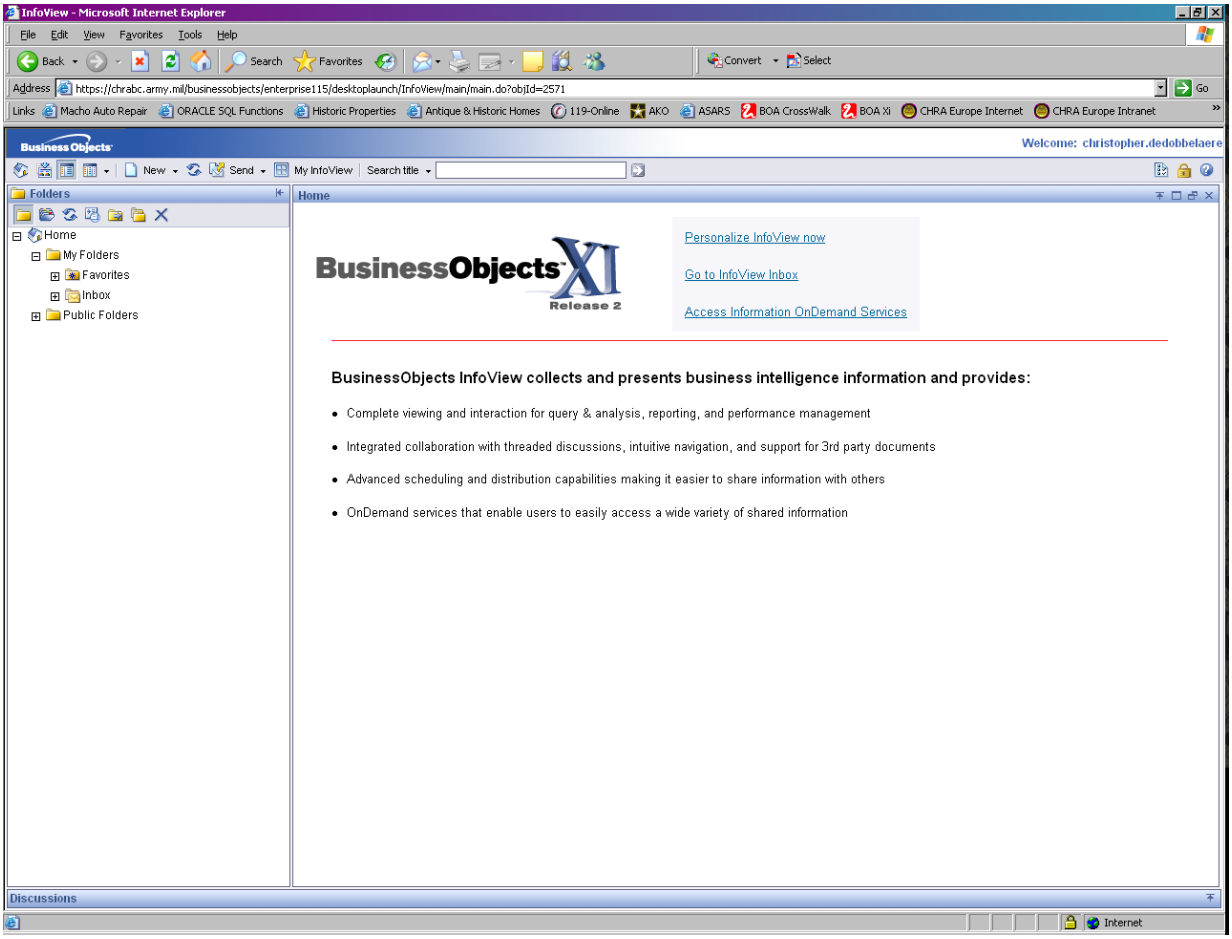
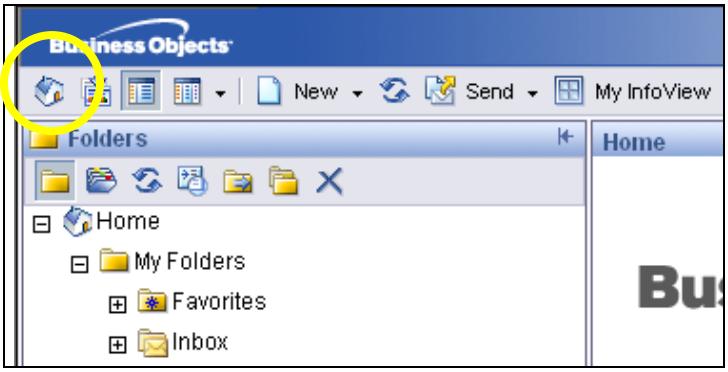
BOXi Transformation Action Complete User Guide

This guide will provide step by step instructions in running and exporting a Transformation Action Planning Information Report (PIR) from Business Objects 11 (BOXi) for first time users.

1. Log into BOXi from CPOL Portal. Once login has been completed successfully you will see a similar screen as pictured below.



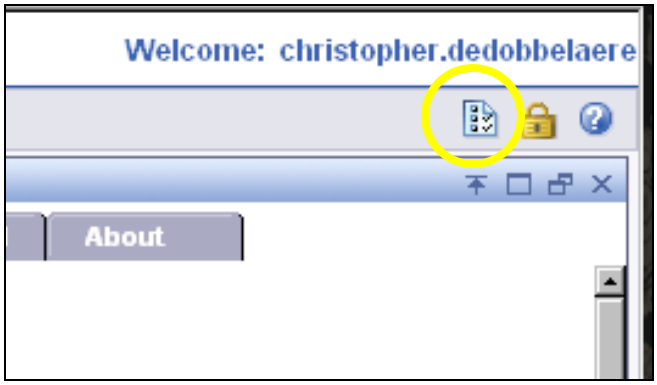
This is known as the BOXi Home Page. You can return to this page at any time by clicking the "Home" icon indicated below.



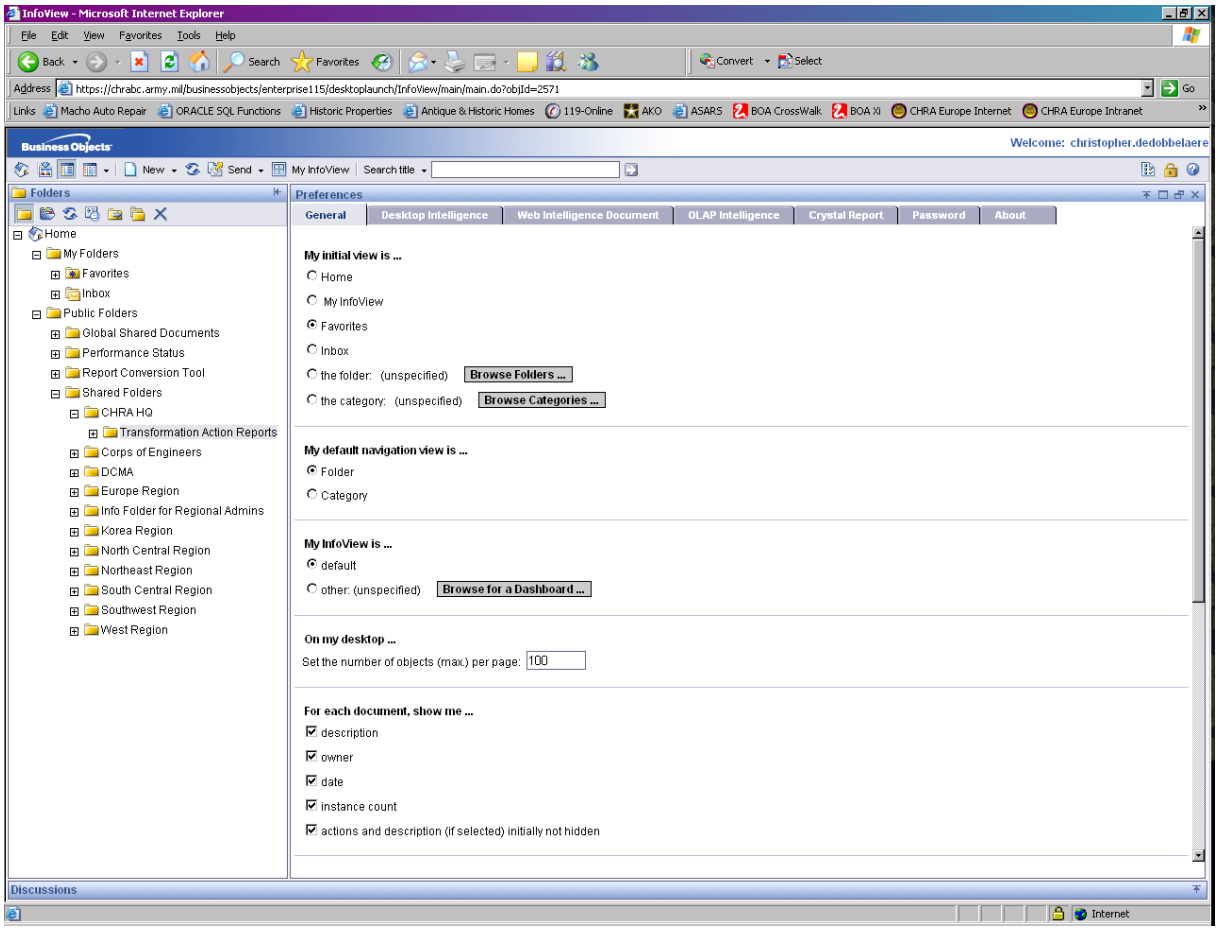
We are now going to set up your preferences in BOXi to ensure that your settings are the same as those used to create this guide. These settings have been determined to be the Optimum BOXi User Preferences for normal use.

If you have already done this step please continue to step 4.

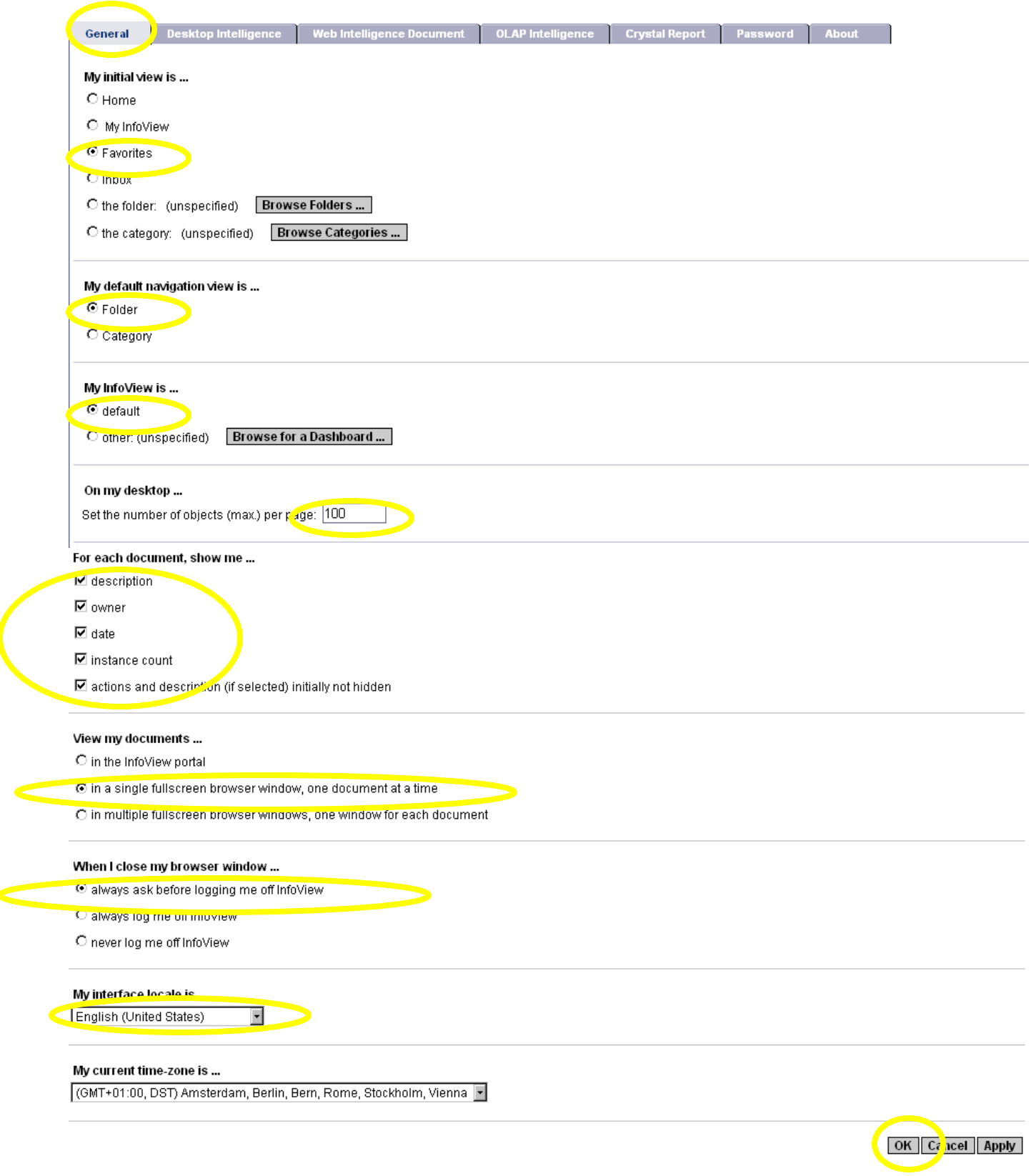
2. In the top right-hand corner of your browser window, just below your login ID, you will see three icons. The first on the left of the three is for Preferences. Please click there as indicated in the screen below.



You should now see a screen similar to the one below.

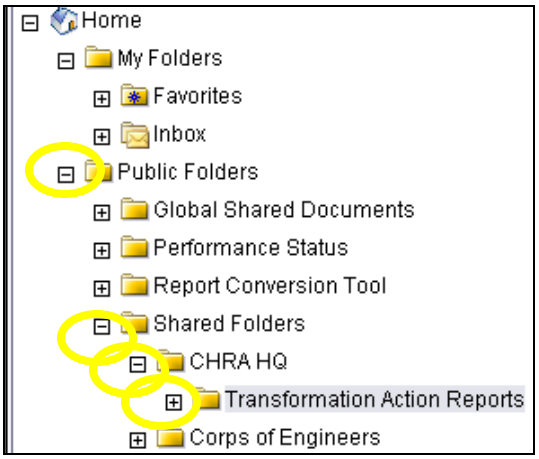


3. Please ensure that your settings match those indicated below.



Once you have changed your settings click “OK” as indicated above.

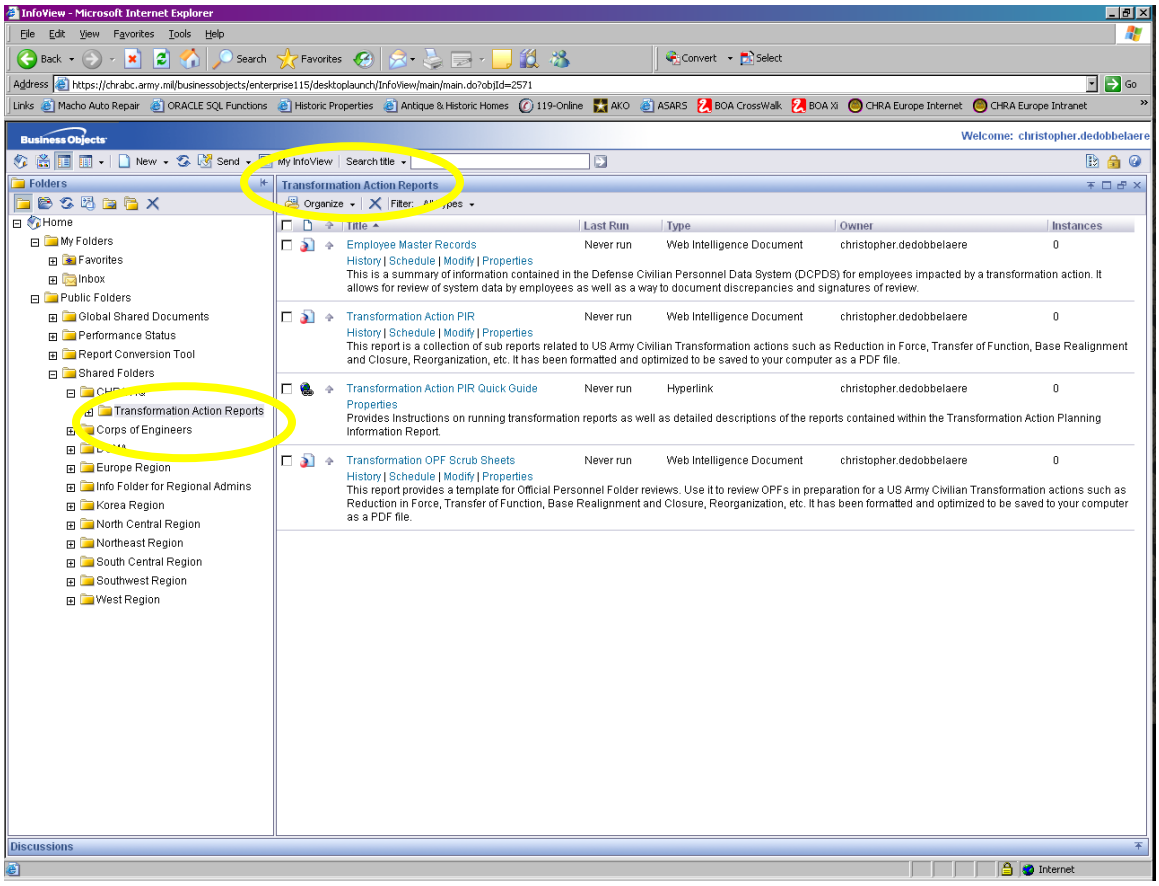
Navigating in BOXi is easy. To open a folder and view its contents, click on the folder name or icon. To view sub folders within a folder, click on the + sign next to the folder icon which will expand and display the sub folders contained within that folder.



4. We are now going to navigate to the shared Transformation Reports in BOXi.

a. Click on the + sign next to "Public Folders"
b. Click on the + sign next to "CHRA HQ"
c. Click on the folder name of "Transformation Action Reports"

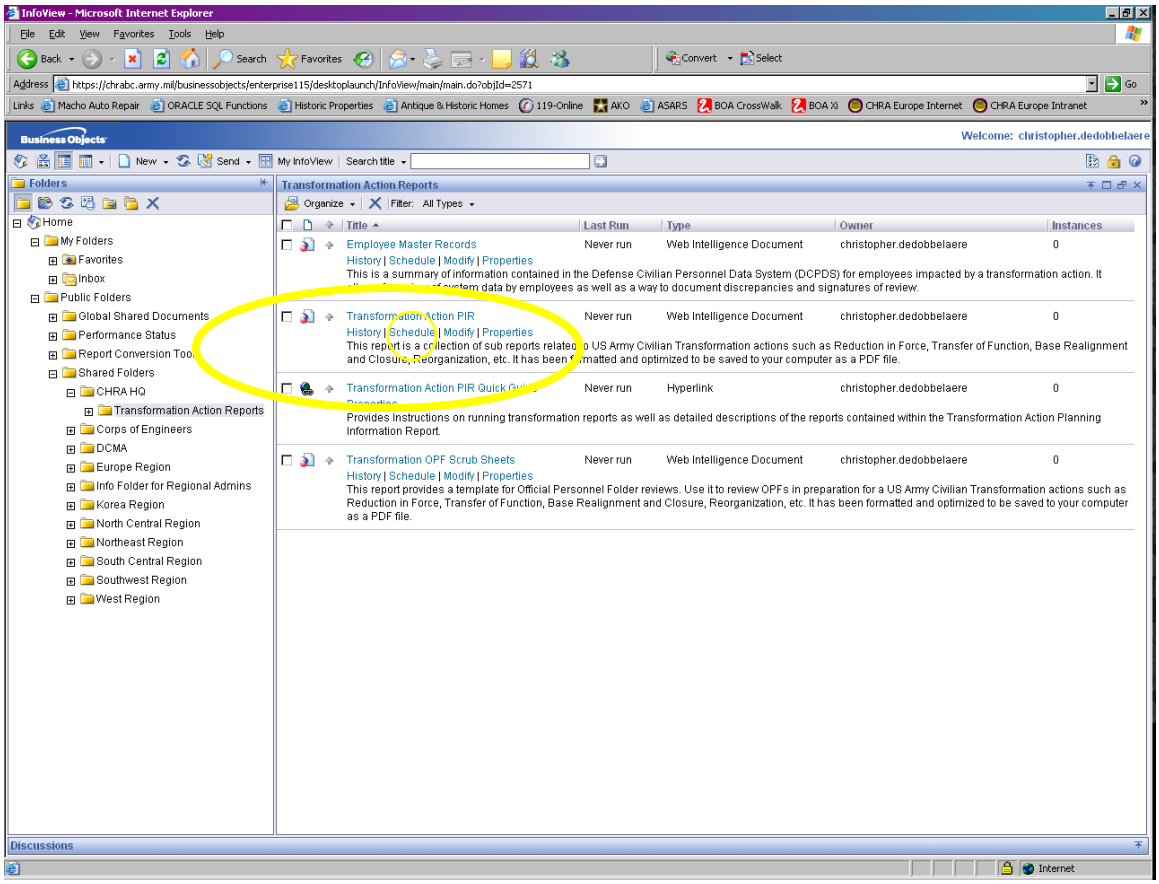
You should now see a screen similar to the one below. Notice that "Transformation Action Reports" is now highlighted and the right panel title bar also displays "Transformation Action Reports."



This folder contains a number of reports that are used for transformation type actions such as Reduction in Force, Transfer of Function, Base Realignment and Closure, Reorganization, etc.

In this guide we are only going to discuss the report titled, “Transformation Action PIR”

5. To run the report, click on the blue text titled, “MODIFY” under the “Transformation Action PIR” as pictured below.



Please ensure that you opened the report by clicking on “MODIFY” and NOT by clicking on the Title of the report.

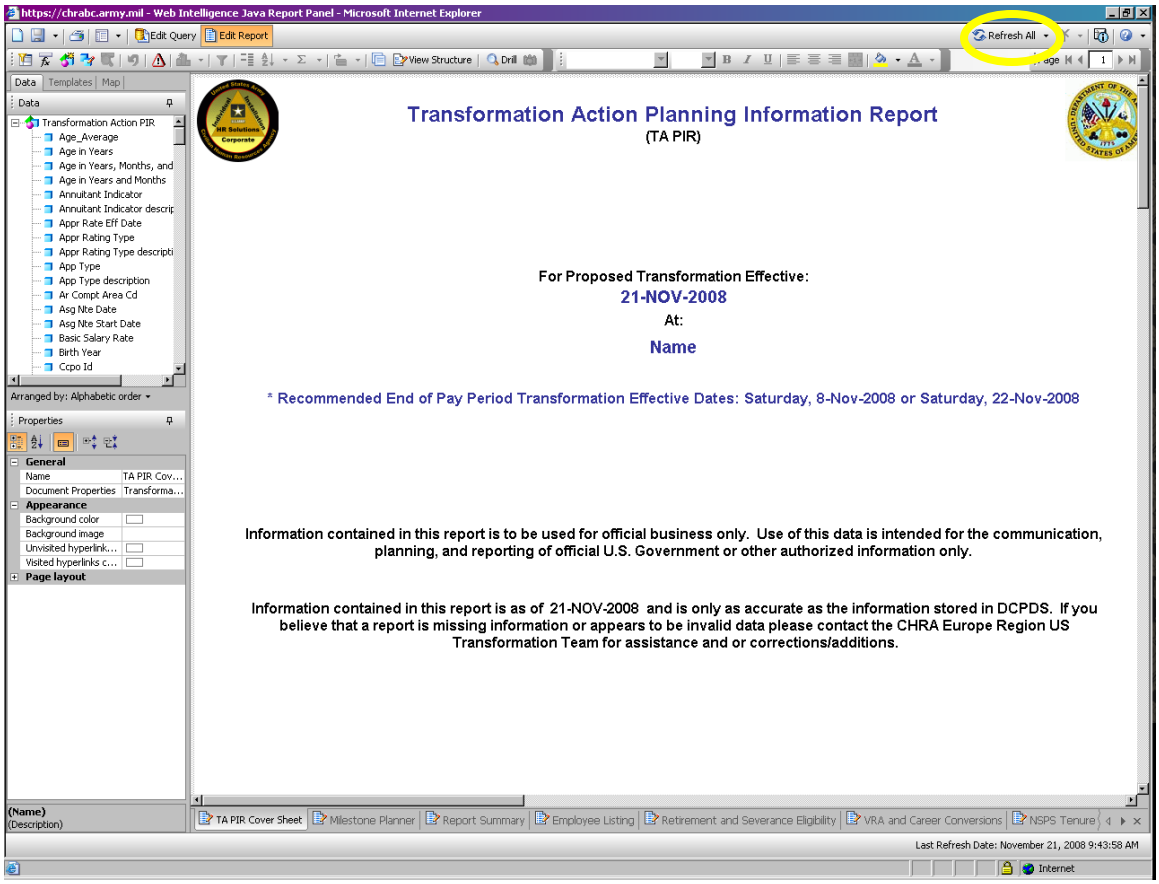
It can take some time before the report completely opens. You will see a new window open and the content of that window will vary and change as the program is loaded. It runs through Java and BOXi processes to display the document content. As stated this can take some time.

Do not close this while it is opening. Please be patient as it can take some time.

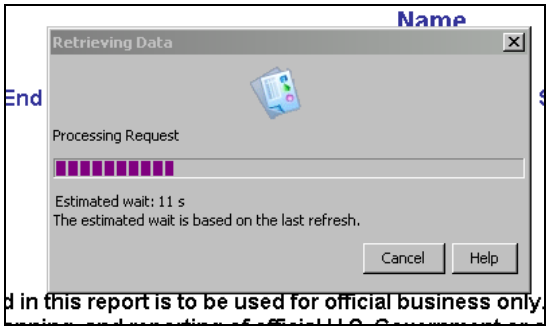
IF YOU ARE PROMPTED to run JAVA, place a check in the box to always grant/trust this source.

Once the document has been fully loaded your screen should look like the one pictured below.

6. To populate this report with your data, click on the “Refresh All” link in the upper left hand corner as pictured below.



This will start the document refresh process. The first item you will see will be similar to that pictured below.



Eventually this will display the Prompts Dialog screen.

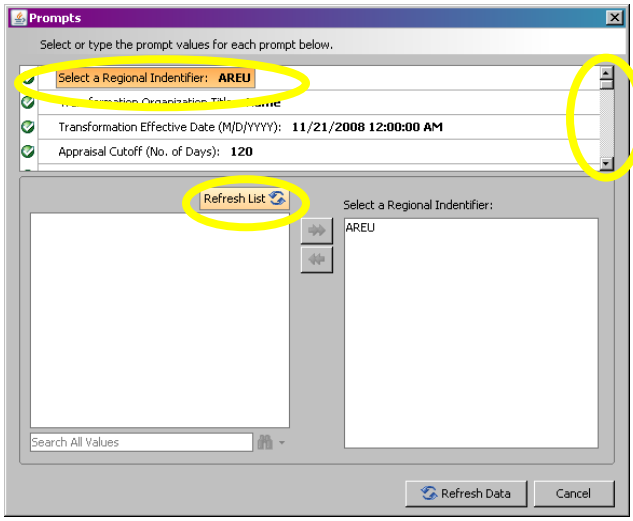
All Prompts must have an answer/value before you can refresh the data.

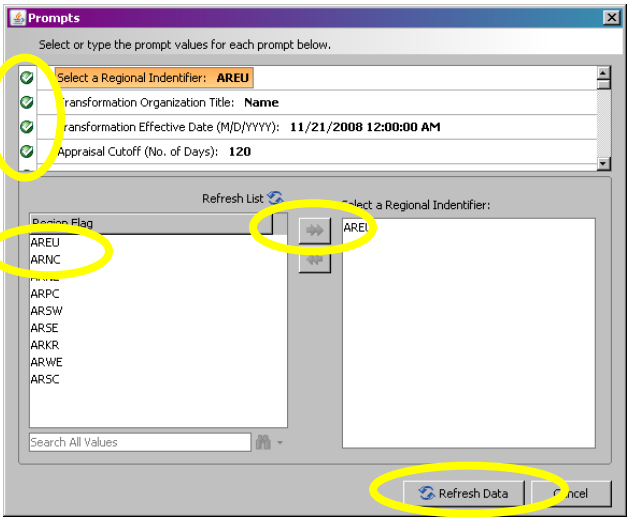
For help with how the prompts should be populated and what types of values should be used in this report, please review the Quick Guide here.

There is a large amount of prompts in this query. This is to allow the user to specify selection criteria that will be unique to their organization without editing the SQL of the BOXi report.

7. To fill in the prompts…
    a. Select the item line you wish to change. Even though you can only see 4 prompts on the screen, notice that there is a scroll bar to the right. Scroll down so that you can see all of the prompts.
    b. Some fields do not let the user type an entry. They require you to select from a list as pictured below. To populate the list, click "Refresh List."
    c. To make a selection from the list, highlight the item in the list and click on the double green arrow to move the selection to the right panel.
    d. Once all of the prompts have a green checkmark on the left the "Refresh Data" button will be available. All prompts must have a value. If you do not want to use a field enter "N/A" as the value.

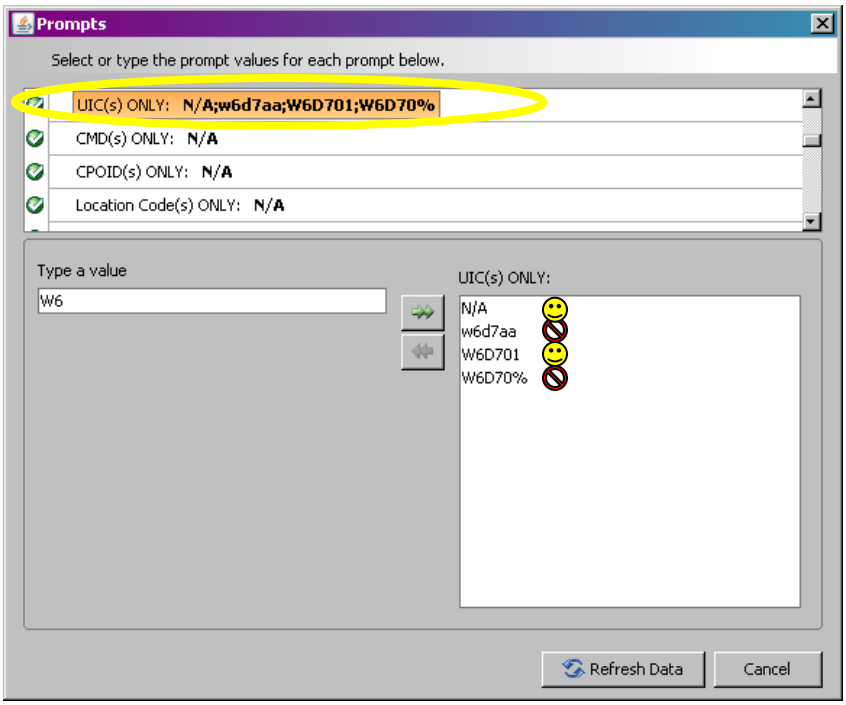
PLEASE REVIEW THE QUICK GUIDE. IT WILL HELP EXPLAIN EACH PROMPT QUESTION AS WELL AS THE REPORT REQUIREMENTS.



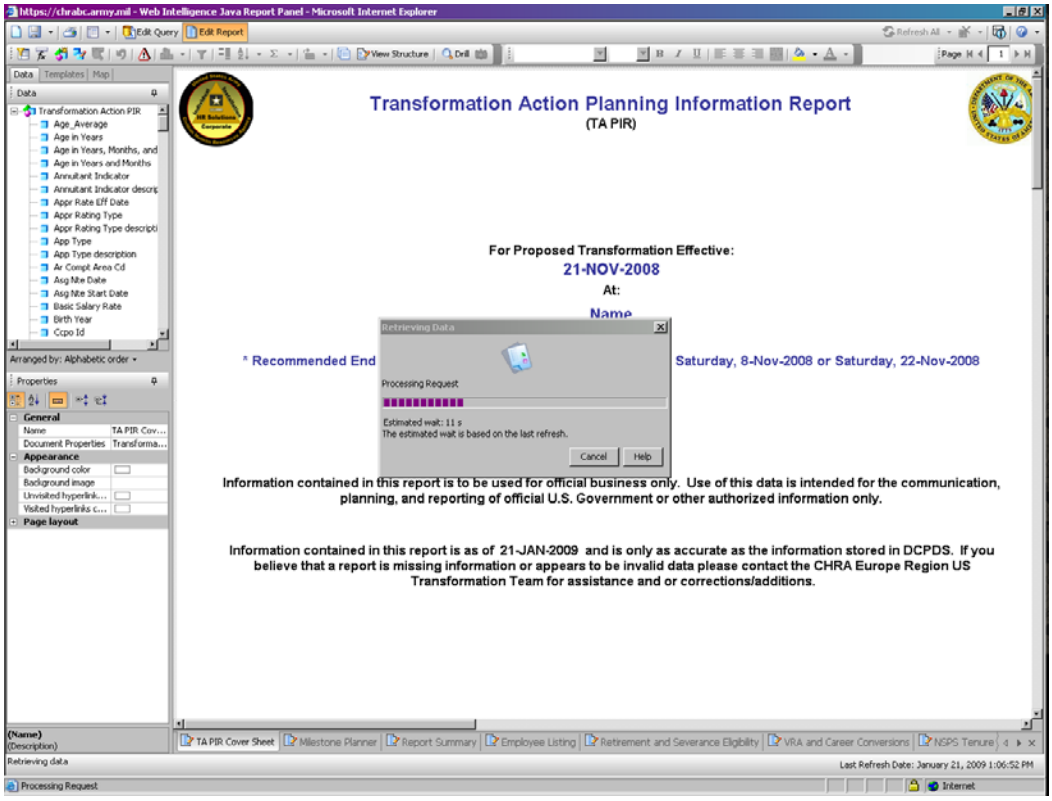


Some of the prompts require the user to type a value or multiple values. When you are typing values, please remember these rules:

- BOXi is case sensitive. W6d7aa will not work, only W6D7AA
- Use “N/A” to populate a field that you do not wish to use.
- This query requires complete values. W6D% will not work, list out all values completely.

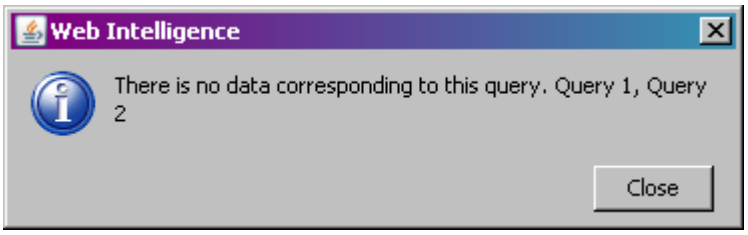


Once you have filled out the prompts appropriately and pressed “Refresh Data” you will see a screen like the one pictured below. This can take some time depending on the amount of records returned.

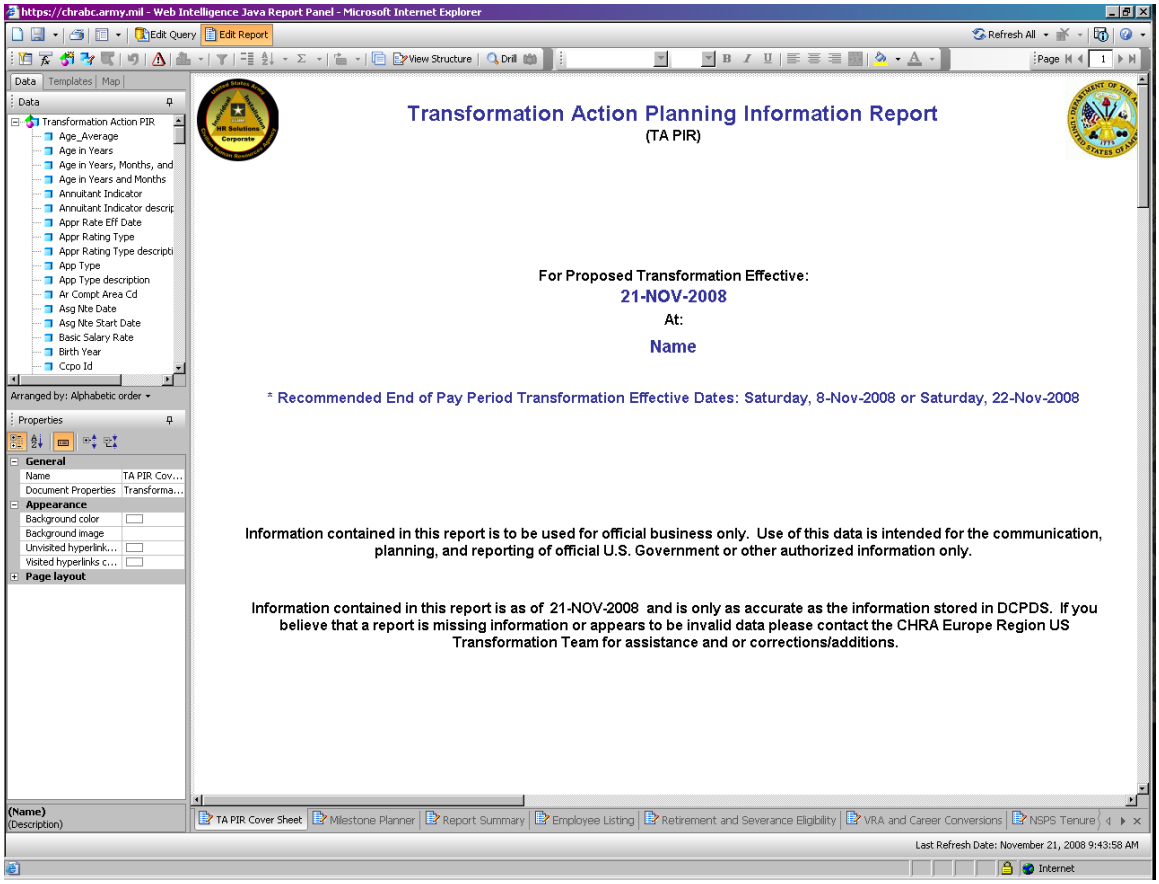


Two things can happen when the report has finished running.

If no results have been found, you will see the following message:



If the query returned results the report will be displayed:

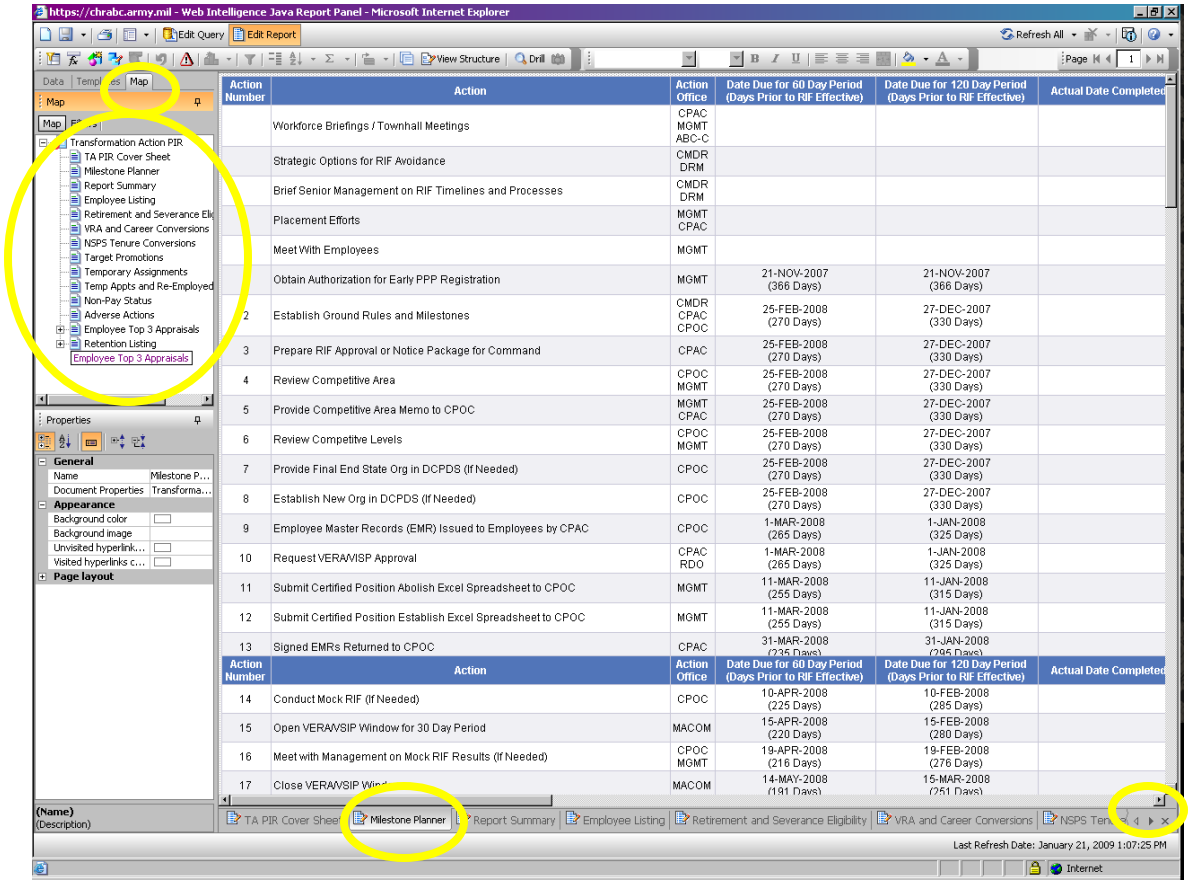


There are multiple reports in this BOXi.

To view the reports, click on the tabs at the bottom of the report.

Or

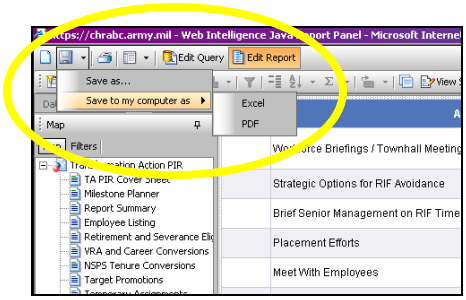
Click on the “Map” tab on the left and then select the report title you wish to view.



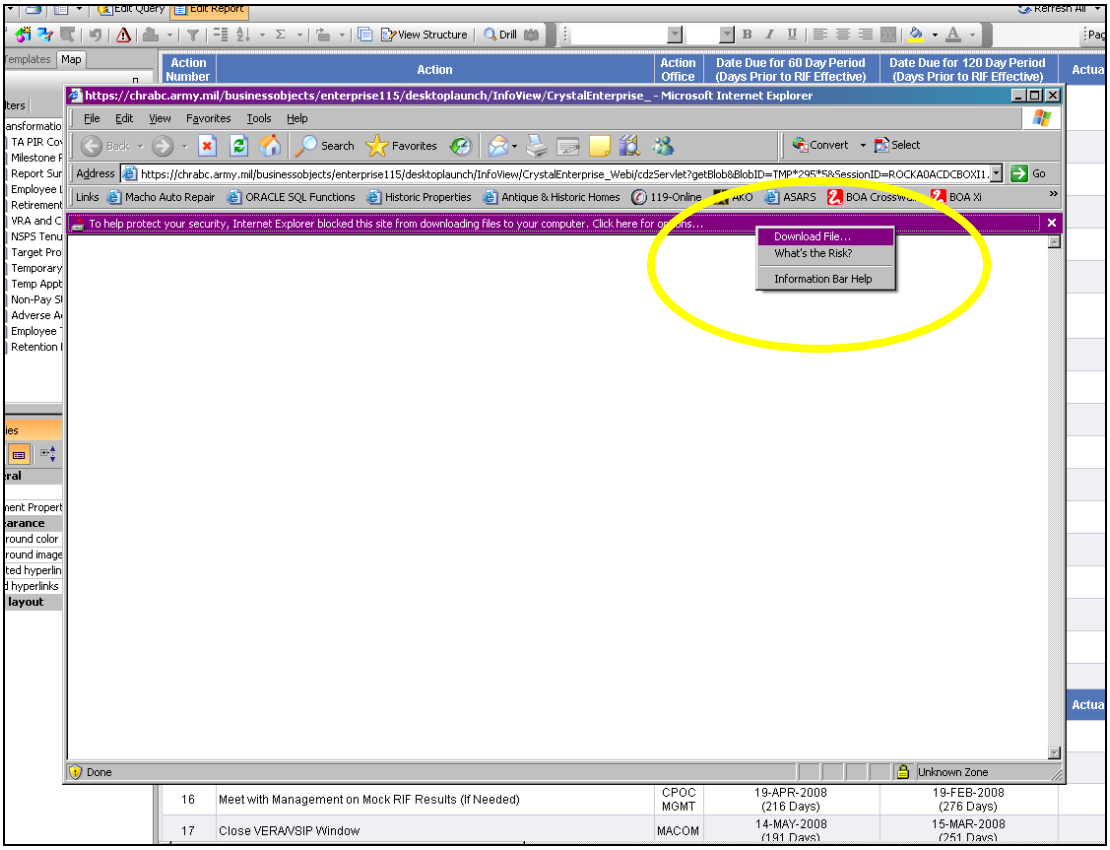
To Save or Export the report, click on the arrow next to the “Save Disk” button.

From here you can select “Save as…” to save a copy of the report to your favorites. This way you do not have to navigate to the shared report every time you wish to run it.

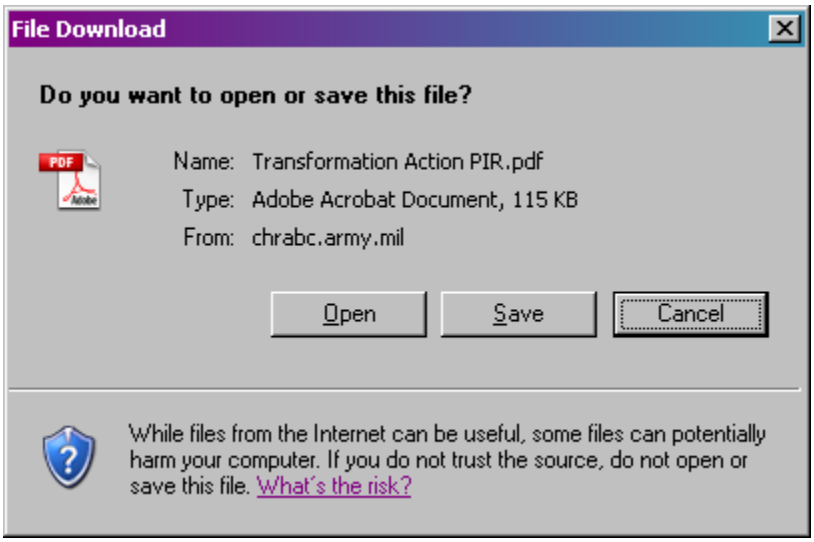
You can also select “Save to my computer as” to export a copy of the report in PDF or Excel. This report has been optimized to be exported as a PDF. It will export to Excel but the report will not display correctly.

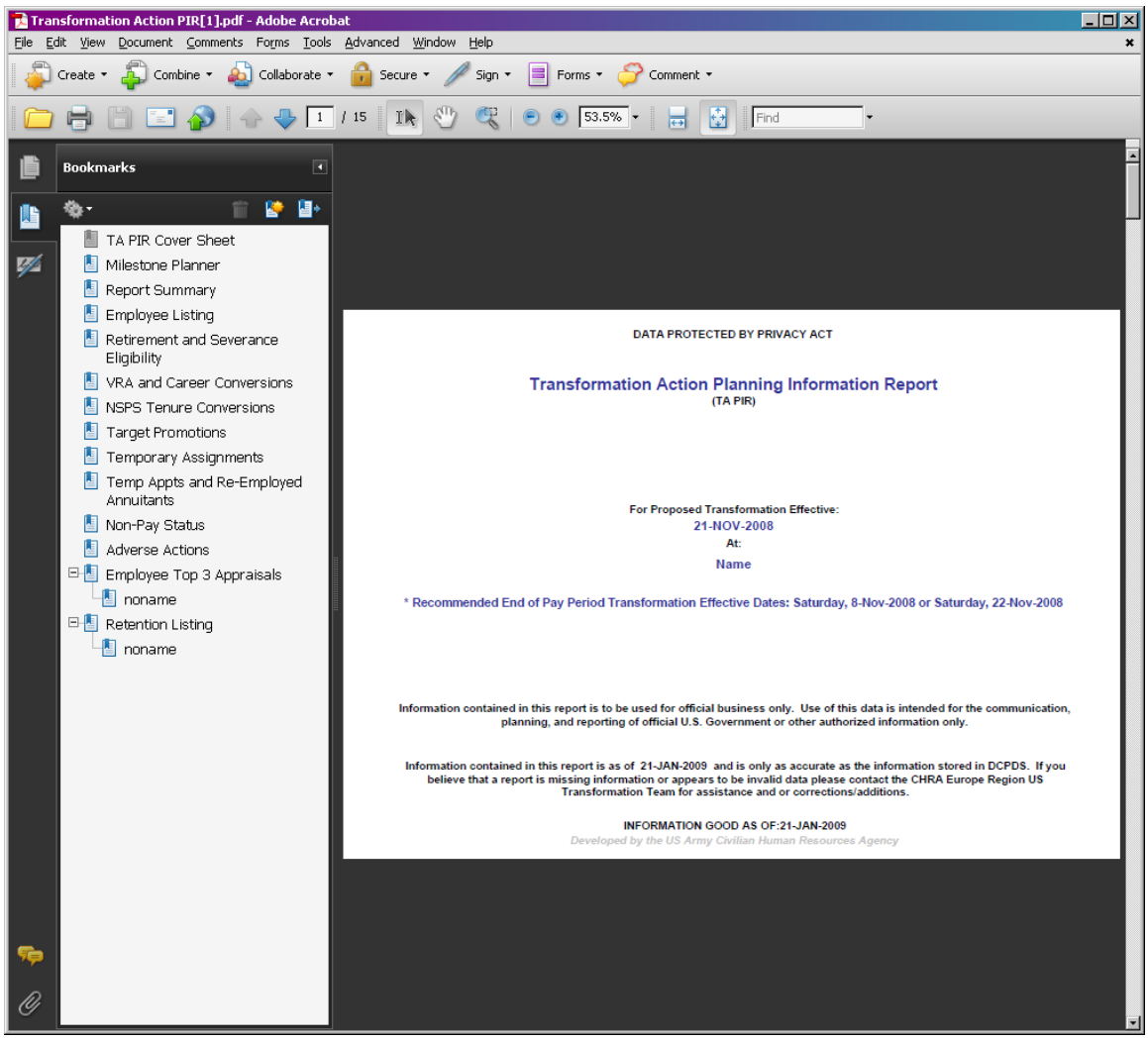


If you are exporting a report a new window will open like the one pictured below. You will need to click on the bar and select “Download File…”



Select Save or Open on this popup to continue Saving or Viewing your report.





Transformation Action Planning Information Report (TA PIR) Quick Guide BOXi

This report is a collection of sub reports related to US Army Civilian Transformation actions such as Reduction in Force, Transfer of Function, Base Realignment and Closure, Reorganization, etc. It has been formatted and optimized to be saved to your computer as a PDF file.

We have provided a sample of the Query Prompt with instructions on how to complete this report. On the next page, we have also included a summary of the reports contained along with a brief description of what each report is doing.

Fields highlighted in green cannot have a (%) value.

These fields must be populated with actual data.

These fields cannot have multiple values.

These fields allow you to include and/or exclude additional employees.

At least one of the groupings highlighted in blue must have actual data in it.

You can use more than one grouping at a time.

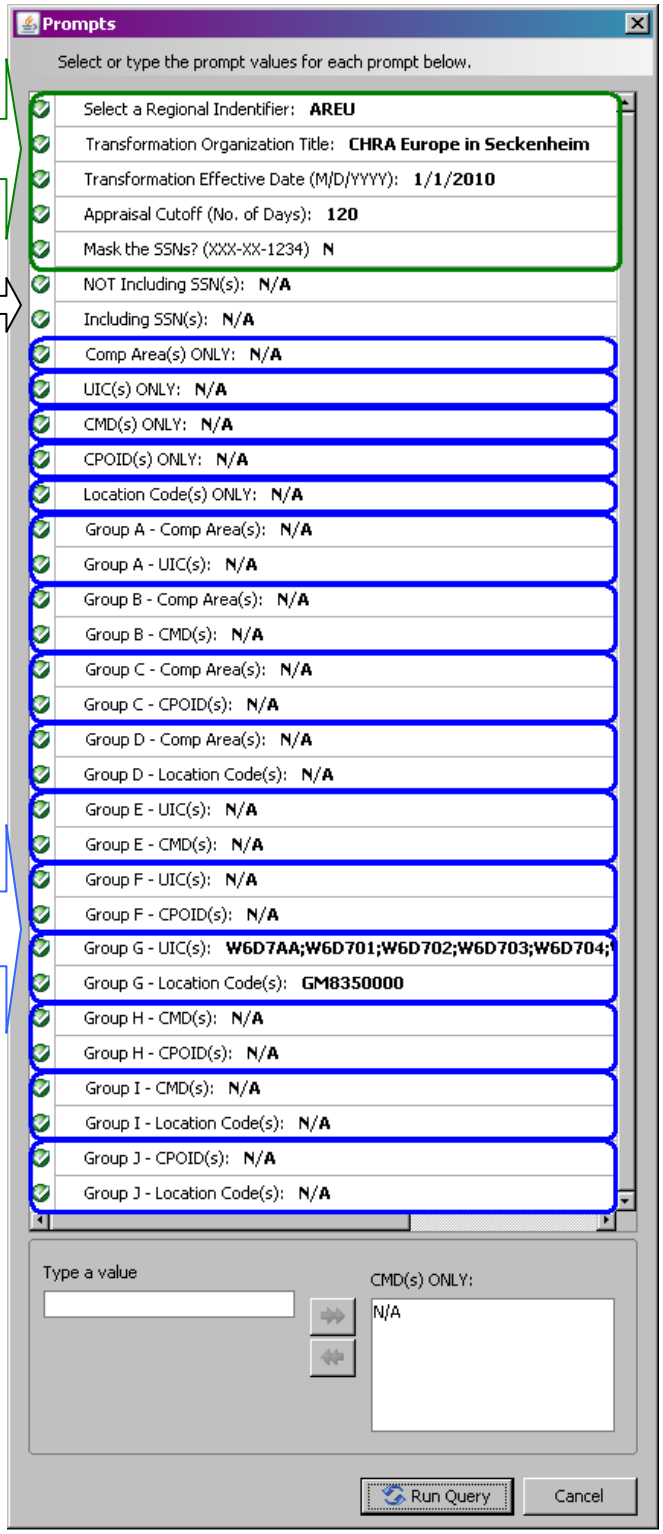
This section allows you to specify the competitive area. There are many different options for pulling this data.

ie: You need to pull data for USA DENTAC Wurzburg

The options you could use are listed below:

- *Use the Comp Area(s) ONLY block*
- *Use the UIC(s) ONLY block*
- *Use the combination of Group G UIC(s) and Location Code(s)*
- *Use all three of the Options above at the same time*

Each one of these can give you slightly different results. If you used just the Comp Area then only records that have the code will be displayed. This could however leave out people that are coded incorrectly but are in the USA DENTAC UIC. If you used just the UIC you would get every employee within that UIC regardless of where they are located. This would be a good option if that organization is going away in it's entirety, but would not work if they were just closing their operations in a specific location.



Transformation PIR BOXi Prompt Basic Rules:

- **All fields in this prompt must have a value.**
- **The OK button will not appear until there are no blank fields.**
- **If the field does not apply type an N/A in the field. If there is nothing in the field, it will not validate and you will not be able to run the report.**
- **To include multiple values as options in the field, separate each entry with a semi-colon (;)** *(ie: 2 ssns = 123456789;987654321 or 3 UICs = W1ADAA;W2ADAA;W3ADAA)*
- **When you are using multiple values do not include a space after or before the semi-colon**
- **BOAs with this prompt only include Appropriated Funds Emp**
- **Once all fields have been completed and each entry has a green checkmark next to it, the Run Query button will be enabled.**

Transformation Action Planning Information Report (TA PIR) Quick Guide BOXi

TA PIR – This Web Intelligence Document is pulled when planning or preparing for a transformation action. This report provides Human Resources and Management with information about the employees and positions that would be impacted during the transformation process.

It provides this information in a nicely formatted PDF document for ease of distribution and review of the data. Below is a brief description of each report contained within the document.

- **TA PIR Cover Sheet** – provides a cover sheet with basic information related to the organization identified when the report was ran.
- **Milestone Planner** – provides goals and recommended dates for significant transformation milestones.
- **Employee Listing** – provides a complete listing of all employees within the criteria you used to pull the report. (I.e. if you pulled the report for all employees with a comp area of "DP", only those records will pull up. If you pulled the report for UIC "WCAY99" and duty location "Kaiserslautern" then all of those records will show up regardless of their comp area code.) This is a good way for mgt to ensure that all employees in their organization are accounted for in DCPDS.
- **Retirement And Severance Eligibility Report** – provides a status for each employee for retirement eligibility or severance pay. Helps mgt plan for RIF avoidance measures. Also contains all of the data needed to process a severance pay calculation in DCPDS. This report is a projected report and will calculate the employee's rights as of the effective date of the Transformation, not the date the report is pulled.
- **VRA And Career Conversion Report** – provides a listing of employees on interim career codes such as VRA and career conditional appointments. It provides their career conversion date and identifies when they are due before or after the RIF effective date. If they are before, you will need to make sure that any RIF actions are processed using the future data as this will change their RIF retention standing.
- **NSPS RIF Tenure Conversion Report** - provides a listing of employees that have a NSPS RIF Tenure of 2. It identifies when and if the NSPS RIF Tenure should be changed to 1.
- **Target/Developmental Promotions Report** - provides a listing of employees on developmental positions. It provides their suggested promotion dates and identifies when they are due before or after the RIF effective date. This identifies these positions. So that mgt is aware of them and can review and promote employees before the RIF is ran when needed.
- **Temporary Assignment Report** - provides a listing of employees on temporary assignments such as details, temp promotions, and temp reassignments. It provides their temporary position data and their permanent position data. All employees will need to be returned to their permanent record before the RIF. Employees play in the RIF based on their permanent record, not temp.
- **Limited Appointment And Re-Employed Annuitant Report** - provides a listing of employees on temporary appointments as well as re-employed annuitants. This report is used to identify employees that are not entitled to RIF rights.
- **Non-Pay Status Report** - provides a listing of employees on non-pay status actions such as LWOP NTE, Terminal LWOP, LWOP OWCP, LWOP US, and Suspensions. This report is used to identify employees that will need to be reviewed for RIF procedures as they are different for employees in non-pay status. Some will be separated as normal, some cannot even receive notices.
- **Adverse Actions Report** - provides a listing of employees with a current adverse action in DCPDS. This report is used to identify employees that are not entitled to RIF rights and should be reviewed by the CPAC.
- **Appraisal History Report** – provides a listing of each employee's top 3 appraisals and calculates their average appraisal for retention standing purposes.
- **Retention Standing Report** – provides a quick look at the basic retention standing of the employees within the organization based on the data currently in our system.