen:- shown when a user logs into IMETS and displays Personal Greeting and last login information, Manning Document, and Last data import date and time.

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