Overview

Introduction

This guide provides procedures to obtain EI-PDR access, scan, forward, and verify EI-PDR documents, and a software user guide.

Perceptive Experience™ Software

EI-PDRs are stored in a document imaging system repository. Perceptive Experience is an internet browser-based software application which facilitates access to the repository. As a browser-based application, Perceptive Experience does not require installation on the standard workstation; it functions within Internet Explorer.

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Perceptive Experience Account Access and Deactivation

Introduction
This section provides instructions and procedures for a Servicing Personnel Office (SPO) to obtain and deactivate Perceptive Experience accounts.

Reference
(a) Personnel and Pay Procedures Manual (PPPM), PPCINST M1000.2 (series)

Responsibilities
The Branch Chief in which the SPO is located or the next senior member within the chain of command is the approving authority for Perceptive Experience Access and Deactivation requests for the SPO Supervisor.

The SPO Supervisor is the approving authority for Perceptive Experience Access and Deactivation requests for other personnel assigned to the SPO.

The Coast Guard Pay & Personnel Center (PPC) Topeka receives and processes Perceptive Experience and Direct Access User Authorization and Deactivation forms. PPC will also maintain a list of the SPO Supervisors and “next senior member” to verify requests have been approved at the appropriate level.

PSC-BOPS-C will regularly monitor accounts for proper access and recommend removal.

Discussion
The purpose of a SPO Perceptive Experience account is for “official business only” access to the EI-PDR in order to comply with COMDTINST M1080.10 (series). EI-PDR

Once missing documents in the EI-PDR are identified, the SPO will scan and send the documents to PSC-PSD-MR for inclusion in the EI-PDR. This process is identified in the guide “SPO PDR Scanning and Submission Procedures”.

A SPO Perceptive Experience account is issued with “read-only” access, and is restricted to only those SPO personnel who perform SPO PDR duties.

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Perceptive Experience Account Access and Deactivation,
Continued

SPO Procedures to establish a Perceptive Experience account

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Ensure member has CGHRS access in Direct Access</td>
<td>See Part I, Chapter 2, DA SPO User Roles and Access (HRS/HRSUP), of this manual. If member doesn’t have HRS access, then complete form CG-7421B (DA User Role Designation)</td>
</tr>
<tr>
<td>2</td>
<td>Complete form CG-7421D (and CG-7421B if the user doesn’t already have “HRS/SPO” access)</td>
<td>Both of these required forms can be found on PPC’s website located at: <a href="http://www.dcms.uscg.mil/ppc/pd/forms/">http://www.dcms.uscg.mil/ppc/pd/forms/</a>. See pages 7 and 8 for samples of completed forms. Forms must be digitally signed and transmitted to PPC Topeka via e-mail. Note: Complete CG-7421D (ImageNow User Access) first, then attach it to a CG-7421B (DA User Role Designation) and submit the completed forms to PPC using the e-mail button in block 13 of the CG-7421B. Reminder: When completing form CG-7421B, Direct Access User Role Designation, mark user roles in block 7 that you currently hold and wish to retain. Each new authorization/designation form supersedes previous authorizations and designations. Users at the Academy and TRACEN SPOs may have additional roles. If you are unsure about the roles you currently hold, refer to the user access form you most recently submitted or run the DA User Role Query.</td>
</tr>
<tr>
<td>3</td>
<td>Receive confirmation from PPC that your Perceptive Experience account has been established.</td>
<td>You will receive an email from PPC stating that your Perceptive Experience account has been established and provided a User ID and Password. Your User ID will be your EMPLID. Additionally, the “SPO IPDR” button on the Direct Access “CG Member Info Page” will be enabled (colored vice gray).</td>
</tr>
<tr>
<td>4</td>
<td>Properly file the Perceptive Experience user access form.</td>
<td>Each user shall file the CG-7421D form for the duration the user has account access. Once requests for deactivation of the account have been completed the original “activation” requests can be destroyed.</td>
</tr>
</tbody>
</table>

Continued on next page
Perceptive Experience Account Access and Deactivation, Continued

SPO Procedures to Deactivate a Perceptive Experience account

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Complete and submit a PPC Customer Care Trouble Ticket.</td>
<td>It is the member and the member's supervisor responsibility to ensure accounts are deactivated immediately upon transfer/reassignment, or in cases of violation of the official use restriction. Deactivation is required even when transferring to another SPO office.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>The PPC Customer Care Trouble Ticket can be found on PPC’s CG Portal site:  <a href="http://cglink.uscg.mil/PPCticket">http://cglink.uscg.mil/PPCticket</a>.</td>
</tr>
<tr>
<td></td>
<td></td>
<td>A sample Trouble Ticket is shown in this section on page 9.</td>
</tr>
</tbody>
</table>

Continued on next page
Perceptive Experience Account Access and Deactivation, Continued

SPO Perceptive Experience Help Contacts

<table>
<thead>
<tr>
<th>Problem</th>
<th>Contact</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Perceptive Experience is not loading after pressing the “SPO IPDR” link</td>
<td>Wait – initial load of Perceptive Experience application may take up to two minutes.</td>
<td>The new version of Perceptive Experience may take a while to load initially. However, once it loads and you are logged in, your response time should be normal.</td>
</tr>
<tr>
<td>Initial Perceptive Experience Account Login problem or the “SPO IPDR” link is not enabled.</td>
<td>PPC Customer Care Branch at 866-PPC-USCG (772-8724)</td>
<td>Contact the PPC Customer Care Branch if the Perceptive Experience account is not established after receiving email confirmation that the CG-7421B and the CG-7421D forms have been processed.</td>
</tr>
<tr>
<td>Perceptive Experience Password Resets or hard error messages.</td>
<td>Submit a PPC Customer Care Trouble Ticket</td>
<td>PPC will provide password resets for Perceptive Experience UserIDs. They will also collect and forward all trouble issues outside of their support level to CG-631 for action. For Password resets or other errors messages, submit a PPC Customer Care Trouble Ticket from PPC’s Website at: <a href="http://cglink.uscg.mil/PPCticket">http://cglink.uscg.mil/PPCticket</a>. See example in this section for both password and error message issues.</td>
</tr>
</tbody>
</table>

Continued on next page
Perceptive Experience Account Access and Deactivation, Continued

Note: CG-7421B is only required if the user doesn’t already have CGHRS-SPO access.

Reminder: Mark user roles in block 7 that you currently hold and need to retain. Each new authorization/designation form supersedes previous authorizations and designations. Run the DA User Role Query if you are unsure of the roles you currently hold.

Click Here - Email form to AO

Click Here - Email form to PPC

Continued on next page
Perceptive Experience Account Access and Deactivation,
Continued

CG-7421D Sample - ImageNow User Access Authorization Form
Digital signature required.

---

**ImageNow User Access Authorization Form**

<table>
<thead>
<tr>
<th>Field</th>
<th>Information</th>
</tr>
</thead>
<tbody>
<tr>
<td>User's Name</td>
<td>Smith, John M.</td>
</tr>
<tr>
<td>Rank/Rate</td>
<td>YB2</td>
</tr>
<tr>
<td>Email Address</td>
<td><a href="mailto:john.m.smith@uscg.mil">john.m.smith@uscg.mil</a></td>
</tr>
<tr>
<td>User Role Description</td>
<td>include current role, this authorization supersedes all of your previous authorizations.</td>
</tr>
</tbody>
</table>

**Security Administrators:**

1. CS User Auth - DA & J/MPS User Auth Forms
2. MISO User Auth - Authorization Administrator
3. ImageNow Administrator
4. Scanners

**HQs/PSC/SPOs:**

1. Document Processors (Scanners/Image Processors) PSC-MR, PSC-PM-3
2. Boardroom Administrators

**Records Review - Full Access:**

1. OPD
2. RPM/Office Reviewer
3. OPD/RPM Boardroom Accounts
4. DMF/Congressional Review
5. Auditor Support

**Records Review - Restricted Access:**

1. PSC-PDR

**Digital signature required.**

**Privacy Act Statement**

**Authority:**

Executive Order 10450, 9379, and Public Law 94-447, the Computer Fraud and Abuse Act of 1986

**Principal Purpose:**

To record names, signatures, and other identifying information for the purpose of identifying ImageNow (USCG) users and information. **Note:** Records may be maintained in accordance with the Privacy Act of 1974.

**Routine Uses:**

None.

**Disclosure:**

Disclosure of the record to U.S. Coast Guard personnel only. This is the record of the language of the user.

**Acknowledgment:**

I certify that the access I have authorized is based on an official need. I am aware of the general functionality I authorized and have no reason to believe that this will be misused to compromise. If there is a potential violation of the Transportation Security Act (TSA) or as AG.

**Signatures:**

1. Signature or Printed Name: John M. Smith
2. Phone: (999) 555-1212

**Digital signature required.**

**Revocation Procedure:**

ImageNow access must be terminated upon PCS, separation, retirement, reassigned, or changes of organization (FPDPs) and change of organization (inter-office transfer). Contact PCC Customer Care via on-line trouble-ticket or via email at PCC-CG-CustomerCare@uscg.mil for all ImageNow account requested.

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**Continued on next page**
Perceptive Experience Account Access and Deactivation, Continued

Sample PPC Customer Care Perceptive Experience Account Deactivation Trouble Ticket

![PPC Customer Care Trouble Ticket Submission Form](image)

Can Your Supervisor, PAO or AO Help? Many issues can be resolved at the unit or SPO level. If necessary, check with your supervisor, PAO, or AO for assistance before submitting a trouble ticket.

A separate ticket or email is required for each issue or individual affected by an issue. Do not submit tickets or emails with multiple members listed.

Review the list of DA-9.1 Known Issues before submitting a trouble ticket or email for Direct Access/Global Pay problems.

Contact Information - Who is submitting this ticket?
- POC Employee ID: 1234567
- POC Email: first.m.last@uscg.mil
- POC First Name: First
- POC Last Name: Last
- POC Title, Rate, or Rank: WO
- POC Daytime Phone Number: 786-555-1212 Ext. 1212

Member/Employee Information - Who is this ticket for?
- Member/Employee ID: 7654321
- Member/Employee First Name: John
- Member/Employee Last Name: Smith

Problem/Issue Information - If travel related issue, include Travel Order Number (TONO) and travel dates in the description.
- User Role for this issue: Am a Command, SPO or ADMIN support user
- Category: EI-PDR/WEBNOW
- Type: USER ACCT/ASSISTANCE
- Cause: REMOVE/DISABLE USER
- Description of Problem/Request: Please deactivate WO Smith’s ImageNow/WebNow account when member is departing on PCS orders.

Submit
Perceptive Experience Account Access and Deactivation, Continued

Sample PPC Customer Care Password Reset and Perceptive Experience Error Trouble Ticket

PPC Customer Care Trouble Ticket Submission Form
(Press 'Submit' after completing the form)

Can Your Supervisor, PAO or AO Help? Many issues can be resolved at the unit or SPO level. Please check with your supervisor, SPO Payment Approving Official (PAO), or for travel related issues, your Travel Approving Official (AO) for assistance before submitting a trouble ticket.

A separate ticket or email is required for each issue or individual affected by an issue. Do not submit tickets or emails with multiple members listed.

Review the list of DA 9.1 Known Issues before submitting a trouble-ticket or email for a Direct Access/Global Pay problem.

Contact Information - Who is submitting this ticket?
POC Employee ID: 1234567
POC Email: first.m.last@uscg.mil
POC First Name: First
POC Last Name: Last
POC Title, Rate or Rank: YNC
POC Daytime Phone Number: 785-565-1212 Ext. 1212

MemberEmploye Information - Who is this ticket for?
Member/Employe ID: 1234567
Member/Employe First Name: First
Member/Employe Last Name: Last

Problem/Issue Information - If a Travel related issue, include Travel Order Number (TONO) and travel dates in the description.
User Role for this Issue: I am a Command, SPO or ADMIN support user
Category: EI-PDR/WEBNOW
Type: USER ACCT/ASSISTANCE 
Cause: UNLOCK USER
Description of Problem/Request: I cannot access webNow with my password Please provide me with a password to login to webNow. My user ID is 1234567

Or, for error messages/problems - change "type to "system problem and select a "cause" and explain the error or problem.

"After logging into webNow, I receive the following error message (Type the exact message you are receiving.)

Submit
SPO Access to the Electronically Imaged PDR (EI-PDR)

SPO PDR Scanning and Verification Process

**Introduction**
This section provides a Servicing Personnel Office (SPO) the criteria and quality-control procedures to identify, scan, e-mail, and verify updates of documents forwarded to PSC for inclusion in a member’s EI-PDR.

**Reference**
(a) Military Personnel Data Records System, COMDTINST M1080.10(series)

**Responsibilities**
The SPO Supervisor has oversight responsibility to ensure documents contained in the SPO PDR match documents authorized for placement in the Electronically Imaged (EI) PDR.

SPOs will review the EI-PDR to identify missing documents. Missing documents will be scanned and forwarded to PSC-BOPS-C-MR for inclusion in the EI-PDR. SPO Personnel must ensure documents sent to PSC have been added to the EI-PDR within the established timelines.

The SPO will identify equipment capable of scanning all required documents as prescribed in this process guide. If no scanner is currently available it is the SPO’s responsibility to procure one for this process.

The PSC-BOPS-C-MR Section will review documents forwarded by a SPO to ensure proper format and readability prior to adding the document into the EI-PDR.

**Discussion**
This section provides instructions and criteria required to identify, label, scan, e-mail, and follow-up on all documents sent to PSC-BOPS-C-MR for inclusion in the EI-PDR.

Familiarization with the Military PDR System COMDTINST M1080.10(series) is essential to this process. There are documents kept in the SPO PDR that are not required in the EI-PDR and vice versa.

Consequently, any documents sent to PSC-BOPS-C-MR that are not required in the EI-PDR will not be added or returned. Additionally, all documents required in the EI-PDR may not be authorized in the SPO PDR, and therefore may not be visible to the user at the SPO (i.e. OERS, etc).

*Continued on next page*
## SPO PDR Scanning and Verification Process, Continued

### SPO Procedures

<table>
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<tr>
<th>Step</th>
<th>Action</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Identify and Label Documents prior to Scanning</td>
<td>Review COMDTINST M1080.10(series) to ensure the document is authorized in the EI-PDR. The PSC-BOPS-C-MR Section constantly receives unauthorized EI-PDR documents that are ultimately shredded. For documents that do not contain an EMPLID, write the EMPLID on the upper right hand corner of the document. All documents relating to a member’s dependents (e.g., birth certificates, adoption papers, etc.) must contain the member’s EMPLID and relationship such as EMPLID – Spouse, EMPLID – Child, or EMPLID – Parent.</td>
</tr>
<tr>
<td>2</td>
<td>Scan documents</td>
<td>The below criteria applies to scanned documents:</td>
</tr>
<tr>
<td></td>
<td></td>
<td><strong>Criteria</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>One member’s record per scanned file</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Adobe (.pdf) format</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Less than 10MB file size</td>
</tr>
<tr>
<td>3</td>
<td></td>
<td>A sample forwarding e-mail is shown on page X-4-14.</td>
</tr>
</tbody>
</table>

Read receipt of the forwarding e-mail is strongly encouraged. To request a read receipt, check box under Options for “Request a read receipt for this message” prior to sending.

Do not encrypt the message. Encrypted emails cannot be opened once delivered to the PSC folder. Per DHS and Coast Guard Policy, PII information which is considered "Sensitive But Unclassified" (SBU) requires no special handling (encryption/password protection) when sent from/to "uscg.mil" or "dhs.gov" addresses.

*Continued on next page*
## SPO PDR Scanning and Verification Process, Continued

### SPO Procedures (continued)

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<tr>
<th>Step</th>
<th>Action</th>
<th>Remarks</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>Save forwarding e-mail to file tracking folder.</td>
<td>Each SPO shall create a centralized “public e-mail” folder to store e-mails sent to the PSC-BOPS-C-MR. You will need to submit a help ticket to your local ESU/ESD IT helpdesk to have this done. The ARL-PF-CGSC-BOPS-MR-SPO_Support public e-mail folder is a good example of a “public folder e-mail name”. A sample e-mail to PSC-BOPS-C-MR with attachments is shown on the next page.</td>
</tr>
<tr>
<td>5</td>
<td>Verify documents were filed in member’s EI-PDR</td>
<td>After 14 days, the SPO must verify that documents forwarded to the PSC-BOPS-C-MR Section are filed in the member’s EI-PDR. This action requires comparing e-mails and Adobe files stored in the SPO central folder to EI-PDR contents. (See “SPO Perceptive Experience User Guide” for information on how to access/use Perceptive Experience). Sorting documents in Perceptive Experience by the “Date Created” is a good method for doing your comparison. This will move the most recently added documents to the top. Purge your SPO public e-mail folder contents upon verification of EI-PDR inclusion.</td>
</tr>
<tr>
<td>6</td>
<td>Contact the PSC-BOPS-C-MR Section as needed</td>
<td>If 14 days have passed and documents are discovered not properly filed in a member’s EI-PDR as part of the verification process above, send an e-mail to the PSC-BOPS-C-MR Section Chief, <a href="mailto:michael.r.lemorie@uscg.mil">michael.r.lemorie@uscg.mil</a>, with a list of documents sent but not filed.</td>
</tr>
</tbody>
</table>

*Continued on next page*
SPO PDR Scanning and Verification Process, Continued

Sample SPO EI-PDR Forwarding E-mail

ARL-CGPSC-BOPS-MR-SPO_Support

Files sent from EMPLXOS:
224567
2345678
3907054

Respectfully,

[Name]

SPO XYZ
District DD
Phone: 202-585-1212

—
SPO Access to the Electronically Imaged PDR (EI-PDR)

SPO Access to Perceptive Experience PDRs

Overview

Introduction

This guide provides a Servicing Personnel Office (SPO) the information and procedures necessary to access, view, print, and export EI-PDR documents using Direct Access (DA) and Perceptive Experience (perceptive).

Prerequisites for Using perceptive

The following items are required to access perceptive records:

- A perceptive account with User ID and password
- A DA account with the role(s) for accessing perceptive
- Access to the Coast Guard’s Data Network

NOTE: If you do not have the above access, you need to submit a CG-7421D form (You MUST read all of the instructions on the form) and make sure it is submitted to Customer Care.

Information

The purpose of a perceptive account is for “official business only” which is to comply with COMDTINST M1080.10 (series). The SPO cannot provide a complete copy of a member’s record due to their limited “read only” access. However, members can still obtain a copy of their EI-PDR from PSC-BOPS-C-MR via this link: http://www.dcms.uscg.mil/Our-Organization/Assistant-Commandant-for-Human-Resources-CG-1/Personnel-Service-Center-PSC/BOPS/PSC-BOPS-C/PSC-BOPS-C-MR/

This icon can be clicked at any time to get back to Documents.

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<td>Printing Perceptive Records</td>
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</tr>
</tbody>
</table>
## Accessing Perceptive Documents

### Introduction

This section provides the procedures for accessing and viewing documents in Perceptive Experience via Direct Access (DA).

### Procedures

See below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Login to DA with your User ID and Password at <a href="https://hcm.direct-access.uscg.mil/psp/HCPRD/EMPLOYEE/HRMS/?cmd=logout">https://hcm.direct-access.uscg.mil/psp/HCPRD/EMPLOYEE/HRMS/?cmd=logout</a>.</td>
</tr>
<tr>
<td>2</td>
<td>Select the <strong>Member Info Report</strong> link in the Self Service for Commands Pagelet.</td>
</tr>
<tr>
<td>3</td>
<td>Enter the members <strong>EMPL ID</strong> and hit <strong>Enter</strong> or <strong>Tab</strong> on the keyboard to display the member’s name.</td>
</tr>
</tbody>
</table>

Continued on next page
Accessing Perceptive Documents, Continued

Procedures, continued

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>The member’s name will display to the right of the Empl ID. Click on the SPO IPDR link to launch the Perceptive application.</td>
</tr>
</tbody>
</table>

![Image of CG Member Info Report]

| 5    | A new window will display with the Perceptive login screen. Enter your Empl ID and Password and click Connect. |

**NOTE 1:** It may take a while to load initially.  
**NOTE 2:** Currently Internet Explorer and Edge work to navigate to Perceptive.  
**NOTE 3:** To log in directly to Perceptive use this link: [https://imgprd01.direct-access.uscg.mil/experience](https://imgprd01.direct-access.uscg.mil/experience)

![Image of Perceptive login screen]

Continued on next page
Accessing Perceptive Documents, Continued

Procedures, continued

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>A list of all the documents for that member will display. The list may be sorted by clicking on the <strong>column headers</strong>. Click on the appropriate <strong>Document</strong> line (the check box will automatically be checked).</td>
</tr>
</tbody>
</table>

---

Continued on next page
Accessing Perceptive Documents, Continued

Procedures, continued

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
</table>
| 7    | The document will be displayed. From this screen, you can ONLY use these features:  
- **Return arrow** – To return to the full list of documents.  
- **Save** – To save, if the document was annotated.  
- **Annotate Page** – This allows for boxes, arrows, sticky notes, etc. to be added to the document and they do display on the printed document.  
- **Download Document** – Used to download a document and uses WinZip.  
- **Export to PDF** - To export a document to a pdf and save it to a folder.  
- **Print** – Opens in a new window to print the document. See Printing Perceptive Records.  
- **Send Email** – Opens in a new email window. The received email contains a link to the document in Perceptive (not sure if someone w/o access to Perceptive would be able to use the link). |

These other links are not used by the SPO and cause errors when clicked: Create Task, Add Page, Delete Page, Apply Retention Hold, Version Control, Add to Workflow, and Open in Workflow.
Printing Perceptive Records

Introduction

This section provides the procedures for printing a document in Perceptive.

Procedures

See below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Enter your <strong>Empl ID</strong> and <strong>Password</strong> and click <strong>Connect</strong>.</td>
</tr>
</tbody>
</table>

Step 2

A list of all the documents for that member will display. The list may be sorted by clicking on the **column headers**.

Click on the appropriate **Document** line (the check box will automatically be checked).

<table>
<thead>
<tr>
<th>Drawer</th>
<th>EMPID</th>
<th>ERRDT YY-MM-DD</th>
<th>NAME</th>
<th>Form Number</th>
<th>DOC TYPE</th>
<th>Pages Created</th>
<th>Created By</th>
<th>Workflow/Queue</th>
<th>File Type</th>
</tr>
</thead>
</table>
Printing Perceptive Records, Continued

Procedures, continued

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>The document will be displayed. Select the <strong>Print</strong> icon.</td>
</tr>
<tr>
<td>4</td>
<td>Do not check the <strong>Convert to PDF</strong> box (not currently working). Click <strong>OK</strong>.</td>
</tr>
</tbody>
</table>

*Continued on next page*
Printing Perceptive Records, Continued

Procedures, continued

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td>The document opens in another window. Select the printer preferences and click <strong>Print</strong>. Once the document prints, the new document window will close automatically.</td>
</tr>
<tr>
<td>6</td>
<td>Select the <strong>Back</strong> arrow to return to the full list of documents.</td>
</tr>
</tbody>
</table>
To Print Multiple Documents

Introduction

This section provides the procedures for printing multiple documents at once in Perceptive.

Procedures

See below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Enter your <strong>Empl ID</strong> and <strong>Password</strong> and click <strong>Connect</strong>.</td>
</tr>
<tr>
<td>2</td>
<td>A list of all the documents for that member will display. The list may be sorted by clicking on the <strong>column headers</strong>. From your search results, select the appropriate <strong>Documents</strong> by clicking the check box next to each document.</td>
</tr>
</tbody>
</table>
To Print Multiple Documents, Continued

Procedures, continued

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>Choose the <strong>Print Document</strong> icon.</td>
</tr>
</tbody>
</table>

3 | Ensure the **Convert to PDF** is unchecked. Uncheck the **Include cover page** option (this inserts a Properties page for each document). Click **OK**. |

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Continued on next page
To Print Multiple Documents, Continued

Procedures, continued

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td>The document(s) opens in another window. Select the printer preferences and click <strong>Print</strong>. Once the document prints, the new document window will close automatically. <strong>NOTE:</strong> If selecting all of the member’s documents (Ctrl, A), you might get the spinning wheel while it is loading all of the documents into the new tab. <strong>Known Error – Some of the documents may not get printed.</strong></td>
</tr>
<tr>
<td>6</td>
<td>Select the <strong>Back</strong> arrow to return to the full list of documents.</td>
</tr>
</tbody>
</table>
Exporting Records from Perspective

Introduction
This section provides the procedures for exporting documents out of Perspective. This can be done for one document or multiple documents.

Procedures
See below.

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Enter your Empl ID and Password and click Connect.</td>
</tr>
<tr>
<td>2</td>
<td>A list of all the documents for that member will display. The list may be sorted by clicking on the column headers. Click on the appropriate Document(s) (the check box will automatically be checked).</td>
</tr>
</tbody>
</table>

Continued on next page
## Exporting Records from Perspective, Continued

### Procedures, continued

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td>The document(s) will be displayed. Select the <strong>Export to PDF</strong> icon.</td>
</tr>
</tbody>
</table>
| 4    | A Download window will display. Click **Save**.  
***Edge: Click the **Save as** arrow & click Save. This goes directly to **Step 10**. |
| 5    | Click **View downloads**. |

*Continued on next page*
Exporting Records from Perspective, Continued

Procedures, continued

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>6</td>
<td>To open the file, click <strong>Open</strong> or go to the folder it is saved to.</td>
</tr>
<tr>
<td>7</td>
<td>Double-click the <strong>PDF</strong>.</td>
</tr>
</tbody>
</table>

Continued on next page
Exporting Records from Perspective, Continued

Procedures, continued

<table>
<thead>
<tr>
<th>Step</th>
<th>Action</th>
</tr>
</thead>
<tbody>
<tr>
<td>8</td>
<td>The PDF will display. Click Save as from the File drop-down, navigate to the desired folder, update the <strong>File name</strong>, and click <strong>Save</strong>.</td>
</tr>
<tr>
<td>9</td>
<td>It does export as a <strong>WinZip file</strong>.</td>
</tr>
</tbody>
</table>