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# ***CORE DOCUMENT DEVELOPMENT SYSTEM (COREDOC) User Guide***

*June 1997*

Department of Defense  
Civilian Personnel Management Service



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## **WHO TO CONTACT?**

Questions or problems may arise during the fielding of any software application. Therefore, a list of contacts is provided to answer questions, receive suggestions for improvements to the software or reference materials and/or resolve technical problems. Chapter One provides more detailed information regarding assistance and problem reporting.

### **PERSONNEL PROCESS IMPROVEMENT HELP DESK**

If users cannot resolve technical or functional problems with the Automated Core Document System (COREDOC), they should contact the local Integrated Personnel Process Improvement (PPI) Suite Program Coordinator(s). If the local Integrated PPI Suite Program Coordinator is not available, users may contact the Air Force Personnel Center (AFPC) Software Distribution Center Help Desk. The Help Desk's telephone numbers are: toll free, 1-800-638-3487; commercial, (210) 652-3995/2849; and DSN, 487-3995/2849. The fax number is (210) 652-5800.

### **USER'S GUIDE**

Any discrepancies, errors or suggestions for improvement should be reported by the Program Coordinator(s) to the Defense Civilian Personnel Management Service, Regionalization and Systems Modernization, Functional Program Management Office via electronic mail or fax. If sending by e-mail, the address is: carolyn.mcknight@cpms.osd.mil. The fax number is: (703) 696-5468.

### **COREDOC PROJECT MANAGER**

General questions concerning the fielding and support of COREDOC may be addressed to the Project Manager, Beres Muschett. He can be contacted by telephone on (703) 696-2666 or DSN, 426-2666, or via fax on DSN, 426-5468 or via email beres.muschett@cpms.osd.mil.

***OR***

Try CPMS World Wide Web Home Page at <http://www.cpms.osd.mil/>. You may contact the Project Manager and the Help Desk from the CPMS Home Page.

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## CHAPTER ONE: INTRODUCTION

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Welcome to the Core Document Development System User's Guide.

This guide applies to the Department of Defense (DoD) Automated Core Document Project (COREDOC) System which is an integral part of the Integrated Personnel Process Improvement (PPI) Suite. The COREDOC software is intended to alleviate the cumbersome process of position documentation by providing managers and personnelists with an automated tool that will enable them to create, modify, and update such documentation easily, quickly, and with maximum efficiency. In addition, COREDOC provides a central source of position related data that can be used in the creation of vacancy announcements, crediting plans, automated rating and ranking tools, and occupational development plans. This user guide documentation was written using Xvision. Therefore, some of the screens will appear different than those people who use CDE Runtime. The process function remains the same.

### Purpose

The purpose of the DoD Core Document (COREDOC) Project System is to automate five separate position related processes into an integrated single (core) document. A Core Document contains four elements: a classified position description; performance management plan; knowledges, skills, and abilities (KSAs) for recruitment; and basic training competencies.

COREDOC replaces the current labor-intensive process of classifying duties and responsibilities for position descriptions; identifying performance elements for employee evaluation; and listing KSAs needed for recruitment and basic training competencies. Using COREDOC, supervisors can create these documents without numerous trips to the civilian personnel office.

The position information contained in the software was developed by teams of subject matters experts and personnelists representing a variety of DoD agencies. COREDOC is a menu-driven software that allows users to select major duties and responsibilities for a position. Each major duty has related performance requirements, classification factors, and KSAs built into the database. COREDOC automatically assigns the grade level, factor pattern, and KSAs consistent with those duties. The result is an electronically generated single (core) document that replaces the traditional classified position description, performance plan, recruitment, and training criteria.

Users will note that certain menu items are “dimmed” or “grayed-out”. This indicates that a particular function in COREDOC is still under development. Additional occupational series are currently under development and will be released upon certification by a team of subject matter experts.

### User Information

Users must be familiar with the basic operation of a personal computer (PC), a mouse, and a printer. In contrast to traditional key-stroke based applications, the mouse is the primary input device used to carry out most functions within COREDOC. This emphasis on the mouse does not mean that users cannot use the keyboard, but most will find that they interact best with the program through the mouse. Users who are not experienced with Windows applications and use of a mouse should review Chapter Two of this Guide.

✓ **Caution:** Anyone wishing to use the keyboard should refer to Appendix D of this guide. Appendix D contains a list of available Hot Keys. **However, user should not attempt to access the menu items in COREDOC with the keyboard.**

The COREDOC user guide provides instructions on using the system and is specifically designed for individuals who are responsible for requesting and/or approving personnel action requests. It is also designed for personnelists who prepare personnel actions for transmission to the Defense Civilian Personnel Data System (DCPDS).

### ***User's Guide Conventions***

To help the user locate and interpret information easily, this guide uses various document conventions and visual cues. These conventions include:

- Components of the PC keyboard, such as the **[Enter]** key, are bolded and placed in brackets.
-  This **checkmark** is used to point out a note of additional information, such as a tip for first-time users.
- Command Buttons are capitalized and placed in quotation marks, e.g., "CREATE," "EDIT", and "EXIT."

### **Security And Privacy**

The information created and stored within this system is UNCLASSIFIED FOR OFFICIAL USE ONLY. Access to COREDOC data is subject to the Privacy Act of 1974. It is the user's responsibility to provide adequate computer security to protect this information in accordance with current regulations and guidance.

### **Controlling Access**

Normally, all individuals involved in preparing, reviewing, authorizing, or processing position related documents will have access to COREDOC. Access is predetermined by management and is controlled by the Username and Password combination. COREDOC provides management with the capability of limiting any user's access to employee, organization, and position data. The software also allows management to establish functional privileges for each user, such as the ability to create or edit a core document.

COREDOC has several levels of access based on whether the user is a supervisor, manager, personnelist, or system administrator. Access does not change a manager's authority to request and/or authorize position related documents. Users should refer any questions concerning individual access levels and privileges to the PPI Program Coordinator at their local installation.

### **Assistance And Problem Reporting**

This Guide supports the release of the COREDOC system. Since questions or problems may arise during the fielding of any software application, this Guide provides personnel contacts to answer questions, receive suggestions for improving the software or reference materials, and resolve technical problems.

### ***Help Desk***

If users cannot resolve technical or functional problems with COREDOC, they should contact their local Integrated PPI Program Coordinator. **Program Coordinators will forward the user's request for assistance to the Help Desk.**

All requests for assistance should include the following information:

1. Name and user identification
2. Component or Agency name
3. The type of action in process at the time the problem occurred
4. The exact steps taken prior to the problem's occurrence
5. The exact error messages received
6. A thorough description of the problem.

If the local Integrated PPI Program Coordinator is not available, users may contact the Air Force Personnel Center (AFPC) Software Distribution Center Help Desk. The Help Desk's telephone numbers are: toll free, 1-800-638-3487; commercial, 210-652-3995/2849; or DSN, 487-3995/2849. The fax number is commercial 210-652-5800 or DSN 487-5800. All problems should be submitted to the Integrated PPI Suite Program Coordinators as soon as possible.

### ***User's Guide***

This version of the COREDOC User's Guide has been reviewed for clarity and functional accuracy by functional personnel. However, users of the Guide may find discrepancies or errors that were missed during the review process, or they may have suggestions for improving it. Any discrepancies or suggestions for improvement **should be** reported by Integrated PPI Program Coordinator(s) to the Defense Civilian Personnel Management Service, Regionalization and Systems Modernization Division by fax on 703-696-5468 or DSN 426-5468 or via E-mail to carolyn.mcknight@cpms.osd.mil. All written requests or suggestions should include the following information.

1. Name
2. Telephone number (DSN)
3. Component or activity name
4. Chapter and page number of the discrepancies, if any
5. Description of the suggested improvement

### ***COREDOC Project Manager***

General questions concerning the fielding and support of COREDOC may be addressed to the Project Manager, Beres Muschett who can be contacted by telephone at commercial 703-696-2666, or DSN, 426-2666, or via fax on DSN, 426-5468.

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<b>Exiting, Stopping or Suspending Work</b>	

This chapter contains detailed step-by-step procedures for the first time or occasional computer user and for those users who are unfamiliar with Windows applications. It presents sufficient detail so that users may easily access the application before learning the details of its functional capabilities.

*These sections may be disregarded if the users are familiar with the basic operation of Windows 3.1 or Motif X-windows, personal computers (PCs), a mouse, and laser printers.*

### Requirements

All users must be familiar with the basic operation of a PC, mouse, and printer. A 486 DX-33 PC is highly recommended with at least 8 MB RAM and a 340 MB hard drive. Users must have an Internet Protocol address or a modem. In addition, X-Vision or CDE Runtime is required to operate the software under a Windows 3.1 or X-windows/Motif in a UNIX environment.

### Working with Windows

This section of the Guide provides users with basic information on the use of Windows.

✓ Skip this section if the user is familiar with running Windows applications.

#### *Windows Tutorial*

Before proceeding, users should be familiar with the basic Windows environment. If not, users should access the Windows Tutorial, which is an interactive, on-line program that covers the basics of using a mouse and Windows. The Windows Tutorial Program is accessible from the Program Manager, as the following steps illustrate.

**Using the Mouse.** While in the Program Manager Window, click the Help Menu and then the Windows Tutorial command.

**Using the Keyboard.** Press and hold down the [Alt] key, then press the [Tab] key repeatedly until “Program Manager” appears in the small window in the middle of the screen. Release both keys. Press and hold down the [Alt] key, then press the [H] key. Release both keys. Press the [Down Arrow] key to select the Windows Tutorial, then press the [Enter] key.

✓ **Working with multiple applications.** Users should be aware that because of the large amount of working data and complex processing of that data in COREDOC, running other Windows applications with COREDOC is not recommended. Even while running just COREDOC, some activities may experience a noticeable delay. During these delays, the screen pointer appears as a watch or hourglass. The pointer returns to normal when the process is complete.

### The Keyboard and COREDOC

#### *Primary Keys used in COREDOC*

The following keys are common to most PCs and may be used to navigate through the different screens within COREDOC. However, as discussed earlier in the Guide, users will find that much of the interaction with the software is accomplished by using the mouse.

<b>DELETE</b>	This key deletes, removes, or eliminates any character that appears at the cursor.
<b>ENTER/RETURN</b>	This key moves the cursor to the beginning of the next field or line.
<b>SPACE BAR</b>	This key can be used to activate a highlighted button on the bottom of a window.
<b>TAB</b>	This key moves the cursor forward to the next column or position on the screen.

### General Operations

#### *Initiating a COREDOC Session*

To initiate a COREDOC session, go to the Windows Program Manager screen and click the PPI icon that contains the COREDOC program. This will bring up the “Logon” screen (Figure 3-1). After entering the assigned Username, press the [Tab] key and enter the assigned password, press the [Enter] key or click the “CONNECT” button. After the correct username and password combination are entered, the software displays the PPI Application Menu (Figure 3-2). **Initiating a COREDOC session is discussed further in Chapter Three of this Guide.** For users of CDE Runtime the database field must be completed. This information is assigned at the same time the username and password are assigned by the systems administrator.

#### *Exiting, Stopping, or Suspending Work*

To stop COREDOC from processing a particular function, click the “CANCEL” button. Users may continue this process with each screen until they are returned to the COREDOC Main Menu screen (Figure 3-9). Click the “File” option on the menu bar and then select “Exit”. The software will bring users back to the “PPI Application Menu” screen. To exit “PPI Application Menu” screen, click the “EXIT” button.

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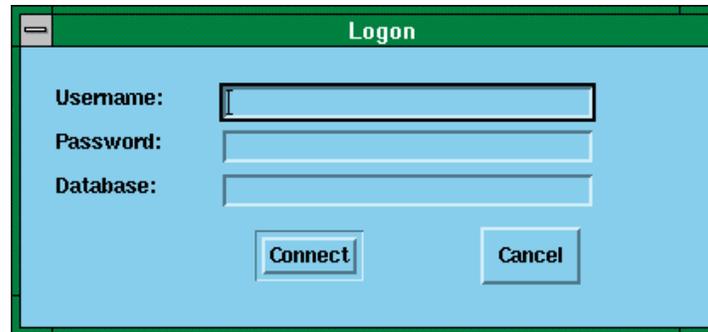
## CHAPTER THREE: COREDOC OPERATING PROCEDURES

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This chapter describes special features within the Core Document Development System (COREDOC) application.

### Initiating a Session

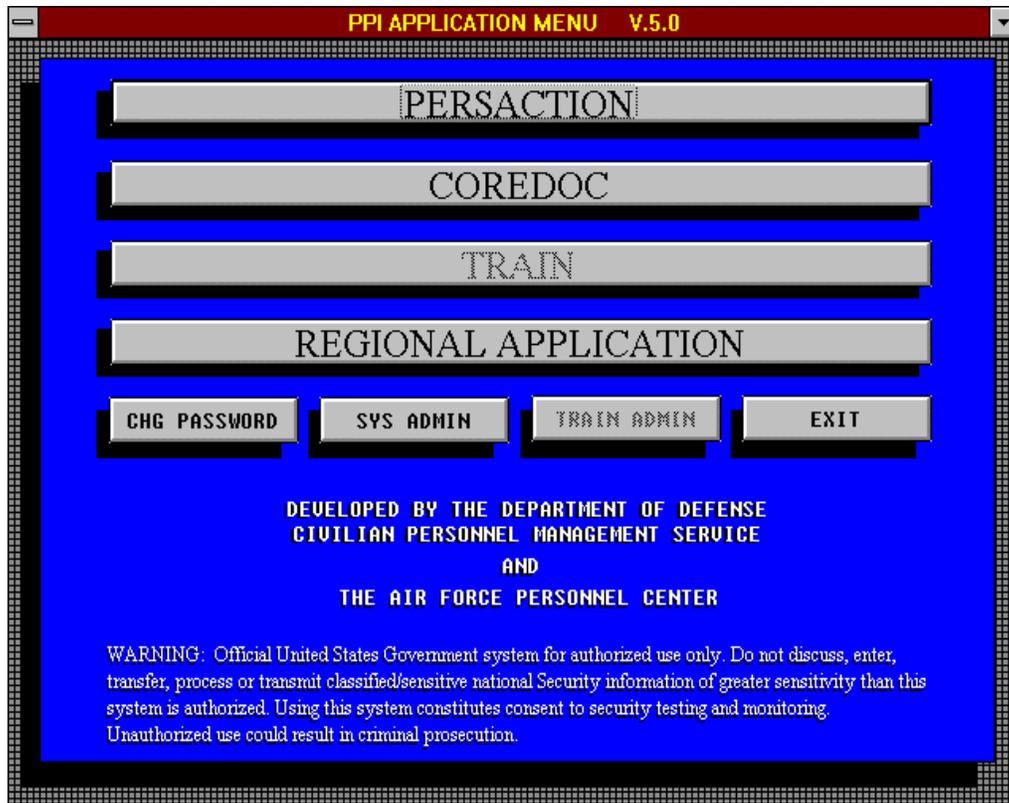
The COREDOC application is accessed through the “PPI Application Menu.” To initiate a COREDOC session, go to the Windows Program Manager screen and click the icon that contains the Integrated Personnel Process Improvement (PPI) Suite program. This will initiate the “Logon” Screen shown in Figure 3-1.



The image shows a Windows-style dialog box titled "Logon". It has a light blue background and a green title bar. Inside the dialog, there are three text input fields labeled "Username:", "Password:", and "Database:". Below these fields are two buttons: "Connect" and "Cancel". The "Connect" button is on the left and the "Cancel" button is on the right. The dialog box has a standard Windows window border with a close button in the top-left corner.

**Figure 3-1. Logon Screen**

After entering the users’ assigned Username, press the **[Tab]** key to go to the “Password” block. After entering the users assigned password, press the **[Enter]** key or click the “CONNECT” command button. Click “CANCEL” to end the session. The following PPI Application Menu will appear after successful Logon.



**Figure 3-2. Personnel Process Improvement (PPI) Application Screen**

The application menu allows user to access PERSACTION, COREDOC, TRAIN, Regional Application, and System Administration applications. The application menu will also allow users to change their “UNIX” or “Oracle” password. Click “EXIT” to exit the Integrated PPI Suite.

### ***CD Writer***

To select COREDOC, click the appropriate block with the mouse or use the [Tab] key until COREDOC is highlighted, then press the [Enter] key. The COREDOC Program will begin. The application will display CD Writer Cover Screen shown in Figure 3-3. CD Writer is an acronym for the Department of Defense Core Document System.

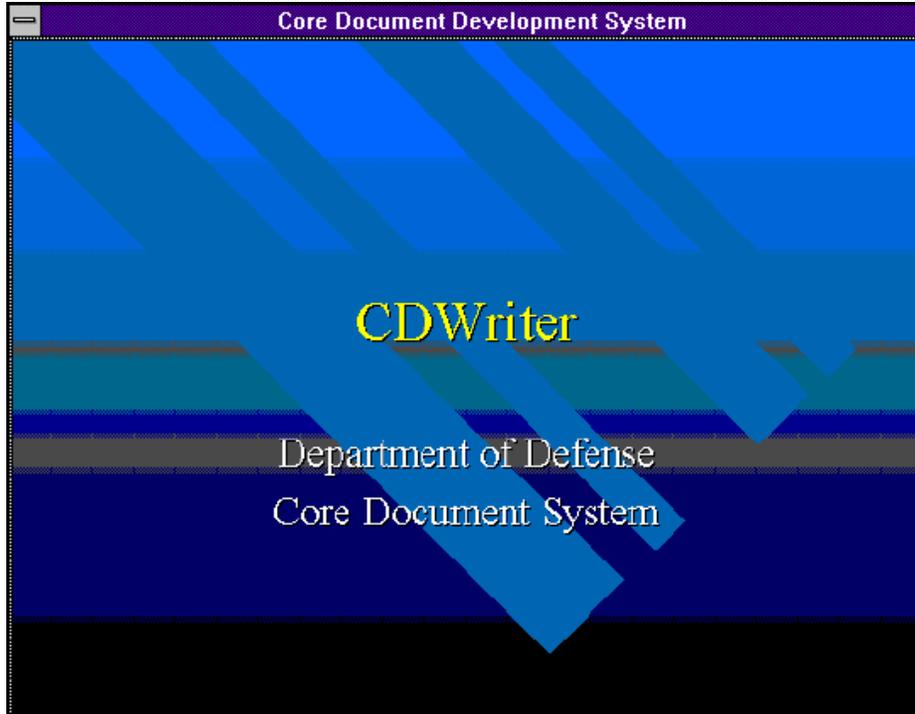


Figure 3-3. CD Writer Introduction Screen

The application will then display the Core Document Main Menu Screen shown in Figure 3-9.

**Password**

The “Password” button allows users to change their password for the Integrated PPI Suite.

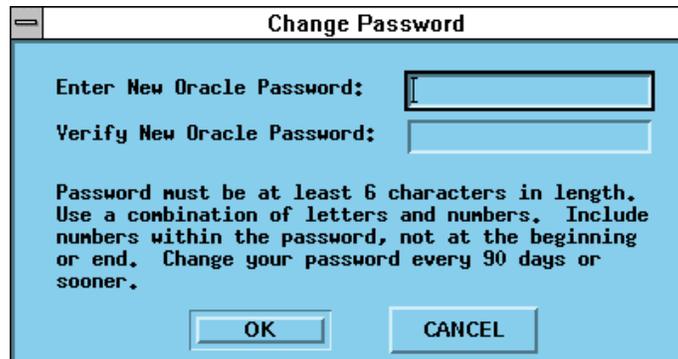


Figure 3-4. Change Password Screen

To change a user’s password from the PPI Application Menu (Figure 3-2), press either the [Tab] or [Enter] key to highlight the “Password” option. After the option is selected, press the [Space Bar], or click the left button of the mouse. The application will display a message asking the user, if they wish to change their Oracle or UNIX password. Select the “Oracle” button and the application will display the “Change Password” Dialog Box shown in Figure 3-4. After entering



indicated by a black rectangle around all the information on that line. To select another request, use the [Up/Down Arrow] key or the mouse to move through the list and highlight the appropriate selection. If there are several pages of requests in the In Box, the [Page Up], [Page Down], or [Arrow] keys, as well as the scroll bar, provide faster means for moving through the In Box.

Figure 3-5 shows an In Box screen with the first record highlighted. The In Box contains nine columns that provide general information for each personnel action, including the Request Number; Pay Plan (PP); Series; Grade; Organizational code; Form Used; Type of Action; Employee Name; whether notes are attached to the action; and if the action was submitted to DCPDS. The “\*NCSA” column provides information concerning a personnel action. The asterisk indicates that a legend is provided at the bottom screen. The “C” column with a “Y” denotes whether a core document was created for the highlighted personnel action. If the “N” or “C” column is **blank**, then no attachment exists for the corresponding action. The “S” column indicates the status of the Personnel Action Request once it is submitted to DCPDS. The “A” column indicates documents (existing core documents, including DOS based documents, organizational charts, memos, etc.) are attached.

To create a Personnel Action Request, click the “CREATE” button at the bottom of the In Box screen. The application will display the Create a Record dialog box shown in Figure 3-6. Users have the choice of selecting either the Personnel Action Request or one of the local national forms, such as AE Form 690-60A. Click the first option and then the “OK” command button. The Actions Screen (Figure 3-6.a) is displayed immediately after Figure 3-7 is displayed. Select the type of personnel action to be processed by using the scroll bar on the right or use the Find function. Highlight the desired action with the cursor and click “OK”. Figure 3-7 is displayed with the nature of action data block completed. If the “CANCEL” command button is clicked, the software returns to the In Box.



Figure 3-6. Create a Record Dialog Box

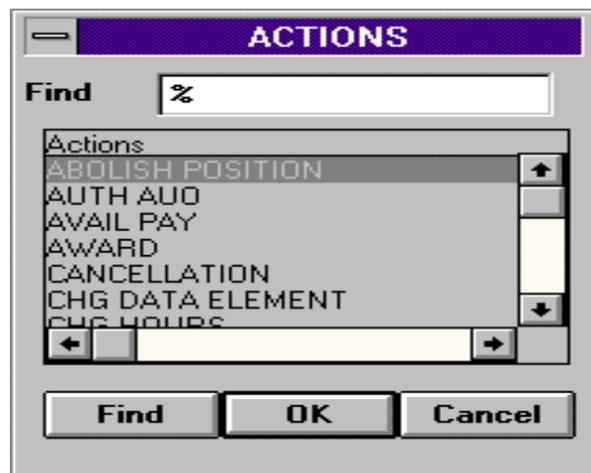


Figure 3-6.a. Actions Screen

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The Personnel Action Request form (Figure 3-7) shown on the screen is essentially identical to the paper form, except it appears as a series of five screens or pages. Users may press either the **[Tab]** or **[Enter]** key, or use the mouse to move from one block to another. Users may also move to another page by clicking the desired page number button on the lower left hand corner of the Personnel Action Request page.

“COREDOC” and “ATTACH” buttons are also located on the Personnel Action Request Form. Click the “COREDOC” button to access the COREDOC System. The “ATTACH” button allows users to append a previously created core document to a Personnel Action Request.

REQUEST FOR PERSONNEL ACTION Page 1 of 5			
Current Status <input type="text"/>		Send to Next Preset Coordination Coord	
PART A - Requesting Office			
Actions Requested REALIGNMENT		NTE: <input type="text"/>	Request Number 96AF000154
For Additional Information Call (Name and Telephone Number) <input type="text"/>			Prop. Dt (MMDDYY) <input type="text"/>
Action Requested By Name <input type="text"/> Title <input type="text"/> Request Date <input type="text"/>		Action Authorized By Name <input type="text"/> Title <input type="text"/> Concurrence Date <input type="text"/>	
PART B - For Preparation of SF 50 (Use only codes in FPM Supplement 292-1. Show all dates - MM-DD-YY)			
SSAN <input type="text"/>	Name (Last, First, Middle) <input type="text"/>	DOB (MMDDYY) <input type="text"/>	Eff. Dt (MMDDYY) <input type="text"/>
1 2 3 4 5	OK	LIST	REGIONAL
		ATTACH	COREDOC
			CANCEL

**Figure 3-7. Page One of the Personnel Action Request Form**

Once the Personnel Action Request has been created, users can select the “ATTACH” button. The application will display the Attach Core Document dialog box that contains all the core documents that were created by that user (Figure 3-8).

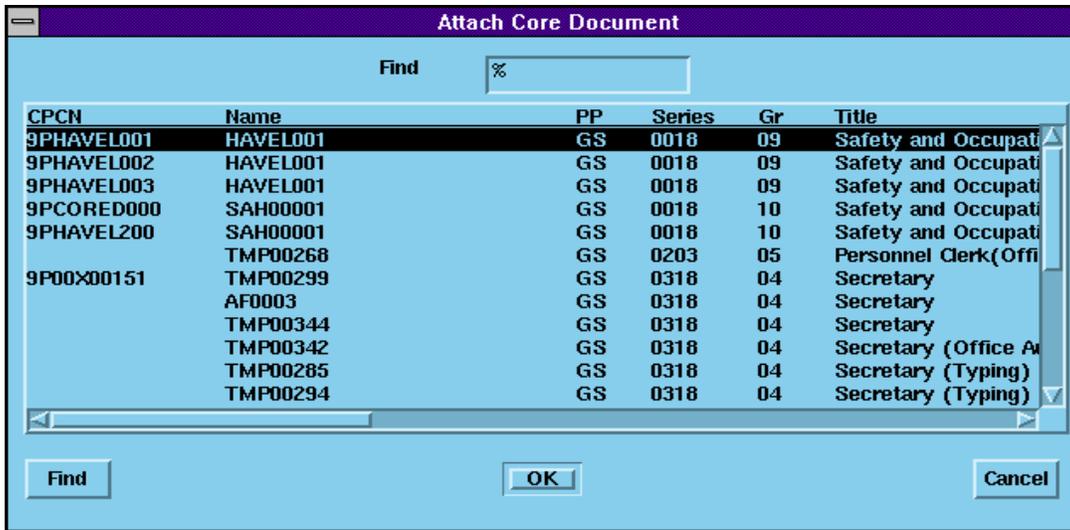


Figure 3-8. Attach Core Document Screen

The Attach Core Document dialog box shown in Figure 3-8 displays the core document in Civilian Position Control Number (CPCN) order. To view the entire list, scroll through the list of core documents or use the “Find” feature. Click the horizontal scroll bar to view the CPCN, pay plan, series, grade, title, organization name, incumbent name, and title of a position.

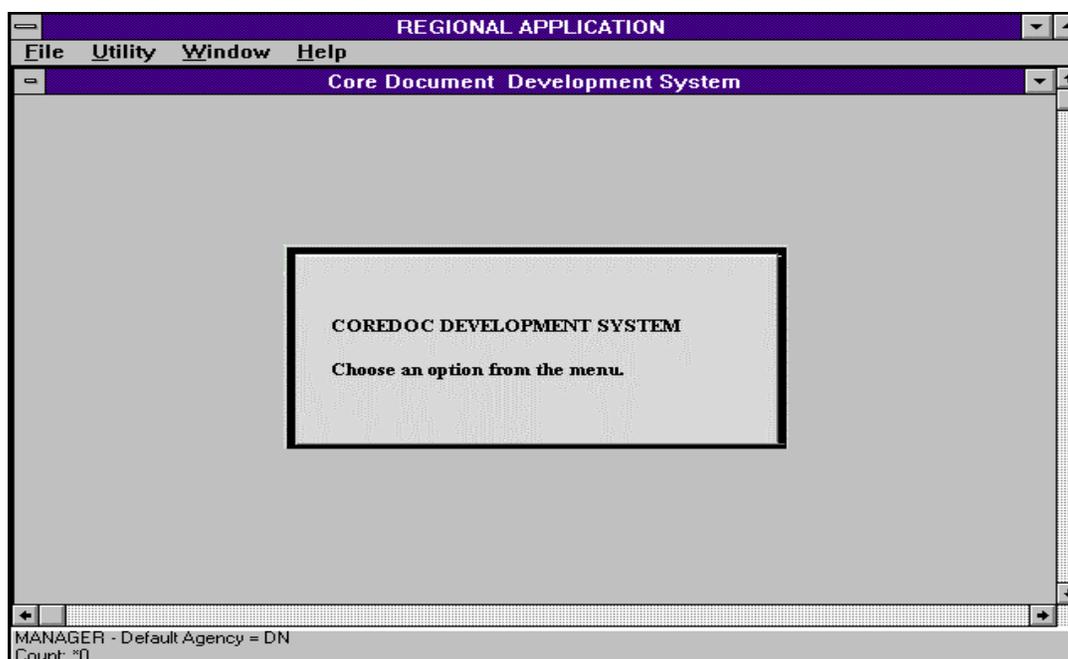
Highlight the core document and click the “OK” button, the application will then attach the core document to the Personnel Action Request.

Once the user attaches a core document, the Personnel Action Request will then be flagged with a “Y” in the “C” column within the PERSACTION In Box. Only the user that created the core document or the COREDOC System Administrator can edit, attach, or unattach a core document.

If the user wishes to attach a different core document, users must return to the Inbox, select the appropriate SF-52, and then select the “ATTACH” button again. A pop-up window will then appear. Click the “ATTACH NEW” button. The application will again provide the user with a list of the core documents that were previously created. If the user needs to unattach the core document, they can select the “ATTACH” button again. This time the user should select the “UNATTACH” button.

## COREDOC Main Menu

The first screen to appear after opening the COREDOC system is the Main Menu. The Main Menu is the first operational screen and central point for performing the basic functions in the program.



**Figure 3-9. Core Document Main Menu**

The three options for performing basic COREDOC functions are listed across the top of the screen. They are:

- **File.** This option allows users to perform a variety of functions. Users can create, delete, view, print, import, copy, and rename any core document within their In Box.
- **Utility.** This option allows users to establish system generated defaults. In addition, classification specialists can assign a Civilian Personnel Control Number (CPCN) to a core document or position description.
- **Help.** Clicking the “Help” menu allows users to view four options, “View Coredoc Manual”, “Print Coredoc Manual”, “Show Keys, and “About Coredoc CD Writer”.

The Main Menu options i.e., File, Utility, and Help have drop-down menus with several sub-options. Users can use the mouse to select one of these options from the menu. Users can also press the [Page Up/Page Down] arrow keys to move between the options. The application will then display the System Default screen also found under the Utility Menu.

### ***File Menu***

The first option listed on the Main Menu screen is “File”, which has eleven options. The File Menu contains most of the functions involving the creation, modification, and deletion of core documents.



**Figure 3-10. File Menu**

The File options shown in Figure 3-10 are described below:

- **New.** This option allows users to create a new core document. For instructions on how to create a core document see CHAPTER FOUR of this guide.
- **Open.** This option allows users to open an existing core document from users folder. For instructions on how to use the edit an existing core document, see Chapter Five of this guide.
- **Delete.** This option allows users to delete an existing core document from users folder.
- **View.** This option allows users to view a core document on screen. Click the File Option and then select the View Option. For instructions on how to use the View function, see either Chapters four or five of this guide.
- **Print.** This option allows users to print a copy of a core document.
- **Import CD.** Users have the capability to import regular or standard core documents into the Integrated PPI Suite from the PC version of CD Writer (version 2.0) software package. This function is normally restricted to the system administrator. For more information, see System Administration Functions section of this chapter or the Administration Guide for the Integrated PPI Suite.
- **Export CD.** Users will have the capability to export core documents to another source.
- **Use Standard CDs.** Users have the capability to copy a core document from the standard library.
- **View Standard CDs.** Users have the capability to view a standard core document.
- **Copy.** This option allows users to duplicate an existing regular or standard core document in their directory.
- **Rename.** This option allows users to assign a new name to an existing regular or standard core document in the users folder.

- **Exit.** This option allows users to return to the Core Document Main Menu Screen, (Figure 3-10).

### Utility Menu

The Utility Menu contains two options, “System Default” and “Assign CPCN.” The “System Default” option is available to any user of the COREDOC application. A third option, “System Administration” is available to persons who have been designated as System Administrators for the Integrated PPI Suite. The “Assign CPCN” option is available to persons who are designated as “Classifiers” in the Integrated PPI Suite. Classifiers are normally located in the civilian personnel office.

### System Default Menu

When users first use the software, they will be prompted to complete the “System Default Screen” (Figure 3-11). This screen allows users to designate certain System Defaults and establish a standard Goal and Organization Name for each core document generated.

The COREDOC software has predetermined defaults that may or may not be compatible with users agency requirements. Users will need to review these defaults and make appropriate changes so the core documents that users create will be in the right format and printed using their printer equipment.

The screenshot shows a window titled "Core Document Development System - User Default Information". The window has a blue background and contains the following elements:

- Oracle User ID:** A text field containing "DOCUMENT\_TESTER1".
- Agency Code:** A text field containing "DN".
- Output Format:** Two radio button options: "Core Document" (selected) and "Position Description".
- On/Off Settings For:** Four checkboxes, all of which are unchecked:
  - Critical/Noncritical
  - Percentage for FWS Positions
  - Show KSA Linkage To Specific Duties
  - Automatic Staffing KSA Selections
- Import CDs:** An unchecked checkbox.
- Export CDs:** An unchecked checkbox.
- Organization Name:** A text field containing "TEST UNIT".
- Organization Goals:** A large, empty text area with a vertical scrollbar.
- Buttons:** "Save" and "Exit" buttons are located at the bottom of the form area.
- Status Bar:** At the bottom of the window, it displays "Count: \*1" and "<Insert>".

Figure 3-11. System Default Screen

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The User Default Information screen allows users to enter a standard goal and mission statement for their organizational component. Users can determine the type of output desired, e.g., core document or position description. Additionally, users can determine what type of settings, if any, that they wish to view during the process of generating a core document.

**Oracle User Id.** The “Oracle User Id” field contain the Oracle User Identification code assigned to the user. This field can not be modified from the “User Default Information” screen.

**Agency Code.** This designates the format of the core document, in particular the performance management plan. The System Default is “DD.” Users may select from five other choices, including Air Force, Army, Marines, National Guard Bureau, and Navy. Click the “Edit” button to get the list of Agencies.

If users are employed by a Defense agency or field activity such as the Defense Finance and Accounting Service (DFAS), the Defense Information Systems Agency (DISA), or the Defense Logistics Agency (DLA), users should retain the standard system default (DD) format.

All other users should change the format to match their parent agency. If users are unsure what format to select, they should contact their civilian personnel office for guidance.

The following are brief descriptions of the basic differences in each format:

- **Air Force.** The Air Force duty statements are merged with the performance requirements. No Performance Management Plan screen will be displayed.
- **Army.** The Army has individual task statements for each duty. The statement, “Other duties as assigned” appears automatically, but without an indicated percentage of time. When activated, the performance management plan automatically includes the appropriate version of the Army unique TAPES.
- **Navy.** The Navy does not have individual tasks statements for each duty . The “Other duties as assigned” statement automatically appears when selected duties fall within the 90 to 99% range. A percentage of time equal to the difference between the total for the selected duties and 100% is assigned to the “Other duties as assigned” statement.
- **Other DoD agencies.** The only difference between the DoD, National Guard Bureau, and Navy formats is the performance management plan. All other areas are the same.

### Output format

Users have the capability to create a standard position description or a core document. The position description does not contain performance management plan or specific performance standards. The Standard System Default format is a CORE DOCUMENT. It is recommended that users retain this as their default. Once users have created a core document, there are various report options that can be viewed or printed during the edit process.

### Settings

**Critical/Noncritical.** The software automatically designates all selected duties as critical when this setting is activated.

**Percentage Of FWS Positions.** Users should not select this option unless their Agency requires duty percentages to appear for wage grade positions. The “Percentage Of Federal Wage System (FWS) Positions” setting was specifically developed for the Department of the Army.

**Show KSA Linkage To Specific Duties.** This default setting allows users to show the linkage between a selected duty statement and competency (Knowledge, Skill, or Ability) for a core document. This option was specifically requested by Department of the Air Force. To disengage, click the checkbox with the mouse.

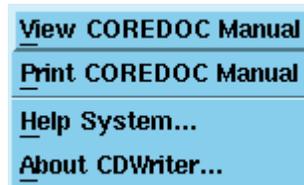
### Organization Name and Goals

Default Goals and Organization Name establishes the standard information that can be selected to appear on all reports created with COREDOC system. This standard information includes “Users Organization Name” and “Users Organization Goals.” We recommend that this standard information be provided whenever possible to facilitate the creation of core documents. During the creation process, users will be asked to provide information about their organization. Users will also be given the option of selecting Standard Goals. The information users provided on the System Default Screen will automatically appear in the core document eliminating the need to type this information.

Once users have selected all of the system defaults, click the “Save” button, to save the selected ones and “Exit” button to exit the “User Default Information” screen.

**Import and Export CDs.** The “Import CD” option is available to system administrators only. The “Export CDs” option is currently under development.

### *HELP Menu*



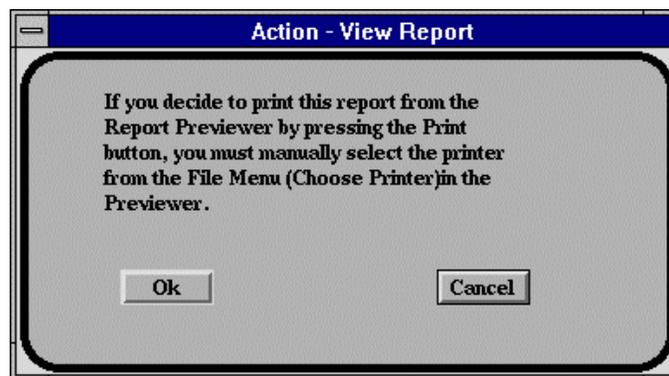
**Figure 3-12. Help Menu**

Users can find this option at the right top corner of the Main Menu. The Help function has four options.

- **View COREDOC Manual.** Users have the capability to view an on-line user manual without exiting the COREDOC program.
- **Print COREDOC Manual.** Users have the option to print a copy of this on-line user manual without exiting the COREDOC program.
- **Help System.** This option provides general information about the purpose and functionality contained in the COREDOC software.
- **About COREDOC (CD Writer).** This option provides general information about the COREDOC software, such as the version number, etc.

### Viewing a Core Document

Users can view and print a core document by selecting the “View” option from the Core Document Edit Menu. A pop-up message telling users how to send the document to the printer will appear as shown in Figure 3-13.



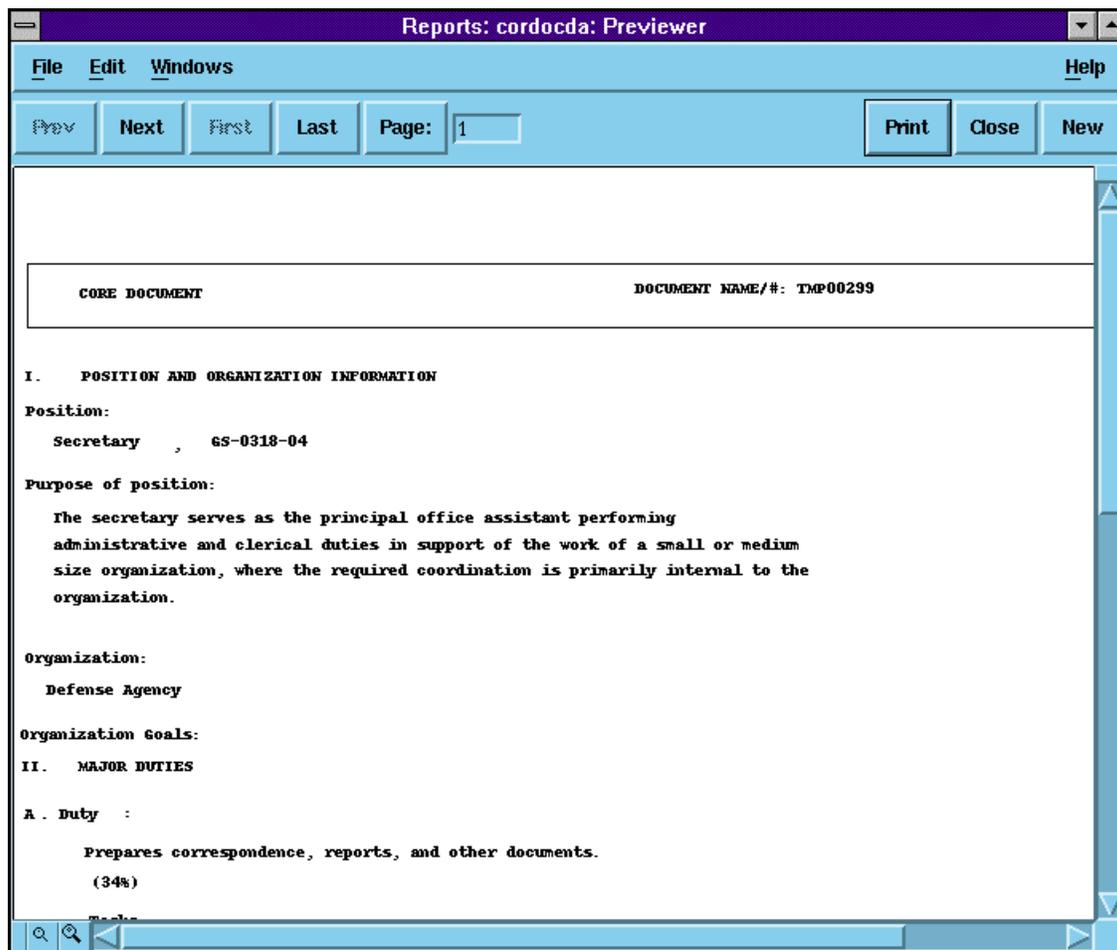
**Figure 3-13. Action -- View Report**

To view the Core Document, use the mouse to highlight the “Previewer” option and click the “OK” button. The COREDOC application will then display the “Previewer” screen shown in Figure 3-14.

The “Previewer” screen allows users to view an entire core document or report before they print it. Users can view a whole page at a time or various elements of the report.

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For illustration purposes, Figure 3-14 displays the “Previewer” screen for the secretarial position.



**Figure 3-14. Core Document - Print Previewer Screen**

In addition to the standard Windows elements found in the COREDOC system, the “Previewer” screens contain a menu bar, seven command buttons, a page finder, two scroll bars, and a zoom feature. To return to the parameter screen, click “CLOSE”.

The Menu Bar contains four options: “File,” “Edit,” “Windows,” and “Help”. The Help option provides information on setting up a printer or saving the report to a file. To access one of these menu options, press the *underlined key* on the keyboard or click the option with the mouse.

If a user decides to print a core document, select the “choose printer” option under the “File” menu. After a printer is selected, users may click the “Print” button to open the “Print Job” dialog box.

Use one or more of the following options to navigate through the “Previewer” screens:

- **Scroll Bars.** The horizontal scroll bar provides a view of the entire screen from the left to the right margins. To locate the last record on the report, drag the scroll box located between the arrows of the vertical scroll bar.

- **Zoom Feature.** The “zoom out” and “zoom in” options are located next to the horizontal scroll bar at the bottom of the “Previewer” screen. They provide the capability to focus on a specific section of the screen. To use the “zoom in” feature, click and drag the object to any point on the “Previewer” screen. The application then automatically enlarges that part on the report to 100%. Click the “zoom out” object to normalize the screen.
- **Command Buttons.** The “FIRST” and “LAST” options display the first or last page of the report, respectfully. The “NEXT” option moves the screen pointer to the first record on the next screen.
- **Page Finder.** The “Page Finder” option is located next to the “LAST” command button on the top of the “Previewer” screen. To view page seven of the report, enter “7” in the “page finder” block and click the “PAGE” button. The application quickly moves the screen pointer to the first record on the designated page.

### Printing a Core Document

In addition to viewing a report, the application allows users to print reports and save them to a file.

#### *Selecting a Printer*

To choose a printer click the “File” Option on the menu of the report. Users will then see a list of options. Select the “Choose Printer” option by clicking on it. The application will then display the “Printer Chooser” screen shown in Figure 3-15.

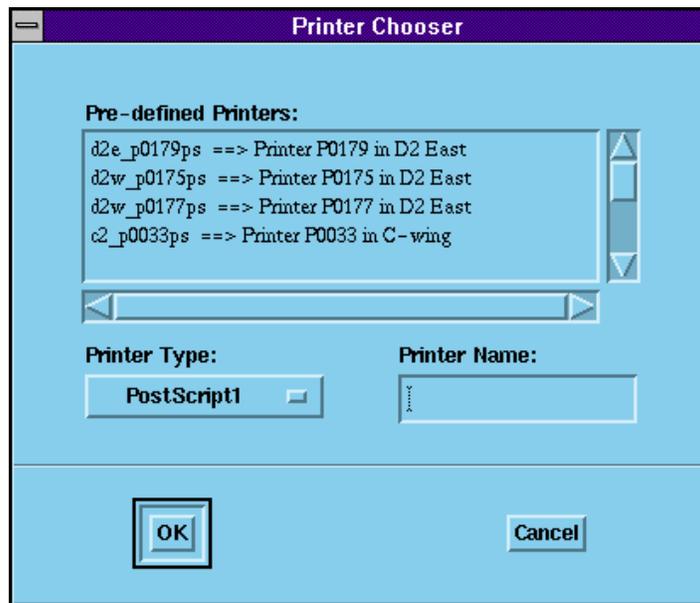
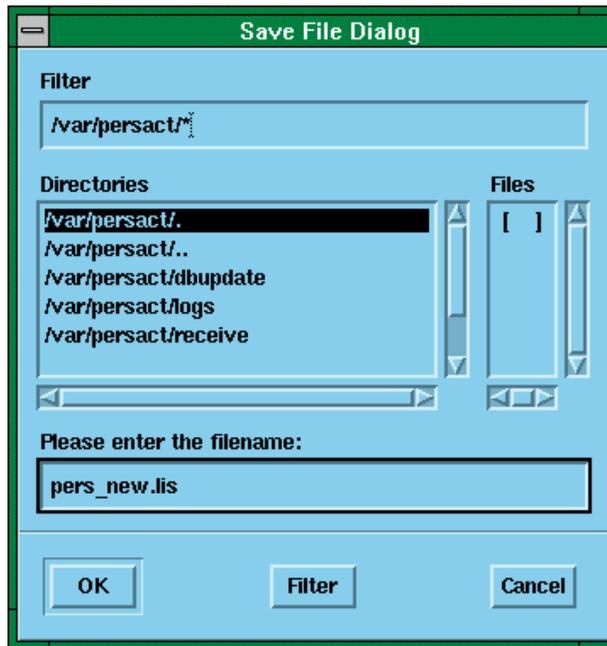


Figure 3-15. Print Chooser Dialog Box

- From the list of printers in pre-defined printers choose the correct printer by clicking it. The name then appears in Printer Name field. Click the “OK” button and the core document and the application will display the “Print Job” dialog box shown in Figure 3-16. To cancel the print job, click “CANCEL” button.

### Saving a Core Document as a File

Click the “SAVE” button on the “Print Job” screen activates the “Save File Dialog” box shown in Figure 3-16.



**Figure 3-16. Save File Dialog Box**

The application assigns a default name to the report. However, users may change a document’s name for the purpose of saving it as a text file. To rename the file, highlight the file listed in the “Please enter the filename” block, and use the delete key to clear the block. Once the block is clear enter a new name for the file.

In addition to modifying the name of the file, users may designate the directory. To designate a different directory for the file, users must first highlight the directory using the vertical and horizontal scroll bars. After the directory is highlighted, click the “OK” button to insert the file into the selected directory.

## Reports

Users can view and print a core document by selecting “Reports” option from the Core Document Edit Menu. After users have selected the Reports option, a list of eight options will appear, including Core Document, Core Document (no competencies), Position Description, Knowledges, Skills, and Abilities, KSAs (no competencies), Performance Plan, Evaluation, and Occupational Series List. If Occupational Series List is selected, the application will display a pull down menu allowing users to print the report “in title” (alphabetical) or “numeric” (series) order (see appendixes B and C of this guide).

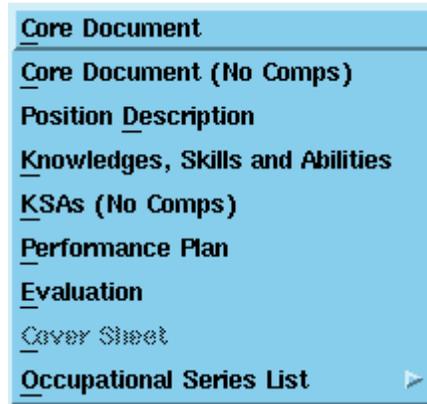


Figure 3-17. Report Menu

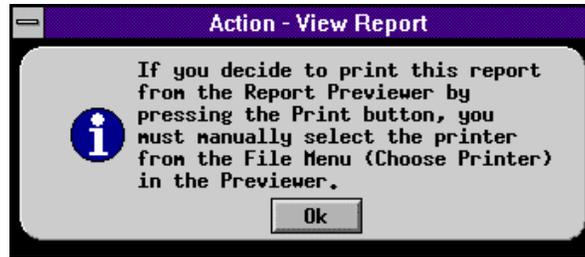
Use the mouse to select any of the options from this menu. The application will display “Report Destination” screen shown in Figure 3-18.



Figure 3-18. Report Destination Screen

Click the check box next to “Printer” and the application will display the “Print Job” Dialog Box. It is recommend that users first view the report before electing to print it. To view the Core Document, use the mouse to highlight the “Previewer” option and click the “OK” button.

A pop-up message telling users how to print the document to the printer will appear as shown in Figure 3-19.



**Figure 3-19. Action -- View Report**

To view the Core Document, click the “OK” button. The COREDOC application will then display the “Previewer” screen (Figure 3-14). The “Previewer” screen allows users to view an entire core document or report before it is printed. Users can view a single page at a time or various elements of the report.

If the user decides to print a core document, select the “choose printer” option under the “File” menu. After a printer is selected, users may click the “Print” button to open the “Print Job” dialog box.

After the print job is completed, the application will return the user to the Report Menu.

### System Administration Functions

**NOTE:** This function **only** applies to systems administrators and those given access to the system administration role within COREDOC. A special username and password are needed to access this function.

The COREDOC application allows a system administrator to perform routine maintenance functions for the typical COREDOC user. This Guide does not contain detailed instructions for the system administration functions within the COREDOC system. A separate document set provides step-by-step instructions for the system administration functions within the Integrated PPI Suite.

To access the System Administration Menu within COREDOC, select the “Utility” option from the COREDOC Main Menu Screen by clicking it. The application will then provide system administrators with a pull down menu that contains “System Defaults” and “System Administration” options.

Click the “System Administration” option with the mouse. The application will then display the Core Document Development System Administration screen.

System administrators can perform a variety of functions within COREDOC. Authorized users can obtain a list of available options by clicking “Action”. The application will provide users with a pull down menu containing eleven system administrative functions. These functions include:

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- **Mass Ownership Change.** A system administrator can change the ownership of COREDOC account. If a particular user is transferred or leaves an organization their user account will not be accessible to any other user, unless they have access to their password. In such a case, the system administrator can change the ownership of that particular account to another person so that the core documents can be processed.
- **Mass CPO ID Change.** The Mass Civilian Personnel Office (CPO) Identification Number option allows a system administrator to designate a New CPO identification number for all the core documents within the COREDOC application.
- **Mass Delete.** The Mass Delete option allows a system administrator to remove all of the core documents from a particular user's account.
- **Delete CPCN.** The Delete CPCN option allows a system administrator to remove a core document **AND** its Civilian Position Control Number (CPCN) from any user's In Box.
- **Delete Standard CDs.** The Delete Standard CDs option allows a system administrator to remove any standard core document from the COREDOC system.
- **Remove CD Locks.** The Remove CD Locks option is used when a user experiences a problem exiting from a screen within the COREDOC application. Generally, users will experience this problem when they select two or more options simultaneously.
- **Modify User Default Information.** The Modify User Default Information option allows a system administrator to change the user default information for a particular account. This screen allows users to designate certain system defaults, establish a standard goal, and organization name for each core document generated. Users may also modify the information on the "System Default" screen by accessing the "Utility" menu
- **Import PC Core Documents.** The Import PC Core Documents option allows system administrators to import core documents created by CDWriter version 1.4a (PC version) into an individual user's in box or the Standard Library within the Integrated PPI Suite.
- **View Import Log File.** The View Import Log File option allows a system administrator to view and print a listing of all the core documents previously imported into the Integrated PPI Suite.
- **Delete Import File.** The Delete Import File option allows system administrators to remove a core document that was previously imported into the Integrated PPI Suite.

## **CHAPTER FOUR: CREATING A CORE DOCUMENT**

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<b>Selecting Occupational Series</b>	<b>4-2</b>
<b>Naming Core Documents</b>	<b>4-6</b>
<b>Selecting Duties</b>	<b>4-6</b>
<b>Selecting Supplemental Information</b>	<b>4-11</b>
<b>Assigning Percentages and Duty Criteria</b>	<b>4-15</b>
<b>Selecting Knowledge, Skills, and Abilities (KSAs)</b>	<b>4-16</b>
<b>Goals and Purpose Requirements</b>	<b>4-18</b>
<b>Establishing Performance Standards</b>	<b>4-19</b>
<b>Core Document Summary</b>	<b>4-20</b>

This chapter guides users through the process of creating a new core document.

### General

This chapter guides users through the process of creating a new core document. Users MUST designate System Defaults and establish Default Goals and Organization Name before they start creating core documents. First time users of the application should return to the UTILITY section in CHAPTER THREE for instructions on how to establish these defaults. To initiate the creation process from the Core Document Main Menu click “File” and then “New” options.

### Selecting Occupations

The first part of the series and occupations selection process requires making a choice from the Primary Occupation screen. The Primary Occupation screen lists all of the available series and occupations in the current version of COREDOC (Figure 4-1).

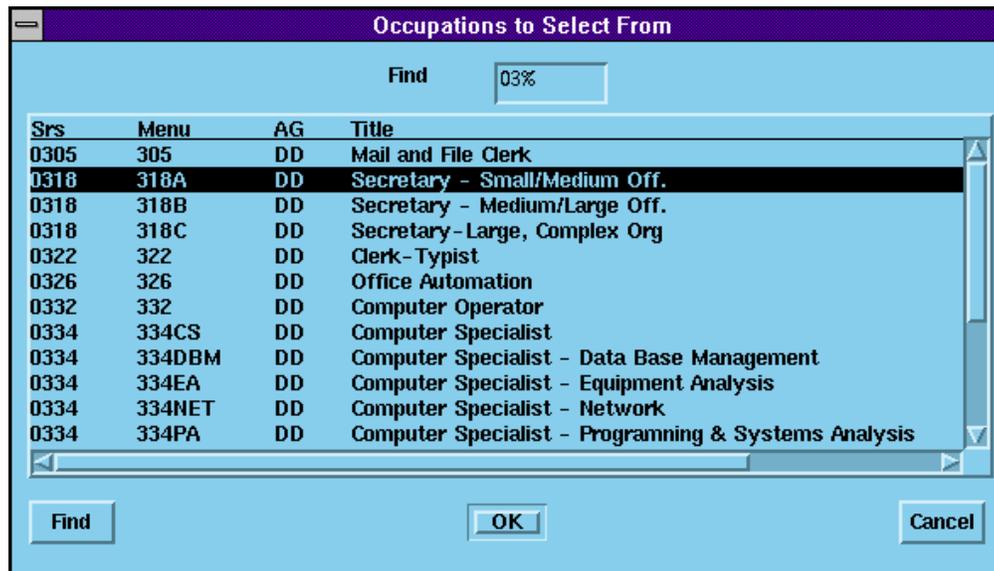


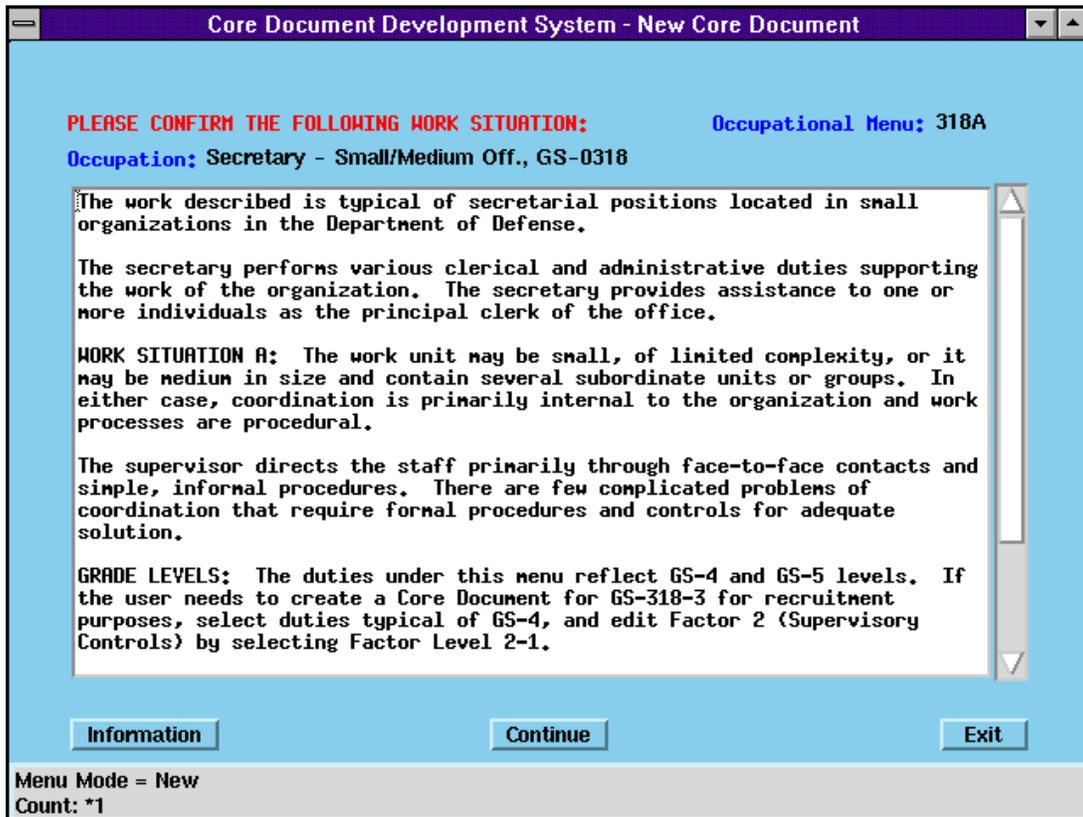
Figure 4-1. Occupations Dialog Box

This version of COREDOC covers a variety of different wage grade (WG) and general schedule (GS) occupations (see appendixes A and B of this guide). Users can click the scroll bar on the right side of the list to move through the list of occupations. COREDOC has been programmed to conduct alphanumeric searches in order to expedite locating a specific series or occupation. Type the first letter of the job title after the “%” sign in the Find box and click the “Find” button. After selecting a particular occupation, click the “OK” button. To find all the Occupations starting with “EL”, e.g., Electrical Engineers, enter “EL%” in the Find box. To locate all the occupations in the “0200” series, enter “02%” in the find box.

## Chapter Four: Creating a Core Document

**NOTE:** Several series have been further defined into a number of occupations. For example, 0318 has other associated occupations listed as 318A, 318B, etc. In addition, there are several series listed as Primary Occupations that require users to select duties from two or more occupational menus. This usually applies when two or more wage occupations of equivalent grade are used in the core document creation process. If users select one of these series, the software will return users to the Primary Occupation screen. Users should select another series with an associated occupation before they can proceed with the core document creation process.

Click the “OK” button, the application will display the message “Please Confirm The Following Work Situation” at the top of the Core Document Screen (Figure 4-2).

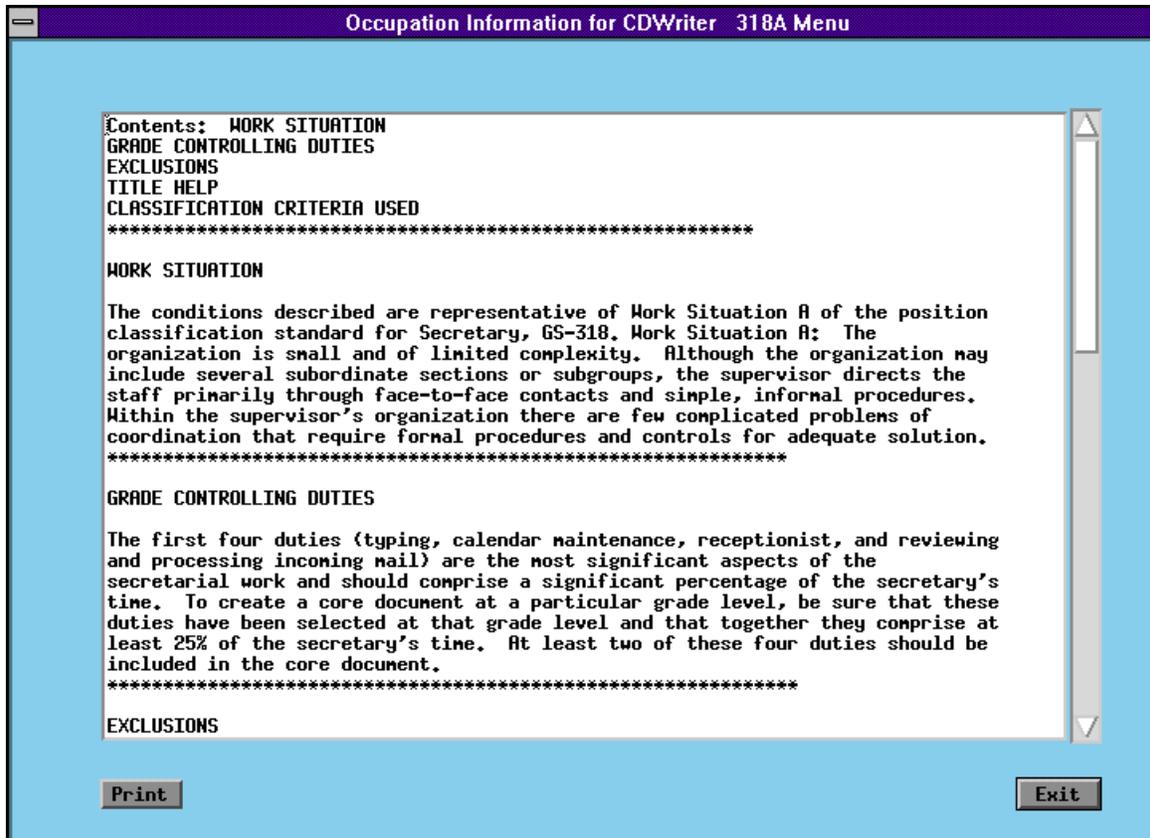


**Figure 4-2. Core Document Screen - Work Situation Screen**

The Work Situation screen has three control buttons, “Information”, “Continue”, and “Exit”.

After the occupational series is selected, users must review the work situation and classification standards information to verify that the selected series with associated Work Situation is appropriate. To read the information contained in this screen, users can use the [Arrow] keys or click the scroll bar with their mouse.

User may view additional information concerning an occupational series by clicking the “Information” button. The application will then display the Occupation Information screen shown in Figure 4-3.



**Figure 4-3. Occupational Information for CD Writer - 318A Menu Screen**

The Occupation Information screen has detailed position classification information about the selected series and occupation which should be read before proceeding. Users can click the scroll bar to navigate through this information. This information can be printed by clicking the “Print” button on the bottom of the screen. Click the “Exit” button to return to the previous screen.

If the selected series or work situation is inappropriate, click the “Exit” button. The application will then display a Confirmation screen that displays the message, “Do You wish to abandon this series?”. Click the “Yes” button. The application will return the user to the Core Document Main Menu screen (Figure 3-8).

If the selected series and occupation are appropriate, click the “Continue” button.

## Chapter Four: Creating a Core Document

The application will display either the CD Type dialog box (Figure 4-4) or the Enter CD Name dialog box (Figure 4-5) depending on the user's individual profile. Only persons designated as a "Classifier" in the COREDOC application will have access to the CD Type dialog box.

The CD Type dialog box allows classifiers to select between two types of Core Documents, a Regular Core Document or Standard Core Document.

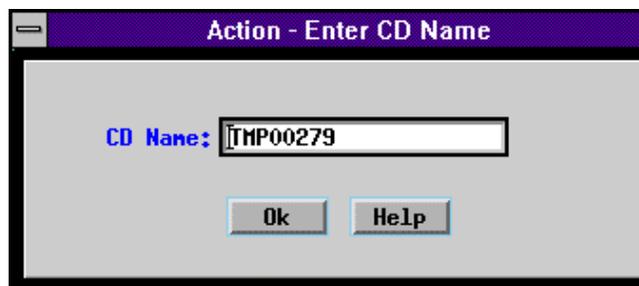
If the classifier elects to create a "Standard CD", anyone having access to the COREDOC application can view, copy, or print it. Therefore, users are cautioned not to generate a standard core document that is based on unique duty requirements or special qualifications of the incumbent.



**Figure 4-4. CD Type Dialog Box**

To select one of these options, click the check box located next to the desired option. Click the "OK" button to continue with the creation process.

For illustration purposes, the classifier selects the "Regular CD" option. The application will then display the Enter CD Name dialog box shown in Figure 4-5. Users will notice that the COREDOC system automatically generated a CD Name of "TMP00279" to the core document.



**Figure 4-5. Enter CD Name Dialog Box**

Click the "Ok" button to accept this number or enter user specific number and click "OK".

### Naming Users Core Documents

As mentioned earlier, the software provides a default name for each core document users are creating. The naming convention will vary depending on the type of core document generated. Using this name as an identifier, the COREDOC software can save the document at each stage of the creation process. Additionally, this permits the user to retrieve a document, even if, they can't complete the creation process.

Regular core documents will have a system generated core document name beginning with TMP and ending with a sequential number (e.g., the first CD Name would be TMP00001, the next TMP00002, etc.). However, it is recommended that users establish their own naming convention. Users can enter any identifier that does not exceed the allocated space of eight alpha-numeric characters.

Standard core documents will have a system generated name comprised of four components: the abbreviation, "STD", the user's two digit agency code, the four digit occupational series, and a sequential number. For example, if the user wants to create a new standard core document for a GS-0334-12, Computer Specialist for the Air Force, the system will automatically name it "STDADF0334000000001". As mentioned earlier, users may establish their own naming convention. However, the overall name must be unique within the system.

After the core document is added to the COREDOC table, the application will display the Duty List screen (Figure 4-6).

### Selecting Duties

The next screen shows the Duty List for the occupation selected. This is the first phase of the duty selection process. The number of duties listed varies depending on the occupational series selected by the user. For example, most wage grade occupations have one duty listed; however, several general schedule occupations have as many as sixteen duty lists. The Duty List screen has the two control buttons, "Select All" and "Continue". The "Select All" button allows users to choose all the duties listed for the occupational series. Click the "Continue" button to proceed with the next step in the selection process. Users are cautioned to click the "Continue" button AFTER they have made all of their duty selections.

Users can select duties by clicking the check boxes next to the Duty Title. Users do not have to use every duty selected in this screen. During the next phase of the duty selection process, users will conduct a comprehensive evaluation of these duties to determine which ones will appear in their core document.

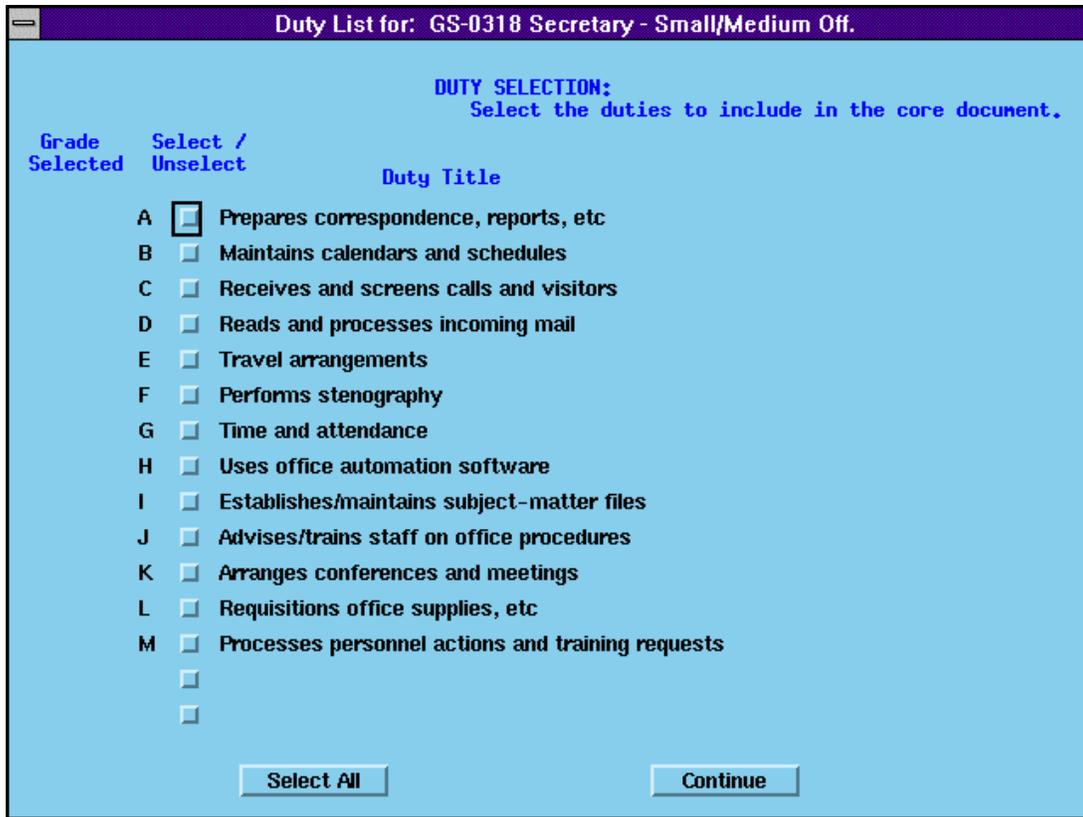
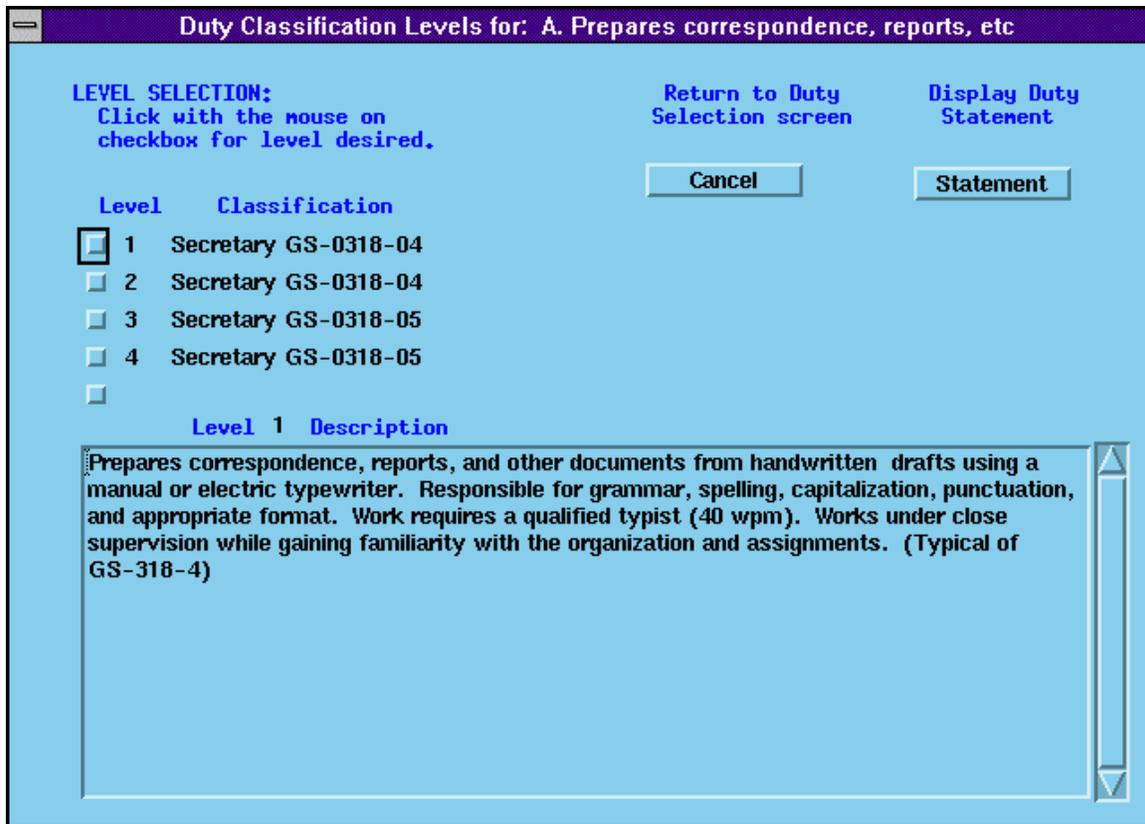


Figure 4-6. Duty List for: GS- 0318 Secretary - Small/Medium Office Screen

To make selections from the Duty List screen, click the check box in front of the Duty users want to select. When a select is made, a check box will be marked adjacent to the duty AND the application will automatically take the user to the Duty Classification Levels Screen shown in Figure 4-7. The Duty Classification Levels Screen shows the levels for each duty statement. For each level indicated by the cursor, a description explaining that particular level is displayed at the bottom of the screen. Users can move through the description by clicking the scroll bar.

✓ Hint: Occasionally users have reported that the scroll bar sometimes becomes inactivated, even if, more information is available for display. When this occurs, users should place the cursor in the text block and click the RIGHT mouse button. The scroll bar will reset and allow users to navigate through the rest of the information.

After each duty title is selected, the application will return the user to the Duty Selection screen (Figure 4-6). After the last duty is selected, click the “Continue” button at the bottom of the Duty Select Screen.

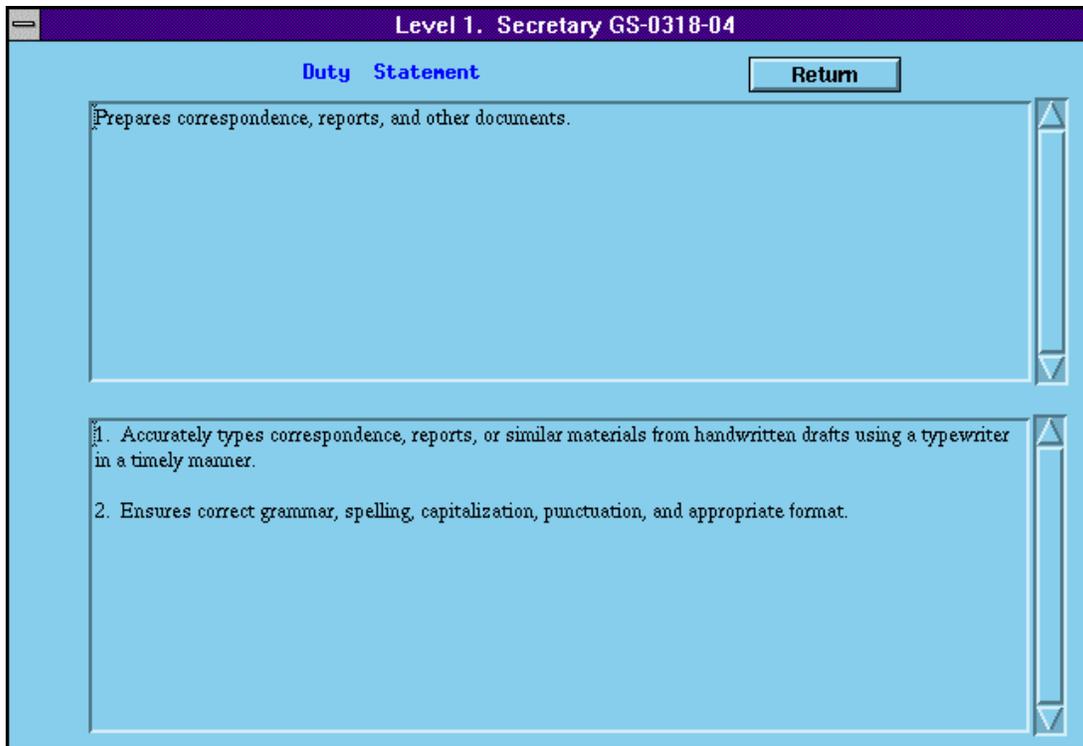


**Figure 4-7. Duty Classification Levels Screen for: A. Prepares Correspondences, Reports, etc. Screen**

Users can return to the duty selection screen without selecting a grade level, by clicking the “Cancel” button.

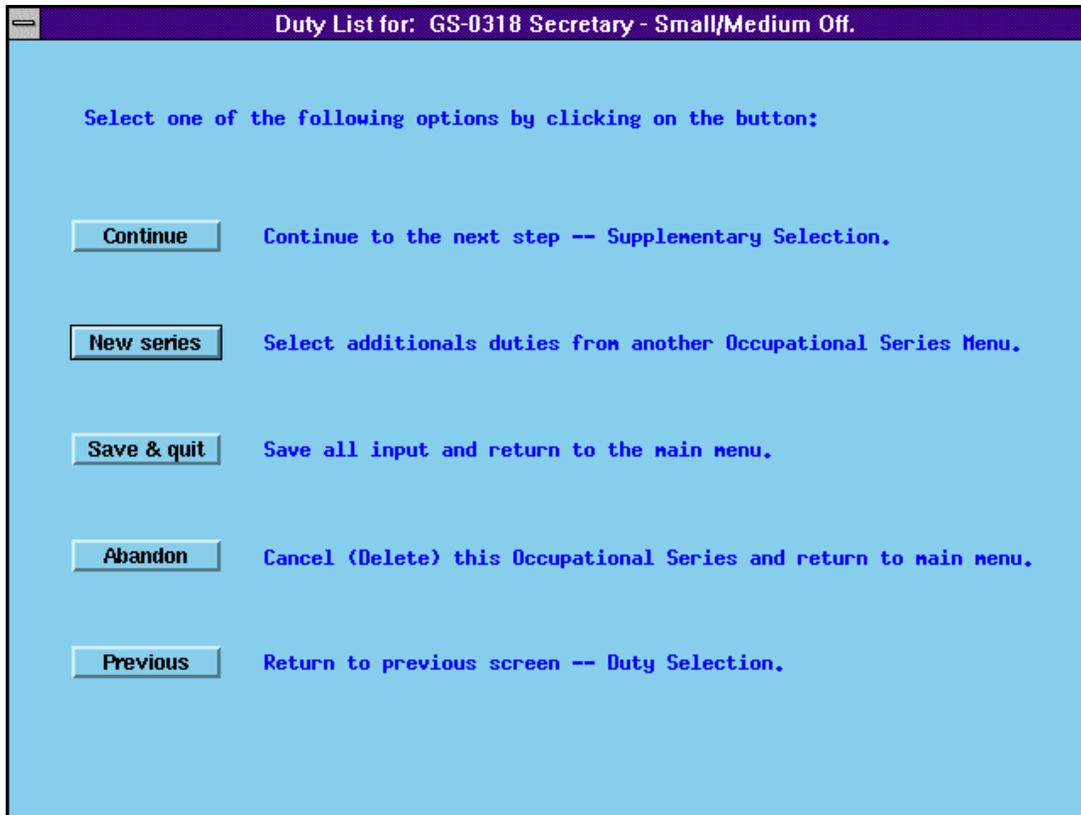
✓ Note: As mentioned previously, a user can elect to click the “Select All” button from the Duty List screen (Figure 4-6). The application will then automatically mark each check box adjacent to the duty AND the application will take the user to the Duty Classification Levels Screen (Figure 4-7). Users can select a grade level by clicking the box adjacent to it. Users may remove a duty from the Core Document by clicking the “SKIP” button.

Users can also view the individual duty statements by clicking the “Statement” button. The application will then display the Duty Statement Screen shown in Figure 4-8. Clicking the “Return” command button will take the user back to the Duty Selection Screen (Figure 4-6).



**Figure 4-8. Duty Statement Screen for Level 1 Screen**

After users have selected the required duties for that job, click the “Continue” button at the bottom of the Duty Selection Screen. The application will display the Duty List Opportunity screen shown in Figure 4-9.



**Figure 4-9. Duty List Opportunity Screen**

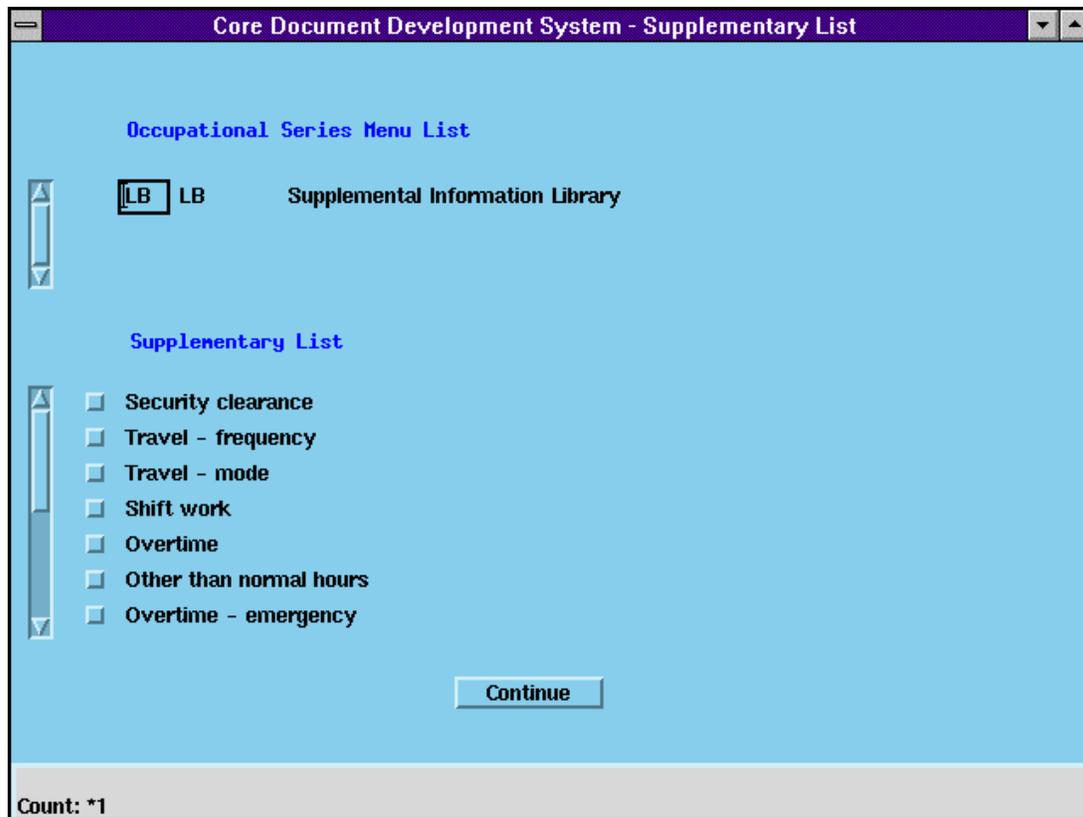
Figure 4-9 contains five command buttons.

- **Continue.** This option allows users to proceed to the next creation screen.
- **New Series.** When users select this option, the application will return them to the Primary Occupation List screen. They will have the capability to select duties from another occupational menu. When the Primary Occupation List screen appears, repeat the procedures outlined in SELECTING OCCUPATIONS SERIES and SELECTING DUTIES.
- **Save & Quit.** The Save and Quit option allows users to save their work up to this point under the CD Name that was established at the beginning of the creation process.
- **Abandon.** This button allows users to exit without saving any of their work. The CD Name assigned at the beginning of the creation process will not appear in their core document folder. The application will display a confirmation message screen that asks, “Are you sure you want to abandon your current duty input?”. Click the “Yes” button, to return the Main Menu screen. Click the “No” button and the application will return the user to Figure 4-8.
- **Previous.** This option allows users to return to the Duty List screen. Click the “Prev” button to select additional duties.

Click the “Continue” button and the application will display the Supplementary Requirements Screen.

### Selecting Supplemental Information

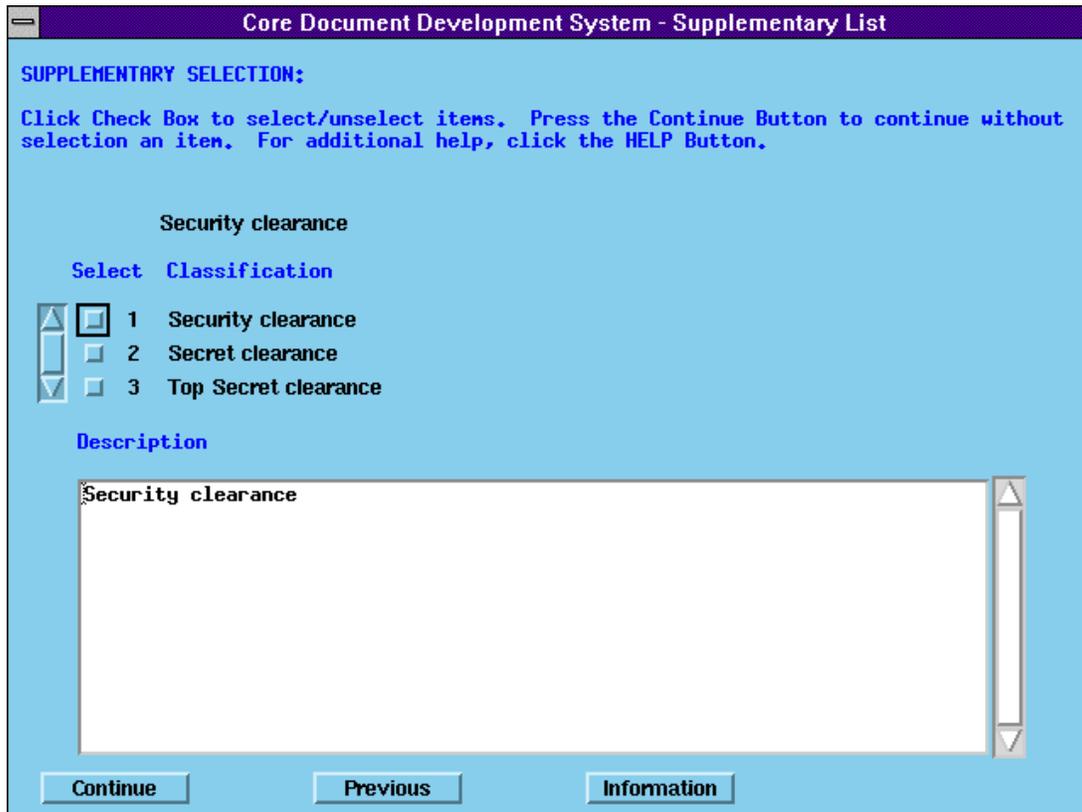
Users can elect to continue creating their core document by clicking the “Continue” button. Users should now be in the Supplementary List screen shown in Figure 4-10. This screen provides a list of standard supplemental requirements that can be selected for a core document. Although these requirements should not effect the title, series or grade of the position, they may be important in ensuring that the requirements for the position are complete. Some examples of supplemental requirements include security clearance, travel, shift work, overtime, and government licensing.



**Figure 4-10. Supplementary List Screen**

Users can select a particular option from the supplemental requirements by clicking the corresponding check box. Move up and down with [Up/Down arrow] keys. It is not necessary to use every requirement selected in this screen. During the next phase of the selection process (Figure 4-11), users will go through a more comprehensive evaluation to determine which ones will appear in the core document.

When users click any of the check boxes in the Supplementary List screen, a screen appears describing the Supplementary Requirements as shown in Figure 4-11.



**Figure 4-11. Supplementary List, Screen Two Screen**

The Supplementary List screen has the following control buttons:

- **Continue.** This option allows users to proceed to the Percentages of Time screen.
- **Previous.** This option allows users to select additional supplementary duties.
- **Information.** This option allows users to obtain information about the screen.

This is the last phase of the supplemental requirements selection process. The Supplementary Selection screen lists each selected requirement individually. The screen shows the requirement along with a brief description of information on this screen. After selecting all the supplementary duties from the list, click the “Continue” button. The application will then display Figure 4-12.



**Figure 4-12. Supplementary List, Continued**

The Supplementary Selection screen has the following control buttons:

- **Continue.** This option allows users to continue the core document creation process.
- **Save & Quit.** This option allows users to save the work up to this point under the CD Name that was established at the beginning of the creation process.
- **Abandon.** Clicking this button allows users to exit without saving any of their work. The CD Name assigned at the beginning of the creation process will not appear in their core document folder. The application will display a confirmation message screen that asks, “Are you sure you want to abandon your current duty input?”. Click the “Yes” button, to return the Main Menu screen. Clicking the “No” button will allow return the user to Figure 4-8.
- **Previous.** This option allows users to return to the preceding Supplementary Selection screen.

To make selections from the Supplementary Selection screen click the check boxes. Users can scroll up and down using scroll bars.

If the user clicks the “Continue” button from the supplementary list screen (Figure 4-12) without making a selection, a message screen will appear asking the user, “Are you finished with Supplementary Information?” screen. To continue the creation process

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without making a selection, select the “Yes” button with the mouse. The application will then display the Percentages of Time screen. Select “No” to return to the Supplementary List screen.

After selecting the last supplementary requirements, click the “Continue” button. The application will display the Percentages of Time screen shown in Figure 4-13.

✓ NOTE: When creating a wage grade position, the Percentages of Time screen *will not* appear until the user activates the setting for PERCENTAGE OF FWS POSITIONS in the System Defaults screen (for more information, see chapter three of this guide).



The screenshot shows a window titled "Percentages of Time" with a light blue background. On the left, there is a vertical scrollbar. The main content area contains a table with two columns: "%" and "Duty". The table lists four rows of data. At the bottom right, it displays "Total Percentage: 100 %" and a "Continue" button.

%	Duty
25	C A Plans and Designs Facilities Projects
25	C B Manages and Monitors Facilities Projects
25	C B Manages and Monitors Facilities Projects
25	C C Program Planning and Development

Total Percentage: 100 %

Continue

Figure 4-13. Percentage of Time Screen

### Assigning Percentages And Duty Criteria

The Percentages of Time screen lists the duties users have selected with an assigned percent for each one. The COREDOC software automatically distributes percentages to equal a total of 100%. They can easily change these percentages by typing in new numbers to replace those assigned by the COREDOC system.

Three of the System defaults established under the Main Menu Utility function will be displayed; CRITICAL or NONCRITICAL, PERCENTAGE OF FWS POSITIONS settings, and AGENCY designator. These defaults affect how some of the items appear on this screen and how the software operates. Use the arrow keys to change the percentages.

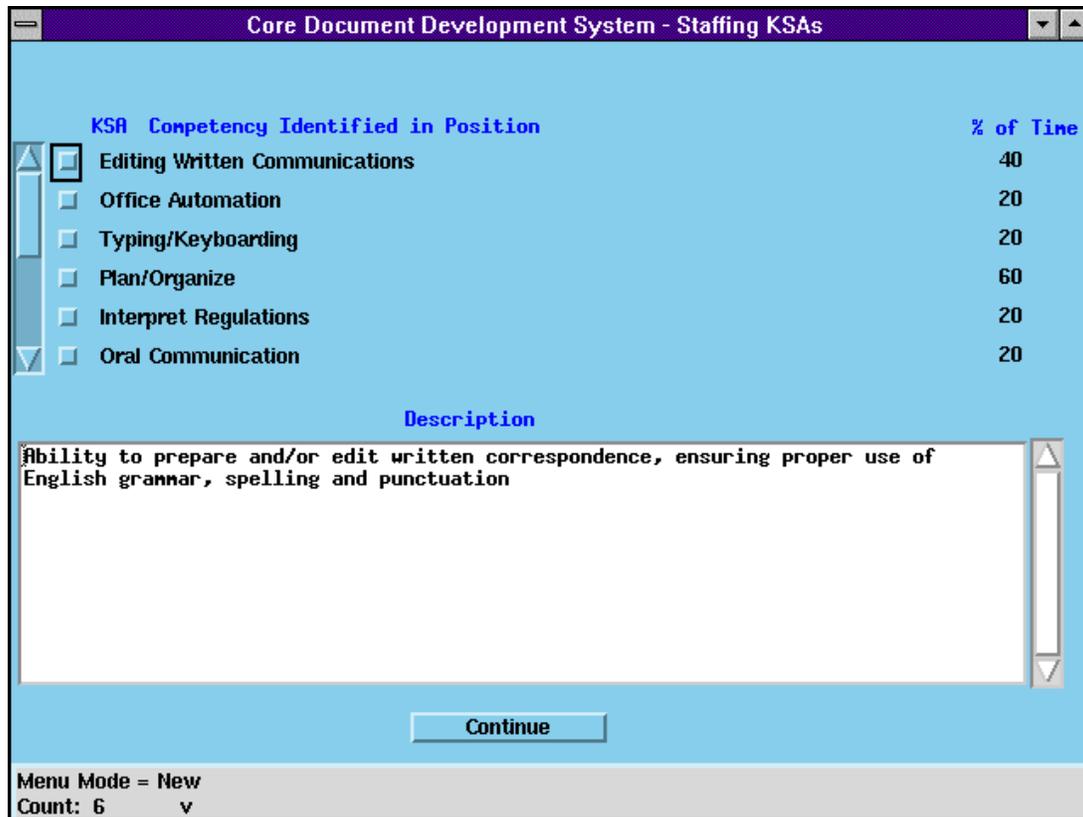
If the CRITICAL/NONCRITICAL setting is selected, a column appears between percentage and duty. The software automatically indicates that all duties are critical by assigning “C” in the column headed “C” (for criticality). To change a duty to noncritical, press the **[Down Arrow]** key to move the blinking cursor to the appropriate entry in the “C” column. Using the **[Delete]** key, remove the letter “C”, then TYPE the letter "N".

Percentages will appear for all general schedule positions and for wage grade only if the PERCENTAGE OF FWS POSITIONS setting was selected as the System Default. The agency designated within System Defaults screen will determine how the software allows users to make changes to the percentages. To change a percentage, the blinking cursor will appear in the square selected. Use the **[Down Arrow]** key to move the cursor to the various percentage options, then enter the new percentage number.

As users change the percentages, the total percentage at the bottom of the screen will fluctuate accordingly. When they have completed all their changes, press the down **[Down Arrow]** key again. Click the “Continue” button. The application screen will then display the Knowledge, Skills and Abilities screen (Figure 4-14).

If the Agency designator is the Air Force or Army, the application will not accept percentages unless the total equals 100%. This is where the difference in agency designator will become apparent. All others will be accepted only if the percentage range is between 90 and 100 percent. A message will appear on screen if the percentages are less than or greater than the total allowed.

### Selecting Staffing Knowledge, Skills and Abilities



**Figure 4-14. Staffing KSAs Screen**

This is the next step in the core document creation process. Users can select the knowledge, skills, and abilities to be used for recruitment (staffing).

The team of facilitators and subject matter experts who developed the occupational data in COREDOC have predetermined the knowledge, skills, and abilities needed for basic training competencies for each duty statement.

The screen has the following columns - KSA, Competency Identified in Position, and % of Time. The KSA column will usually be blank. If there are check marks already in the column, the team of experts assembled to develop the occupational data considered the knowledge, skills, and abilities in the adjacent column to be essential to both staffing and training.

The numbers in the % of Time column indicate the percentage of work requiring the particular competency (knowledge, skill or ability). For example, if the competency applies to all of the duties selected then the percentage is 100.0. If the competency

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applies to only one duty and that duty comprises 30% of the job then the % of Time will be 30.0. This column is displayed merely as additional information to assist users in deciding which knowledge, skills, and abilities should be selected for staffing.

All of the competencies listed here will appear in the core document and in the Basic Training Competencies section. Only those selected for staffing, however, will be listed in the Selected Staffing KSAs section. To select the staffing knowledge, skills, and abilities, use the [Arrow] keys to navigate between the check boxes. When the appropriate competency is highlighted, click the checkbox using the mouse.

After the last selection is made, click the “Continue” button. The application will then display the Core Document (Title, Pay Plan, Series, and Grade) Summary screen (Figure 4-15).

The screenshot shows a window titled "Core Document Development System - Title, Pay Plan, Series, Grade" with a version number "2.9" in the top right corner. The main content area is light blue and contains a gray-bordered form with the following fields and values:

- CD Name: TMP00327
- Official Title: Secretary (Typing)
- Series: 0318
- Pay Plan: GS
- Grade: 04

At the bottom of the form area, there are three buttons: "Edit", "Title" (which is grayed out), and "Continue". At the bottom left of the window, it says "Count: \*1".

**Figure 4-15. Core Document (Title, Pay Plan, Series, and Grade) Summary Screen**

The Core Document Summary screen contains the CD name, official title, series, pay plan, and grade for the core document generated by the user (Figure 4-15). Figure 4-15 shows the title, series, and grade for CD Name TMP00327. There are three buttons located at the bottom of the screen, “Edit”, “Title”, and “Continue”. The “Title” button is “grayed out” during this phase of the creation process. Users may edit the official title, series or pay plan for the core document. However, any changes made on this screen will be reflected in the Classification Summary for the Core Document. Users may proceed with the creation process by clicking the “Continue” button.

### Goals And Purpose Requirements

The first option under the Core Document Edit menu is Goals and Purpose. Select this option by clicking it. A new screen will appear entitled Core Document (Goals and Purpose). There are three buttons listed at the bottom of this menu, “Edit”, “Standard Goals”, and Exit. To edit any of the information on this screen, click the “Edit” button and place the cursor in one of the blocks.

An Organization’s Name and its Goals will automatically appear in the appropriate blocks on the Core Document Goals and Purpose screen when users click the “Standard Goals” button. Users can use the “Exit” button to return to the edit screen.

Use the mouse to move between the different sections on the screen. Users should notice the location of the blinking cursor before they begin modifying the information on this screen.

Core Document Development System - Goals and Purpose

CD Name: TMP00327  
Title: Secretary (Typing)  
Organization:  
Comments:  
Organization Goals:

Purpose:  
The secretary serves as the principal office assistant performing administrative and clerical duties in support of the work of a small or medium size organization, where the required coordination is primarily internal to the organization.

Edit Standard Goals Continue

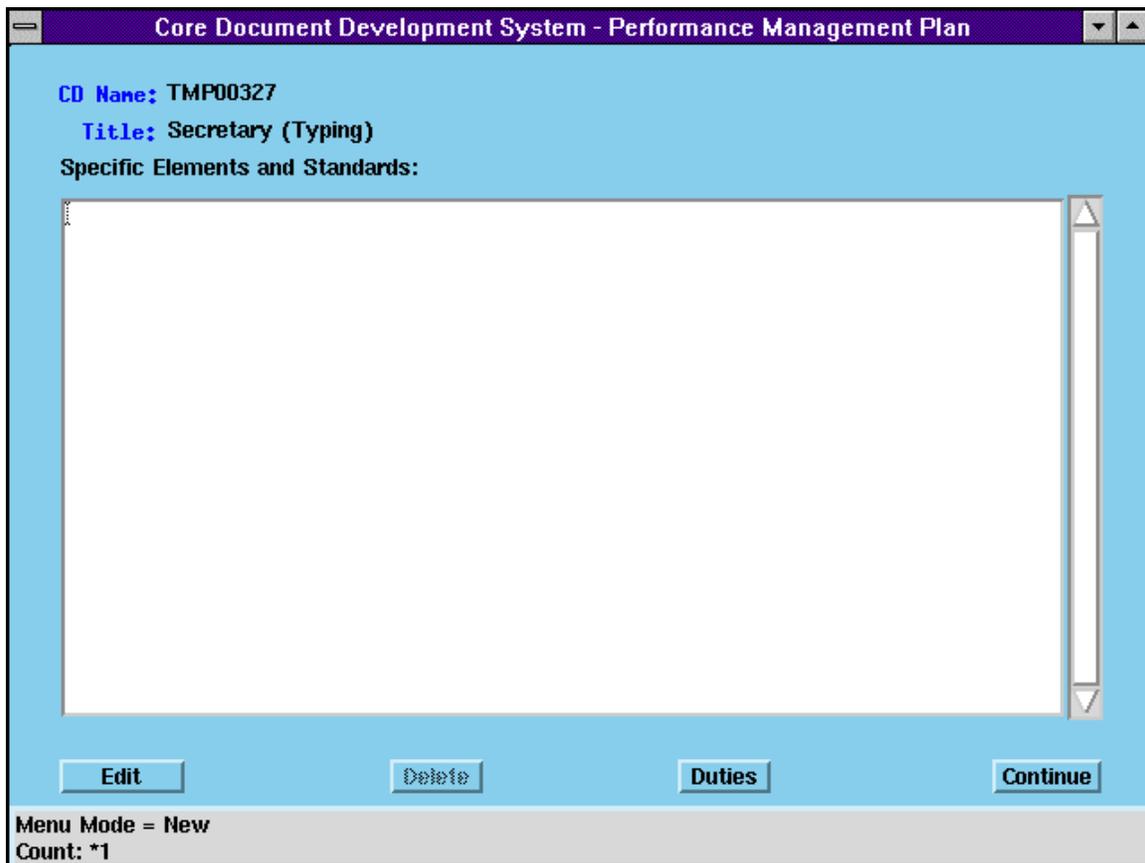
Count: \*0

**Figure 4-16. Core Document (Goals and Purpose) Screen**

Users may proceed with the creation process by clicking the “Continue” button.

### Establishing Performance Standards

COREDOC is programmed to reconfigure the duties that are selected into objectives for use in the Specific Performance Requirements screen. The COREDOC software will format the duty statements (objectives) to emulate the users current performance management plan. The Performance Management Plan screen is essentially identical for each user. However, the output will be different depending on the user's Agency.



**Figure 4-17. Performance Requirements Screen**

To insert Specific Performance Requirements use the control buttons at the bottom of the screen by clicking with the mouse:

- **Edit.** This option allows users to add text or change text to comply with their agency's regulations governing performance elements and standards.
- **Delete.** This option allows users to remove text from the screen.
- **Duties.** This option allows users to load duty statements associated with the core document onto the Performance Requirement Screen.
- **Continue.** This option allows users to continue the creation process.

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To establish performance elements and standards, click the “Duties” button. The application will then display a message asking, “ Are you sure you want standards?”. Click the “Yes” button. After the user selects the “Edit” option, the application will display a brief description of the Performance Requirements. To accept these without change, click the “Continue” button. Users can click the “Edit” button and make the necessary changes.

✓ NOTE: In order for the Performance Management Plan (PMP) to appear in a core document, users must either type specific text into the PMP screen or select Standard Performance Requirements. Editing the Specific Performance Requirements screen triggers the software to include the plan when viewing and printing a core document.

This is the last step in the creation process. Click the “Continue” button. After users have completed generating a core document, the COREDOC system will automatically take users to the Core Document Edit Menu (Figure 4-18).

### Core Document Edit Menu

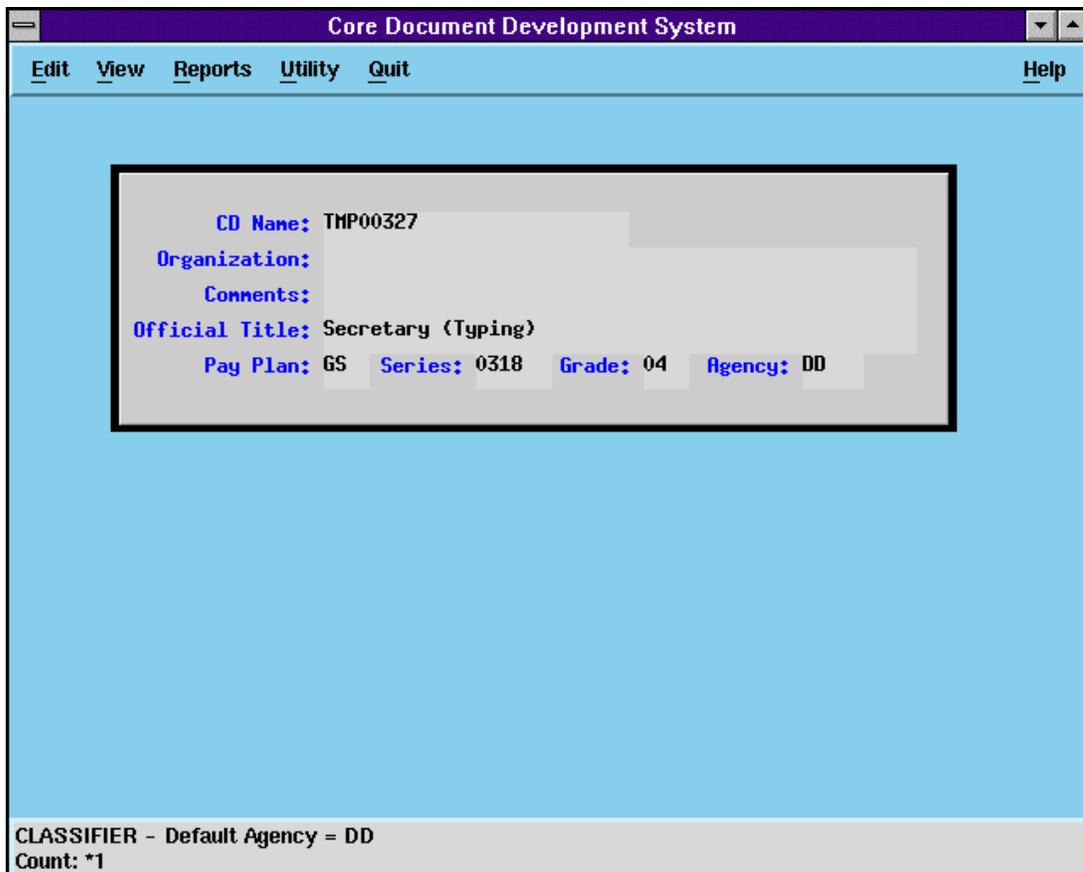


Figure 4-18. Core Document Summary Screen

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The Core Document Edit Menu is used to view, edit, and print the core document. If the user wishes to edit an existing core document at a later date, the user must return to the Core Document Main Menu and select the “Open” option from the “File” menu under the Core Document Menu Bar.

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## **CHAPTER FIVE: EDITING AN EXISTING CORE DOCUMENT**

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Edit Major Duties	
Modify Percentages of Assigned Duties	
Edit Knowledge Factors	
Edit Other Classification Factors	
Edit KSAs and Training Competencies	
Select Staffing KSAs	
Select Other Work Requirements	
Edit Cover Sheet	
Edit Performance Requirements	
Edit Title, Pay Plan and Series	
Edit Cover Sheet	
Edit Classification Remarks	
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This chapter describes how to view, edit, and print a core document that was previously created. This chapter applies to any user having access to the COREDOC system.

## General

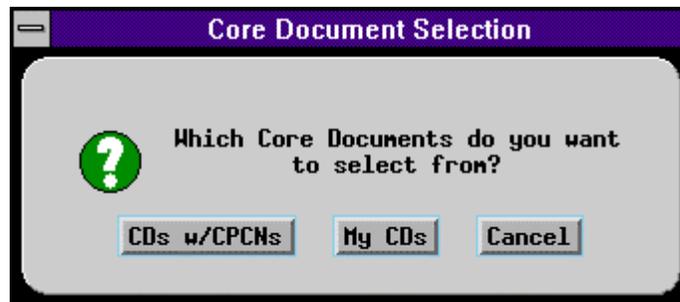
After users have completed generating a core document, the COREDOC system will automatically take users to the Core Document Edit Menu. The Core Document Edit Menu is used to view, edit, and print the core document. If the user wishes to edit an existing core document at a later date, the user must return to the Core Document Main Menu and select the “Open” option from the “File” menu under the Core Document Menu Bar.

## Modifying an Existing Core Document

After users have selected the “Open” option from the “File” menu, the application will display the “Core Document Selection” screen shown in Figure 5-1.

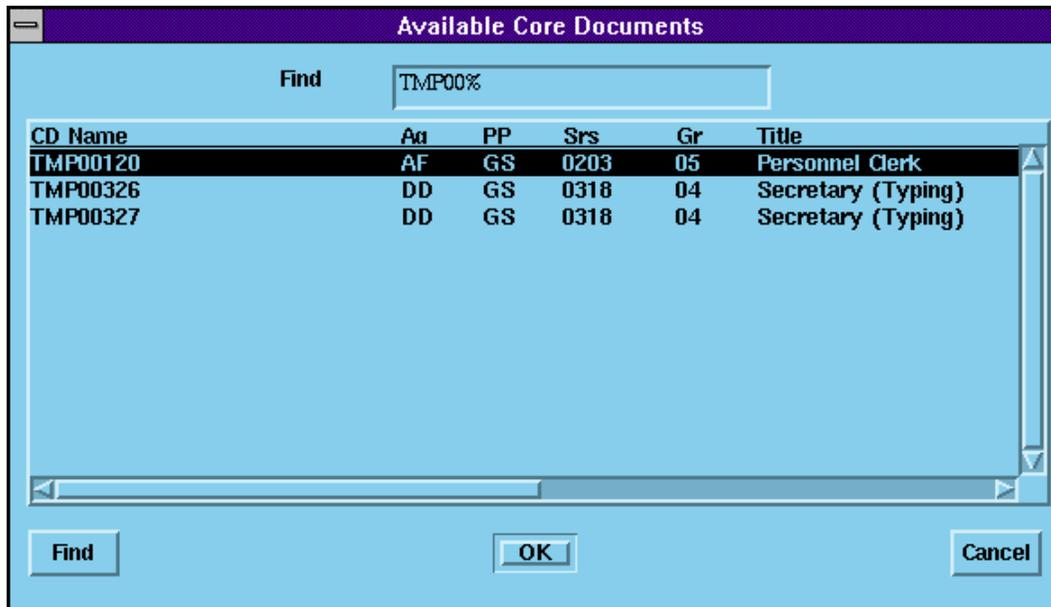
The Core Document Selection screen contains three buttons, “CDs w/CPCNs”, “My CDs”, and “Cancel”. If the user has never created a core document, the “CDs w/CPCNs” and the “Cancel” buttons will be activated. Once the user has linked a core document with a Request for Personnel Action (SF-52) in the PERSACTION system, all three buttons will be activated. Click the “Cancel” button to return to the Core Document Edit Menu.

✓ Note: If the user has previously created core documents, but never linked one to personnel action request, the “Core Document Selection” screen will be by-passed. The application will automatically display the “Available Core Documents” Screen shown in Figure 5-2.



**Figure 5-1. Core Document Selection Screen**

For illustration purposes, the user selected “My CDs” from the Core Document Selection screen (Figure 5-1). The application will now display the Available Core Document screen. This screen contains a listing of all the core documents generated by an individual user.



**Figure 5-2. Available Core Documents Screen**

This screen contains core documents that are listed in numerical order. To view the entire list, scroll through the core documents or use the “Find” feature to locate the core document that will be modified. Click the horizontal scroll bar to view the entire title for a position. Highlight the core document and click the “OK” button, which then displays the core document summary sheet.

**Using the “Find” Feature.** To use the “Find” feature, move the screen pointer to the “Find” block located at the top of the dialog box. The cursor should be placed to the left side of the percentage (%) symbol, then type part or all of the “CD Name” into the block. For example, users can locate a core document with the name of “TMP000031 by entering “T” before the % symbol. The application then narrows the list of selections to those containing a “CD Name” beginning with the letter “T”. To execute the “Find” option, press the **[Enter]** key or click the “Find” command button. When the desired name is located, highlight the selection and then click the “OK” button.

After a core document is selected, the screen for the Core Document Main Edit screen is displayed (Figure 5-3).

Some of the functions shown in the Figure 5-3 are also available from the COREDOC Main Menu screen, such as printing a core document and changing its appearance by modifying the system default designations. Users can modify almost every field in a core document, except those fields determined by their Agencies (Components) to be non-editable such as generic performance criteria.



**Figure 5-3. Core Document Development System Edit Screen**

The Core Document Development System Edit screen contains six options within its menu bar. These six options are:

- **Edit.** This option allows users to add, delete, or modify any part of the core document.
- **View.** This option allows users to view any part of the core document. This option is available to all users.
- **Reports.** This option allows users to create a variety of special output products to the printer or a file.
- **Utility.** The option allows users to configure software to specific requirements.
- **Quit.** Selecting this option will return the user to the Core Document Main Menu screen.
- **Help.** This option allow users to view an on-line tutorial.

**The Edit Menu.** Click the “Edit” option to activate a drop down menu that contains fifteen individual options. Additionally, the “Performance Management” option may be

“grayed-out” for managers and personnelists based on an agency’s internal performance management directives.



**Figure 5-4. Edit Menu Screen**

The Edit Menu has the following options:

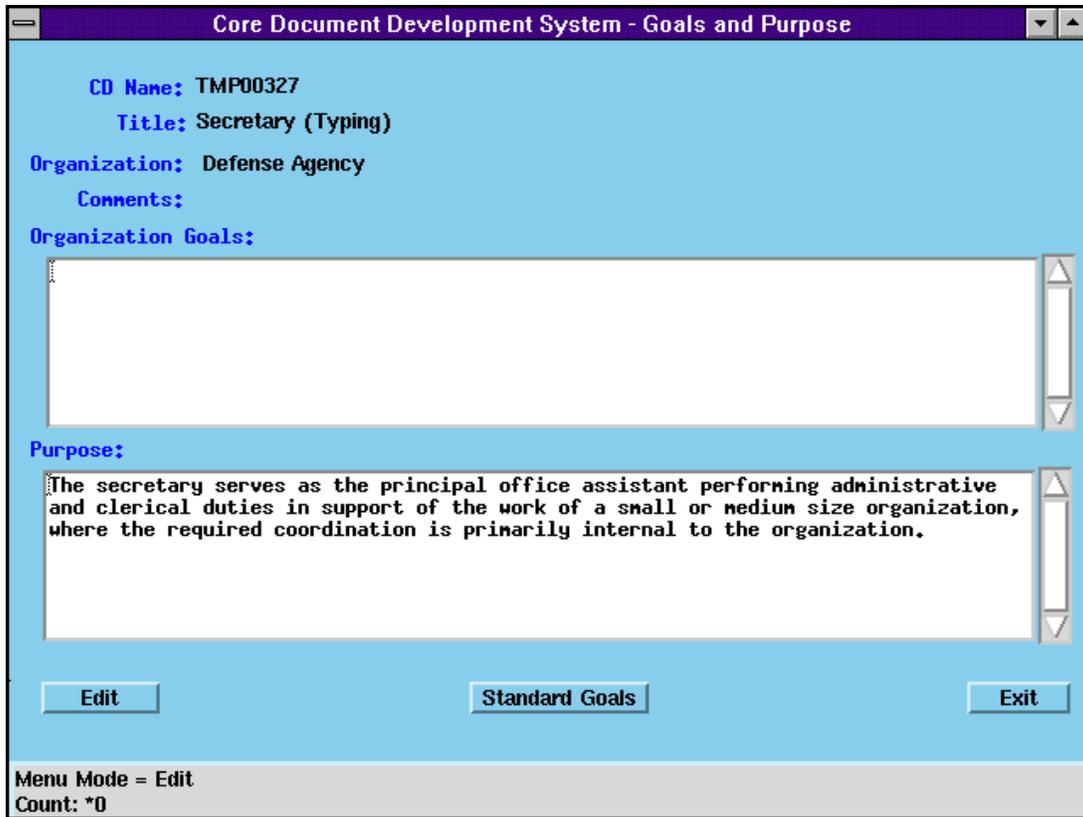
- **Goals and Purpose.** This option allows users to change the Organizational Goals, Name and Purpose of Position for an existing core document
- **Major Duties.** This option allows users to modify duties and tasks in an existing core document.
- **Percentages.** This option allows users to change the percentages of time assigned for each duty in an existing core document.
- **Knowledge Factors.** This option allows users to edit the classification knowledge factors for an existing core document.
- **Other Facts.** This option allows users to edit the other classification factors for an existing core document.
- **KSAs (Competencies).** This option allows users to add, delete or modify the basic knowledge, skills and abilities for an existing core document.
- **Select staffing KSAs.** This option allows users to select or deselect previously selected staffing (requirement) knowledge, skills and abilities in an existing core document.
- **Other Work Requirements.** Allows users to modify, add, delete supplementary duties and responsibilities for an existing core document.

- **Performance Management.** Allows users to add, delete, or modify performance elements and standards for an existing core document. Additionally, a agency-specific Performance Management Plan screen will be displayed when the core document has been assigned a Civilian Position Control Number.
- **Title/Pay Plan/Series.** Allows users to change title, series and/or pay plan for an existing core document.
- **Cover Sheet.** This option allows supervisory and managers during the creation process to complete and sign a core document cover sheet. The Cover Sheet option will be activated under both the “Edit” and “Reports” menus when the CD has been assigned a Civilian Position Control Number.
- **Classification Remarks.** Allows users to add remarks to supplement the summary information for an existing core document.
- **More Occupations.** Allows users to add duties from a different occupational series to an existing core document.
- **Classification Summary.** Allows users to view the classification summary for an existing core document.
- **Exit.** Allows users to quit out of “Edit” mode and return to the Core Document Main Menu screen.

### **Edit Goals And Purpose Requirements**

The first option under the Edit Menu is Goals and Purpose. Select this option by clicking it. The Goals and Purpose Screen contains the CD Name, Title, Organization, Comments, Organizational Goals, and Purpose. There are three buttons listed at the bottom of this menu, “Edit”, “Standard Goals”, and “Exit”.

An Organization’s Name and its Goals will automatically appear in the appropriate blocks on the Core Document Goals and Purpose screen when users click the “Standard Goals” button.

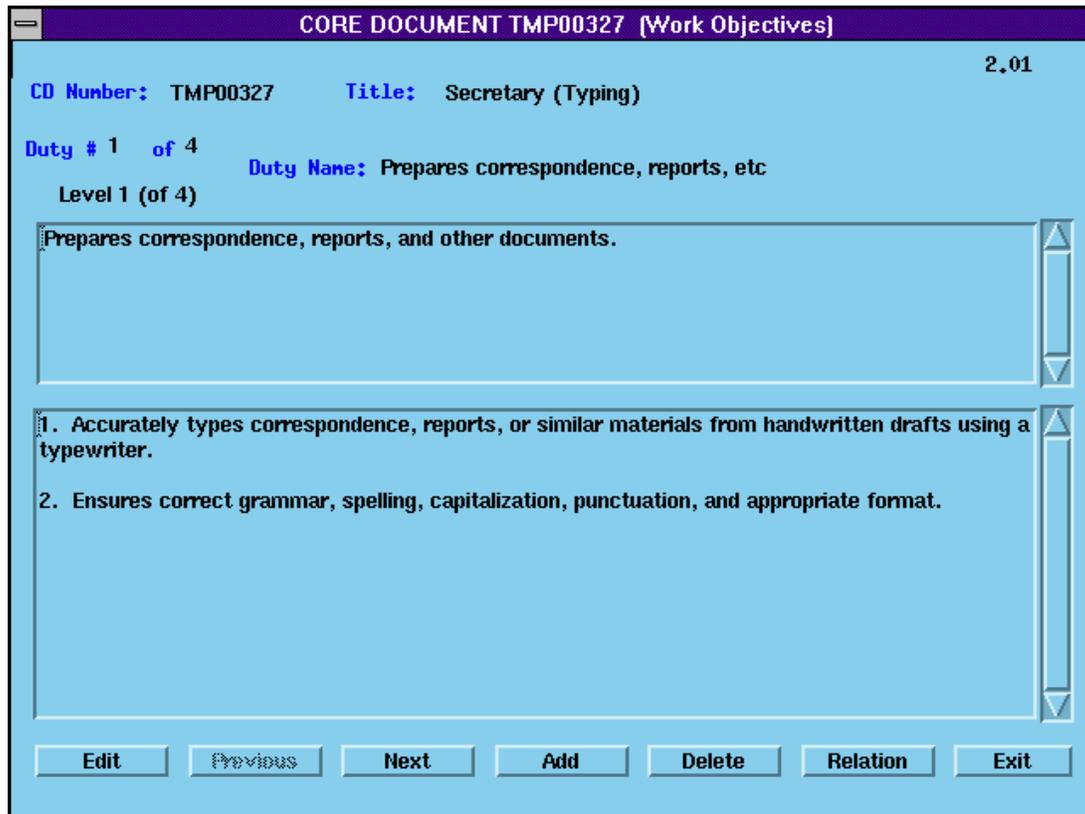


**Figure 5-5. Core Document (Goals and Purpose) Screen**

Use the mouse or the [Tab] key to navigate between the different sections on the screen. To edit any of the information on this screen, place the cursor in one of the blocks, and click the “Edit” button that located at the bottom of the screen. The application will then change the “Edit” button into a “Save” button. After the last modification is made, click the “Save” button. Click the “Continue” button to return to the Core Document Edit Menu (Figure 5-3).

## Edit Major Duties

The second option on the Core Document Edit Menu under the “Edit” option is entitled “Major Duties”.



**Figure 5-6. Core Document TMP00327 (work objectives) Screen**

Figure 5-6 displays the CD Number, Title, Duty Number, Duty Name, Level and Tasks for first duty statement, “Prepares Correspondence, Reports, etc.” for Core Document Number TMP00327.

The "Core Document (Work Objectives)" screen appears with seven control buttons displayed across the bottom of this screen: These buttons are:

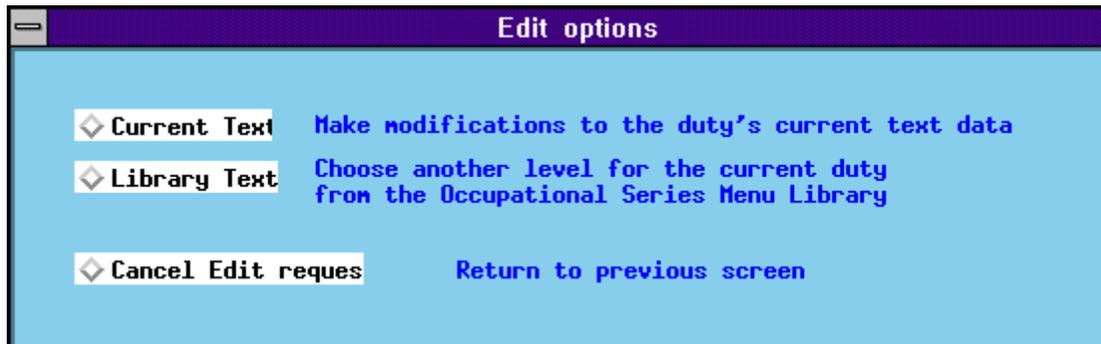
- **Edit.** The Edit button allows users to edit the displayed duty.
- **Next.** When activated, this button allows users to view the next duty statement.
- **Previous.** When activated, this button allows users to view the previous duty statement.
- **Add.** This option allows users to add a new duty statement from the library. If the user has previously selected all the available duties for the occupational series, the

application will display a blank screen. The user can then enter the duty name and a description into the text box.

- **Delete.** The option allows users to delete the current duty statement.
- **Relation.** Clicking this button, allows users to understand the connections between individual duty statements and the classification knowledge and training competencies.
- **Exit.** Clicking this button allows users to return to the Core Document Edit Menu.

The CD Number and the Title of the Position are located at the top of the screen. This screen also displays the current duty number, how many duties exist, and the name of the duty. Immediately below the Duty Name, there are two text boxes. The first text box contains the entire duty statement. The second text box contains the task or objective for that duty statement (i.e. what work is done).

If more than one level is available for a duty statement, click the “Edit” button and the application will display the “Edit Options” dialog box shown in Figure 5-6. The “Edit Options” dialog box allows users to select one of the three options, “Current Text”, “Library Text”, or “Cancel Edit request”. Click the check box to select any of the options.



**Figure 5-7. Edit Options Dialog Box**

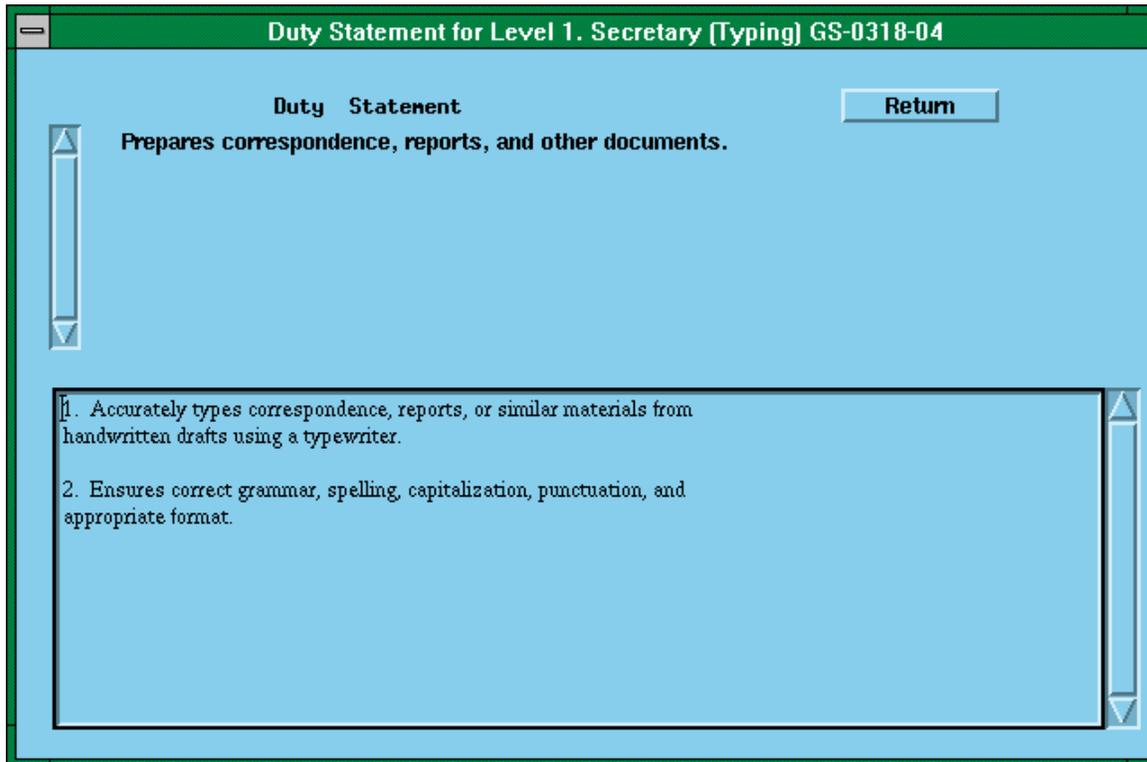
### **Edit Current Text**

The “Edit Current Text” option allows users to modify the current text on the screen. To edit any of these sections, users must first place the screen pointer into one of the text boxes. To change any of the text, delete the current text and type the new text in its place. Users may also type additional text as desired. The blinking cursor will indicate the current section to be edited.

When users begin editing text, the cursor is in the "Duty Name" field. Using the mouse, go to the section immediately below the “Duty Name” field. This is the field for the duty statement. Immediately below this is the field for the various tasks. Users can view all of

the tasks (duty statements) contained in this field by using the scroll bar located on the right-hand side of the screen.

To modify the text in the “Duty” or “Task” field, click the “Edit” button, the application will display the entire duty statement. For illustration, Figure 5-8 contains the “Duty Statement for Level 1, Secretary (Typing), GS-0318-04”.



**Figure 5-8. Edit Option - Current Duty Statement Text Screen**

The application automatically places the cursor into the text box. Use the **[Arrow]** keys or the scroll bar to navigate through the text box. Once a duty is located, use the **[backspace]** or the **[delete]** key to remove the unwanted text, then type the new text. If users want to add a new work objective to the “Duty” section, move the cursor to the last task and begin typing.

If users are in the Duty section and want to move to the “Tasks” text box, users must use the mouse to place the screen pointer in the “Tasks” section of the screen. They will now see the blinking cursor in the “Tasks” section. Use the scroll bar or the **[Arrow]** keys to navigate through the contents of the “Task” section. To add a new work objective to the “task”, move the cursor to the last task and begin typing. To move the cursor back to the “Duty” section of the Work Objective screen, press the **[Page Up]** key. Users should note that the blinking cursor has moved to the previous section.

After the last change is made, click the “Return” box located at the top right-hand corner of the screen. The application will then return the user to Core Document Work Objective (Figure 5-6) screen.

### Edit Library Text

The Edit Library Text option allows users to view the individual duties from the occupational series previous selected. To select a new duty level, click the checkbox next to the desired level. The application will automatically display a description of the level selected.

Click the “Statement” button to view additional information concerning a new duty statement from the Core Document Library. Clicking the “Cancel” button will reinstate the previously selected work objectives without re-establishing the duty.

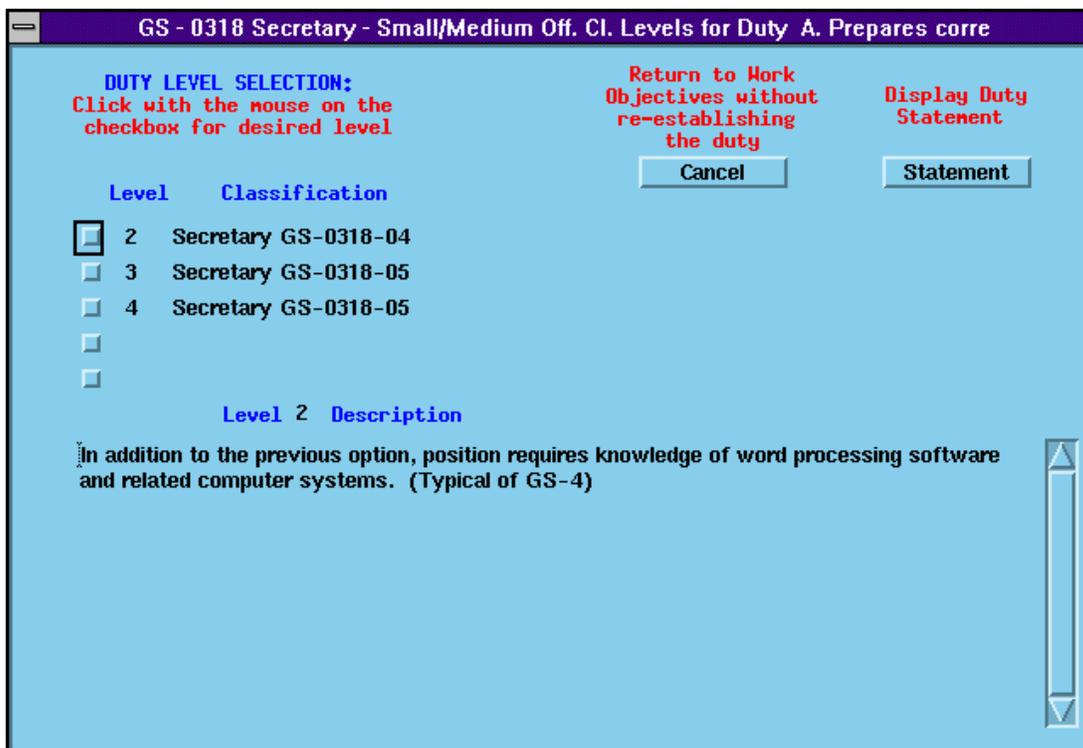


Figure 5-9 Edit Options - Library Text Screen

### Cancel Edit Request

Clicking the “Cancel Edit Request” button on the “Edit Options” dialog box will return users to the Edit Work Objectives screen (see Figure 5-6).

## Relationship

The identification of knowledge requirements is crucial to the classification and staffing process whether the classification standards are in the Factor Evaluation System (FES) or the narrative format. To review these requirements, type the letter "R" to display the Relation screens.

Figure 5-10 shows the "Related Competencies KSA" screen which displays a list of competencies associated with a selected duty statement. The subject matter experts who developed the requirements for the COREDOC system determined that training competencies are important to the staffing process. The subject matter experts identified a list of knowledges, skills, and abilities that are crucial to successful performance of an occupation. However, users can select additional competencies for a duty statement. Clicking the checkbox adjacent to the duty name will select it. Additionally, clicking the checkbox will deselect an option already marked. Click the "Exit" button to return to the Major Duties (Work Objective) Screen (Figure 5-6).

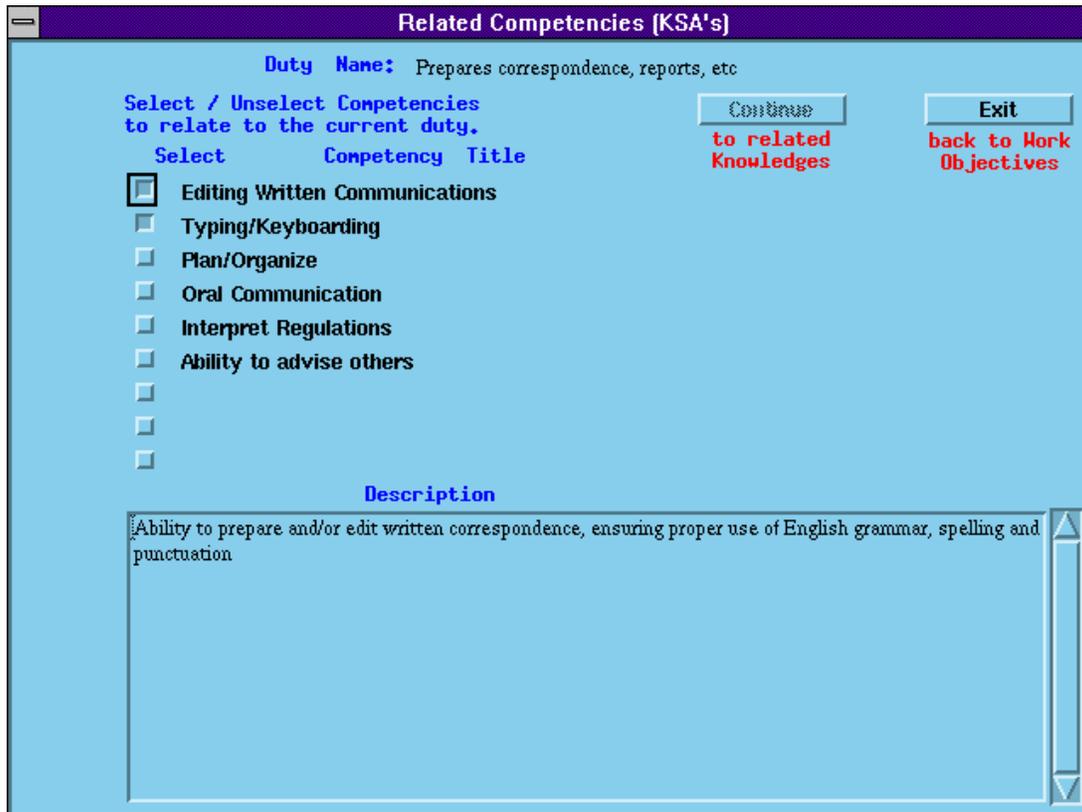


Figure 5-10. Relations Screen - Related Competencies (KSAs) Screen

If the user has modified the duty statement, the “Continue” button will be activated. Clicking the “Continue” button on the “Related Competencies (KSAs) screen allows users to view a list of related knowledges for a duty statement (Figure 5-11). However, users can not edit the knowledge statements associated with a duty statement from the “Related Knowledges” Screen. Clicking the checkbox next to a “Knowledge Title” will allow users to view a detailed description in the text box.

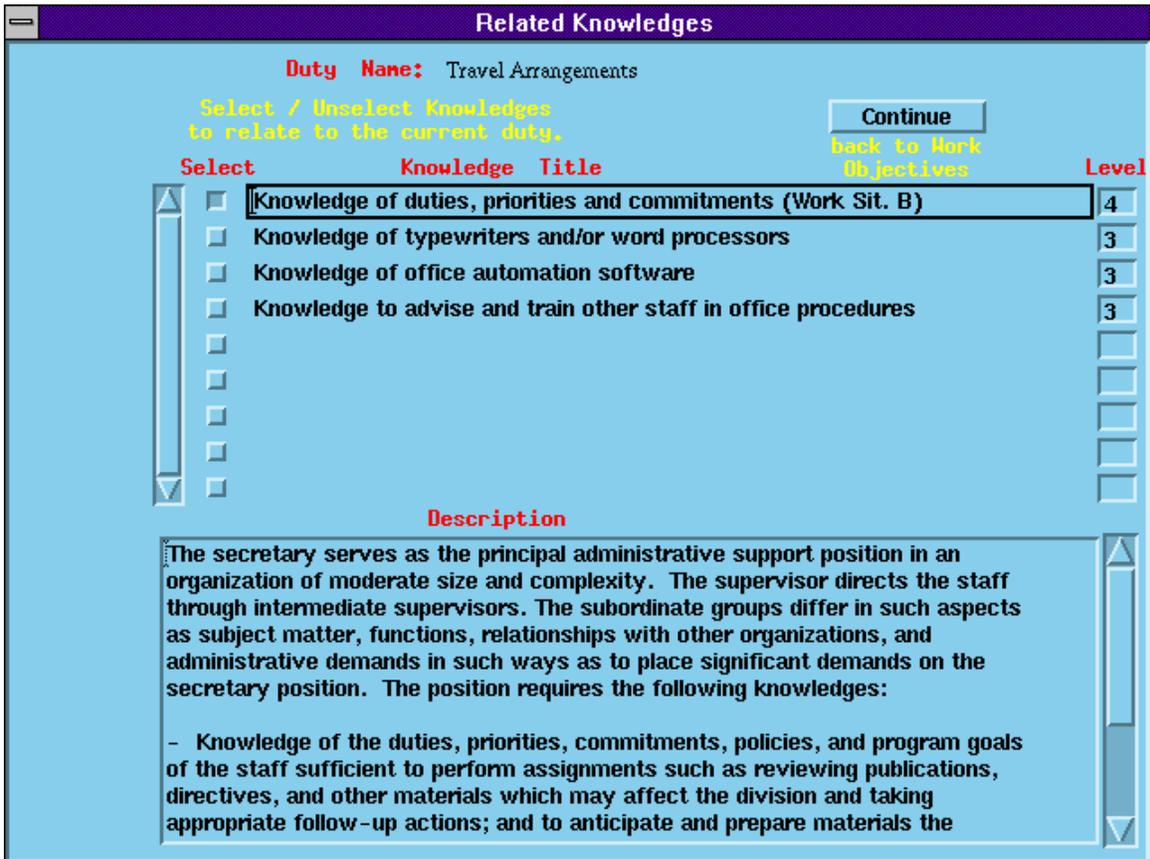


Figure 5-11. Related Knowledges Screen

Click the “Continue” button to return to the Core Document (Work Objectives) menu (Figure 5-6).

The “Core Document (Work Objectives) menu contains five other options, “Previous”, “Next”, “Add”, “Delete”, and “Exit”. If users want to see the Next or remaining list of duties, continue clicking the “Next” button until all of the duty statements have been viewed. The “Next” button is automatically disabled when there are no additional duties. If users have added or deleted a duty, the application will take the user to the Percentages screen. Otherwise, users will be returned to the Edit Menu Screen (Figure 5-4).

## Modify Percentages Of Assigned Duties

This is the third option under the “Edit” menu within the Core Document Edit Menu. This option allows users to modify the percentages for each of the assigned duties.

The screenshot shows a window titled "Percentages of Time" with a light blue background. It contains a table with four columns: "%", "CD", "Grade", and "Duty". The table lists four duties, each with a percentage of 25 and a grade of 04. At the bottom of the screen, it displays "Total Percentage: 100 %" and a "Continue" button. A status bar at the very bottom shows "Count: \*4".

%	CD	Grade	Duty
25		04	Prepares correspondence, reports, etc
25		04	Maintains calendars and schedules
25		04	Receives and screens calls and visitors
25		04	Travel arrangements

Total Percentage: 100 %

Continue

Count: \*4

**Figure 5-12. Percentages of Time Screen**

Click the “Percentages” option and the application will display the Percentages of Time screen (Figure 5-12). This screen displays a list of the duties that have been selected for a core document. The screen also displays the percentages of time spent performing each duty or work objective. The total percentage for all the position duties is shown at the bottom of the screen. Generally, the final total must be 100 percent. However, depending on the user’s classification policy, the percentage may fall within a range of 90 to 100. If the user’s organization permits a total of less than 100 percent, and the total is between 90 and 100 percent, the system will automatically generate an additional duty entitled "Performs Other Duties As Assigned".

Use the [Arrow] keys or the mouse to move the cursor to the desired duty statement. To change a percentage of any duty, move the cursor to the field and enter the new number. The block at the bottom of this screen entitled "Total Percentage" will show the total percentage after each revision. A maximum of two numbers can be entered on the percentage line for any duty listed. Therefore, if a percentage of 100 or more is assigned to any duty statement, the system will prevent the user from leaving this menu.

Additionally, the application will display a warning message that the total percentage must be 100 percent or between 90 and 100 percent, depending on the organizational component. Users will be returned to the “Modify Percentages” screen until the total percentage is in compliance with their agency requirements.

If the CRITICAL/NONCRITICAL setting was selected, a column appears between percentage and duty. The software automatically indicates that all duties are critical by assigning “C” in the column headed C (for criticality). To change a duty to non-critical: press the [Tab] key or move the blinking cursor to the appropriate entry in the “C” column then type the letter "N". Click the “Continue” button to return to the Core Document Edit Menu.

### Edit Knowledge Factor

The “Edit Knowledge Factor” option shows the classification knowledge requirements that were automatically assigned based on the duties selected by the user. Upon selection of this option, a menu will appear on the screen entitled "Core Document (Classification Knowledge Factors)".

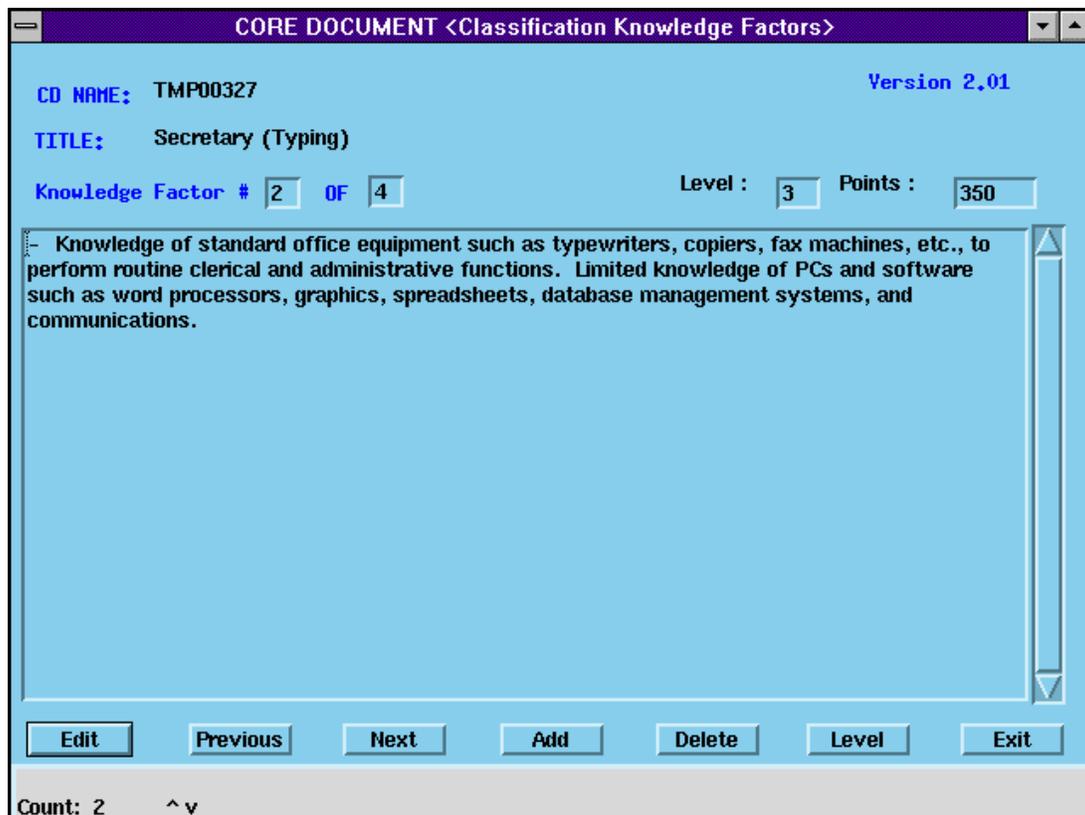


Figure 5-13. Core Document - Classification Knowledge Factors Screen

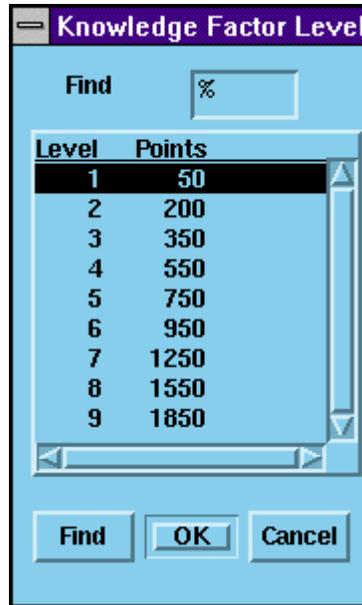
The Core Document, Classification Knowledge Factors screen contains seven buttons. These buttons are:

- **Edit.** The Edit button allows users to edit the classification knowledge factor.
- **Next.** When activated, this button allows users to view the next duty knowledge factor.
- **Previous.** When activated, this button allows users to view the previous knowledge factor.
- **Add.** This option allows users to add a new knowledge factor.
- **Delete.** This option allows users to delete the current knowledge factor.
- **Level.** This option allows users to change the classification level of a new or modified knowledge factor.
- **Exit.** This options allows user to return to Core Document Edit Menu

To edit the information, click the “Edit” button. Use the **[Page Up/Page Down]** keys or the **[Arrow]** keys to move the cursor to the desired location. After users have finished editing, click the “End” button which now appears at the bottom of the screen. This will take users back to the “Knowledge Factors” Screen.

To add a new knowledge factor, click the “Add” button. The application will then create a new record and append it to the end of the knowledge factors section. Users can make changes to the actual text displayed. After users have completed entering their information, click the “End” button to continue to the next step in the process.

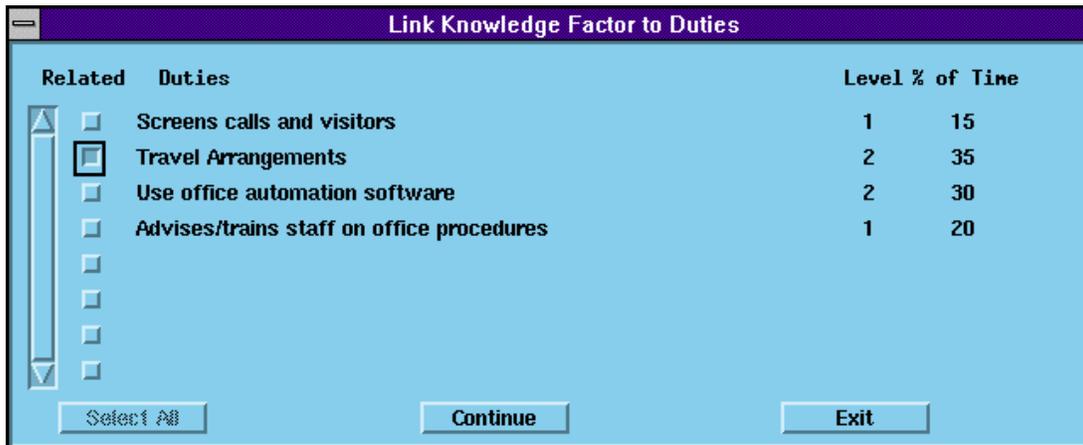
If users add a new classification knowledge or edit a current knowledge requirement, the application will display the different classification levels for that knowledge (Figure 5-14). We recommend that users contact a subject matter expert in the Civilian Human Resources Office for guidance on the proper determination of a classification level if they are unfamiliar with a classification standard.



**Figure 5-14. Knowledge Factor Level Screen**

Using the scroll bars or the “Find” feature, locate the desired knowledge factor level, then click the “OK” button.

The application will then display a message that states: “Do you want to Link it to a Duty in order to display it in the Core Document”. Click the “Yes” button. The application will display the “Link Knowledge Factor to Duties” dialog box shown in Figure 5-15).



**Figure 5-15. Link Knowledge Factor to Duties Dialog Box**

To select a related duty, click one of the check boxes adjacent to a duty name. Users may elect to link the new knowledge factor with all of the duty statements by clicking the “Select All” option. Click the “Continue” button to return to the knowledge factors screen.

The Knowledge Factors screen contains several additional options, “Next”, “Previous”, “Delete”, and “Exit”. If users select the “Next” option, any necessary editorial changes to the other classification knowledge requirements can be made. They do not have to go through all of the listed knowledge requirements before leaving this screen. Users can end the edit process any time by clicking the “Exit” button.

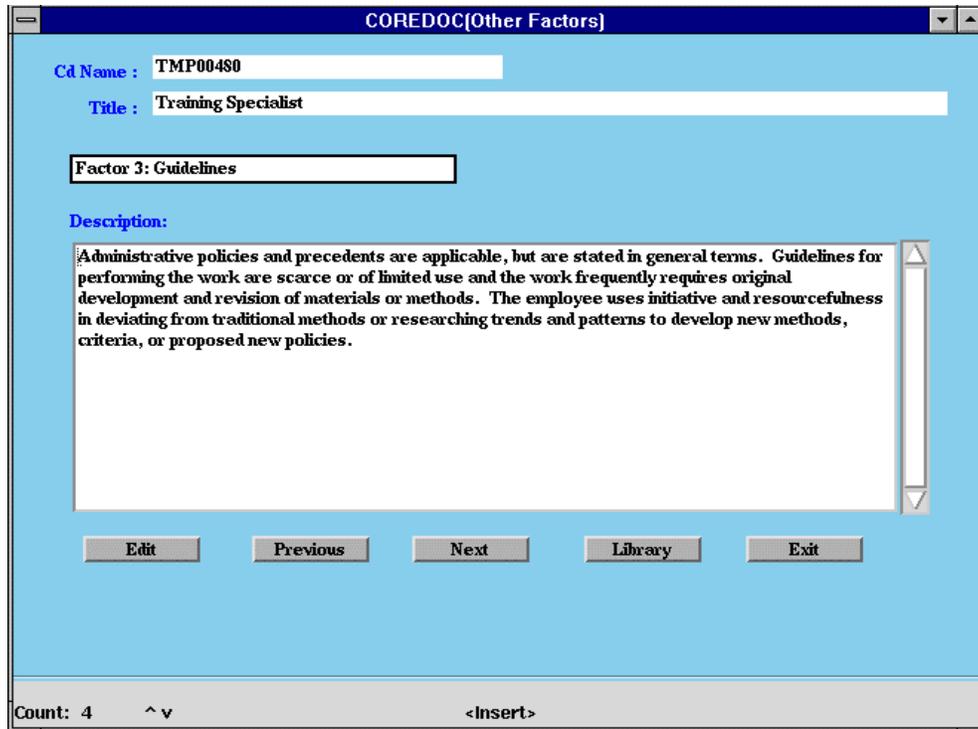
Users can remove any information from a classification knowledge factor by clicking the “Delete” button. The application will then display a confirmation message. Click the “Yes” button to delete the knowledge factor or the “No” button to cancel the delete command.

 **Caution:** If users delete a classification knowledge, it could have an impact on the classification of the position. The classification knowledge linked to the duties in the occupational database were carefully reviewed and approved by subject matter experts and personnel specialists throughout the Department of Defense.

Clicking the “Exit” button will return users to the Core Document Edit Menu.

### **Edit Other Classification Factors**

In the Core Document Edit Menu, under the Edit option, click “Other Factors”. The application will display the “Core Document (Other Factors)” screen shown in Figure 5-16. This option allows users to edit classification factors two through nine under the Factor Evaluation System (FES) for General Schedule positions and Factors Two through Four in the Federal Wage System. Upon selection of the “Other Factors” option, the application will display a screen that lists the factors in numerical order.



**Figure 5-16. Core Document - Other Factors Screen**

The Core Document - Other Factors screen contains six command buttons.

- **Edit.** This option allows users to edit a classification factor.
- **Next.** When activated, this button allows users to view the next knowledge factor.
- **Previous.** When activated, this button allows users to view the previous knowledge factor.
- **Library.** This option allows users to select other factor level options from the occupational database library.
- **Exit.** This option end the edit mode and returns users to the Core Document Edit Menu.
- **End.** This option is dimmed until the edit option is selected.

If users click the “Edit” button, a blinking cursor will appear on the screen. All the buttons will be disabled and the “End” button will be activated. Use the [Arrow] keys or mouse to move the cursor to a section of the text that will be modified. Users also have the option to select other options, using the Library option.

If users edit the factor, a box is displayed that shows the different classification levels for the factor. Users should refer to the classification standard for the subject occupation to properly determine which level is appropriate based on their revisions. Clicking the “End” button will permit users to discontinue any further text modifications and will

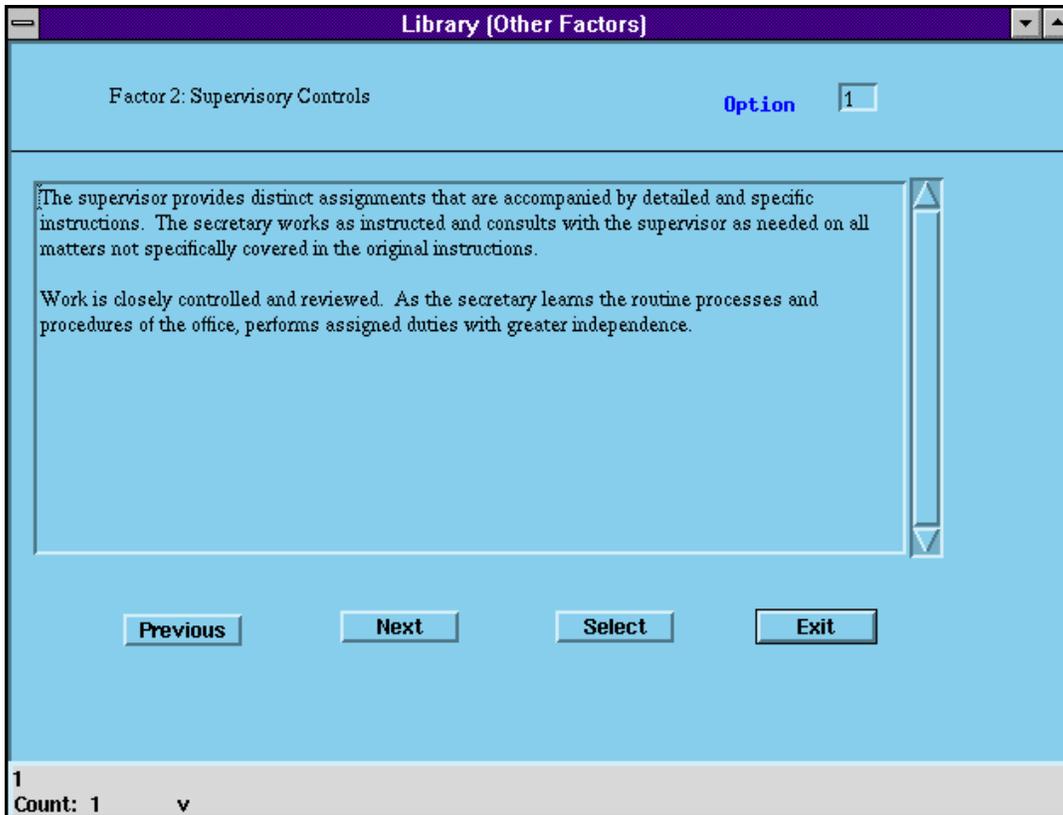
display the “FACTLVL” dialog box shown in Figure 5-17. The “FACTLVL” dialog box displays the different classification levels and the point assigned for each classification factor.



**Figure 5-17. Other Factors - Factor Level Dialog Box**

Using the scroll bars or the “Find” feature, locate the desired classification factor level, then click the “OK” button. The application will return users to the “Core Document Other Factors” screen.

User can select classification factors from the occupational library within the COREDOC system, by clicking the “Library” command button. The application will then display a menu entitled "Library (Other Factors)" shown in Figure 5-18). These factor level descriptions will vary depending on the occupation selected, factor level, and factor type.

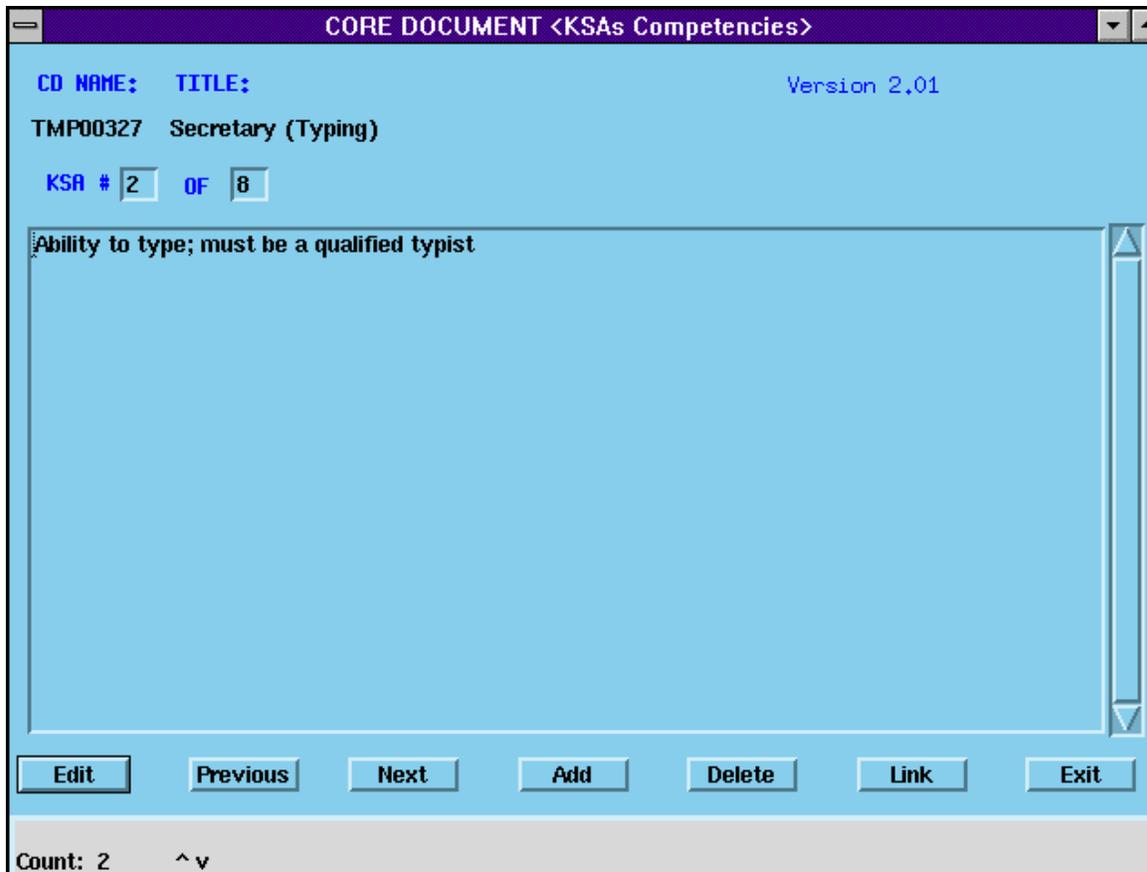


**Figure 5-18. Library - Other Factors Screen**

Click the “Select” button, to chose a description of a factor level. To see the next factor level, click the “Next” button. To view the earlier factor level, click the “Previous” button. Clicking the “Exit” button, allows users to return to the “Core Document (other Factors)” screen (see Figure 5-16) without making any changes. To view other factor levels, such as Factor 2: Supervisory Controls, users must return to the “Core Document (Other Classification Factors)” screen. Click the “Exit” button to return to the Core Document Edit Menu (Figure 5-4).

## **Edit KSAs (Competencies)**

The next option on the Core Document Edit Menu, under the Edit option, is KSAs (Competencies) screen. This screen shows the first of the training competencies that are currently associated with the duties chosen by the user. This screen will also display the KSA followed by the number of the current competency and the total number of competencies linked to this core document. If the user has not previously edited this section, the screen will display those competencies which were preselected by the COREDOC system based upon the duties chosen.



**Figure 5-19. Core Document (KSAs - Competencies) Screen**

There are seven options available in this menu that are listed at the bottom of the screen:

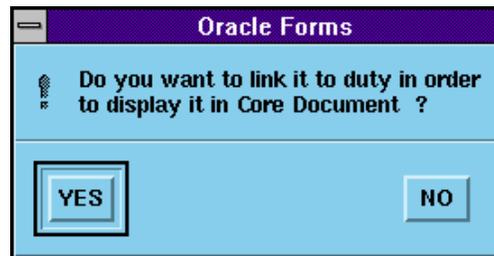
- **Edit.** This option allows users to edit the displayed competency (KSA).
- **Next.** This option allows users to view the next competency (KSA).
- **Previous.** This option allows users to view the previous competency (KSA).
- **Add.** This option allows users to add a new competency (KSA).
- **Delete.** This option allows users to delete the current competency (KSA).
- **Link.** This option allows users to link one or more competencies to a duty statement.
- **Exit.** This option allows users to return to Core Document Edit Menu

Users can make changes to the actual text displayed or go to the library and see the other competencies (KSAs) which were available for the selected occupations. To access the KSA Library, users must click the “Exit” button to exit this menu, then select the “Staffing KSAs” option from the “Edit” menu. Instructions for selecting Staffing KSAs are provided in the next section of this User Guide.

Click the “Edit” button, to edit the KSA shown on the screen. Users will notice that all the buttons at the bottom of the screen have disappeared, and a new button “End” now appears. The COREDOC system assigns a number for each KSA that is located above the KSA text.

Use the [Arrow] keys or mouse to move the cursor. Make the necessary changes to the text of this KSA and click the “End” button at the bottom of the screen to end this process. To view another KSA, click the “Next” button. The next KSA will then appear allowing users to make their desired modifications. Continue clicking the “Next” button, to view the remaining KSAs.

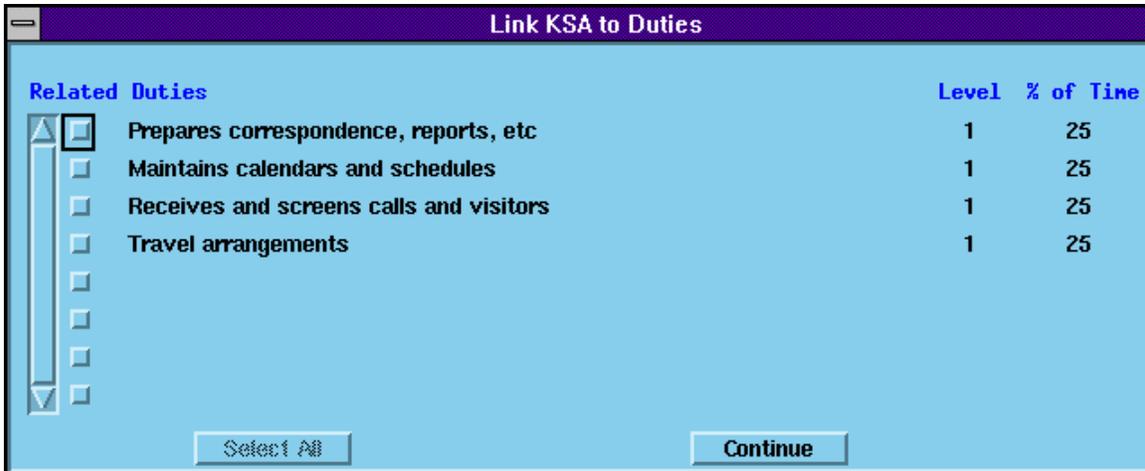
To add another KSA, click the “Add” button, the application will then display a new Core Document KSA screen. Clicking the “End” button will take users to the next step in the process. A box will appear asking users, “Do you want to link it (KSA) to a duty in order to display it in the Core Document?”.



**Figure 5-20. Message Screen.**

If users click the “No” button, the individual competency will not be linked, and they will be returned to the CORE DOCUMENT (KSAs - Competencies) screen. If they select “Yes”, a new menu will then appear entitled “Link KSA to Duties” (Figure 5-21).

To select a related duty, click one of the check boxes adjacent to a duty name. Users may elect to link the new KSA (competency) with all of the duty statements by clicking the “Select All” option.



**Figure 5-21. Link KSA to Duties Screen**

Click the “Continue” button, to return to the Core Document (KSAs) menu and to the next step in the process.

The “Core Document (KSAs - Competencies)” screen contains several additional options, “Next”, “Previous”, “Delete”, and “Exit”. If users select the “Next” option, any necessary editorial changes can be made to the other KSA requirements. Users do not have to go through all of the listed KSAs requirements before they can exit. They can end the edit process any time by clicking the “Exit” button.

Users can remove any information from “Core Document (KSAs - Competencies)” screen by clicking the “Delete” button. The application will then display a confirmation message. Click the “Yes” button to delete a KSAs (Competency) or the “No” button to cancel the delete command. Clicking the “Exit” button will return users to the Core Document Edit Menu (Figure 5-4).

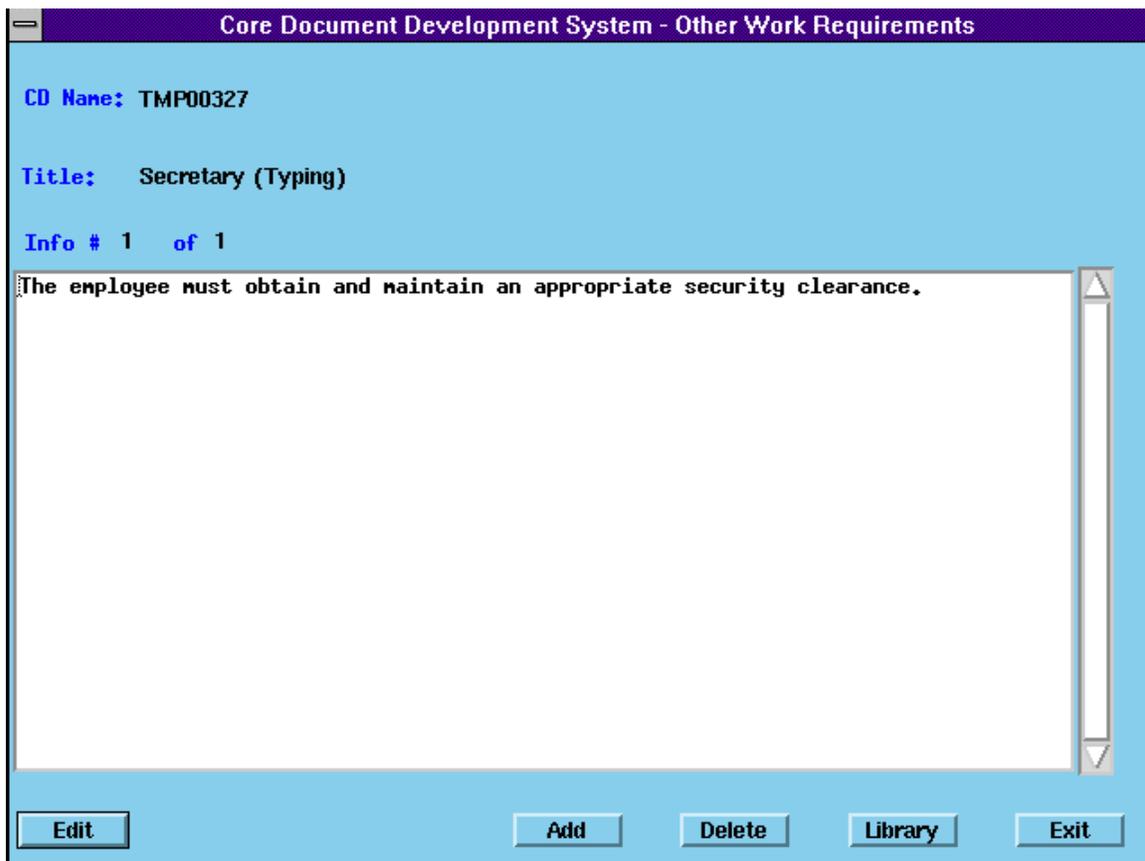
## Select Staffing KSAs

The seventh option on the Core Document Edit Menu, under the Edit option, is “Select Staffing KSAs”. By clicking the “Select Staffing KSAs” option, the menu titled "Knowledge, Skills, and Abilities" will appear on the user’s screen. Make the KSA selections or deletions from the items listed in the column entitled "Competency Identified in Position" by clicking the check boxes adjacent to it.

As users scroll through the KSAs, a description of these requirements will be shown in greater detail in the section of this menu titled "Description". Select the “Exit w/save” option, to save the changes made on the screen. If users do not wish to save the changes made on screen, click the “Exit w/o save”.

## Select Other Work Requirements

Users may add supplemental information to the core document that has no affect on the classification but may be essential in filling the position. To add supplementary information, select the eighth option entitled "Other Work Requirements" in the Core Document Edit Menu under the Edit option. Some examples of supplementary information would include the requirement to work overtime or shift work, security clearances, or the need for frequent travel.



**Figure 5-22. Core Document - Supplementary Information Screen**

The application will then display the "Core Document (Supplementary Information)". Screen. There are seven options available in this menu and these are listed at the bottom of the screen.

- **Edit.** This option allows users to edit any supplemental item.
- **Next.** This option allows users to view the next supplemental item.
- **Previous.** This option allows users to view the previous supplemental item.

- **Add.** This option allows users to add a new supplemental item.
- **Delete.** This option allows users to delete the a supplemental item.
- **Library.** This option allows users to view a list of supplemental items for an occupational series.
- **Exit.** This option allows users to end the edit mode and return to Core Document Edit Menu

Clicking the “Edit” button allows users to modify the position requirement statements found in this menu. The system assigns a number for that particular requirement and it is located above the requirement description text. Users cannot edit this number since it is assigned by the COREDOC system. Make the necessary changes to the text of this job requirement then click the “End” button. The application will then end the edit process and display the seven options at the bottom of the screen again.

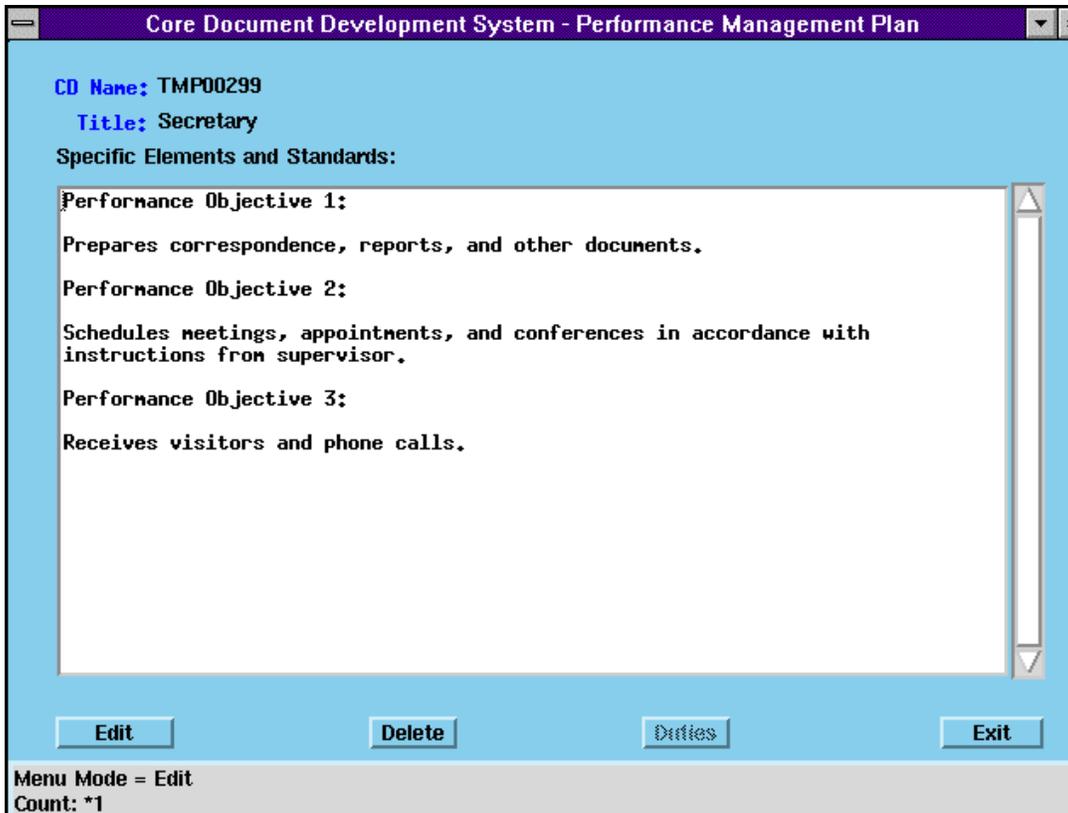
The “Core Document (supplementary Information)” screen contains several additional options, “Next”, “Previous”, “Delete”, and “Exit”. If users select the “Next” option, any necessary editorial changes can be made to the other supplementary requirements. Users can end the edit process any time by clicking the “Exit” button.

Users can add another supplementary requirement for a position, by clicking the “Add” command button. After entering the supplementary requirements, click the “End” button to return to the Core Document (Supplementary Information) menu. Users can make changes to the actual text displayed or go to the library and see the other job requirements which were available for the selected occupations.

Users can remove any supplementary information from a core document by clicking the “Delete” button. The application will then display a confirmation message. Click the “Yes” button to delete the knowledge factor or the “No” button to cancel the delete command.

### **Edit Performance Requirements**

The “Edit Performance Requirements” option allows users to modify a Performance Management Plan. To edit a performance plan, click the ninth option under “Edit” menu in the Core Document Edit Menu. This option allows users to add non-classification information related to the performance appraisal process.



**Figure 5-23. Performance Management Plan Screen**

The CD Number and the Title of the Position appear at the top of the menu screen. Users have four options from which to select on this screen, “Edit”, “Delete”, “Duties”, and “Continue”. Click the “Duties” button to select the Standard Performance Requirements. After selecting this option, the COREDOC system will automatically insert the Duty (objective) summary statements from each of the duties that were selected. Users can add or edit the information text displayed in this menu. There may be more than one performance objective listed in this menu.

Click the “Edit” button to modify a performance element. Use the scroll bar to navigate through the performance elements. Clicking the “Delete” button, will remove all of the performance elements from the core document.

Click the “Exit” button and the application will display either the Core Document Edit Menu or an agency specific performance management plan screen. The Agency Specific Performance Management Plan screen will be displayed, if a Civilian Position Control Number was assigned to the core document.

For illustration purposes the Army Performance Management Plan screen is shown in Figure 5-24.

The screenshot shows a software window titled "Core Document Development System - Army Performance Information". The interface is light blue with white text. At the top, it displays "CD Name: TMP00299" and "Title: Secretary". Below this, there are fields for "Date Period" (with "to" between two boxes), "Rate: Unencumbered Position", "Initial:" (with a box), "Midpoint:" (with a box), and "Rater Chain". Further down are "Rater:" (with a box), "Intermediate (Optional):" (with a box), and "Senior:" (with a box). There are three large text areas for "Initial Key Points:", "Midpoint Key Points:", and "Employee's Significant Contributions:", each with a vertical scrollbar on the right. At the bottom of the form are three buttons: "Edit", "Save", and "Continue". A grey status bar at the very bottom shows "Count: \*0".

Figure 5-24. Army Performance Management Plan Screen

The Army Performance Management Plan screen contains several blocks, including the CD Name, Title of the Position, Rating Periods, names of the first-level and second-level supervisors, and three comment blocks. Users have three options from which to select on this screen, “Edit”, “Save”, and “Continue”.

Click the “Edit” button to modify the information on the screen. To end the “edit” function, click the “Save” button. Click the “Continue” button to return to the COREDOC Edit Menu Screen.

## Edit Title, Pay Plan, and Series

Select the tenth option on the Core Document Edit Menu under the “Edit” option to modify the title, pay plan and series of the position. Users can select this option by selecting it with the mouse.

A new menu will appear titled Core Document (Title, Pay Plan, Series and Grade). This screen shows the title, pay plan, series, and grade that the COREDOC system automatically generated. Users can not edit the grade of the position. Click the “Edit” button to change the Title, Pay Plan or Occupational Series. Users can move to the next item by using the [Tab] key.

Users may view the original list of title options appropriate for the duty list by clicking the “Titles” button. Use the mouse to highlight a particular title.

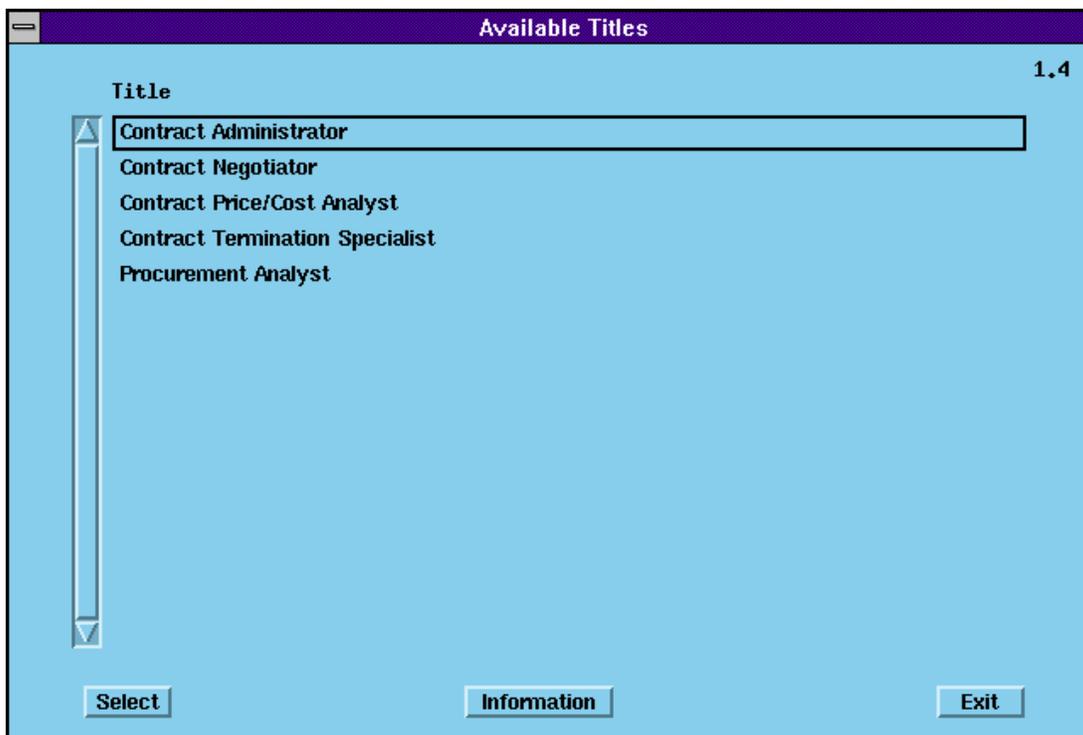


Figure 5-25. Available Titles Screen

Click the “Information” button to see information about titling practices appropriate for the position. Click the “Select” button to make the title selection. The Application will then display the Core Document Summary screen.

## **Chapter Five: Editing a Core Document**

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To change the grade, users must either change the duties or modify the classification factors from the Duty, Classification Knowledge or Other Factors options. Click the “Exit” button to end the edit process and return to the Core Document Edit Menu.

## Edit Cover Sheet

The “Edit Cover Sheet” option allows users to complete a Cover Sheet for a core document. To edit the cover sheet, click the eleventh option under “Edit” menu in the Core Document Edit Menu. Depending on the Agency Default, the application will display either a generic or an agency specific cover sheet.

For illustration purposes, the cover sheet shown in Figures 5-26, 5-27, and 5-28 is displayed for Air Force users.

**Core Document - Cover Sheet Screen 1 of 3**

Classification: Safety and Occupational Health Specialist 65-0018-12

Unofficial Title: Safety and Occupational Health Specialist

Employ Off Loc: \_\_\_\_\_ Job Share:  N

Duty Station: \_\_\_\_\_ Emergency Ess:  N

Target Grade: 12 Mobilization:  N

Reason for Submission:      Sensitivity:      Position is:

- Redescription
- Reestablishment
- New
- Other
- Non-Sensitive
- Noncritical Sensitive
- Critical Sensitive
- Special Sensitive
- Supervisory
- Managerial
- Neither

Previous PD#: \_\_\_\_\_ Financial Statement(s) Required:

- Public Financial Disclosure Report
- Confidential Financial Disclosure Report

Immediate Supervisor:

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Higher Level Supervisor or Manager/Reviewer:

Name: \_\_\_\_\_

Title: \_\_\_\_\_

Help      Next      Save      Exit

Please use TAB key to move to next field  
Count: \*0

**Figure 5-26. Cover Sheet- Page 1**

Page one of the Cover Sheet contains four buttons at the bottom of the screen.

- **Help.** This option allows user to access a table of values for a particular block on the cover sheet.
- **Next.** When activated, this button allows users to view the next page of the cover sheet.
- **Save.** This option allows users to save the information entered on the screen.

- **Exit.** Selecting this option will return the user to the Core Document Main Menu screen.

Click the “Next” button. The application will then display page two of the cover sheet.

Core Document - Cover Sheet Screen 2 of 3

Classification: Safety and Occupational Health Specialist GS-0018-12

Organization: AIR FORCE

First Subdivision:

Second Subdivision:

Third Subdivision:

Fourth Subdivision:

Fifth Subdivision:

Help Prev Next Save Exit

Please use TAB key to move to next field.  
Count: \*0

**Figure 5-27. Cover Sheet - Page 2**

Click the “Next” button. The application will then display the last page of the cover sheet.

Core Document - Cover Sheet Screen 3 of 3

Classification: Secretary (Typing) GS-0318-04

Additional Classification Information:

Career Prog Id:

Org & Func Code:

1st Skill Code: 0%

2nd Skill Code: 0%

3rd Skill Code: 0%

Aquisition Position:

Comp Level:  BOC:  FLSA:  Position Status:

BUS:  OPM Func Cd:   Exempt  Competitive

Drug Test: N Subject to I/A: N  Nonexempt  Excepted

Agency Use:  Mobility:  AFSC/MOS:   SES (Gen.)

Key Pos:  Envir. Diff.:  CFI:   SES (CR)

Remarks:   Comp/Except

Official Pay Plan, Series, Grade and Title :  
 GS-0318-04 Secretary (Typing)

Official Taking Classification Action : Position Number (CPCN): 9P00X00150  
 Name:  Date Established: 10/02/96  
 Title:

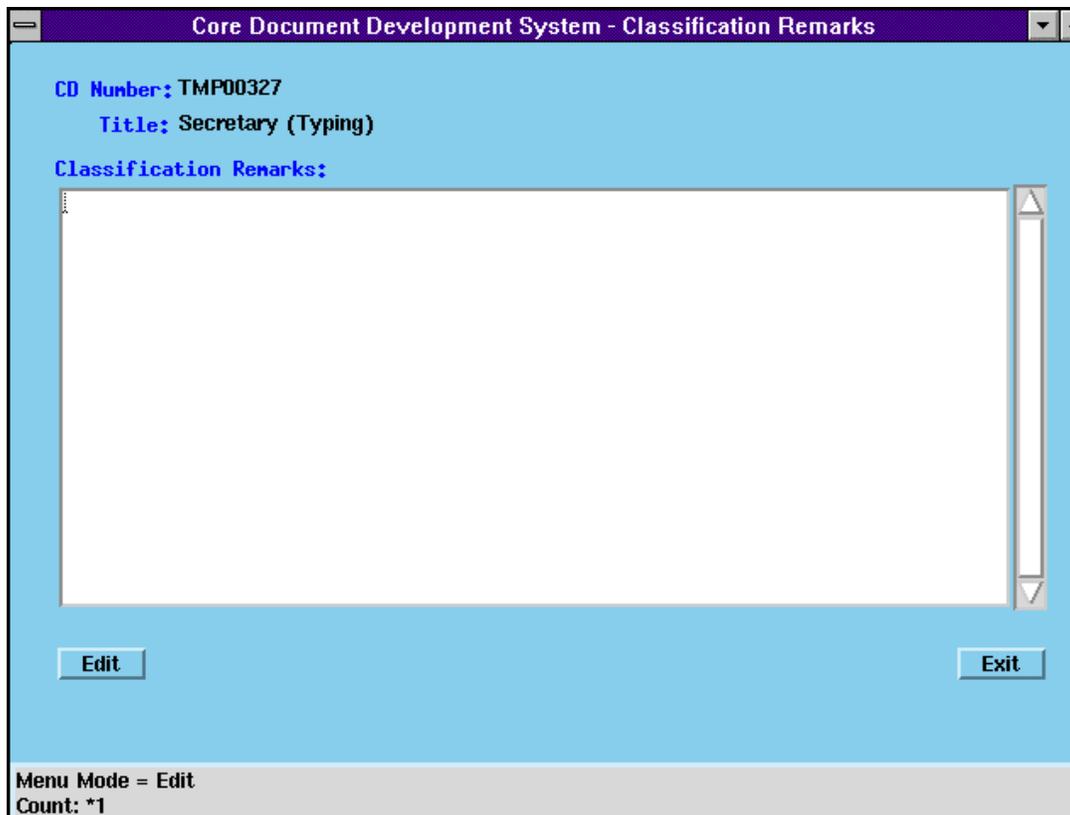
Help Prev Save Exit

Figure 5-28. Cover Sheet - Page 3

Click the “Save” button to record any changes to the cover sheet. Click the “Exit” button to return to the COREDOC Edit Menu Screen.

### Edit Classification Remarks

To edit the Classification Remarks area, go to the Core Document Edit Menu and click on the Edit option. From the list of options on the pull down menu click the Classification Remarks to select the "Classification Remarks" option for the selected position. "Classification Remarks" is the twelfth option under the Edit option.



**Figure 5-29. Core Document Remarks**

Click the “Edit” button to modify the information in the block designated “Remarks” while in the screen entitled “Core Document (Remarks)”. This option allows users to add information which will be included after the system generates classification evaluation. This section would normally be completed by a classification specialist in their human resources office. Click the “Exit” button, to return to the Core Document Edit Menu.

### **Add More Occupations**

The thirteenth option on the Core Document Edit Menu, under the Edit option, is More Occupations. Click the “More Occupations” option and the application will display the Occupations to Select From Screen (Figure 5-30). This screen contains a listing of other occupations that users can add to their core document. For example, users can create a position which requires duties and knowledges for two or more functional areas within the civilian human resource management fields, such as staffing, classification, and employee development.

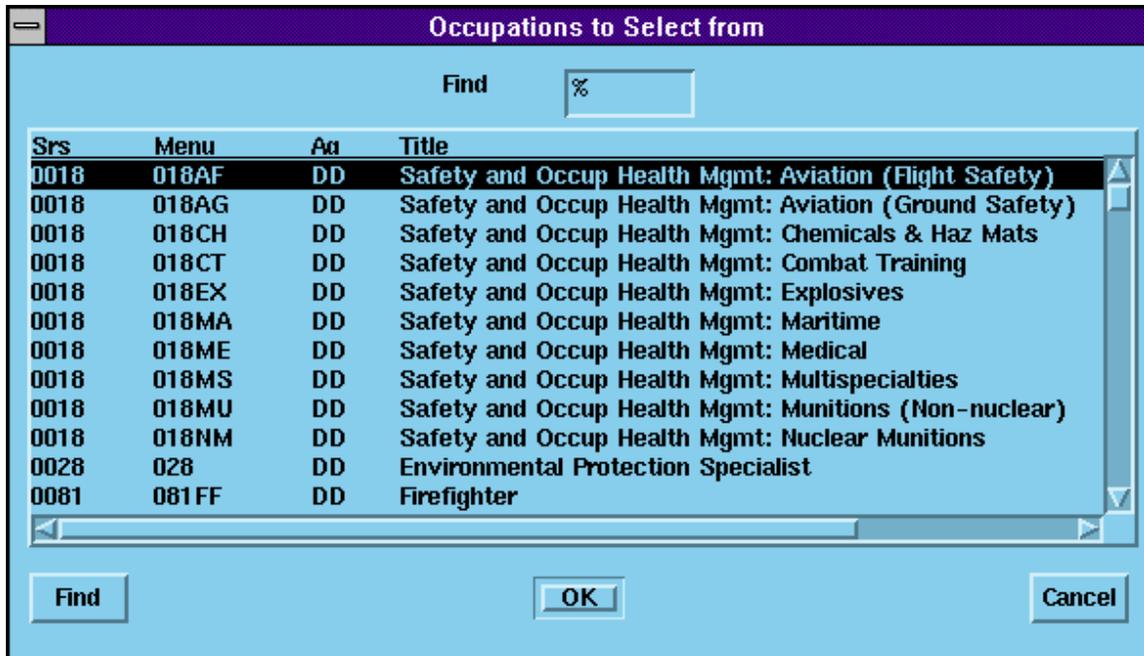


Figure 5-30. “Occupations to Select From” Screen

## Classification Summary

Users can display the Classification Summary by selecting this option under the Edit option of the Core Document Edit Menu. Click the Classification Summary option from the list of options on the Edit option. A new menu will now appear titled ‘Classification Summary’ which provides a brief explanation of the basis for the classification title, pay plan, series, and grade. At the top of this menu is located the CD number and the position title. If a position title was not selected then the title block will be blank. A brief explanation is provided explaining how the percentages of time for the duties affected the classification. Use the [Arrow] keys to scroll through the summary. Click the “Exit” button to exit this menu. The information text on this menu can not be edited by the user. Any changes they have made to the title, pay plan, series, any duty, factor, or Competency (KSA) will be noted here.

## Assigning Position Numbers

Classifiers have the capability to edit a cover sheet and assign a position number only after a core document has been attached to a Personnel Action Request.

### *Accessing PERSACTION*

As previously mentioned, the FPI Application Main Menu is the entry point into the PERSACTION, COREDOC, TRAIN, and Regional Applications. Upon selection of the “PERSACTION” option, the application takes users to the In Box screen.



REQUEST FOR PERSONNEL ACTION Page 1 of 5			
Current Status <input type="text"/>		Send to Next Preset Coordination Coord	
PART A - Requesting Office			
Actions Requested REALIGNMENT		NTE: <input type="text"/>	Request Number 96AF000154
For Additional Information Call (Name and Telephone Number) <input type="text"/>		Prop. Dt (MMDDYY) <input type="text"/>	
Action Requested By Name <input type="text"/>		Action Authorized By Name <input type="text"/>	
Title <input type="text"/>		Title <input type="text"/>	
Request Date <input type="text"/>		Concurrence Date <input type="text"/>	
PART B - For Preparation of SF 50 (Use only codes in FPM Supplement 292-1. Show all dates - MM-DD-YY)			
SSAN <input type="text"/>	Name (Last, First, Middle) <input type="text"/>	DOB (MMDDYY) <input type="text"/>	Eff. Dt (MMDDYY) <input type="text"/>
1 2 3 4 5	OK	LIST	REGIONAL
		ATTACH	COREDOC
			CANCEL

**Figure 5-32. Page One of the Personnel Action Request Form**

Page One of the Personnel Action Request Form contains six command button, including “COREDOC” and “ATTACH”. The “COREDOC” button allows users access to the COREDOC System. The “ATTACH” button, allows users to append a previously created core document to a Personnel Action Request.

***Linking a Core Document to a Personnel Action Request***

Click the “ATTACH” button. The application will display the Attach Core Documents dialog box.

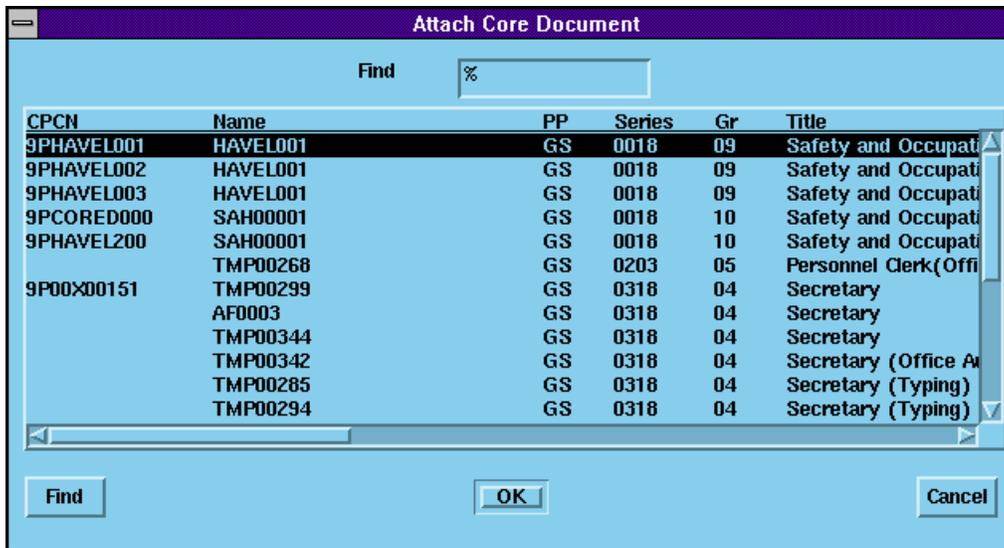


Figure 5-33. Attach Core Document Dialog Box

The Attach Core Document dialog box shown in Figure 5-34 displays the core documents in Civilian Position Control Number (CPCN) order. To view the entire list, scroll through the core document or use the “Find” feature. Click the horizontal scroll bar to view the CPCN, pay plan, series, grade, title, organization name, incumbent name, and title of a position.

Highlight the core document and click the “OK” button, the application will then attach the core document to the Personnel Action Request. If the user wishes to attach a different core document, they can select the “ATTACH” button again. A pop-up window will then appear. Click the “ATTACH NEW” button. The application will again provide the user with a list of the core documents that were previously created.

***Assigning a Position Number***

The user may access the COREDOC Edit Menu by clicking the “COREDOC” button located at the bottom of Page One of the Personnel Action Request. The application will then display the COREDOC Edit Menu.

Select “Utility” option from the COREDOC Edit Menu. The Utility Menu contains two options, “System Default” and “Assign CPCN”. The “System Default” option is available to any user of the COREDOC application. The “Assign CPCN” option is available only to persons who are designated as “Classifiers” in the Integrated FPI Suite.

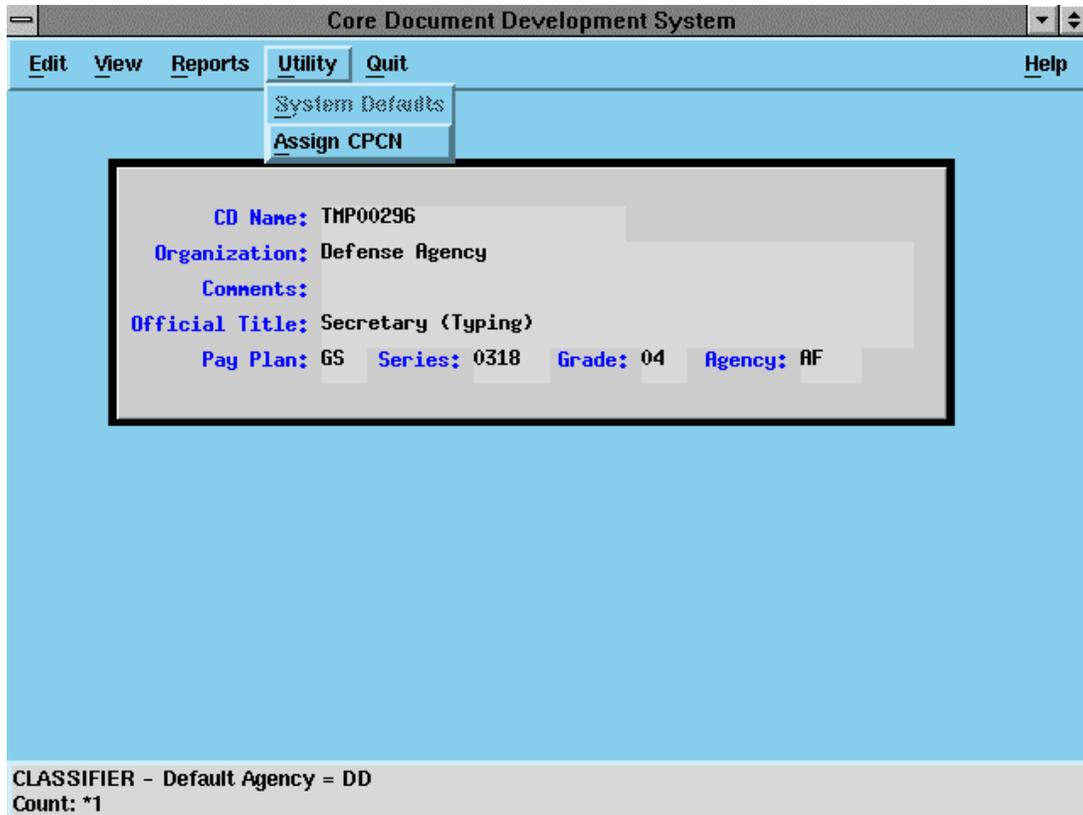


Figure 5-34. COREDOC Edit Menu Screen

Select the “Assign CPCN” option by clicking it. The application will then display the Assign CPCN dialog box.

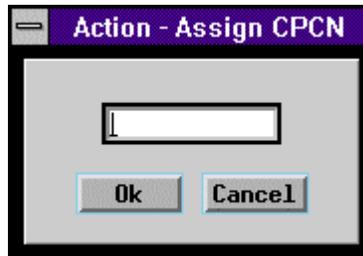


Figure 5-35. Action - Assign CPCN Dialog Box

Classifiers can then enter the ten digit Civilian Position Control Number (CPCN). Classifiers are cautioned that the first two characters of the CPCN must be the Civilian Personnel Officer Identifier (CPO ID), followed by a five digit core number, and then a three digit sequential number. The CPCN must also be unique in the Defense Civilian Personnel Data System (DCPDS).

Click the “OK” button to save the CPCN. Click the “Cancel” button to return to the COREDOC Edit Menu screen. The application will then display a confirmation window that displays the following message: “A CPCN # is now assigned to the CORE DOCUMENT”. The application will then automatically return the user to the COREDOC Edit Menu.

### **View Menu**

Users can view and print a core document by selecting the “View” menu from the Core Document Edit Menu. Users may also save a core document as a text file. For more information, users should refer to Chapter Three: COREDOC Operating Procedures for specific instructions on how to view a core document.

### **Report Menu**

The next option on the Core Document Edit Menu is Reports. This option allows users to display on their screen a variety of views of a core document. COREDOC contains nine reports: Core Document, Core Document without training competencies, Position Description, Knowledge, Skills, and Abilities (KSAs), KSAs without training competencies, Performance Plan, Evaluation Summary, Cover Sheet, and Occupational Series List. Users should refer to Chapter Three: COREDOC Operating Procedures for specific instructions on how to view and print these reports.

### **Utility Menu**

When users first use the software, they will be prompted to complete the “System Default” screen. This screen allows users to designate certain system defaults and establish a standard goal and organization name for each core document generated. For more information, users should refer to Chapter Three: COREDOC Operating Procedures.

### Exit

To exit the Edit Menu screen, click the “File” option then choose “Exit”.



**Figure 5-36. Confirmation Dialog Box**

The application will then display a message asking users to confirm their selection. Click the “Yes” button to exit the COREDOC application and return to the FPI Application Menu screen. Click the “No” button will return users to the COREDOC Main Menu screen.

### Help Menu

Users can find this options at the right-hand corner of the Core Document Edit Menu Screen. The Help function has two options, Help System and Show Keys. The Help System option provides general information about the purpose and general functionality contained in the COREDOC application. The Show Keys option provides users with information on using convention keystrokes (Appendix D).

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**APPENDIX A**  
**SAMPLE CORE DOCUMENT**

## I. POSITION AND ORGANIZATION INFORMATION

POSITION: Librarian, GS-1410-09

Purpose of position:

The primary focus of this position is to provide professional library and information services.

Organizations:

Defense Civilian Personnel Management Service

Organization Goals:

## II. MAJOR DUTIES

### A. Duty:

Provides reference and research assistance to library clientele.

Tasks

1. Interviews and interacts with clientele to establish user needs and requirements. Analyzes user requirements; locates and selects appropriate information resources
2. Access locally available information resources, on-line computer data bases other libraries, or external subject resources. Devises appropriate service strategies.
3. Explains arrangement and resources of the library; may conduct orientation tours for specific groups.
4. Instructs users, either individually or in groups, on the use of various audio and/or electronic database tools.
5. Develops reading lists and subject bibliographies to meet user needs.
6. Performs abstracting and indexing duties, To meet specialized user needs.
7. Ensure access to information available at other libraries and centers is available through inter-library loan process. Provides for document delivery to clientele and open literature and other materials through circulation and procedures.
8. Determines users' need to know and employs required handling procedures for classified materials.

Selected Staffing KSAs:

### B. Duty (Critical):

Assists senior librarian or staff member by participating in automation support projects for specific segments of the library operation.

Tasks

1. Writes portions of procedures manuals for automated library operations.
2. Evaluates equipment and reviews software for use in the library.
3. Instructs library personnel in the use of new software packages and adaptations
4. When the employee serves as librarian-in-charge, responsible for managing network services, such as Local Area Network (LAN), Wide Area Network (WAN), and Internet.

Selected Staffing KSAs:

C. Duty:

Responsible for the acquisition of materials for the library collection.

Tasks:

1. Establishes internal procurement and quality processes to ensure appropriate accountability of library acquisitions.
2. Is responsible for ensuring the most effective acquisition method to purchase or procure library materials in all formats.
3. Works with vendors to determine product identification, development, and availability.
4. Works with the procurement office to develop purchase agreements and statements of work for various library services. May serve as the Contracting Officer's Technical Representative (COTR) for library procurements.
5. Resolves problems with procurement activity, finance and accounting office, or vendors.

Selected Staffing KSAs:

D. Duty:

Performs original or modified descriptive cataloging in machine-readable cataloging format where the bibliography characteristics are relatively easy to determine and cataloging decision are made within standard such as the current Anglo-American catalogue Rules (AACRS) and by comparison to the local database or authority file. The assignment of classification and subject headings can be easily determined by consistently comparing the content to a stand list of terms, such as the library of Congress Subject Headings.

Tasks

1. Uses standard cataloging rules to catalog material in a variety of formats.

2. Applies knowledge of automated cataloging system when cataloging in machine-readable format.
3. Organizes (classifies) and catalogs materials to make them accessible to library uses through public catalogs.
4. ensures catalog records are accurate and current.
5. Maintains name and subject authority control records.
6. Obtains input from reference librarians and customers to improve quality of bibliographic records and access to library materials.

Selected Staffing KSAs:

E. Duty:

Serves as the professional responsible for a small general branch library or limited specialized collection information resources within a larger academic or technical environment.

Tasks

1. Responsible for library information resource selections, budget, procurements personnel, facility, or space allocations for the library.
2. Recommends short and long-range library plans.
3. Responsible for reference and research service; determines information needs of the function. Performs selective dissemination information.
4. Establishes and maintains circulation and interlibrary loan services.
5. Acquires and organizes materials for the collection.
6. Recommends and uses appropriate computer technology.
7. Performs liaison with user groups establishes cooperative linkage with other libraries and/or information centers, and maintains contact with professional library organizations. Maintains currency with the library profession.

Selected Staffing KSAs:

F. Other Work Requirements

The employee must obtain and maintain a secret clearance (NAC/NACI).

III. KNOWLEDGES, SKILLS AND ABILITIES (KSAs)

A. Selected Staffing KSAs:

**B. Basic Training Competencies:**

1. Master's Degree in Library Science or two full academic years of graduate education in a subject-matter field that provided the knowledge required to perform the duties of the position.
2. Skill in one or more major functional areas of library science, to include, knowledge of multi-informational sources and access points such as MOASAIC, WAIS, WWW, STN) and electronic information access, development, and dissemination (Internet, LANs, and WANs).
3. Knowledge of specific subject-matter field, specialized subject or field of endeavor related to the mission of the serviced organization.
4. Ability to maintain good working relationships with the staff and other associates.
5. Knowledge of on-line database searching and research techniques, and capabilities of post-processing to meet user requirements.
6. Familiarity with language(s) appropriate to the position.
7. Skill in written communication
8. Skill in oral communication.
9. Skill in developing systems specifications for developers, acceptance testing, implementation and troubleshooting hardware and software, negotiating site and software licenses.
10. Ability to apply theories, principles, and practices of classification and of descriptive and subject cataloging.
11. Ability to plan a library program to meet the mission of the organization.

**IV. CLASSIFICATION FACTORS**

Factor 1. Knowledge

Level 1 - 6 950 points

## Knowledge A:

-Knowledge of standard methods, techniques, concepts, and principles of research and referral in order to perform independent assignments in locating information without significant deviation from established methods and precedents. Reference services needs are relatively easy to determine from client interviews or written requests and bibliographic source materials are readily accessible. A familiarity with a foreign language and/or specialized subject field may be required.

## Knowledge B:

-Knowledge of established library work processes, terminology and standards, bibliographic utilities, such as the On-line Computer library Center (OCLC) system; database publishers with

products ( on-line or in tape or CD-ROM format) in the fields of science and technology to assist with planning, design, implementation, and use of automated systems in a library environment.

-Knowledge of information retrieval technology particularly as it relates to the end-user (i.e. acquisitions, serials control, cataloging, and optical disk storage of documents) to evaluate software for library applications and to recognize probable conflicts.

-Knowledge typically found in a graduate of an ALA-accredited masters' program in library and information science with either an academic background in computer science or experience in performing automation projects.

#### Knowledge C:

-Knowledge of established procurements rules and regulations and internal organization acquisition policies and those of various networked information centers. A familiarity with publishers' and suppliers' methods of operation.

-Basic knowledge of bibliographic tools necessary and available for the preparation of complete and accurate order information.

#### Knowledge D:

-Knowledge of standard methods, techniques, concepts and principles of cataloging in order to perform independent assignments in classifying and cataloging information without significant deviation form established methods and precedents.

-A Familiarity of foreign language(s) and/or specialized subject field may be required to catalog materials.

#### Knowledge E:

-Knowledge of standard library principles, concepts, methodology, and management to accomplish the assigned library functions.

-Knowledge of the policies, procedures, systems, and interrelationships of the organization and clientele served.

#### Factor 2. Supervisory Controls

Level 2 - 1 275 points

The supervisory defines the scope of responsibility, objectives, priorities, and deadlines More detailed assistance is available in unusual situations that do not have clear precedents. The librarian plans and carries out the successive steps, handles deviation accordance with instructions, policies previous training, or accepted practices. Completed work is usually evaluated for technical soundness, appropriateness to the needs of the library and its clientele and for conformity to policy and requirements.

## Factor 3. Guidelines

Level 3 - 1 275 points

Guidelines include library and agency information policies regulations, and operating procedures; cataloging rules and formats; authorities lists; subject heading lists; professional and technical literature, standards; and federal contracting regulations. The guides are not completely applicable to the work or have gaps in specificity. The librarian uses judgment in interpreting and adapting the guides for application to specific situations.

## Factor 4. Complexity

Level 4 - 1 150 points

Assignments consist of various duties involving different and unrelated but established processes and methods. Typically, the work consists of providing standard public or technical services of a relatively nonspecialized nature, or performing a segment or segments of more specialized services projects. Decisions regarding what needs to be done depend on analysis of each objective and the nature of the information to be provided or categorized.

## Factor 5. Scope and Effect

Level 5 - 1 150 points

The purpose of the work is to apply established practices and techniques to investigate and analyze a variety of frequently encountered library problems, questions, or situations. The librarian recommends solutions or courses of action. The work affects other library personnel and the ability of clientele to perform their missions.

## Factor 6. Personal Contacts

Level 6 - 1 25 points

Regular and recurring personal contacts are with employees in the same agency, but outside the immediate organization, and with individuals or groups outside the agency in a moderately structured setting.

## Factor 7. Purpose of Contacts

Level 7 - 1 50 points

The purpose of the contacts is to plan or coordinate work efforts, solve operating problems, or provide advice to managers and clientele on noncontroversial issues and concerns.

## Factor 8. Physical Demands

Level 8 - 1 5 points

The work is sedentary and includes no special physical demands. It may involve some walking, standing, bending, or carrying of light items.

## Factor 9. Work Environment

Level 9 - 1 5 points

Work involves everyday risks or discomforts typically associated with libraries, offices and meeting and training rooms. Work areas are adequately heated, lighted, and ventilated.

## V. CLASSIFICATION SUMMARY

In this position:

Duty A. 20% GS-1410-09 Librarian  
Reference

Duty B. 20% GS-1410-09 Librarian  
Systems

Duty C. 20% GS-1410-09 Librarian  
Acquisition

Duty D. 20% GS-1410-09 Librarian  
Cataloging

Duty E. 20% GS-1410-09 Librarian  
Directs library program

The classification criteria are based on the OPM, FES, Position Classification Standard for the Librarian Series GS-1410, (T-13) August 1994.

GS-09 Point range: 1855-2100

Total points: 1885

Grade: GS-09

VI. PERFORMANCE MANAGEMENT PLAN

A. Major Performance Objectives/Individual Performance Standards

Performance Objective 1:

Provides reference and research assistance to library clientele.

Performance Objective 2:

Assists senior librarian or staff member by participating in automation support projects for specific segments of the library operation.

Performance Objective 3:

Responsible for the acquisition of materials for the library collection.

Performance Objective 4:

Performs original or modified descriptive cataloging in machine-readable cataloging format where the bibliographic characteristics are relatively easy to determine and cataloging decision are made within standards such as the current Anglo-American Cataloging Rules (AACR2) and by comparison to the local database or authority file. The assignment of classification and subject headings can be easily determined by consistently comparing the content to a standard list of terms, such as the Library of Congress Subject Headings.

Performance Objective 5:

Serves as the professional responsible for a small general branch library or limited specialized collection of information resources within a larger academic or technical environment.

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## **Appendix B**

### **Occupational Series List - Numerical Order**

## APPENDIX B

### Occupational Series List - Numerical Order

Series	Menu	Title
GS-018	018AF	Safety & Occupational Health Specialist: Aviation (Flight Safety)
GS-018	018AG	Safety & Occupational Health Specialist: Aviation (Ground Safety)
GS-018	018CH	Safety & Occupational Health Specialist: Chemical and Haz. Mat.)
GS-018	018CT	Safety & Occupational Health Specialist: Combat Training
GS-018	018EX	Safety & Occupational Health Specialist: Explosives
GS-018	018MA	Safety & Occupational Health Specialist: Maritime
GS-018	018ME	Safety & Occupational Health Specialist: Medicine
GS-018	018MS	Safety & Occupational Health Specialist: Multi-specialities
GS-018	018MU	Safety & Occupational Health Specialist: Munitions (non-nuclear)
GS-018	018NM	Safety & Occupational Health Specialist: Munitions (nuclear)
GS-028	028	Environmental Protection Specialist: Medical
GS-081	081FF	Fire Fighter
GS-081	081FI	Fire Protection Inspector
GS-083	083	Police Officer
GS-0085	085	Security Guard
GS-0203	203PA	Personnel Actions Clerk
GS-0203	203CL	Personnel Clerk/Assistant (Classification)
GS-0203	203EB	Personnel Clerk/Assistant (Employee Benefits)
GS-0203	203ED	Personnel Clerk/Assistant (Employee Development)
GS-0203	203ER	Personnel Clerk/Assistant (Employee Relations)
GS-0203	203ST	Personnel Clerk/Assistant (Staffing)
GS-0204	204	Military Personnel Clerk/Technician
GS-0205	205	Military Personnel Specialist
GS-0305	305	Mail and File Clerk
GS-0318	318C	Secretary - Large, Complex Organization
GS-0318	318B	Secretary - Medium/Large Office
GS-0318	318A	Secretary - Small/Medium Office
GS-0322	322	Clerk-Typist
GS-0326	326	Office Automation
GS-0332	332	Computer Operator
GS-0334	334CS	Computer Specialist - General
GS-0034	334DBM	Computer Specialist - Database Management
GS-0334	334EA	Computer Specialist - Equipment Analyst
GS-0334	334NET	Computer Specialist - Network/Telecommunications
GS-0334	334PA	Computer Specialist - Programmer Analyst
GS-0334	334PG	Computer Specialist - Programmer
GS-0334	334SA	Computer Specialist - Systems Analyst

## Occupational Series List - Numerical Order (Cont.)

Series	Menu	Title
GS-0335	355	Computer Assistant
GS-0343	343	Management and Program Analyst
GS-0344	344	Management and Program Assistant
GS-0346	346	Logistics Management Specialist
GS-0350	350	Equipment Specialist
GS-0390	390	Telecommunications Operator
GS-0510	510	Accountant
GS-0511	511	Auditor
GS-0525	525	Accounting Technician
GS-0540	540	Voucher Examining Series
GS-0544	544	Civilian Pay Technician
GS-0545	545	Military Pay Technician
GS-0560	560	Budget Analyst
GS-0561	561	Budget Assistant
GS-0620	620	Practical Nurse
GS-0621	621	Nursing Assistant
GS-0680	680	Dental Officer
GS-0681	681	Dental Assistant
GS-0682	682	Dental Hygienist
GS-0801	801FAC	General Engineer
GS-0808	808FAC	Architect
GS-0810	810FAC	Civil Engineer
GS-0830	830FAC	Mechanical Engineer
GS-0850	850FAC	Electrical Engineer
GS-0895	895	Industrial Engineering Technician
GS-0896	896	Industrial Engineer
GS-1071	1071	Audio Visual Specialist
GS-1102	1102	Contract Specialist
GS-1102	1102WS	Contract Specialist - Weapons Systems
GS-1105	1105	Purchasing Agent
GS-1106	1106	Procurement Clerk/Technician
GS-1150	1150	Industrial Specialist
GS 1173	1173	Housing Management
GS-1370	1370	Cartographer
GS-1410	1410	Librarian
GS-1410	1410M	Librarian (Medical)
GS-1411	1411	Library Technician
GS-1412	1412	Technician Information Specialist
GS-1515	1515	Operations Research Analyst
GS-1670	1670	Equipment Specialist
GS-1712	1712TA	Training Administrator

## Occupational Series List - Numerical Order (Cont.)

Series	Menu	Title
GS-1712	1712TI	Training Instruction
GS-1712	1712TS	Training Specialist
GS-1740	1740GC	Guidance Counselor
GS-1740	1740ES	Education Services Specialist
GS-1750	1750	Instructional Systems Specialist
GS-0811	1811	Criminal Investigators
GS-1910	1919	Quality Assurance Specialist
GS-2001	2001	General Supply Specialist
GS-2003	2003	Supply Program Management
GS-2005	2005	Supply Technician
GS-2010	2010	Inventory Management
GS-2030	2030	Distribution Facilities and Storage Management
GS-2032	2032	Packaging
GS-2050	2050	Supply Cataloging
WG-2604	2604	Electronic Mechanic
WG-2610	2610	Electrician Integrated System Mechanic
WG-2805	2805	Electrician
WG-2810	2810	Electrician (High Voltage)
WG-2854	2854	Electrical Equipment Repairer
WG-2892	2892	Aircraft Electrician
WG-3359	3359	Instrumental Mechanic
WG-3414	3414	Machinist
WG-3610	3610	Insulator
WG-3703	3703	Welder
WG-3806	3806	Sheet Metal Mechanic
WG-3808	3808	Boilermaker
WG-3820	3820	Shipfitters
WG-4010	4010	Prescription Eyewear Maker
WG-4102	4102	Painter
WG-4204	4204	Pipefitter
WG-4206	4206	Plumber
WG-4604	4604	Wood Worker
WG-4605	4605	Wood Crafter
WG-4607	4607	Carpenter
WG-4701	4701	General Mechanics and Operator
WG-4737	4737	General Equipment Mechanics
WG-4741	4741	General Equipment Operator
WG-4742	4742	Utility Systems Repairer - Operator
WG-4749	4749	Maintenance Mechanic
WG-5026	5026	Pest Controller

## Occupational Series List - Numerical Order (Cont.)

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Series	Menu	Title
WG-5210	5210	Rigger
WG-5306	5306	Air Conditioning Equipment Mechanic
WG-5334	5334	Marine Machinery Mechanic
WG-5402	5402	Boiler Plant Operator
WG-5406	5406	Utility Systems Operator
WG-5423	5423	Sandblasting
WG-5703	5703	Motor Vehicle Operator
WG-5704	5704	Fork List Operator
WG-5725	5725	Crane Operator
WG-5803	5803	Heavy Mobile Equipment Mechanics
WG-5823	5823	Automotive Mechanic
WG-6904	6904	Tools and Parts Attendant
WG-6907	6907	Materials Handler
WG-6910	6910	Material Expediter
WG-7002	7002	Packer
WG-7402	7402	Baker
WG-7404	7404	Cook
WG-7407	7407	Meat Cutter
WG-7408	7408	Food Service Worker
WG-8602	8602	Aircraft Engine Mechanic
WG-8852	8852	Aircraft Mechanic

**Total GS Series = 60**

**Total WG Series = 48**

*Number of Menus: 140*

*As of 05/07/97*

**Total All Series = 112**

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**APENDIX C**  
**Occupational Series List - Alphabetical Order**

## APPENDIX C

### Occupational Series List - Alphabetical Order

Series	Menu	Title
GS-0510	510	Accountant
GS-0525	525	Accounting Technician
WG-5306	5306	Air Conditioning Equipment Mechanics
WG-2892	2892	Aircraft Electrician
WG-8602	8602	Aircraft Engine Mechanic
WG-8852	8852	Aircraft Mechanic
GS-0808	808FAC	Architect
GS-1071	1071	Audio Visual Specialist
GS-0511	511	Auditor
WG-5823	5823	Automotive Mechanic
WG-7402	7402	Baker
WG-4602	4602	Blocker and Bracer
WG-5402	5402	Boiler Plant Operator
WG-3808	3808	Boilermaker
GS-0560	560	Budget Analyst
GS-0561	561	Budget Assistant
WG-4607	4607	Carpenter
GS-1370	1370	Cartographer
GS-0810	810FAC	Civil Engineer
GS-0544	544	Civilian Pay Technician
GS-0322	322	Clerk-Typist
GS-0335	335	Computer Assistant
GS-0332	332	Computer Operator
GS-0334	334CS	Computer Specialist - General
GS-0034	334DBM	Computer Specialist - Database Management
GS-0334	334EA	Computer Specialist - Equipment Analyst
GS-0334	334NET	Computer Specialist - Network/Telecommunications
GS-0334	334PA	Computer Specialist - Programmer Analyst
GS-0334	334PG	Computer Specialist - Programmer
GS-0334	334SA	Computer Specialist - Systems Analyst
GS-1102	1102	Contract Specialist
GS-1102	1102WS	Contract Specialist - Weapons Systems
WG-5725	5725	Crane Operator
GS-1811	1811	Criminal Investigator
GS-0681	681	Dental Assistant
GS-0682	682	Dental Hygienist
GS-0680	680	Dental Officer
GS-2030	2030	Distribution Facilities and Storage Management

## Occupational Series List - Alphabetical Order (Cont.)

Series	Menu	Title
GS-1740	1740ES	Education Services Specialist
GS-850	860FAC	Electrical Engineer
WG-2854	2854	Electrical Equipment Repairer
WG-2805	2805	Electrician
WG-2810	2810	Electrician (High Voltage)
WG-2610	2610	Electrician Integrated System Mechanic
WG-2604	2604	Electronic Mechanic
GS-028	028	Environmental Protection Specialist
GS-0350	350	Equipment Operator
GS-1670	1670	Equipment Specialist
GS-0081	081	Firefighter
WG-7408	7408	Food Service Worker
WG-5704	5704	Fork Lift Operator
GS-0801	801FAC	General Engineer
WG-4737	4737	General Equipment Mechanics
WG-4741	4741	General Equipment Operator
WG-4701	4701	General Mechanics and Operator
GS-2001	2001	General Supply Specialist
GS-1740	1740GC	Guidance Counselor
WG-5803	5803	Heavy Mobile Equipment Mechanics
GS-1173	1173	Housing Management
WG-3359	3359	Instrument Mechanic
GS-0896	896	Industrial Engineer
GS-0895	895	Industrial Engineering Technician
GS-1150	1150	Industrial Specialist
GS-1750	1750	Instructional Systems Specialist
WG-3610	3610	Insulator
GS-2010	2010	Inventory Management
GS-1410	1410	Librarian
GS-1410	1410M	Librarian (Medical)
GS-1411	1411	Library Technician
GS-0346	346	Logistics Management Specialist
WG-3414	3414	Machinist
WG-4749	4749	Maintenance Mechanic
GS-0305	305	Mail and File Clerk
GS-0343	343	Management and Program Analyst
GS-0344	344	Management and Program Assistant
WG-5334	5334	Marine Machinery Mechanic
WG-6910	6910	Material Expediter

## Occupational Series List - Alphabetical Order (Cont.)

WG-6907	6907	Materials Handler
WG-7407	7407	Meat Cutter
GS-0830	830FAC	Mechanical Engineer
GS-0545	545	Military Pay Technician
GS-0204	204	Military Personnel Clerk/Technician
GS-0205	205	Military Personnel Specialist
WG-5703	5703	Motor Vehicle Operator
GS-0621	621	Nursing Assistant
GS-0326	326	Office Automation
GS-1515	1515	Operations Research Analyst
WG-7002	7002	Packer
GS-4102	4102	Painter
GS-0203	203PA	Personnel Actions Clerk
GS-0203	203CL	Personnel Clerk/Assistant (Classification)
GS-0203	203EB	Personnel Clerk/Assistant (Employee Benefits)
GS-0203	203ED	Personnel Clerk/Assistant (Employee Development)
GS-0203	203ER	Personnel Clerk/Assistant (Employee Relations)
GS-0203	203ST	Personnel Clerk/Assistant (Staffing)
WG-5026	5026	Pest Controller
WG-4204	4204	Pipefitter
WG-4206	4206	Plumber
GS-0083	083	Police Officer
GS-0620	620	Practical Nurse
WG-4010	4010	Prescription Eyewear Maker
GS-1106	1106	Procurement Clerk/Technician
GS-1105	1105	Purchasing Agent
GS--1910	1910	Quality Assurance Specialist
WG-5210	5210	Rigger
GS-018	018AF	Safety & Occupational Health Specialist: Aviation (Flight Safety)
GS-018	018AG	Safety & Occupational Health Specialist: Aviation (Ground Safety)
GS-018	018CH	Safety & Occupational Health Specialist: Chemical and Haz. Mat.)
GS-018	018CT	Safety & Occupational Health Specialist: Combat Training
GS-018	018EX	Safety & Occupational Health Specialist: Explosives
GS-018	018MA	Safety & Occupational Health Specialist: Maritime
GS-018	018ME	Safety & Occupational Health Specialist: Medicine
GS-018	018MS	Safety & Occupational Health Specialist: Multi-specialities
GS-018	018MU	Safety & Occupational Health Specialist: Munitions (non-nuclear)
GS-018	018NM	Safety & Occupational Health Specialist: Munitions (nuclear)
WG-5423	5423	Sandblaster

**Occupational Series List - Alphabetical Order (Cont.)**

GS-0318	318C	Secretary - Large, Complex Organization
GS-0318	318B	Secretary - Medium/Large Office
GS-0318	318A	Secretary - Small/Medium Office
GS-085	085	Security Guard
WG-3806	3806	Sheet Metal Mechanic
WG-3820	3820	Shipfitter
GS-2050	2050	Supply Cataloging
GS-2003	2003	Supply Program Management
GS-2005	2005	Supply Technician
GS-0390	0390	Telecommunications Operator
WG-6904	6904	Tools and Parts Attendant
GS-1712	1712TA	Training Administrator
GS-1712	1712TI	Training Instruction
GS-1712	1712TS	Training Specialist
WG-5406	5406	Utility Systems Operator
WG-4742	4742	Utility Systems Repairer - Operator
GS-0540	540	Voucher Examining Series
WG-3703	3703	Welder
WG-4605	4605	Wood Crafter
WG-4604	4604	Wood Worker

---

<b>Total GS Series: = 64</b>	<i>As of 05/07/97</i>
<b>Total WG Series: = 48</b>	
<i>Number of Menus: 140</i>	
<b>Total All Series: = 112</b>	

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## **APPENDIX D**

### **Special Keys in COREDOC**

## APPENDIX D

### Special Keys In COREDOC

Function	Hot Key	Description
Accept	Ctrl - F7	Save the exiting Core Document
Clear Block	Ctrl - b	Clear highlighted block
Clear Form	Shift - F5	Clear all blocks on a form
Clear Record	Ctrl - F5	Clear record
Count Query Hits	Ctrl - q	Display the count of records
Debug Mode	Ctrl - F4	Self-explanatory
Delete Backward	Backspace	Delete one character in a block
Delete Record	Ctrl - d	Delete an entire record
Display Error	Ctrl - o	View an error report
Down	Down Arrow	Move to the next screen
Edit	Ctrl - e	Open an exiting Core Document
Enter Query	Ctrl - F3	Begin query mode
Exit	Alt - F4	Close the current session
Help	Ctrl - h	List Help topics
Insert Record	Ctrl - i	Add a new record
Left	Left Arrow	Move one block to the left
List of Values	Ctrl - I	Display list of values
Main Menu	Shift - F11	Return to COREDOC Main Menu
Next Block	Page Down	Move to the next block
Next Item	Tab	Move to the next item
Next Record	Shift - Down Arrow	Move to the next record
Next Set of Records	Ctrl - s	Move to the next set of records
Previous Block	Page Up	Move to the previous block
Previous Item	Ctrl - Tab	Move to the previous item
Previous Menu	Shift - Tab	Return to the previous menu
Previous Record	Shift - Page Up	Return to Previous Record
Print	Ctrl - P	Print the current core document
Redefine Username/Password	Ctrl - j	Allows user to change password
Return	Return	Move to previous block or form
Right	Right Arrow	Move to the next block or form
Show Keys	Ctrl - k	Display special function keys
Toggle Insert/Replace	Alt - F8	Switch in/out of overtype mode
Up	Page Up	Move to previous block or form

## **APPENDIX E**

### **Import and Export PC Core Documents**

## **Import and Export PC Core Documents**

The Import Core Document option allows a user to select standard and regular core documents for import from the CDWriter 2.0 (PC version) into the Integrated PPI Suite.

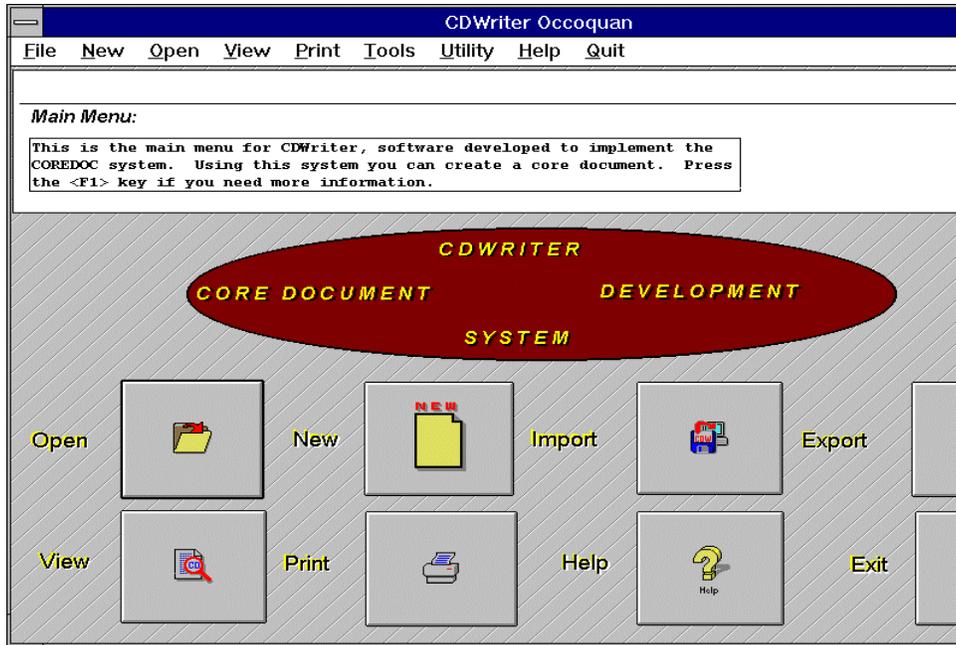
There are three basic steps involved in the process of importing PC version core documents into the Integrated PPI Suite:

1. Export as an ASCII file from CDWriter version 2.0,
2. Use File Transfer Protocol (FTP) to export the files from the PC version to the UNIX host,
3. Import core documents into Integrated PPI Suite.

### ***Exporting and Importing Core Documents from PC version of CDWriter***

To initiate a CDWriter session, go to the Windows Program Manager Screen and click the icon that contains the PC version of CDWriter, if this application is resident on the users computer. This will initiate the “Logon” Screen for CDWriter. Users may press either the **[Tab]** or **[Enter]** key, or use the mouse to move from one block to another.

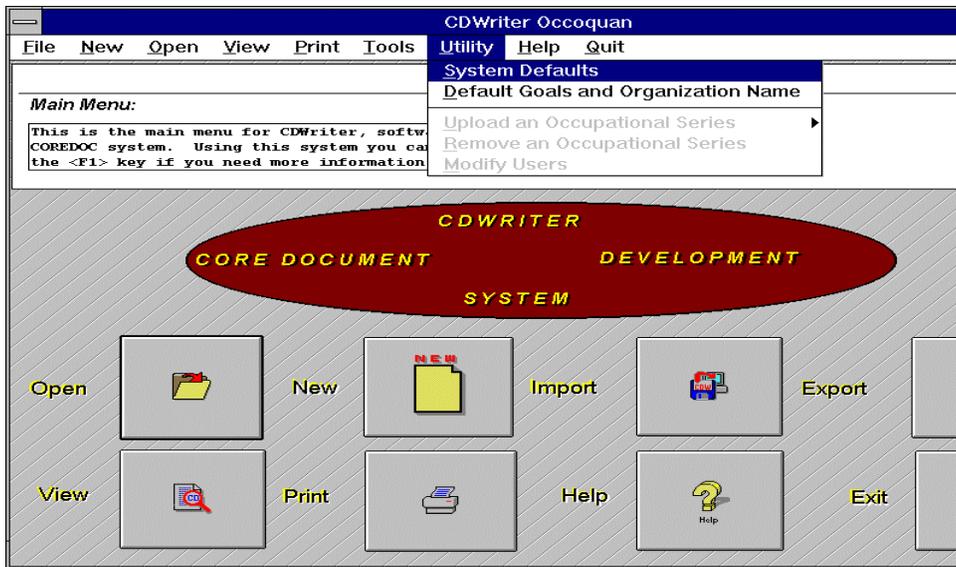
After entering the users assigned Username, press the **[Enter]** key to go to the “Password” block. After entering the users assigned password, press the **[Enter]** key. The CDWriter Main Menu Screen will appear after successful Logon. The CDWriter Main Menu Screen contains eight icons: Open, New, View, Print, Import, Export, Help and Exit. The Menu Bar contains nine options: File, New, Open, View, Print, Tools, Utility, Help, and Quit. The user can use either the icon or the menu bar to import or export a Core Document into another application such as the Integrated PPI Suite. The preferred method is to use the icons, Import or Export, to perform this function versus the menu bar. The methods for processing the actions are the same whether the Menu Bar is used or the icons on the CD Writer Main Menu Screen.



**Figure E-1. CDWriter Version 2.0 Main Menu Screen**

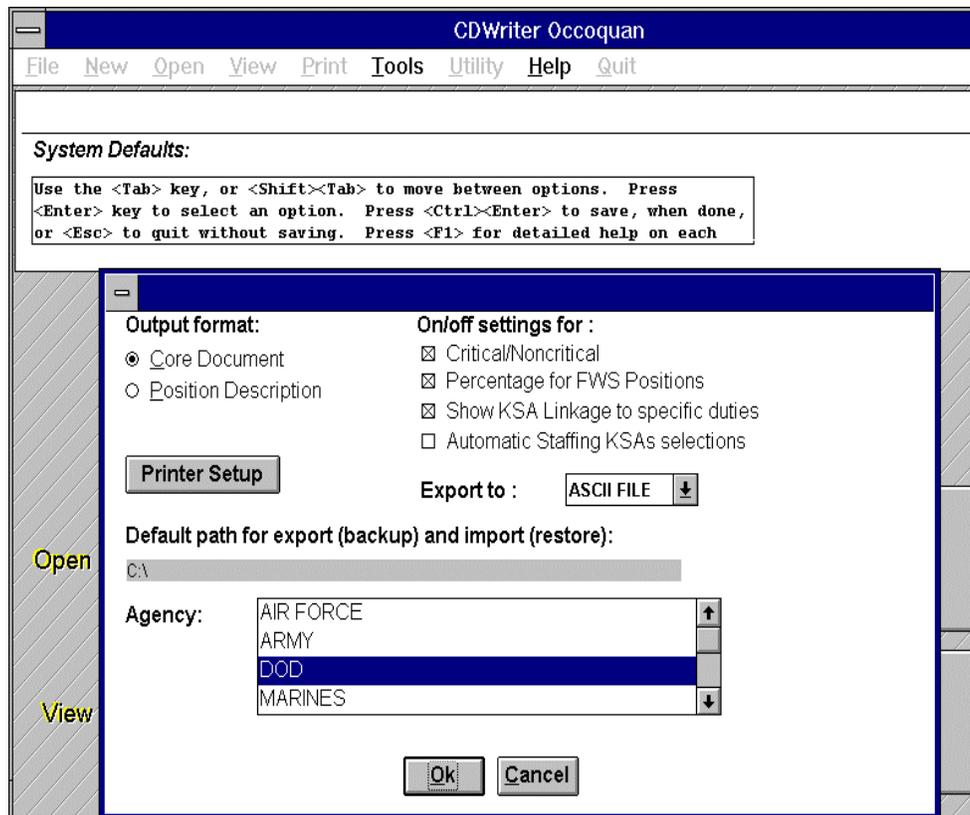
**LOCATING A CORE DOCUMENT.**

Using the mouse or the [Tab] key, highlight “Utility” from the Menu Bar, and press the [Enter] key. The application will display a pull down menu containing two options, “System Defaults” and “Default Goals and Organization Name” (Figure E-2). Systems Administrators will have access to additional options within this area. Click the “System Default” option. Figure E-3 is displayed.



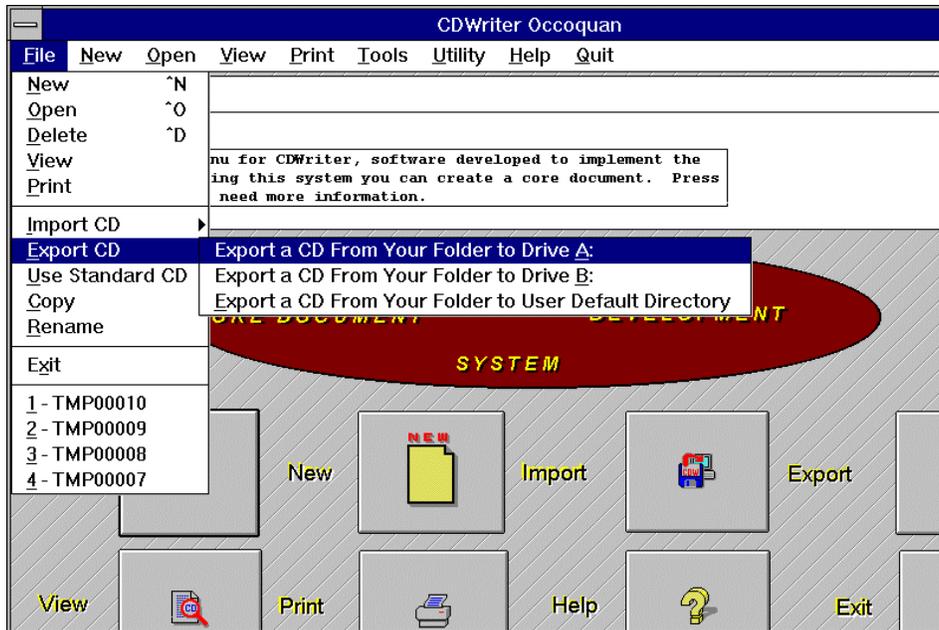
**Figure E-2. CDWriter Version 2.0 (PC Version) Utility Menu Screen**

Users should review the user's default options and make any necessary modifications. For example, the "Output Format" should be set for a "Core Document. Using the [Tab] and enter keys, select the correct "On/Off Settings" for the Core Document. Tab to the "Export to" block and use the mouse to move the arrow up and down to select the correct file type. Highlight the "ASCII File" and then press the [Enter] key. Tab to the "Default Path" data block. Set the default path and directory, if desired, e.g., "C:\corefile\" for the core document that will be exported and imported. Also select the correct Agency for the Core Document. To save this entry, click "OK".



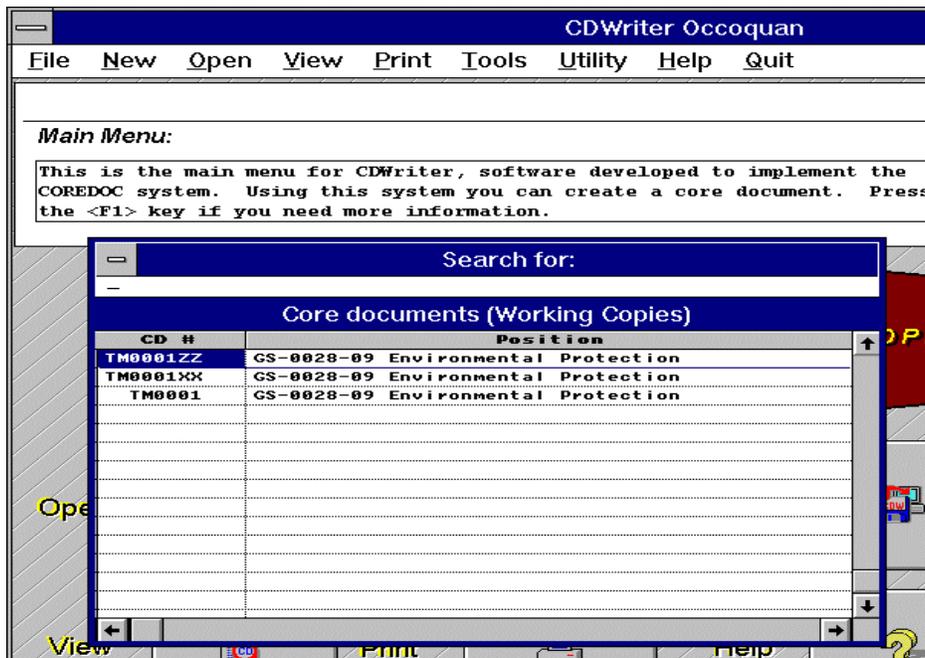
**Figure E-3. CDWriter Version 2.0 (PC Version) - Systems Default Screen**

From the Core Document Main Menu Screen (Figure E-1), use the [Tab] key to highlight "File" on the Menu Bar and press the [Enter] key. Use the mouse or the [Down Arrow] keys to highlight "Export CD" option and press the [Enter] key. The application will display a pull down menu containing three options, "Export a CD From Your Folder to Drive A:", "Export a CD From Your Folder to Drive B:", and "Export a CD From Your Folder to User Default Directory" (Figure E-4).



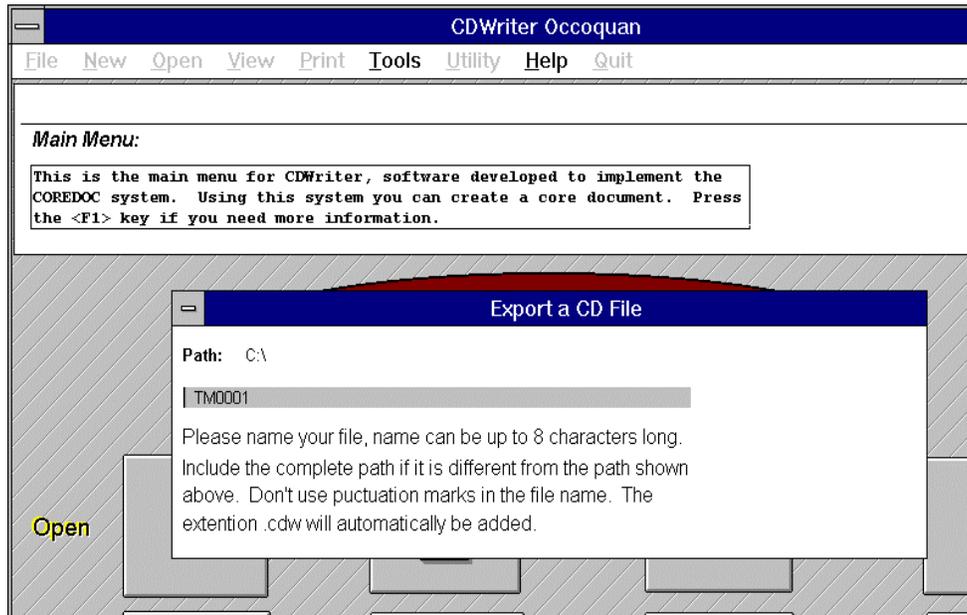
**Figure E-4. CDWriter 2.0 Version (PC Version) - File Menu Screen**

Once the export selection has been made from the screen in Figure E-4, Figure E-5 is displayed with the names of the Core Documents. To select the correct document to export, highlight the document, and press [Enter]. The Export a CD File Screen (Figure E-6) is displayed.



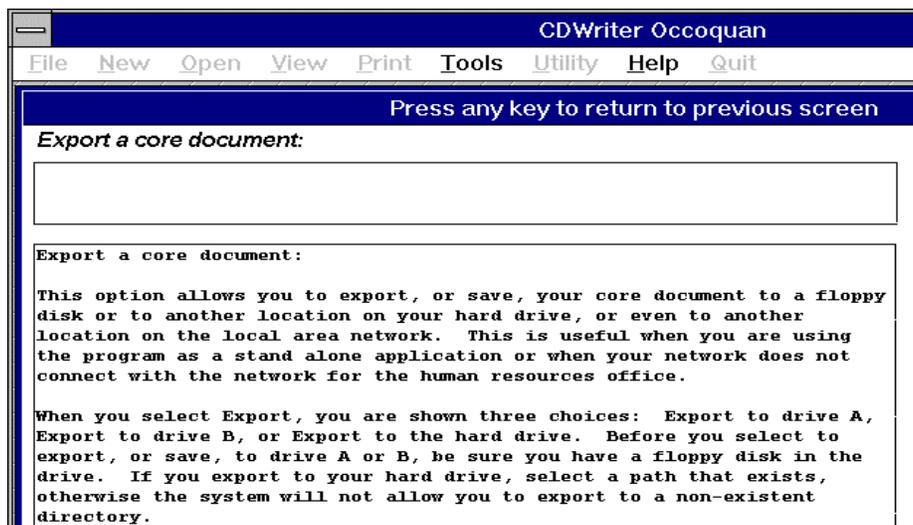
**E-5. CDWriter Version 2.0 (PC Version) - Core Document Listings Screen**

Changes to the Export a CD File Screen (Figure E-6) can be made at this time to the name of the file and the path. Follow the instructions given on the screen to complete the export function. The CD name can contain up to eight characters. However, users are cautioned NOT to use punctuation marks in the file name. Press [Enter] to export the file. Figure E-8 is displayed to confirm the document has been saved. Press any key to continue within the CDWriter Version 2 (PC Version).



**Figure E-6. CDWriter Version 2.0 (PC Version) - Export a CD File Screen**

If help is needed with the Export function, a help screen is available (Figure E-7). Press “Help” from the Menu Bar to display the help information.



**Figure E-7. Help Screen for Exporting a Core Document**

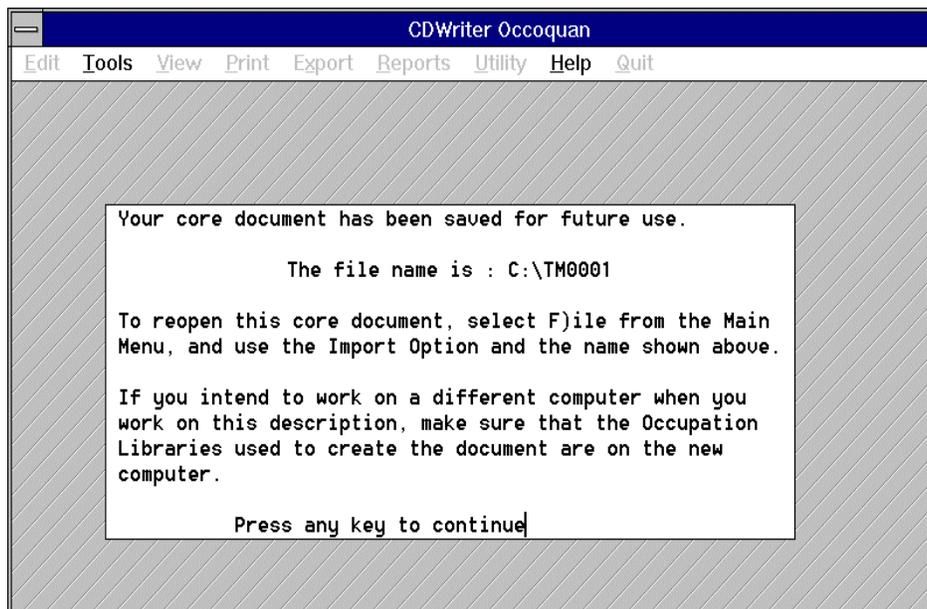
## Standard Core Documents

If users are exporting a standard core document, the first letter should always begin with a “S” and followed by the 2-character **Agency Code**, an underscore (“\_”), and then four additional characters (alpha-numeric) to make the name unique. For example, if the Standard CD was created for the Air Force, the name of the export file would be “SAF\_0001”.

## Regular Core Documents

If users are exporting a regular core document, the first letter should always begin with a “R” and followed by the 2-character **Agency Code**, an underscore (“\_”), and then four additional characters (alpha-numeric) to make the name unique. For example, if the Regular CD was created for the Air Force, the name of the export file would be “RAF\_0001”.

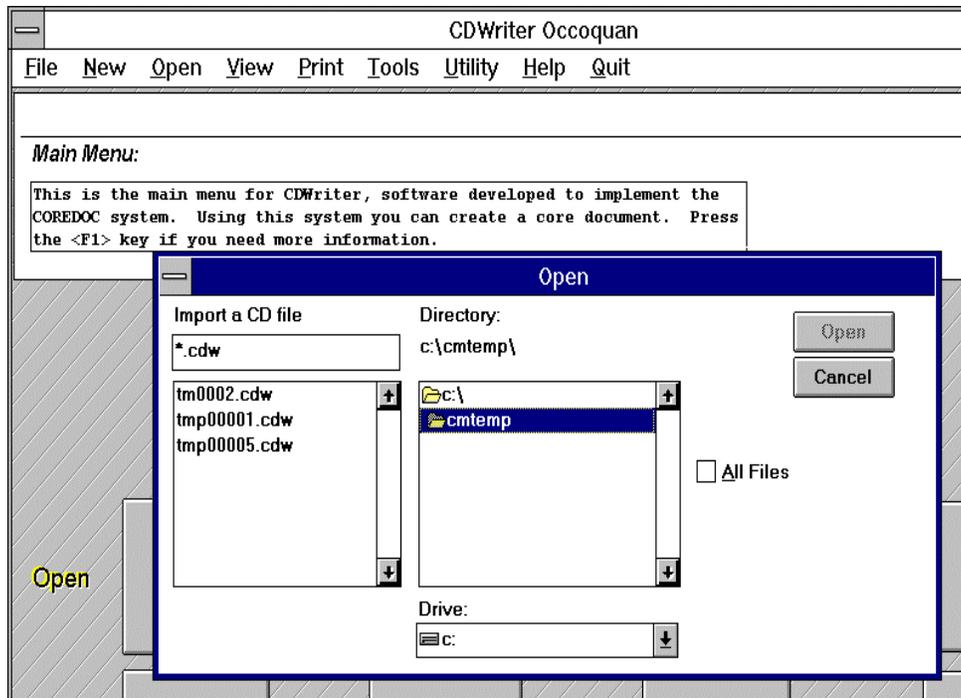
After the correct path and file name are entered on the screen, press the [Enter] key. The application will then display a Confirmation Screen.



**Figure E-8. CDWriter Version 2.0 (PC Version) - Confirmation Screen**

The Confirmation Screen will display a message indicating the complete file name, e.g., C:\TMP0001” for the export file. Press any key to continue.

To import a CD into the PC Version of CDWriter, click the Import icon from the Main Menu Screen. The Open Screen (Figure E-9) is displayed.



**Figure E-9. CD Writer Version 2.0 (PC Version) - Import Screen**

Select the directory and file name where the core document was saved. Then, continue to work on the imported document in the CDWriter Version 2.0 (PC Version). To import the saved core document into the PPI Suite of COREDOC, contact the systems administrator for further instructions or follow the instructions on the screen.

### ***FTP from PC to UNIX Host***

Users can utilize several different File Transfer Protocol (FTP) program applications to move a core document to the UNIX host. Currently there are three applications, including: Microsoft FTP, Oracle FTP, and WS\_FTP

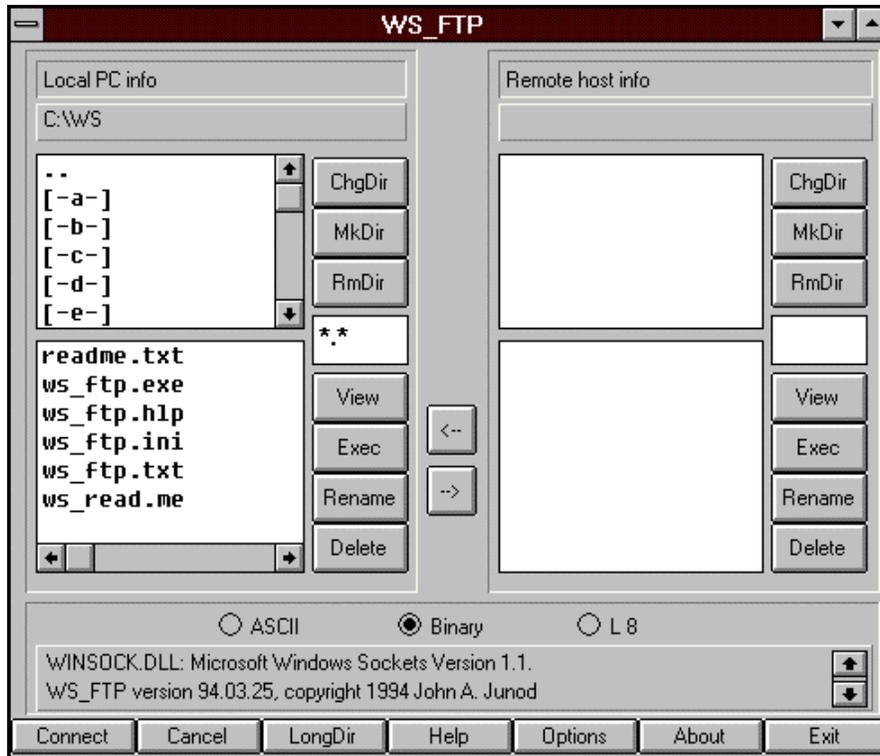
Regardless of which FTP application users select, always be sure that the transfer protocol is set to **ASCII**! Before beginning the file transfer, refer to the application's Help File documentation on how to proceed with File Transfer. The UNIX Host directory to **FTP** the **ASCII** files should be **"/tmp"**.

For illustration purposes, the **WS\_FTP** application will be used to export files into UNIX host.

### **FTP into Open System**

Locate the **WS FTP** icon in **Network** group in Program Manager. Double click the **WS FTP** icon to activate it. Users should take a minute to familiarize themselves with the

available options. The left portion shows the Local PC from where the CD's are present and right portion shows the Remote Host (the place users want to import). Press the "Connect" button located at bottom left of the screen. The application will display the WS\_FTP Main Menu Screen (Figure E-9).



**Figure E-10. WS\_FTP Main Screen**

The WS\_FTP Main Screen connects users to the system stated in the text-box, **Config name** and **Host name**. In some versions, the "Connect to" dialog box is also called a "Session Profile". Complete all the boxes (Figure E-11) and press "OK" to return to the WS\_FTP Main Menu Screen (Figure E-12).

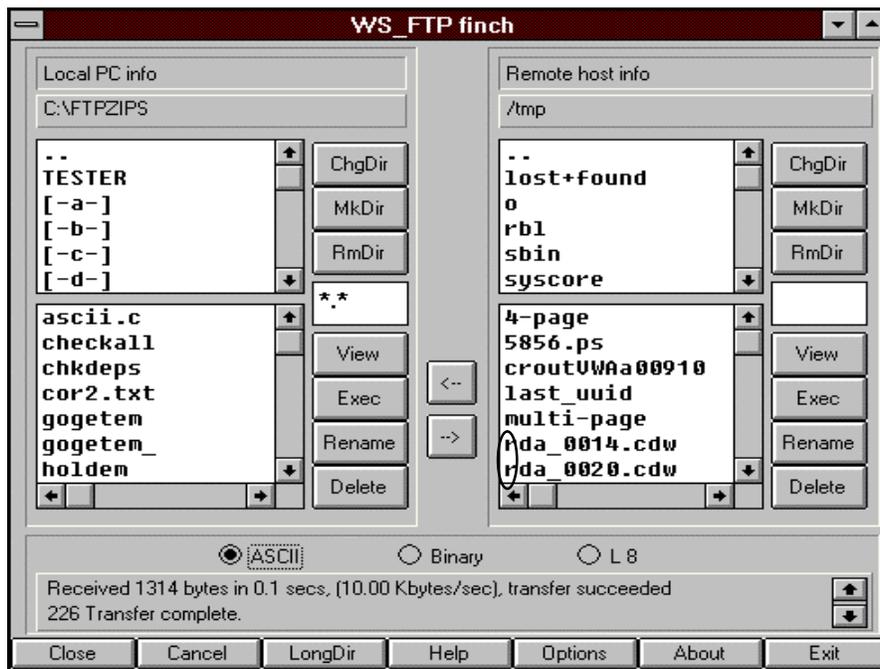


**Figure E-11. Connect In... Dialog Box**

Users will notice both the **Local PC information** and **Remote host information** sections now contain information. Select the directory containing the Core Documents in the Local PC top section. The bottom section displays the related files similar to any file manager.

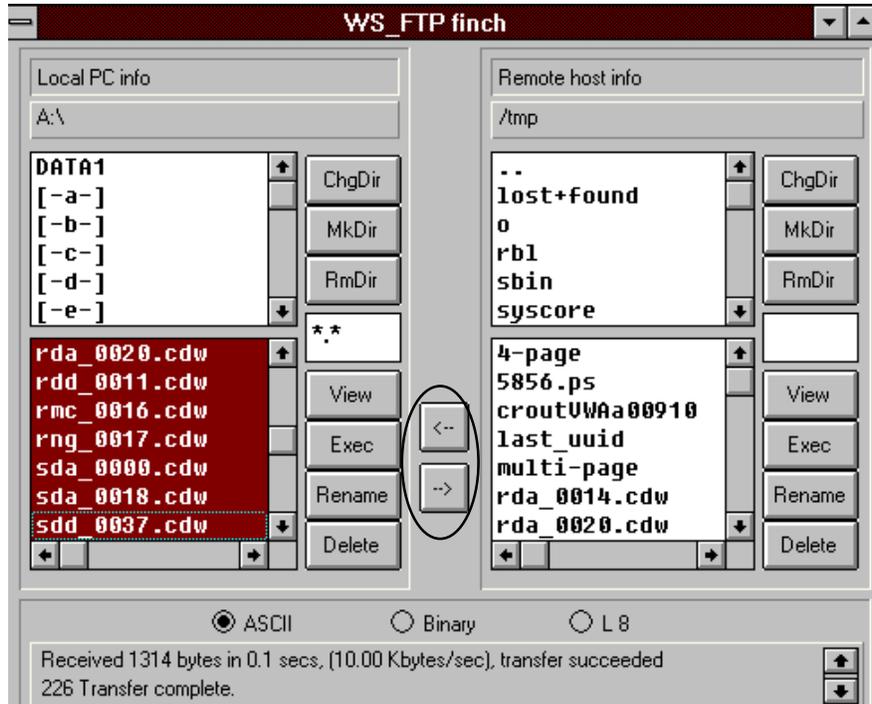
**Important:** Please change the radio button from **Binary** to **ASCII** before selecting any files.

Select the directory in **Remote host** information where users want the CD's to be imported (Figure E-12).



**Figure E-12. WS-FTP Main Menu Screen**

**Note:** Regular CD's start with 'r' and Standard CD's start with 's' in the file directory of the Remote host.



**Figure E-13. WS-FTP Main Menu Screen**

Select CD's to be exported from the bottom left as shown. Import them to the Remote host by pressing the "-->" button from the center of the WS\_FTP Screen indicating the direction of transfer of files.

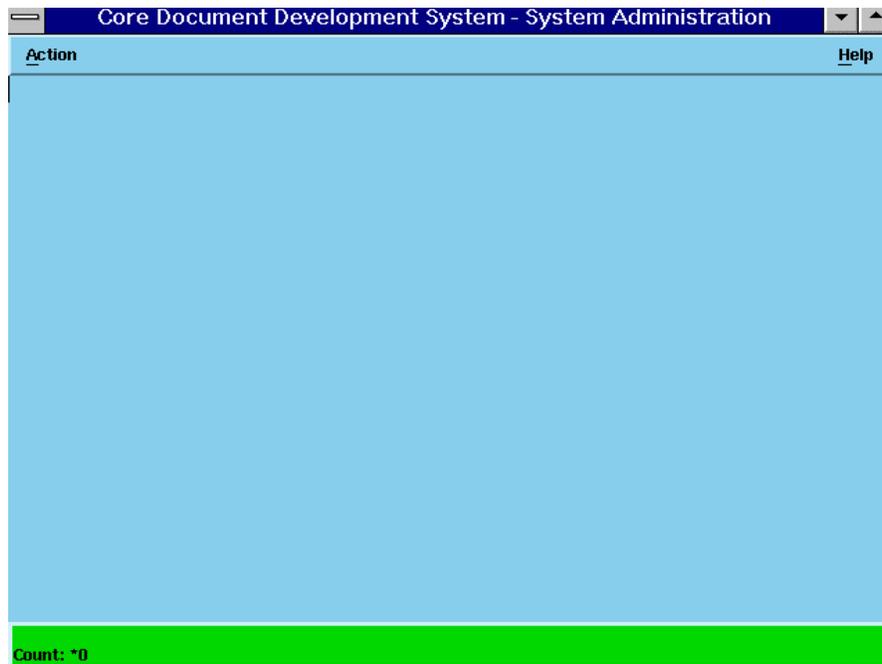
### ***Import of the CD into Coredoc PPI Suite (System Administrator)***

Open the COREDOC Application in the PPI Suite and select "Utilities" from the Menu Bar. Users see the following options as shown in Figure E-14.



**Figure E-14. Utilities Menu**

Click **System Administration**, if a system administrator, and the application will display the COREDOC System Administration Screen. Click "Action" on the Menu Bar (Figure E-15).



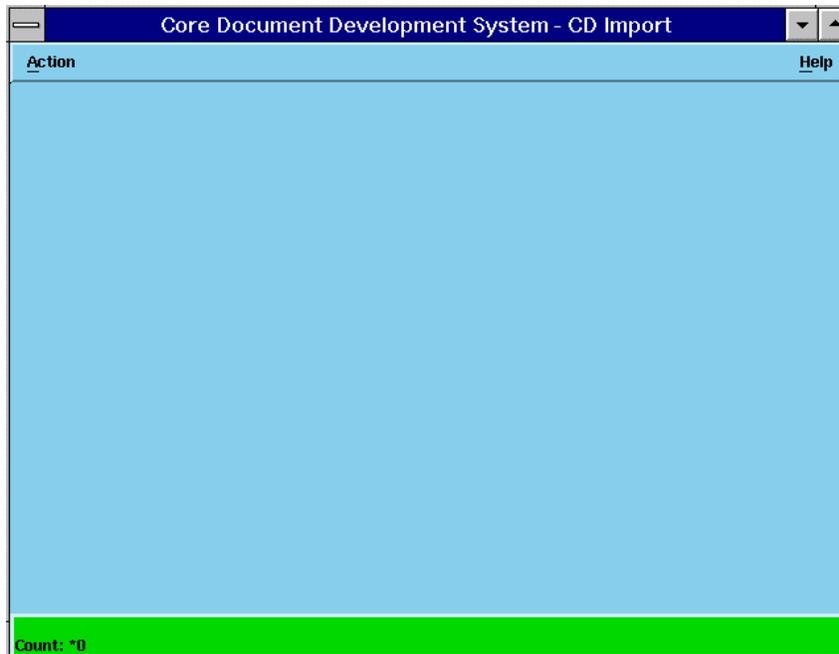
**Figure E-15. Action Screen - PPI Suite COREDOC Application**

The following drop down menu appears (Figure E-16).



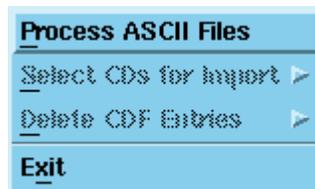
**Figure E-16. Action Menu Screen**

Select “Import PC Core Documents” (Figure E-16). The CD Import Screen is displayed (Figure E-17).



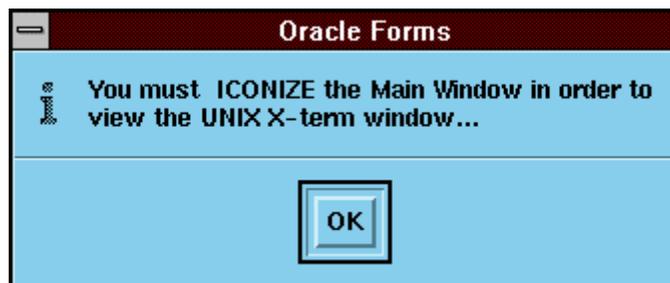
**Figure E-17. CD Import Screen**

Select “Action” from the Menu Bar. Figure E-18 is displayed. Select “Process ASCII Files” option.



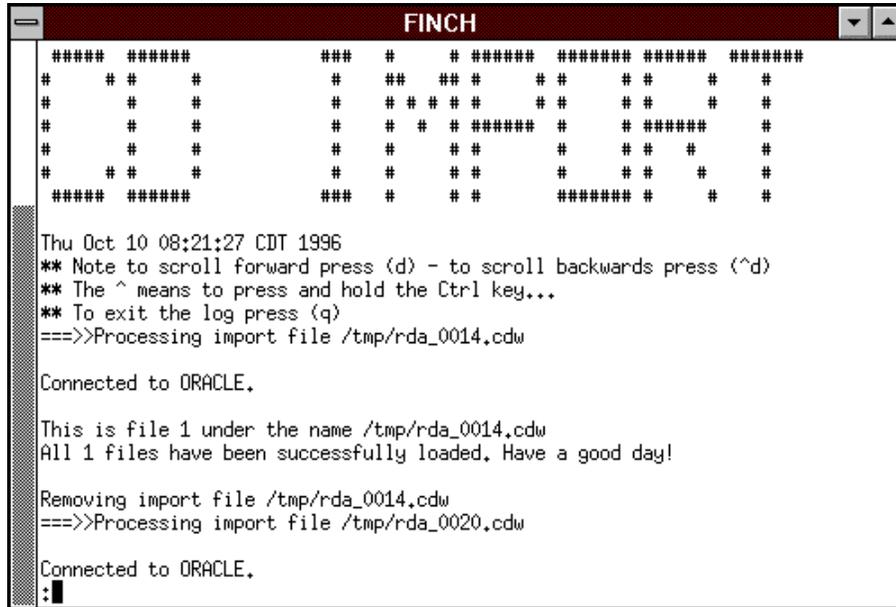
**Figure E-18. Process ASCII Files Menu**

The application will display an Oracle Forms Message Box that states “Users must ICONIZE the Main Window in order to view the UNIX X-term window” (Figure E-19).



**Figure E-19. Iconize Screen**

Press the “OK” button. Click the “control bar” to minimize the Main Window. The application will then display the UNIX X-Term window (Figure E-20). Users may now observe the processing status, if desired.



**Figure E-20. UNIX X-Term Window**

The UNIX system will check all the CD’s available for import, load, and then process them. Press “q” to exit the viewer. Press “y” to print a copy of the log.

Double click the Main Window Screen which has been “iconized” in the previous step. The application will again display the COREDOC System Administration Screen shown in Figure E-15.

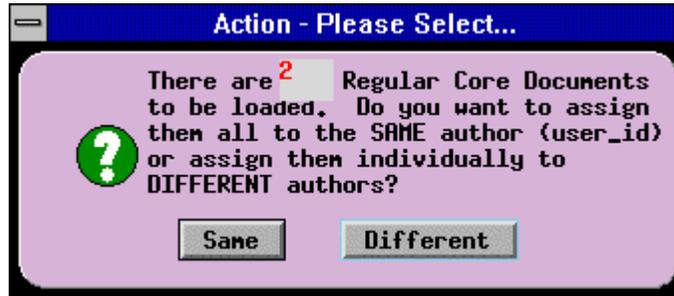
Click “Action” on the Menu Bar and the application will display a drop down menu containing three options, “Select CDs for Import”, “Delete CDF Entries” and “Exit” (Figure E-21).



**Figure E-21. Select CDs for Import Menus**

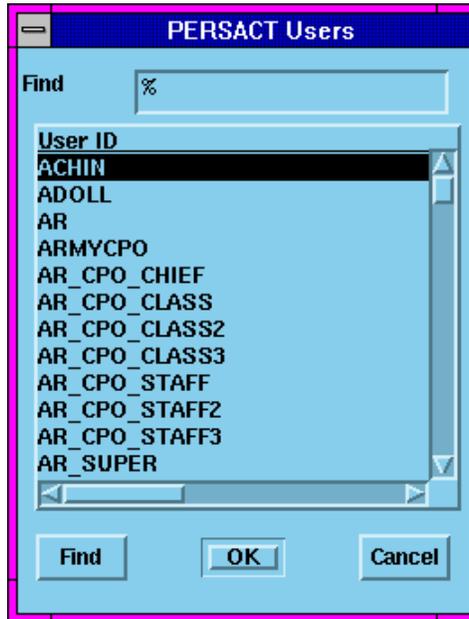
Click the “Select CDs for Import” option, the application will then display another drop down list allowing the user to select, “Standard CDs” or “Regular CDs”.

For illustration purposes, the user selects “Regular CDs” option. The application will then display the Action -Please Select... Dialog Box (Figure E-22).



**Figure E-22. Action - Please Select... Dialog Box**

Users are given the option to assign all of the regular core documents to the same user\_id or to assign them individually to different user\_ids (Figure E-23).

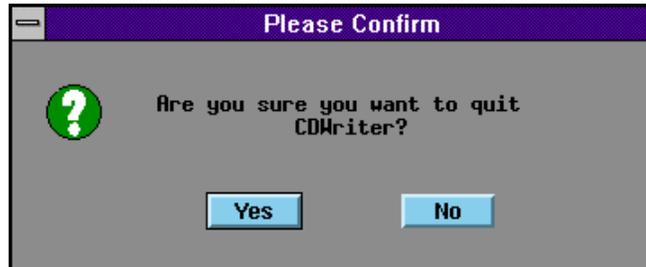


**Figure E-23. PERSACT Users Dialog Box**

Select a “User\_id” and a message box confirms that core documents are being loaded. After the documents are loaded, the application will automatically display the Core Document System Administration Screen (Figure E-15). Select “Action” to see if any additional documents are to be loaded. Exit if everything has been loaded.

## Exit

To exit the COREDOC application, click the “Exit” option from the System Administration Menu Bar (Figure E-15). Click the “Action” Option from the Menu Bar and then select the “Exit” Option.



**Figure E-24. Confirmation Dialog Box**

The application will then display a message asking users to confirm their selection. Click the “Yes” button to exit the COREDOC application and return to the PPI Application Menu Screen. Clicking the “No” button will take users back to the COREDOC Main Menu Screen.

**APPENDIX F**

**“ATTACH DOC” Instructions**

**for CDE Runtime Users**

## Appendix F

### “Attach DOC” Instructions for CDE Runtime Users

This appendix covers the “ATTACH DOC” procedures for the Coredoc and Persaction records. This procedure is available **ONLY** for those individuals who are using CDE Runtime. Users of X-Vision and other operating applications **DO NOT** have this capability.

To attach a document, click “Attach Doc” at the bottom of the Persaction In Box Screen (Figure F-1).

The screenshot shows a window titled "INBOX NAME: CPO\_CHIEF". It contains a table with the following data:

Request #	PP	SER	GR	Organization	Form	Type	Employee	*NCSA
97AF000001	GS	0318	05	4LOJFB2VCC	SF52	PROMOTION	ABZZZZ MARY A	Y
97AF000002	GS	0326	04	9P2UF7JJSVXFC	SF52	PROMOTION	ABZZZZ MARY A	Y
97AF000003	WG	8863	05	4LOJFHR6LGMCC	SF52	PROMOTION	ABUAN ROBERT M	Y
97AF000022	GS	0203	06	4LOJFDHVDPC	SF52	FILL/RECRUIT		Y
97AF000027					SF52	FILL/RECRUIT		Y

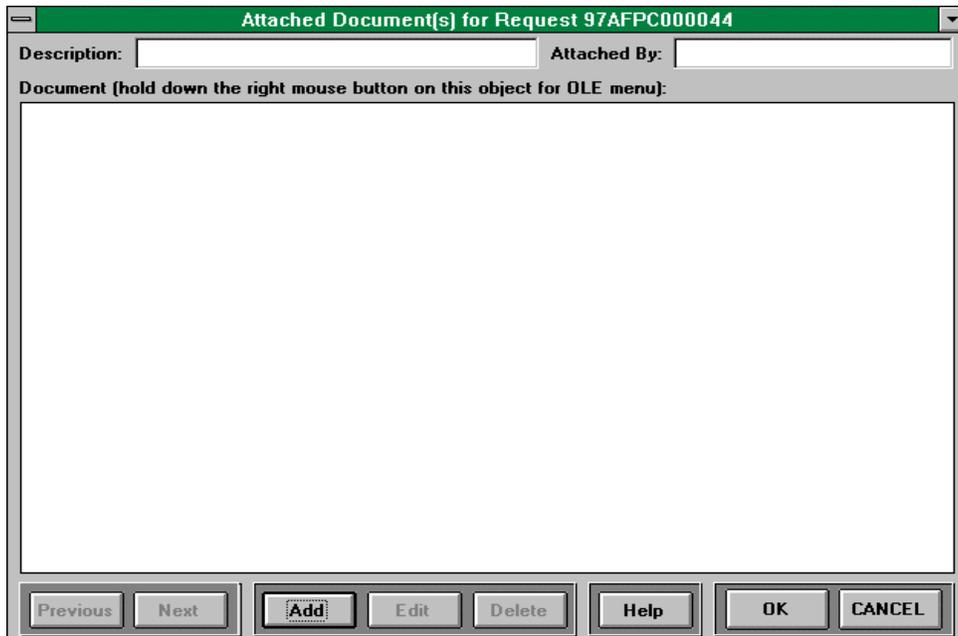
Below the table is a legend:

\*N column: Y=Indicates notes are attached to the request.  
C column: Y=Indicates a core document is attached to the request.  
S column: Y=PTI Response read R=PTI Response received but not read ?=Waiting f/Response  
A column: A=Indicates document(s) are attached.

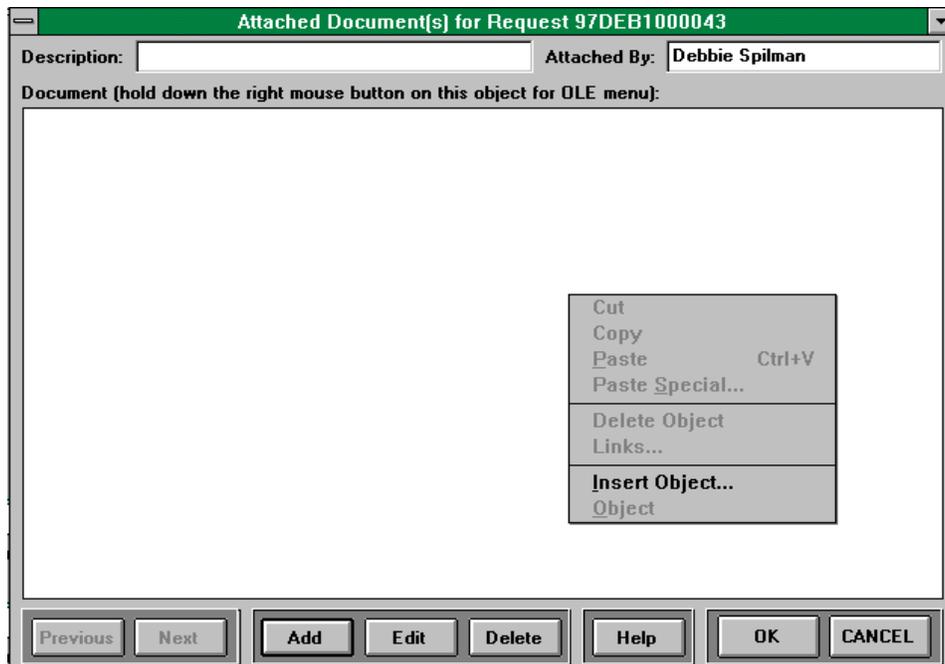
At the bottom, there is a control panel with buttons: Create, Edit, Coordinate, PTI, Print, Batch Print, Attach Doc (circled), Notes, Delete, Close, Sort, Track, Reports, and Quit.

Figure F-1. PERSACTION In Box Screen

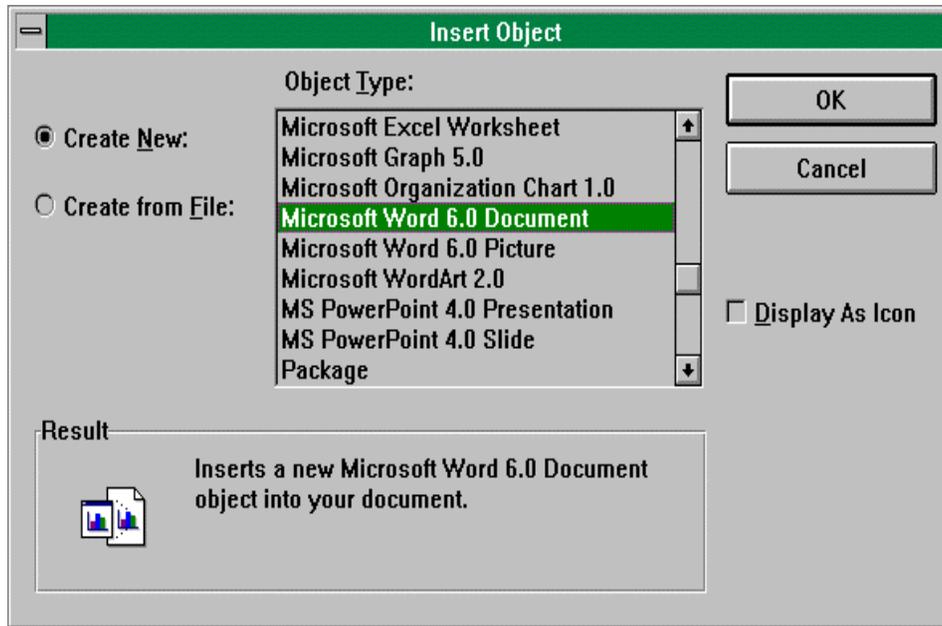
The Attached Documents Screen (Figure F-2) is displayed. Click the “Add” button. Place the mouse pointer inside the Document block section when the screen is displayed and click the right mouse button. The pull down menu in Figure F-3 is displayed. When the “Add” button is selected, the users name is automatically entered in the “Attached By” data field. The “Description” data field is enabled to allow the user to enter a brief description of the document to be entered into the Attached Document of Request Screen field. Click the **Insert Object** for the type of document to be inserted into the Attached Document of Request Screen (Figure F-3). Clicking **Insert Object** displays the Insert Object Screen (Figure F-4).



**Figure F-2. Attach Document Request Screen - Blank**

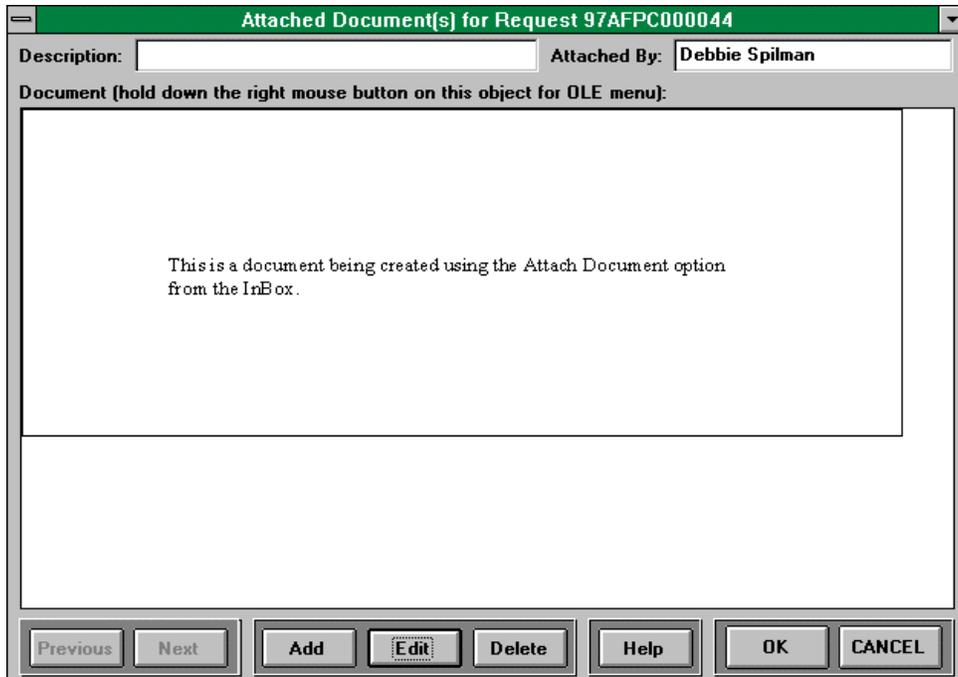


**Figure F-3. Pull Down Menu Screen Within the Request Data Screen**



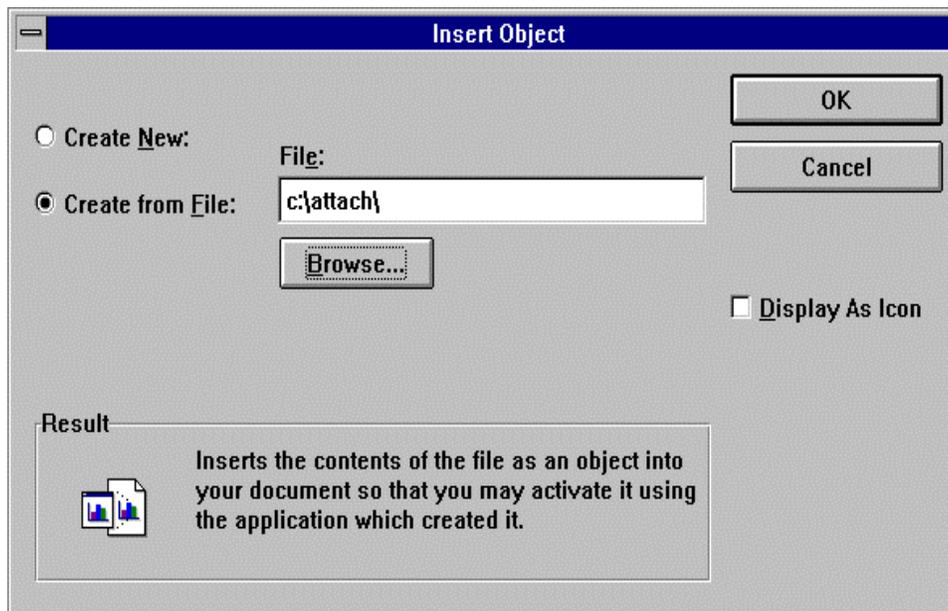
**Figure F-4. Insert Object Screen**

Click the **Create New** Button to create a new file or click **Create from File** to insert a previously written file. Select **Object Type** by using the scroll bar to locate the type of document to be created by the user. Highlight the needed document and click "OK". To create a new document, select "Create New", "Object Type", and then click "OK". Figure F-5 gives an example of a Word 6.0 Document. After creating the document, exit the application by selecting "File" and then "Exit" from the Menu Bar. The document will be saved in the database. To save a copy of the document to the hard drive, select "File" and "Save Copy As" from the Menu Bar. Then "Exit" to exit the application.



**Figure F-5. Screen Displayed When Select Object Type Selected**

To attach an already existing document, select the “Create From File” button. Figure F-6 is displayed. If the file name of the document is known, enter the file name with the correct drive and directory to the File Field. If there is a need to visually locate the document, press the Browse... button. This displays the standard Windows dialog box for locating a file. Simply follow the normal process in selecting the desired file.



**Figure F-6. Create From File Screen**

By selecting “Display As Icon” the appropriate icon will be displayed beneath the Display As Icon area on the Insert Object Screen (Figure F-7). The icon will also be displayed in the Attached Document screen area (Figure E-8).

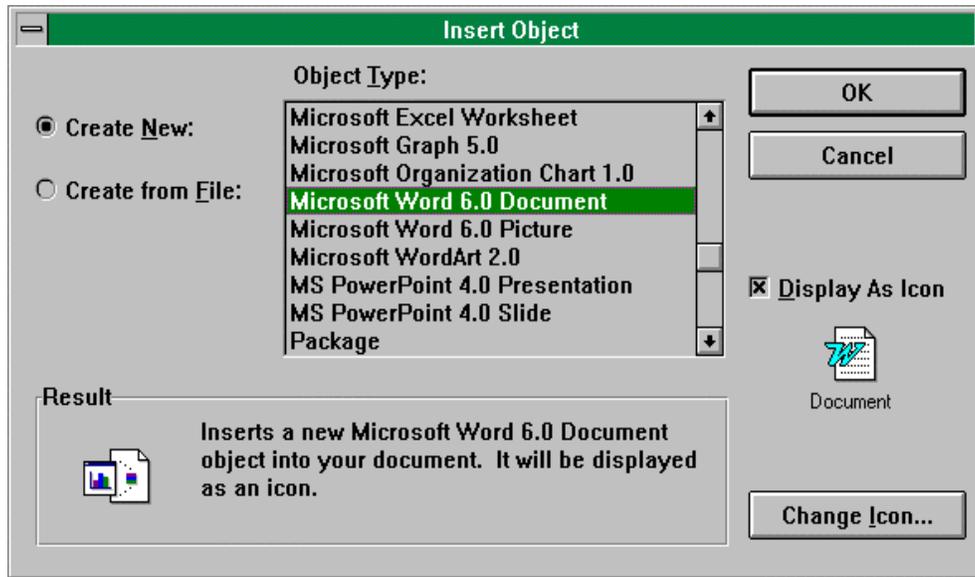


Figure F-7. Display As Icon on Insert Object Screen

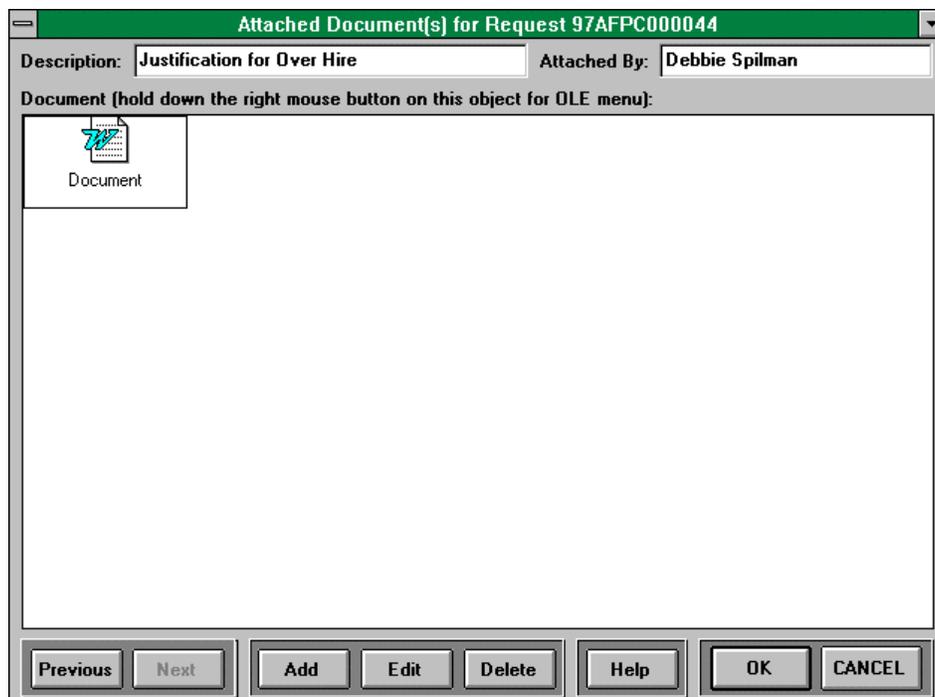


Figure F-8. Attached Documents Screen with Icon and Buttons

## **Attached Document Buttons**

To view and edit the attached document, click “**Edit**” at the bottom of the screen and the associated application will be launched. For example, click the Edit button and Microsoft Word will be launched with the document open. Corrections, additions, or deletions can be made to the document.

The “**Next/Previous**” buttons are used to navigate through the attached documents when multiple documents are attached. When the “**Next**” button is gray, there are no additional documents attached. When the “**Previous**” button is gray, the user is at the first attached document.

Attachments are deleted by selecting the “**Delete**” button. There is no confirmation screen to make sure the user really wants to delete the document . To recover the document, select the “**Cancel**” button.

Selecting the “**Cancel**” button allows the users to abandon all changes made to attached document(s). The “**Cancel**” button can also be used if no changes were made to the attached document(s) and no document(s) were added.

Select the “**OK**” button to exit the Attached Document form and save any changes made.

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## COREDOC Quick Help for Personnelists

### Initiating a COREDOC Session

1. Open COREDOC by clicking the Integrated Personnel Process Improvement (PPI) Suite icon from the Program Manager screen.
2. Type your Username and press the **[Tab]** key. Enter your password. Click the **"CONNECT"** command button. The application will display the **PPI Application Menu** screen.
3. Click the **"COREDOC"** option. If this is the first time accessing the COREDOC system, the application will display the **System Default Screen (see chapter three of the COREDOC User Guide)**. Otherwise, the application will display the **COREDOC Main Menu** screen.

### Creating a Core Document

1. Go to the COREDOC Main Menu Bar, click the **"File"** menu. Select **"New"** to create a core document. The application will display a list of available occupational series.
2. Use the scroll bars to navigate through the list of occupational series or type the first letter of the job title after the **"%"** character in the locator block. Click the **"FIND"** button. When you have highlighted the desired series, click **"OK"**.
3. The application will display the **Core Document (CD) Type** dialog box. This dialog box allows you to create a standard or regular core document. Click the appropriate check box. Click the **"OK"** button.
4. The application automatically assigns a **"TMP Number"**. However, we recommend that you enter your own eight character identifier for the core document. Click the **"OK"** button to accept this number. The application will then display the **Duty Listing Screen**.
5. Review all the duties associated with the series. To select duties, click the check box located to the left of the duty statement. The application will then display the **Duty Classification Levels Screen**.
6. Click the **Position Title** to the side of each grade level. The application will display a short description of the work associated with that grade level. To display the duty statement, click the **"Statement"** button. Review statement, click **"Return"**. To select a grade level, click the check box. The application will return you to the **Duty Listing Screen**.
7. **Repeat steps 5 and 6 to select additional duties.** After you have selected your last duty statement, click the **"Continue"** button.
8. The application will display a **Duty List Opportunity** screen. Click the **"Prev"** button to select additional duties. Click the **"Save and Quit"** button to exit COREDOC. Click **"Continue"** to display the **Supplementary Requirements Screen**.
9. Review the additional requirements statements associated with this series. To select a statement, click the check box located on the left hand side of the statement. Click the **"OK"** button to save your selection(s). Click **"Continue"** to proceed to the **Percentage of Time** screen.

**COREDOC Quick Help for Personnelists (Cont.)**

10. The application will automatically assign a percentage to each duty. You may enter a new percentage for each duty statement. Click the **“Continue”** button.
11. The application will display the Knowledges, Skills, and Abilities (KSAs) for the position based on the duties and grade levels you selected. Click the appropriate checkboxes. Click the **“Continue”** button.
12. The application will display the **Core Document Summary** screen. Click the **“Continue”** button.
13. The application will display the **Goals and Purpose** screen. The organization you entered in the System Defaults Screen is automatically entered on your core document. Go to the **“Organizational Goals”** block and select **“Standard Goals”**. Click the **“Continue”** button. **Note: Air Force users should go to Step 15.**
14. The application will display the **Performance Management Plan** Screen. Click **“Duties”** button to view the duty statements that you previously selected. Click the **“Continue”** button.
15. The application will then display the **Core Document Summary** screen. Go to the **“Edit”** Menu. Review the options. Select **“Exit”** to return to the **Core Document Main Menu** screen.

**Viewing and Printing a Core Document**

1. Go to the COREDOC Main Menu Bar, click the **“File”** menu. Select **“Open”** to view a list of previous created core documents. Use the scroll bar or the **“Find”** option to highlight a core document. Click the **“OK”** button.
2. Click the **“Reports”** menu. Select the **“Core Document”** option. The application will display the **Reports Destination** screen. Select **“Previewer”** and then click the **“OK”** button.
3. The application will display the **Previewer** screen. Use the scroll bars to view the core document.
4. Go to the **“File”** Menu within the **Previewer** screen. Select the **“Choose Printer”** option. Using your mouse, highlight the desired printer from a list of pre-defined printers. Click the **“OK”** button.
5. Click the **“OK”** button located at the bottom of the **Print Job** dialog box. The application will again display the **Previewer** screen. Click the **“Print”** button. After the print job is finished, click the **“Close”** button.

**Logging off COREDOC**

1. Go to the **Coredoc Main Menu** Screen. Click the **“File”** menu. Click the **“EXIT”** button.
2. The application will display the message, *“Do you wish to exit the Core Document System”*. Click **“Yes”**. The application will then return you to the **PPI Application Menu**.
3. Click the **“EXIT”** button to return to the Program Manager screen.

## COREDOC Quick Help for Managers

### Initiating a COREDOC Session

1. Open COREDOC by clicking the Integrated Personnel Process Improvement (PPI) Suite icon from the Program Manager screen.
2. Type your Username and press the **[Tab]** key. Enter your password. Click the **"CONNECT"** command button. The application will display the **PPI Application Menu** screen.
3. Click the **"COREDOC"** option. If this is the first time accessing the COREDOC system, the application will display the **System Default Screen (see chapter three of the COREDOC User Guide)**. Otherwise, the **COREDOC Main Menu** screen is displayed.

### Creating a Core Document

1. Go to the COREDOC Main Menu Bar, click the **"File"** menu. Select **"New"** to create a core document. The application will display a list of available occupational series.
2. Use the scroll bars to navigate through the list of occupational series or type the first letter of the job title after the **"%"** character in the locator block. Click the **"FIND"** button. When you have highlighted the desired series, click **"OK"**.
3. The application will display the work situation for the series you selected. Click the **"information"** button to view additional information and any special instructions concerning the series. Click the **"Continue"** button.
4. The application automatically assigns a **"TMP Number"**. However, we recommend that you enter your own eight character identifier for your core document. Click the **"OK"** button to accept this number. The application will then display the **Duty Listing Screen**.
5. Review all the duties associated with the series. To select duties, click the check box located to the left of the duty statement. The application will then display the **Duty Classification Levels Screen**.
6. Click the **Position Title** to the side of each grade level. The application will display a short description of the work associated with that grade level. To display the duty statement, click the **"Statement"** button. Review Statement, click **"Return"**. To select a grade level, click the check box. The application will return you to the **Duty Listing Screen**.
7. **Repeat steps 5 and 6 to select additional duties.** After you have selected your last duty statement, click the **"Continue"** button.
8. The application will display a **Duty List Opportunity** screen. Click the **"Prev"** button to select additional duties. Click the **"New Series"** to select another series to mix with the series previously selected. Click the **"Save and Quit"** button to exit COREDOC. Click the **"Continue"** to display the **Supplementary Requirements Screen**.
9. Review the additional requirements statements associated with this series. To select a statement, click the check box located on the left hand side of the statement. The application will then take you to the **Supplementary Selection** screen. To select an item, click on the check box for the appropriate selection

## COREDOC Quick Help for Managers (Cont.)

The application will then return you to the **Supplementary List** screen to make further selections.. Click the **“OK”** button to save your selection(s). Click **“Continue”** to proceed to the **Percentage of Time** screen.

10. The application will automatically assign a percentage to each duty. You may enter a new percentage for each duty statement. Click the **“Continue”** button.
11. The application will display the Knowledges, Skills, and Abilities (KSAs) for the position based on the duties and grade levels you selected. To select, click the appropriate checkboxes. Click the **“Continue”** button.
12. The application will display the **Core Document Summary** screen. Click the **“Continue”** button.
13. The application will display the **Goals and Purpose** screen. The organization you entered in the System Defaults Screen is automatically entered on your core document. Go to the **“Organizational Goals”** block and select **“Standard Goals”**. Click the **“Continue”** button. **Note: Air Force users should go to Step 15.**
14. The application will display the **Performance Management Plan** screen. Click **“Duties”** button to view the duty statement that you previously selected. Click the **“Continue”** button.
15. The application will then display the **Core Document Summary** screen. Go to the **“Edit”** Menu. Review the options. Select **“Exit”** to return to the **Core Document Main Menu** screen.

### **Viewing and Printing a Core Document**

1. Go to the COREDOC Main Menu Bar, click the **“File”** menu. Select **“Open”** to view a list of previously created core documents. Use the scroll bar or the **“Find”** option to highlight a core document. Click **“OK”**.
2. Click the **“Reports”** menu. Select the **“Core Document”** option. The application will display the **Reports Destination** screen. Select **“Previewer”**. Click the **“OK”** button.
3. The application will display the **Previewer** screen. Use the scroll bars to view the core document.
4. Go to the **“File”** Menu within the **Previewer** screen. Select the **“Choose Printer”** option. Using your mouse, highlight the desired printer from the list of pre-defined printers. Click the **“OK”** button.
5. Click the **“OK”** button located at the bottom of the **Print Job** dialog box. The application will again display the **Previewer** screen. Click the **“Print”** button. After the print job is finished, click the **“Close”** button.

### **Logging off COREDOC**

1. Go to the **Coredoc Main Menu** Screen. Click the **“File”** menu. Click the **“EXIT”** button.
2. The application will display the message, *“Do you wish to exit the Core Document System”*. Click **“Yes”**. The application will then return you to the **PPI Application Menu**.
3. Click the **“EXIT”** button to return to the Program Manager screen.