

# SPO Perceptive Experience Documents

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

### Overview

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

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

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## **Perceptive Experience Account Access and Deactivation**

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

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

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**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.

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**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

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### SPO Procedures to establish a Perceptive Experience account

Step	Action	Remarks
1	Ensure member has CGHRS access in Direct Access	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)
2	Complete form CG-7421D (and CG-7421B if the user doesn't already have "HRS/SPO" access)	<p>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.</p> <p>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.</p> <p>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. <b>Each new authorization/designation form supersedes previous authorizations and designations.</b> 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.</p>
3	Receive confirmation from PPC that your Perceptive Experience account has been established.	<p>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.</p> <p>Additionally, the "SPO IPDR" button on the Direct Access "CG Member Info Page" will be enabled (colored vice gray).</p>
4	Properly file the Perceptive Experience user access form.	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.

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## Perceptive Experience Account Access and Deactivation, Continued

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### SPO Procedures to Deactivate a Perceptive Experience account

Step	Action	Remarks
1	Complete and submit a PPC Customer Care Trouble Ticket.	<p>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.</p> <p>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>.</p> <p>A sample Trouble Ticket is shown in this section on page 9.</p>

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**Perceptive Experience Account Access and Deactivation,**  
Continued

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**SPO Perceptive Experience Help Contacts**

<b>Problem</b>	<b>Contact</b>	<b>Remarks</b>
Perceptive Experience is not loading after pressing the “SPO IPDR” link	Wait – initial load of Perceptive Experience application make take up to two minutes.	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.
Initial Perceptive Experience Account Login problem or the “SPO IPDR” link is not enabled.	PPC Customer Care Branch at 866-PPC-USCG (772-8724)	Contact the PPC Customer Care Branch if the Perceptive Experience account is not established after receiving e-mail confirmation that the CG-7421B and the CG-7421D forms have been processed.
Perceptive Experience Password Resets or hard error messages.	Submit a PPC Customer Care Trouble Ticket	<p>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.</p> <p>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>.</p> <p>See example in this section for both password and error message issues.</p>

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Perceptive Experience Account Access Authorization and Deactivation, Continued

CG-7421B Sample – Direct Access User Access Authorization (Add CGSIPDR role)

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.

U.S. Coast Guard  
**DIRECT ACCESS USER ROLE DESIGNATION**  
 Please fill out online. Do not print. This authorization supersedes current role designations.

1. User's Name (Last, First, MI.) **Smith, John. M** 2. Rank **E05** 3. Employee ID # **7654321**

4. Dept ID & Unit Name (Include Staff Symbol) **000012/SPO Timbuktoo** 5. Area Code & Phone Number **(999) 555-1212** 6. E-mail Address **john.m.smith@uscg.mil**

7. Role Designation—Do not forget current elevated roles (Current designations will be removed if not included on this request).  
Note: See Chapter 2 of the Personnel and Pay Procedures Manual, PPCINST M1000 Series for an explanation of user roles common to field units.

**Command**

- CGSSCMD—[CMD] Command User (Basis, Dibs, Airport Terminal, etc.)
- CGEMPREV—[Es & Above] Employee Review Only (not needed if you have CGSSCMD or CGHRS)

**Administration**

- CGFIELDADM—[Admin] Access to Airport Terminal & Member Personal Profile (Competencies, Training, & Awards)
- CGHRSVW—[Admin] View only access to the CGHRS Role.
- CGHRS—[SPO] Pay Tech (See Chapter 2 of the Personnel and Pay Procedures Manual, PPCINST M1000 Series for rules)
- CGHRSUP—[SPO] Payment Approving Official (PAO). \*\*ES's require Justification Memo\*\*

Note: See Chapter 2 of the Personnel and Pay Procedures Manual, PPCINST M1000 Series.

**Reserve Only Administration**

- CGRSVISC/CGRSVORD—[DXR] Reserve Orders Approval/Funding
- CGRSVMGR—[Reserve Manager] Create, review, and endorse request for reserve orders
- CGRSVDRL—[Reserve Admin] Schedule, Edit, and Approve Reserve IDT Drills

**Training**

- CGFTESO—[Training Center] Unit Educational Services Officer. \*\*Requires Designation Memo\*\*
- CGTRNOFF—[Unit ESO] Electronic Training Request Unit ESOs. \*\*Requires Designation Memo\*\*
- CGTRNFAC—[Training Center] TAS Course Sessions
- CGTRNTQC—[TQC] TAS Course Scheduler

**Security**

- CGSECURN—Unit Security Manager (View Only)
- CGSECUVW—Area/Dist Security Manager (View Only) \*\*Requires Digital Signature from DCMS-34\*\*

Routed by User to DCMS-36 for Approval and Signature

**Various/Other**

- CGURINALYSIS—[Unit Urinalysis Coordinator] Unit rosters with DOD-ID numbers. \*\*Requires Designation Memo\*\*
- CGASGN—[PSC] Assignment Officer (EPM/OPM/RPM)
- CGAIRTRM—[Relocation/Housing Office] Airport Terminal Only (Not required if administration roles checked above)
- CGGWIS—[Various] Global Workforce Inquiry System (Provides View Only Access to Personal Data and Reports)
- Comments/Other (not listed) – Describe what you need to access in DA:

**Automatic Revocation:** Elevated Direct Access roles are automatically terminated upon PCS, separation, retirement, reassignment of duties (FleetUps), and change of organization (interoffice transfer). Users will retain Self-Service access only.

**CGHRSUP user roles for PAOs are automatically terminated each fiscal year unless the PAO completes annual required training and is re-designated in accordance with Chapter 2 of Personnel and Pay Procedures Manual, PPCINST M1000 Series.**

**Manual Revocation:** Supervisors may submit an email citing the reason and which elevated roles to revoke to PPC Customer Care at: [PPC-CG-CustomerCare@uscg.mil](mailto:PPC-CG-CustomerCare@uscg.mil).

**Form Submission:** Please be sure to submit elevated roles request in a timely manner. Also recognize that if a user submits a new access form and it is processed by PPC before the SPO submits the PCS separating endorsement, the system will automatically terminate the new access once they are departed.

**Digital Signature:** <http://www.uscg.mil>  
 Once a digital signature is applied the form is locked from editing. Only the signer can remove their own signature by right clicking and selecting "Clear Signature". If the signer is unavailable to remove a signature you start over by downloading a new form here: <http://www.uscg.mil/ppc/forms/#tabs-1>

**Attachments:** Can be viewed by clicking the 'Show/Hide' Attachment button on the top left of the form. You can only attach one multipage attachment to the form for each role. You cannot attach multiple single page documents.

**User Acknowledgement:** I understand that I am authorized to access the Direct Access system and that accessing it for purposes beyond the scope of authorization is a violation of Federal Law (18 U.S.C 1030 et al).  
Note: Refer to the Automated Information Systems (AIS) User Acknowledgement Form (CG-66004), which is required for all U.S. Coast Guard AIS Users. It contains the full scope of Authorization and Acknowledgement.

8. User's Signature: **[Signature]** **Click Here - Email form to AO**

**Authorizing Official Acknowledgement:** I certify that the access I have authorized is based on an official need. I am aware of the general functionality I have authorized and I am aware of what this will allow this member/employee to complete.  
 \*\*\*Only the CO/OIC and XO/XPO of any unit or Division/Branch Chiefs (including sub units) at the following units may sign:  
 HQs/DCMS/CGPSC/PPC/FORCECOM/AREA ("By Direction" is not authorized)\*\*\*  
Note: For Contractor Users, the Contracting Officer's Technical Representative (COTR) signs as AO.

9. AO EMPLID: **1234567** 10. AO RANK: **W04** 11. AO TITLE: **SPO Chief** 12. AO Phone: **(999) 555-1212**

13. AO's Signature: **[Signature]** **Click Here - Email form to PPC**

**Privacy Act Statement**

**AUTHORITY:** Executive Order 10450, 9397; and Public Law 99-474, the Computer Fraud and Abuse Act.  
**PRINCIPAL PURPOSE:** To record names, signatures, and other identifiers for the purpose of identifying individuals requesting access to U.S. Coast Guard (USCG) systems and information. Note: Records may be maintained in both electronic and/or paper form.  
**ROUTINE USES:** None.  
**DISCLOSURE:** Disclosure of this information is voluntary; however, failure to provide the requested information may impede, delay or prevent further processing of this request.

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

**Perceptive Experience Account Access and Deactivation,**  
Continued

**CG-7421D Sample - ImageNow User Access Authorization Form**

Digital signature required.

DEPARTMENT OF HOMELAND SECURITY U.S. Coast Guard <b>IMAGENOW USER ACCESS AUTHORIZATION</b>		
<i>Please fill out online and sign digitally! This authorization supercedes previous applications.</i>		
1. User's Name (Last, First, MI) (Please print or type) Smith, John, M	2. Rank/Rate YN2	3. Employee ID # (Not SSN) 7654321
4. Dept ID & Unit Name (Include Staff Symbol) 000012/SPO Timbuktoo	5. Area Code & Phone Number (999) 555-1212	6. e-mail Address john.m.smith@uscg.mil
7. User Role Description (Include current roles, this authorization supercedes all of your previous authorizations):		
<b>PPC General:</b>		
RAS: <input type="checkbox"/> Accounting Techs <input type="checkbox"/> Admin	<input type="checkbox"/> ACT/RES Pay Techs <input type="checkbox"/> Supervisor/Auditors	<input type="checkbox"/> Annuitant Pay Techs <input type="checkbox"/> View & Print <input type="checkbox"/> View Only
SES: <input type="checkbox"/> ADT <input type="checkbox"/> ADT View & Print <input type="checkbox"/> ADT View Only	<input type="checkbox"/> IDT <input type="checkbox"/> IDT View & Print <input type="checkbox"/> IDT View Only	<input type="checkbox"/> SOCS <input type="checkbox"/> SOCS View & Print <input type="checkbox"/> SOCS View Only
TVL: <input type="checkbox"/> Claim Examiners <input type="checkbox"/> System Support	<input type="checkbox"/> View & Print	<input type="checkbox"/> View Only
<b>Security Administrators:</b> <input type="checkbox"/> CS User Auth - DA & JUMPS User Auth Forms <input type="checkbox"/> ID AIS		<b>Administrators:</b> <input type="checkbox"/> ImageNow Administrator <input type="checkbox"/> Scanners
<b>HQs/PSC/SPOs:</b>		
Document Processors (Scanners/Image Processors) <input type="checkbox"/> PSD-MR <input type="checkbox"/> OPM-3 <input type="checkbox"/> Boardroom Administrators		
Records Review - Full Access <input type="checkbox"/> OPM <input type="checkbox"/> RPM (Officer Records) <input type="checkbox"/> OPM/RPM Boardroom Accounts <input type="checkbox"/> BCMR/Congressional Review <input type="checkbox"/> Auditor Support		
Records Review - Restricted Access <input checked="" type="checkbox"/> SPO IPDR <input type="checkbox"/> EPM <input type="checkbox"/> RPM (limited) <input type="checkbox"/> PPC		
8. Authorizing Official (Signature & Typed or printed name, Rank, Title (see instructions), HQ/DCMS/CGPSC/FORCECOM/OPCOM/DIST, Branch Chief) & Phone Number:  I certify that the access I have authorized is based on an official need. I'm aware of the general functionality I have authorized and I'm aware of what this will allow this member to complete. If this is for a contractor, the Contracting Officer's Technical Representative (COTR) sign as AO.		
Signature, PRINTED or TYPED Name, Rank, I. M. Daboss	SPO Supervisor Title (see instructions),	(999) 555-1212 Phone
<b>Privacy Act Statement</b>		
<b>AUTHORITY:</b>	Execute Order 10450, 9397; and Public Law 99-474, the Computer Fraud and Abuse Act.	
<b>PRINCIPAL PURPOSE:</b>	To record names, signatures, and other identifiers for the purpose of identifying USCG systems and information. NOTE: Records may be maintained in accordance with 33 CFR 1.1000-10.	
<b>ROUTINE USES:</b>	None.	
<b>DISCLOSURE:</b>	Disclosure of this information to unauthorized persons may result in the release of information that is exempt from public release. If you are a contractor, you must provide the request for information to the appropriate contractor.	
<b>Acknowledgment:</b> I understand that I am authorized to access the ImageNow/WebNow system and that a violation of Federal law (18 U.S.C. 1030 et seq.) (note: Refer to the Automated Information System Security Plan (AIS-SSP) for all U.S. Coast Guard AIS users, it contains the full Scope of Authorization and Acknowledgment).		
10. User's Signature <i>(Signature)</i>	11. Date 05/17/2016	<b>e-Mail to PPC (CCB)</b>
<b>Revocation Procedure:</b>		
ImageNow access must be terminated upon PCS, separation, retirement, reassignment of duties (Fleet-Ups) and change of organization (inter-office transfer). Contact PPC Customer Care via on-line trouble-ticket or via email at <a href="mailto:PPC-DG-CustomerCare@uscg.mil">PPC-DG-CustomerCare@uscg.mil</a> for all ImageNow account revocations.		

Digital signature required.

Save completed, digitally signed form and attach it to your CG-7421B. Submit the complete forms to PPC using the e-mail button in block 13 of the CG-7421B. You can use this button (e-Mail to PPC (CCB)) if submitting the form without a CG-7421B.

Digital signature required.

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# Perceptive Experience Account Access and Deactivation, Continued

## Sample PPC Customer Care Perceptive Experience Account Deactivation 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: → 785-555-1212 Ext. 1212  
*(include area code & ext)*

**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: → I 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 YN2 Smith's ImageNow/WebNow account. 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: 785-555-1212 Ext. 1212  
*(include area code & ext)*

**Member/Employee Information - Who is this ticket for?**

Member/Employee ID: 1234567  
Member/Employee First Name: First  
Member/Employee Last Name: Last

**Problem/Issue Information – If 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 WebnNow, I receive the follwing error message (Type the exact message your are receiving."

Submit

## SPO PDR Scanning and Verification Process

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**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.

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

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**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.

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**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).

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## **SPO PDR Scanning and Verification Process, Continued**

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### **SPO Procedures**

<b>Step</b>	<b>Action</b>	<b>Remarks</b>								
1	Identify and Label Documents prior to Scanning	<p>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.</p> <p>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.</p>								
2	Scan documents	<p>The below criteria applies to scanned documents:</p> <table border="1"> <thead> <tr> <th><b>Criteria</b></th> <th><b>Description</b></th> </tr> </thead> <tbody> <tr> <td>One member's record per scanned file</td> <td>Multiple documents for the same member are allowed. Do not include documents for more than one member per .pdf file. The scanned file name will be the member's EMPLID (e.g., "1234567.pdf").</td> </tr> <tr> <td>Adobe (.pdf) format</td> <td>This is the required format for documents to ensure they can be opened by PSC-BOPS-C-MR. The Adobe documents must be legible and of good quality.</td> </tr> <tr> <td>Less than 10MB file size</td> <td>Ensure e-mail attachments are less than 10 megabytes (MB). E-mails exceeding 10MBs will not be sent.</td> </tr> </tbody> </table>	<b>Criteria</b>	<b>Description</b>	One member's record per scanned file	Multiple documents for the same member are allowed. Do not include documents for more than one member per .pdf file. The scanned file name will be the member's EMPLID (e.g., "1234567.pdf").	Adobe (.pdf) format	This is the required format for documents to ensure they can be opened by PSC-BOPS-C-MR. The Adobe documents must be legible and of good quality.	Less than 10MB file size	Ensure e-mail attachments are less than 10 megabytes (MB). E-mails exceeding 10MBs will not be sent.
<b>Criteria</b>	<b>Description</b>									
One member's record per scanned file	Multiple documents for the same member are allowed. Do not include documents for more than one member per .pdf file. The scanned file name will be the member's EMPLID (e.g., "1234567.pdf").									
Adobe (.pdf) format	This is the required format for documents to ensure they can be opened by PSC-BOPS-C-MR. The Adobe documents must be legible and of good quality.									
Less than 10MB file size	Ensure e-mail attachments are less than 10 megabytes (MB). E-mails exceeding 10MBs will not be sent.									
3		<p>A sample forwarding e-mail is shown on page X-4-14.</p> <p>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.</p> <p>Do <b>not</b> 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.</p>								

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**SPO PDR Scanning and Verification Process, Continued**

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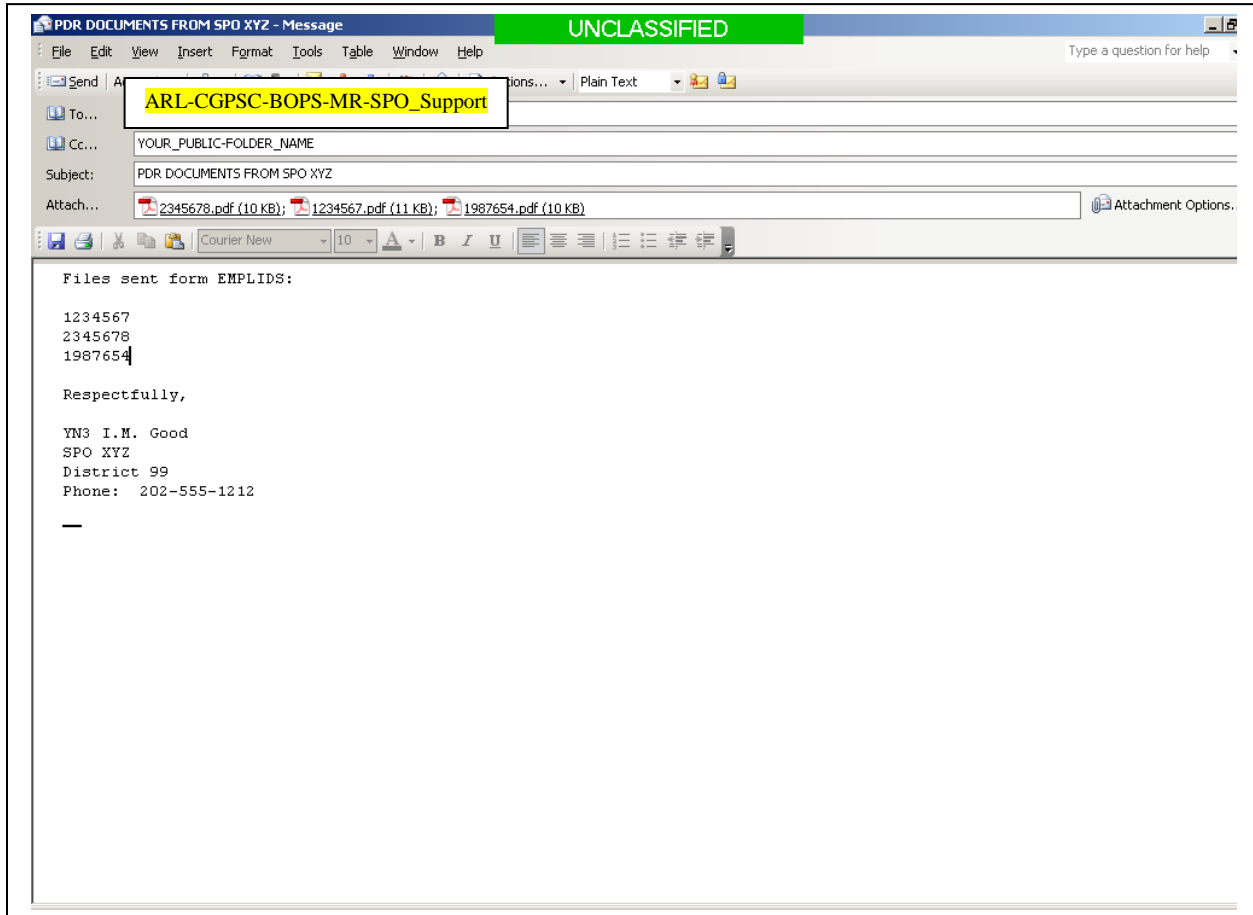
**SPO Procedures (continued)**

<b>Step</b>	<b>Action</b>	<b>Remarks</b>
4	Save forwarding e-mail to file tracking folder.	<p>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.</p> <p>The ARL-PF-CGPSC-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.</p>
5	Verify documents were filed in member’s EI-PDR	<p>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).</p> <p>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.</p> <p>Purge your SPO public e-mail folder contents upon verification of EI-PDR inclusion.</p>
6	Contact the PSC-BOPS-C-MR Section as needed	<p>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.</p>

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## SPO PDR Scanning and Verification Process, Continued

### Sample SPO EI-PDR Forwarding E-mail



## SPO Access to Perceptive Experience PDRs

### Overview

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**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).

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**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.

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**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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### Contents



Topic	See Page
<a href="#">Accessing Perceptive Documents</a>	16
<a href="#">Printing Perceptive Records</a>	20
<a href="#">To Print Multiple Documents</a>	23
<a href="#">Exporting Records from Perspective</a>	26

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## Accessing Perceptive Documents

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

**Procedures** See below.

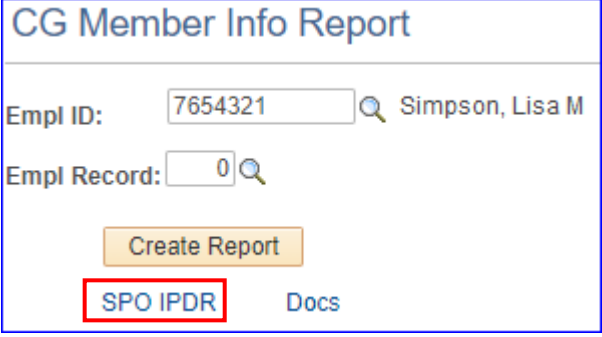
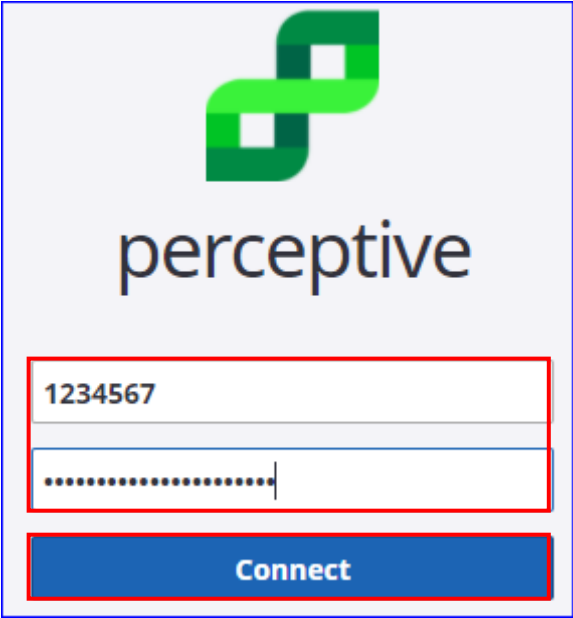
Step	Action
1	Login to DA with your User ID and Password at <a href="https://hcm.direct-access.uscg.mil/psp/HCPRD/EMPLOYEE/HRMS/?cmd=logout">https://hcm.direct-access.uscg.mil/psp/HCPRD/EMPLOYEE/HRMS/?cmd=logout</a> .
2	<p>Select the <b>Member Info Report</b> link in the Self Service for Commands Pagelet.</p>  <p>The screenshot shows a web interface titled "Self Service for Commands". It has two columns: "Reports" and "Use". Under "Reports", there are several links: "Positions at a Department", "Member All Duty Report", "Member Info Report" (highlighted with a red box), "PDE by Dept", "SWE Profile Letter by Dept", "SWE Profile Letter by Member", "SWE PDE", "Department Role Query - PPC", "Department Role Query - Field", and "1 More...".</p>
3	<p>Enter the members <b>EMPL ID</b> and hit <b>Enter</b> or <b>Tab</b> on the keyboard to display the member's name.</p>  <p>The screenshot shows a form titled "CG Member Info Report". It has two input fields: "Empl ID:" with the value "1234567" (highlighted with a red box) and "Empl Record:" with the value "0". There is a "Create Report" button and two links: "SPO IPDR" and "Docs".</p>

*Continued on next page*



## Accessing Perceptive Documents, Continued

Procedures,  
continued

Step	Action
4	<p>The member's name will display to the right of the Empl ID. Click on the <b>SPO IPDR</b> link to launch the Perceptive application.</p> 
5	<p>A new window will display with the Perceptive login screen. Enter your <b>Empl ID</b> and <b>Password</b> and click <b>Connect</b>.</p> <p><b>NOTE 1:</b> It may take a while to load initially.  <b>NOTE 2:</b> Currently Internet Explorer and Edge work to navigate to Perceptive.  <b>NOTE 3:</b> To log in directly to Perceptive use this link: <a href="https://imgprd01.direct-access.uscg.mil/experience">https://imgprd01.direct-access.uscg.mil/experience</a></p> 

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## Accessing Perceptive Documents, Continued

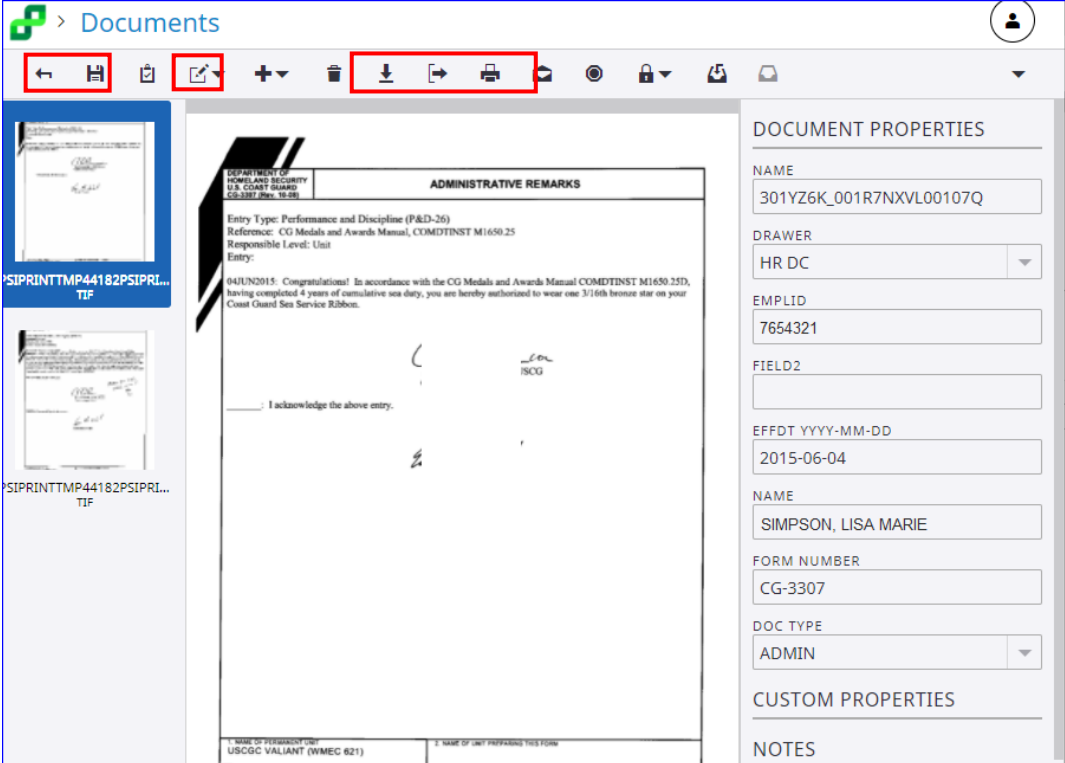
Procedures,  
continued

Step	Action																																																																																																																								
6	<p>A list of all the documents for that member will display. The list may be sorted by clicking on the <b>column headers</b>. Click on the appropriate <b>Document</b> line (the check box will automatically be checked).</p> <table border="1" data-bbox="327 633 1358 958"> <thead> <tr> <th><input type="checkbox"/></th> <th>Drawer</th> <th>EMPLID</th> <th>EFFDT YYYY-MM...</th> <th>NAME</th> <th>Form Number</th> <th>DOC TYPE</th> <th>Pages</th> <th>Created</th> <th>Created By</th> <th>Workflow Queue</th> <th>File Type</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>HR DC</td> <td>7654321</td> <td>2016-04-13</td> <td>SIMPSON, LISA MARIE</td> <td>CG-3307</td> <td>ADMIN</td> <td>1</td> <td>9/1/2016 11:55 AM</td> <td>2345678</td> <td></td> <td>tif</td> </tr> <tr> <td><input type="checkbox"/></td> <td>HR DC</td> <td>7654321</td> <td>2015-12-31</td> <td>SIMPSON, LISA MARIE</td> <td>CG-3307</td> <td>ADMIN</td> <td>1</td> <td>8/26/2016 7:34 AM</td> <td>1234567</td> <td></td> <td>tif</td> </tr> <tr> <td><input type="checkbox"/></td> <td>HR DC</td> <td>7654321</td> <td>2015-12-19</td> <td>SIMPSON, LISA MARIE</td> <td>CG-3307</td> <td>ADMIN</td> <td>1</td> <td>8/26/2016 7:33 AM</td> <td>1234567</td> <td></td> <td>tif</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>HR DC</td> <td>7654321</td> <td>2015-06-04</td> <td>SIMPSON, LISA MARIE</td> <td>CG-3307</td> <td>ADMIN</td> <td>2</td> <td>6/18/2015 3:29 AM</td> <td>1234567</td> <td></td> <td>tif</td> </tr> <tr> <td><input type="checkbox"/></td> <td>HR DC</td> <td>7654321</td> <td>2015-06-03</td> <td>SIMPSON, LISA MARIE</td> <td>CG-3307</td> <td>ADMIN</td> <td>1</td> <td>7/9/2015 2:34 AM</td> <td>2345678</td> <td></td> <td>tif</td> </tr> <tr> <td><input type="checkbox"/></td> <td>HR DC</td> <td>7654321</td> <td>2015-04-13</td> <td>SIMPSON, LISA MARIE</td> <td>CG-3307</td> <td>ADMIN</td> <td>1</td> <td>8/26/2016 7:34 AM</td> <td>9876543</td> <td></td> <td>tif</td> </tr> <tr> <td><input type="checkbox"/></td> <td>HR DC</td> <td>7654321</td> <td>2015-03-12</td> <td>SIMPSON, LISA MARIE</td> <td>CG-3307</td> <td>ADMIN</td> <td>1</td> <td>3/31/2015 6:14 AM</td> <td>2345678</td> <td></td> <td>tif</td> </tr> <tr> <td><input type="checkbox"/></td> <td>HR DC</td> <td>7654321</td> <td>2013-03-15</td> <td>SIMPSON, LISA MARIE</td> <td>CG-3307</td> <td>ADMIN</td> <td>1</td> <td>8/26/2016 7:33 AM</td> <td>1234567</td> <td></td> <td>tif</td> </tr> <tr> <td><input type="checkbox"/></td> <td>HR DC</td> <td>7654321</td> <td>2012-11-20</td> <td>SIMPSON, LISA MARIE</td> <td>CGPSC-2020D</td> <td>ADMIN_NO_BRD</td> <td>2</td> <td>7/30/2013 8:56 AM</td> <td>1234567</td> <td></td> <td>tif</td> </tr> </tbody> </table>	<input type="checkbox"/>	Drawer	EMPLID	EFFDT YYYY-MM...	NAME	Form Number	DOC TYPE	Pages	Created	Created By	Workflow Queue	File Type	<input type="checkbox"/>	HR DC	7654321	2016-04-13	SIMPSON, LISA MARIE	CG-3307	ADMIN	1	9/1/2016 11:55 AM	2345678		tif	<input type="checkbox"/>	HR DC	7654321	2015-12-31	SIMPSON, LISA MARIE	CG-3307	ADMIN	1	8/26/2016 7:34 AM	1234567		tif	<input type="checkbox"/>	HR DC	7654321	2015-12-19	SIMPSON, LISA MARIE	CG-3307	ADMIN	1	8/26/2016 7:33 AM	1234567		tif	<input checked="" type="checkbox"/>	HR DC	7654321	2015-06-04	SIMPSON, LISA MARIE	CG-3307	ADMIN	2	6/18/2015 3:29 AM	1234567		tif	<input type="checkbox"/>	HR DC	7654321	2015-06-03	SIMPSON, LISA MARIE	CG-3307	ADMIN	1	7/9/2015 2:34 AM	2345678		tif	<input type="checkbox"/>	HR DC	7654321	2015-04-13	SIMPSON, LISA MARIE	CG-3307	ADMIN	1	8/26/2016 7:34 AM	9876543		tif	<input type="checkbox"/>	HR DC	7654321	2015-03-12	SIMPSON, LISA MARIE	CG-3307	ADMIN	1	3/31/2015 6:14 AM	2345678		tif	<input type="checkbox"/>	HR DC	7654321	2013-03-15	SIMPSON, LISA MARIE	CG-3307	ADMIN	1	8/26/2016 7:33 AM	1234567		tif	<input type="checkbox"/>	HR DC	7654321	2012-11-20	SIMPSON, LISA MARIE	CGPSC-2020D	ADMIN_NO_BRD	2	7/30/2013 8:56 AM	1234567		tif
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## Accessing Perceptive Documents, Continued

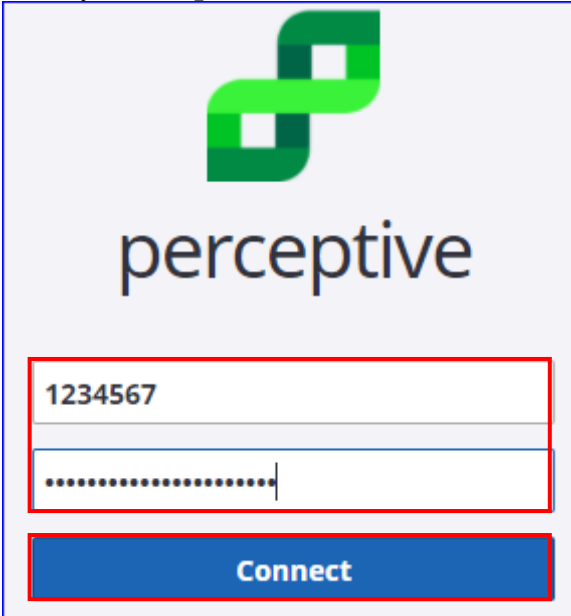
Procedures,  
continued

Step	Action
7	<p>The document will be displayed.</p> <p>From this screen, you can <b>ONLY</b> use these features:</p> <ul style="list-style-type: none"> <li>• <b>Return arrow</b> – To return to the full list of documents.</li> <li>• <b>Save</b> – To save, if the document was annotated.</li> <li>• <b>Annotate Page</b> – This allows for boxes, arrows, sticky notes, etc. to be added to the document and they do display on the printed document.</li> <li>• <b>Download Document</b> – Used to download a document and uses WinZip.</li> <li>• <b>Export to PDF</b> - To export a document to a pdf and save it to a folder.</li> <li>• <b>Print</b> – Opens in a new window to print the document. See <a href="#">Printing Perceptive Records</a>.</li> <li>• <b>Send Email</b> – 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).</li> </ul> <p><b>These other links are not used by the SPO and cause errors when clicked:</b> Create Task, Add Page, Delete Page, Apply Retention Hold, Version Control, Add to Workflow, and Open in Workflow.</p>  <p>The screenshot shows the Perceptive Documents interface. At the top, there is a navigation bar with a 'Documents' title and a user profile icon. Below this is a toolbar with several icons: a left-pointing arrow (Return), a floppy disk (Save), a document with a pencil (Annotate), a plus sign (Add Page), a trash can (Delete Page), a download arrow (Download Document), a document with a right-pointing arrow (Export to PDF), and a printer icon (Print). The main content area is split into three sections: a left sidebar with document thumbnails, a central document viewer, and a right sidebar for 'DOCUMENT PROPERTIES'. The document viewer displays an 'ADMINISTRATIVE REMARKS' form with the following text: 'DEPARTMENT OF HOMELAND SECURITY U.S. COAST GUARD (CG-3307 Rev. 10-08)', 'Entry Type: Performance and Discipline (P&amp;D-26)', 'Reference: CG Medals and Awards Manual, COMDTINST M1650.25', 'Responsible Level: Unit', 'Entry: 04/JUN2015: Congratulations! In accordance with the CG Medals and Awards Manual COMDTINST M1650.25D, having completed 4 years of cumulative sea duty, you are hereby authorized to wear one 3/16th bronze star on your Coast Guard Sea Service Ribbon.' Below the text is a signature line with 'ISCG' and a date '2015-06-04'. The 'DOCUMENT PROPERTIES' sidebar includes fields for NAME (301YZ6K_001R7NXVL00107Q), DRAWER (HR DC), EMPLID (7654321), FIELD2, EFFDT (2015-06-04), NAME (SIMPSON, LISA MARIE), FORM NUMBER (CG-3307), DOC TYPE (ADMIN), and a NOTES section.</p>

# Printing Perceptive Records

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

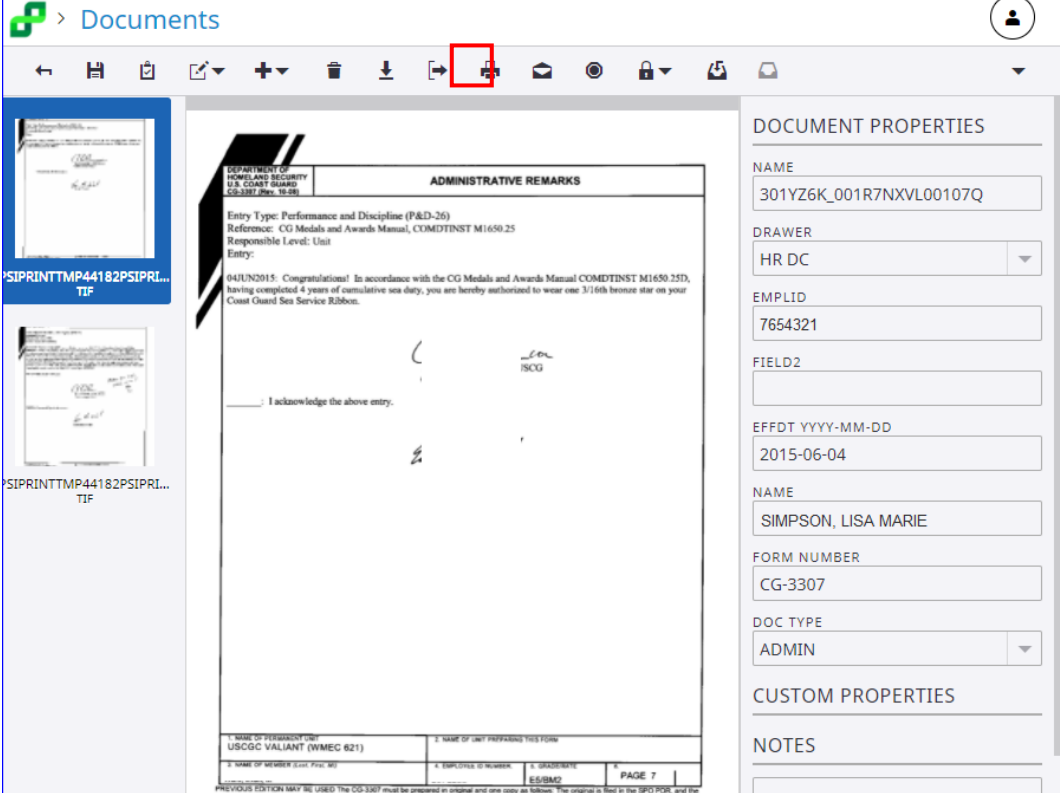
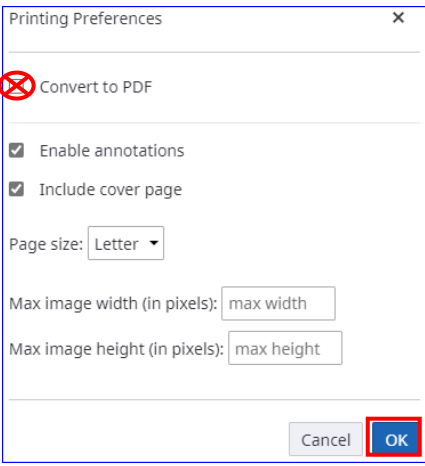
**Procedures** See below.

Step	Action																																																																																																																								
1	<p>Enter your <b>Empl ID</b> and <b>Password</b> and click <b>Connect</b>.</p> 																																																																																																																								
2	<p>A list of all the documents for that member will display. The list may be sorted by clicking on the <b>column headers</b>. Click on the appropriate <b>Document</b> line (the check box will automatically be checked).</p> <table border="1" data-bbox="327 1368 1358 1697"> <thead> <tr> <th><input type="checkbox"/></th> <th>Drawer</th> <th>EMPLID</th> <th>EFFDT YYYY-MM...</th> <th>NAME</th> <th>Form Number</th> <th>DOC TYPE</th> <th>Pages</th> <th>Created</th> <th>Created By</th> <th>Workflow Queue</th> <th>File Type</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>HR DC</td> <td>7654321</td> <td>2016-04-13</td> <td>SIMPSON, LISA MARIE</td> <td>CG-3307</td> <td>ADMIN</td> <td>1</td> <td>9/1/2016 11:55 AM</td> <td>2345678</td> <td></td> <td>tif</td> </tr> <tr> <td><input type="checkbox"/></td> <td>HR DC</td> <td>7654321</td> <td>2015-12-31</td> <td>SIMPSON, LISA MARIE</td> <td>CG-3307</td> <td>ADMIN</td> <td>1</td> <td>8/26/2016 7:34 AM</td> <td>1234567</td> <td></td> <td>tif</td> </tr> <tr> <td><input type="checkbox"/></td> <td>HR DC</td> <td>7654321</td> <td>2015-12-19</td> <td>SIMPSON, LISA MARIE</td> <td>CG-3307</td> <td>ADMIN</td> <td>1</td> <td>8/26/2016 7:33 AM</td> <td>1234567</td> <td></td> <td>tif</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td>HR DC</td> <td>7654321</td> <td>2015-06-04</td> <td>SIMPSON, LISA MARIE</td> <td>CG-3307</td> <td>ADMIN</td> <td>2</td> <td>6/18/2015 3:29 AM</td> <td>1234567</td> <td></td> <td>tif</td> </tr> <tr> <td><input type="checkbox"/></td> <td>HR DC</td> <td>7654321</td> <td>2015-06-03</td> <td>SIMPSON, LISA MARIE</td> <td>CG-3307</td> <td>ADMIN</td> <td>1</td> <td>7/9/2015 2:34 AM</td> <td>2345678</td> <td></td> <td>tif</td> </tr> <tr> <td><input type="checkbox"/></td> <td>HR DC</td> <td>7654321</td> <td>2015-04-13</td> <td>SIMPSON, LISA MARIE</td> <td>CG-3307</td> <td>ADMIN</td> <td>1</td> <td>8/26/2016 7:34 AM</td> <td>9876543</td> <td></td> <td>tif</td> </tr> <tr> <td><input type="checkbox"/></td> <td>HR DC</td> <td>7654321</td> <td>2015-03-12</td> <td>SIMPSON, LISA MARIE</td> <td>CG-3307</td> <td>ADMIN</td> <td>1</td> <td>3/31/2015 6:14 AM</td> <td>2345678</td> <td></td> <td>tif</td> </tr> <tr> <td><input type="checkbox"/></td> <td>HR DC</td> <td>7654321</td> <td>2013-03-15</td> <td>SIMPSON, LISA MARIE</td> <td>CG-3307</td> <td>ADMIN</td> <td>1</td> <td>8/26/2016 7:33 AM</td> <td>1234567</td> <td></td> <td>tif</td> </tr> <tr> <td><input type="checkbox"/></td> <td>HR DC</td> <td>7654321</td> <td>2012-11-20</td> <td>SIMPSON, LISA MARIE</td> <td>CGPSC-2020D</td> <td>ADMIN_NO_BRD</td> <td>2</td> <td>7/30/2013 8:56 AM</td> <td>1234567</td> <td></td> <td>tif</td> </tr> </tbody> </table>	<input type="checkbox"/>	Drawer	EMPLID	EFFDT YYYY-MM...	NAME	Form Number	DOC TYPE	Pages	Created	Created By	Workflow Queue	File Type	<input type="checkbox"/>	HR DC	7654321	2016-04-13	SIMPSON, LISA MARIE	CG-3307	ADMIN	1	9/1/2016 11:55 AM	2345678		tif	<input type="checkbox"/>	HR DC	7654321	2015-12-31	SIMPSON, LISA MARIE	CG-3307	ADMIN	1	8/26/2016 7:34 AM	1234567		tif	<input type="checkbox"/>	HR DC	7654321	2015-12-19	SIMPSON, LISA MARIE	CG-3307	ADMIN	1	8/26/2016 7:33 AM	1234567		tif	<input checked="" type="checkbox"/>	HR DC	7654321	2015-06-04	SIMPSON, LISA MARIE	CG-3307	ADMIN	2	6/18/2015 3:29 AM	1234567		tif	<input type="checkbox"/>	HR DC	7654321	2015-06-03	SIMPSON, LISA MARIE	CG-3307	ADMIN	1	7/9/2015 2:34 AM	2345678		tif	<input type="checkbox"/>	HR DC	7654321	2015-04-13	SIMPSON, LISA MARIE	CG-3307	ADMIN	1	8/26/2016 7:34 AM	9876543		tif	<input type="checkbox"/>	HR DC	7654321	2015-03-12	SIMPSON, LISA MARIE	CG-3307	ADMIN	1	3/31/2015 6:14 AM	2345678		tif	<input type="checkbox"/>	HR DC	7654321	2013-03-15	SIMPSON, LISA MARIE	CG-3307	ADMIN	1	8/26/2016 7:33 AM	1234567		tif	<input type="checkbox"/>	HR DC	7654321	2012-11-20	SIMPSON, LISA MARIE	CGPSC-2020D	ADMIN_NO_BRD	2	7/30/2013 8:56 AM	1234567		tif
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## Printing Perceptive Records, Continued

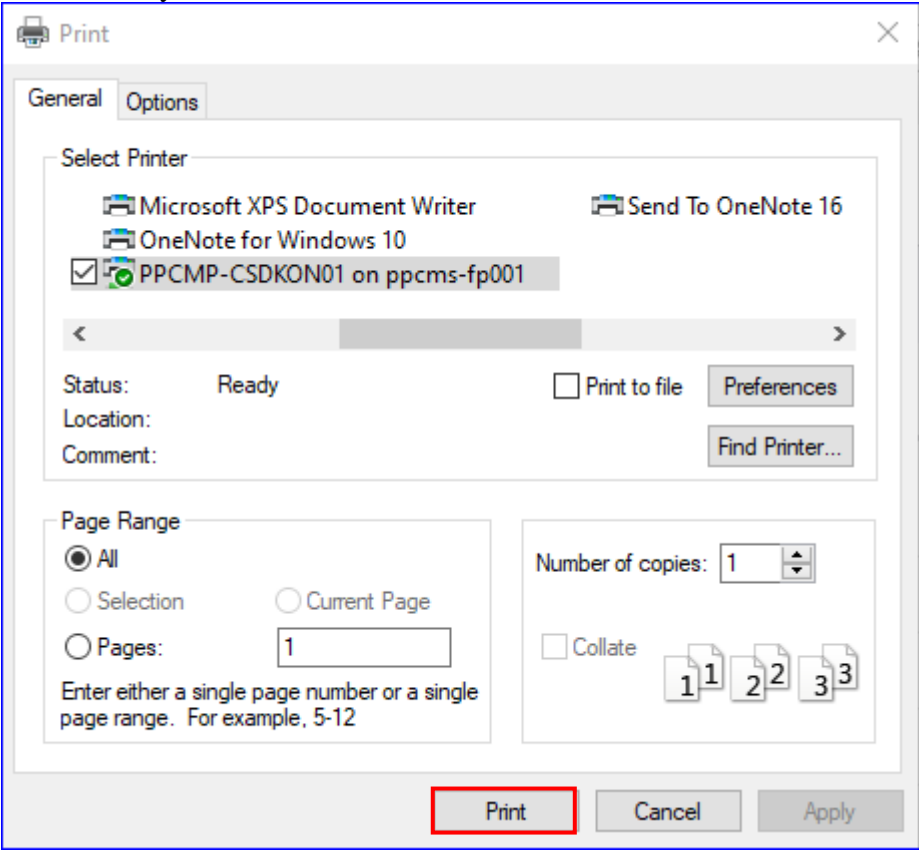
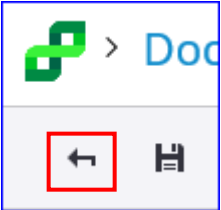
Procedures,  
continued

Step	Action
<p><b>3</b></p>	<p>The document will be displayed. Select the <b>Print</b> icon.</p> 
<p><b>4</b></p>	<p>Do not check the <b>Convert to PDF</b> box (not currently working). Click <b>OK</b>.</p> 

*Continued on next page*

## Printing Perceptive Records, Continued

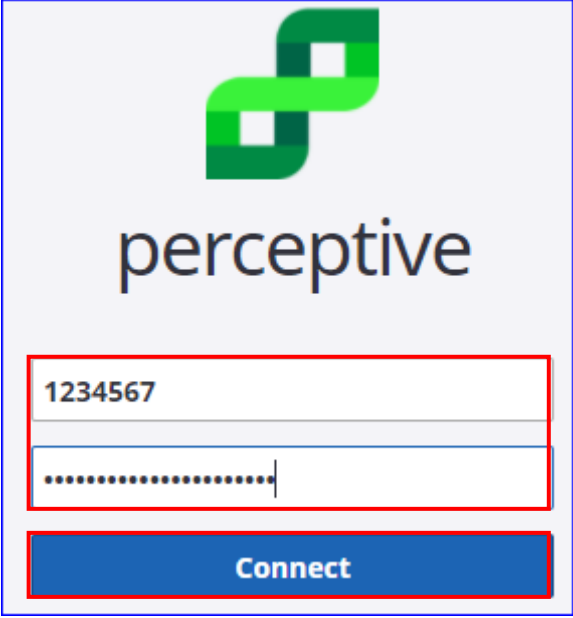
Procedures,  
continued

Step	Action
5	<p>The document opens in another window. Select the printer preferences and click <b>Print</b>. Once the document prints, the new document window will close automatically.</p> 
6	<p>Select the <b>Back</b> arrow to return to the full list of documents.</p> 

## To Print Multiple Documents

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


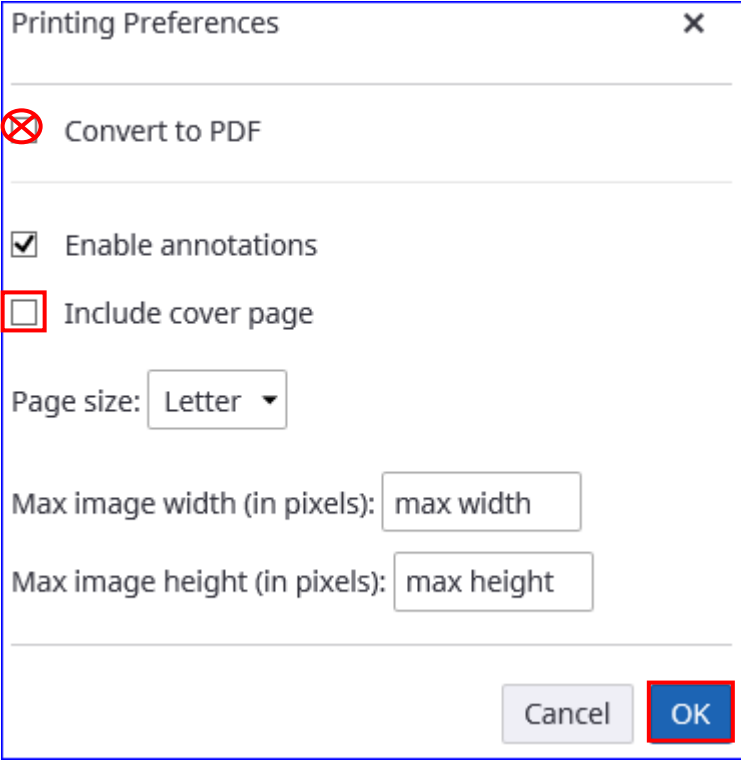
**Procedures** See below.

Step	Action																																																																																																			
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## To Print Multiple Documents, Continued

Procedures,  
continued

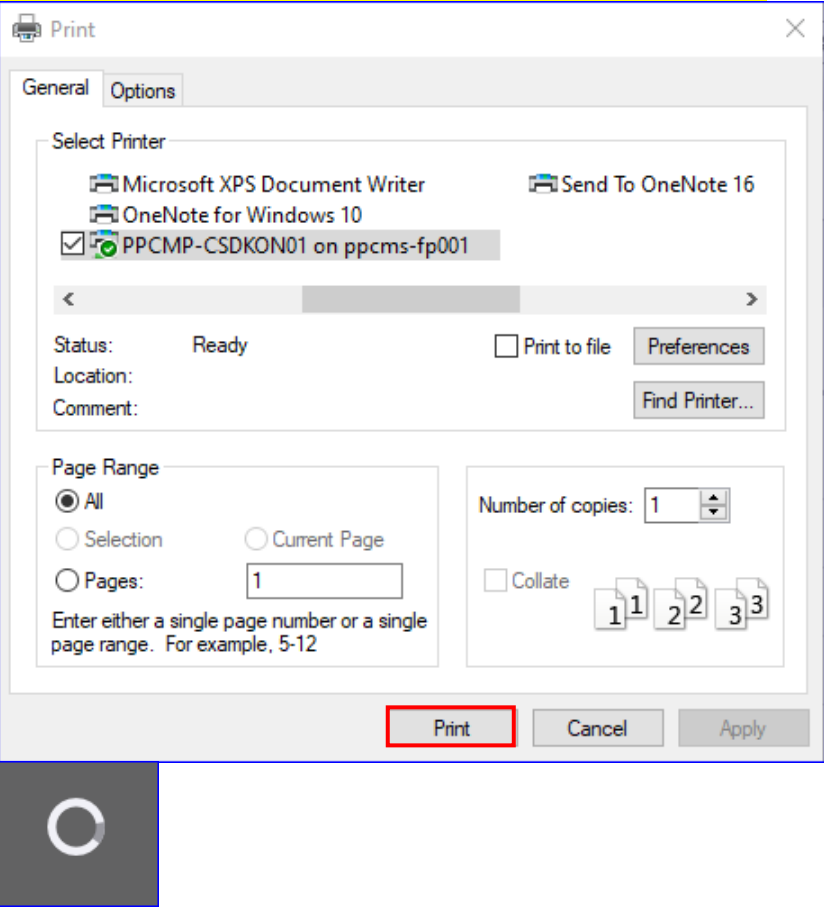
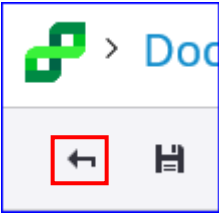
Step	Action
3	<p>Choose the <b>Print Document</b> icon.</p> 
3	<p>Ensure the <b>Convert to PDF</b> is unchecked. Uncheck the <b>Include cover page</b> option (this inserts a Properties page for each document). Click <b>OK</b>.</p> 

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## To Print Multiple Documents, Continued

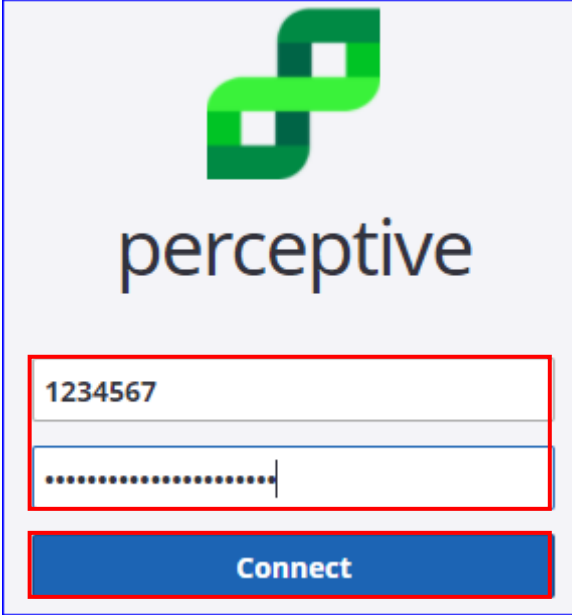
Procedures,  
continued

Step	Action
<p><b>4</b></p>	<p>The document(s) opens in another window. Select the printer preferences and click <b>Print</b>. Once the document prints, the new document window will close automatically.</p> <p><b>NOTE:</b> 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.</p> <p><b>Known Error – Some of the documents may not get printed.</b></p> 
<p><b>6</b></p>	<p>Select the <b>Back</b> arrow to return to the full list of documents.</p> 

## 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.

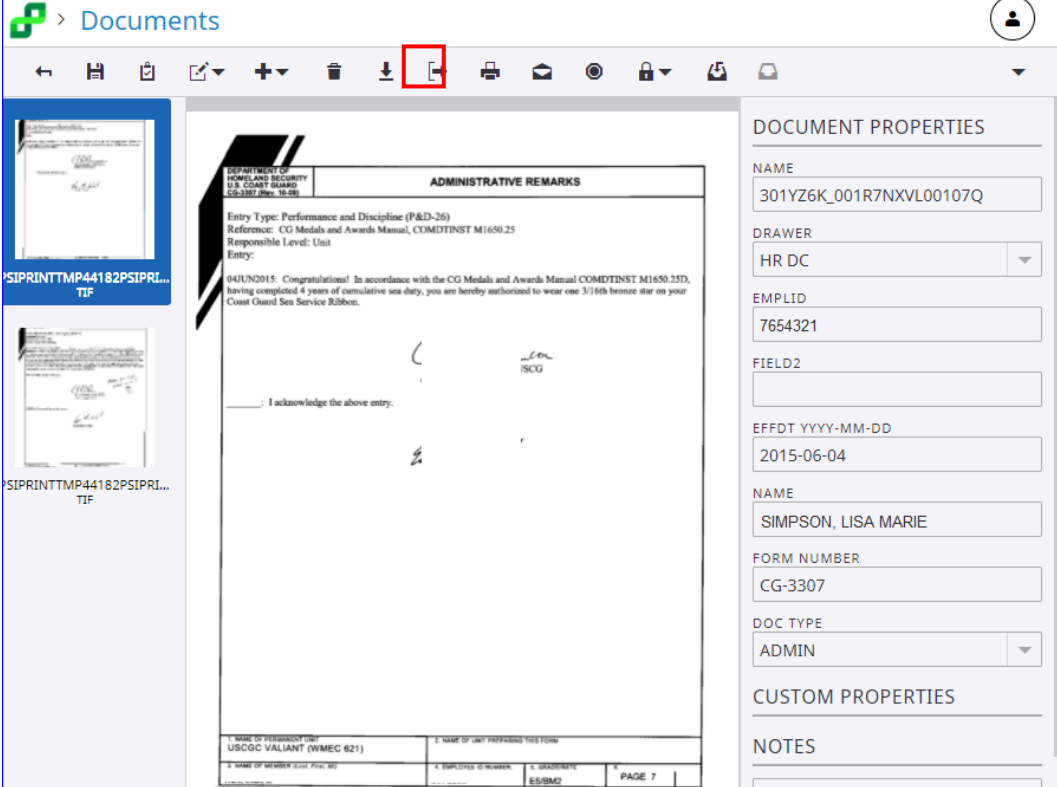
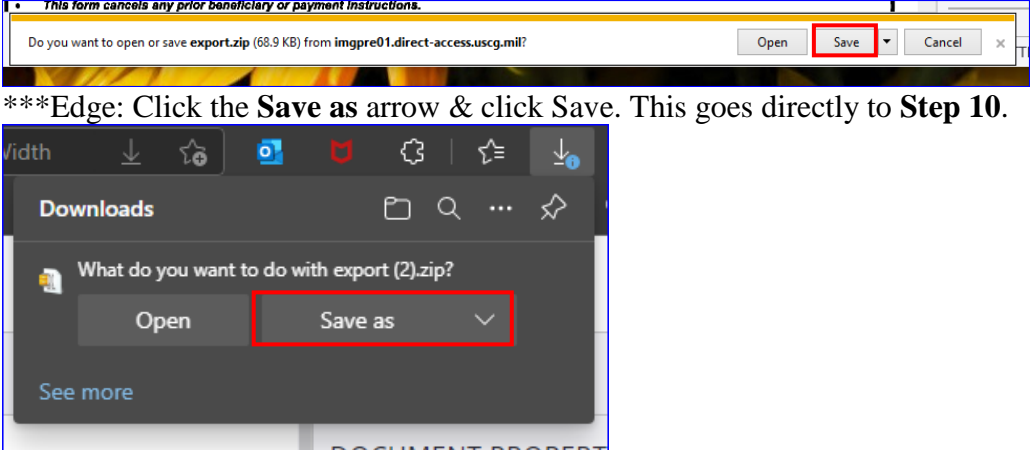
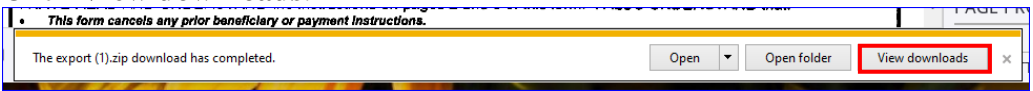
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## Exporting Records from Perspective, Continued

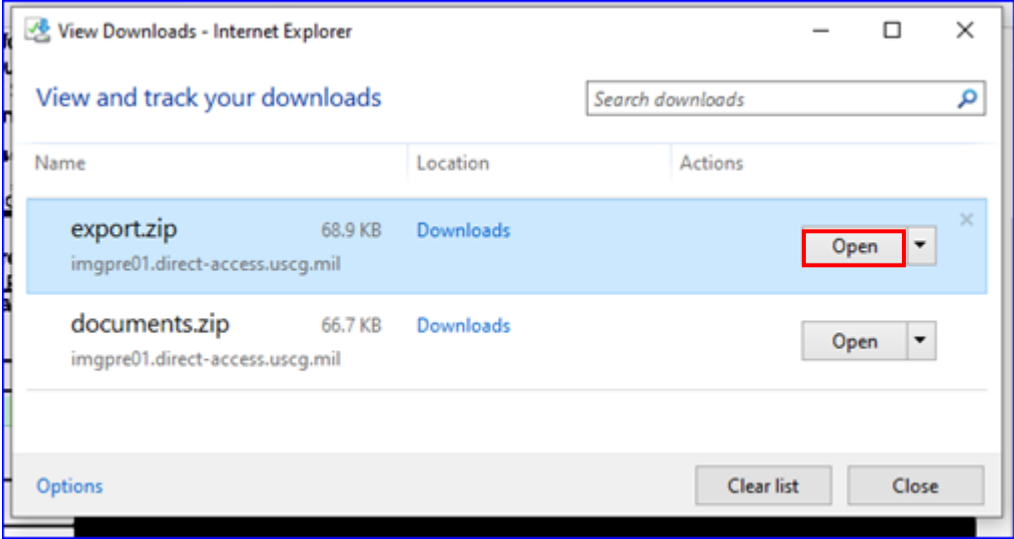
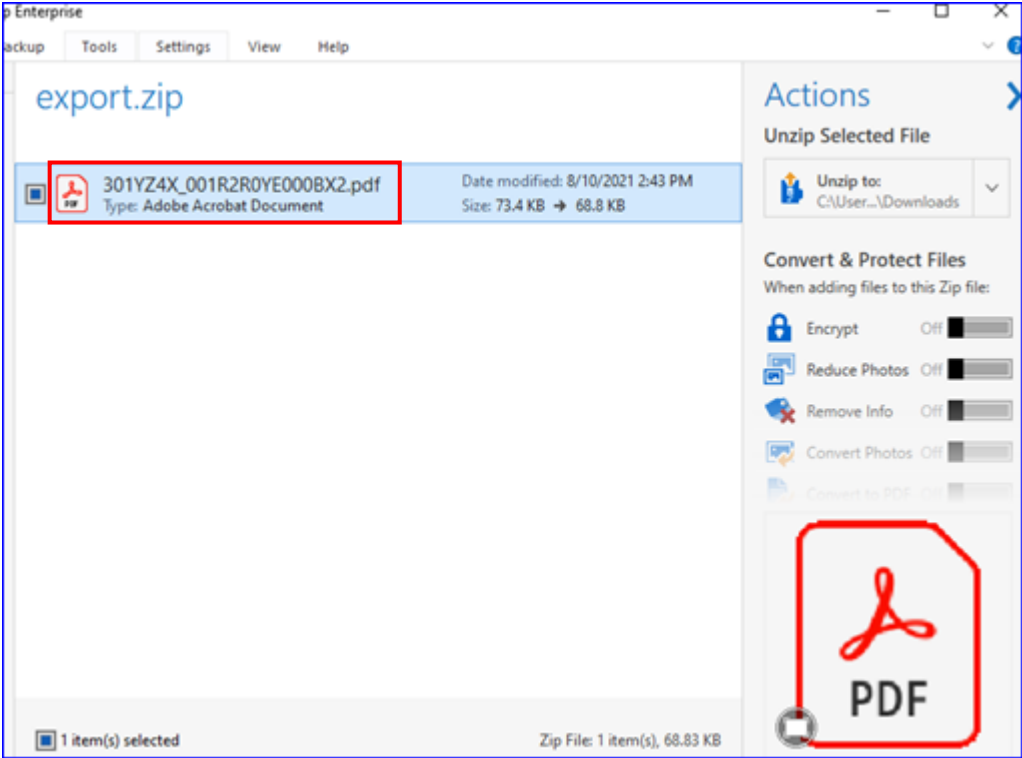
Procedures,  
continued

Step	Action
<p>3</p>	<p>The document(s) will be displayed. Select the <b>Export to PDF</b> icon.</p> 
<p>4</p>	<p>A Download window will display. Click <b>Save</b>.</p>  <p>***Edge: Click the <b>Save as</b> arrow &amp; click Save. This goes directly to <b>Step 10</b>.</p>
<p>5</p>	<p>Click <b>View downloads</b>.</p> 

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## Exporting Records from Perspective, Continued

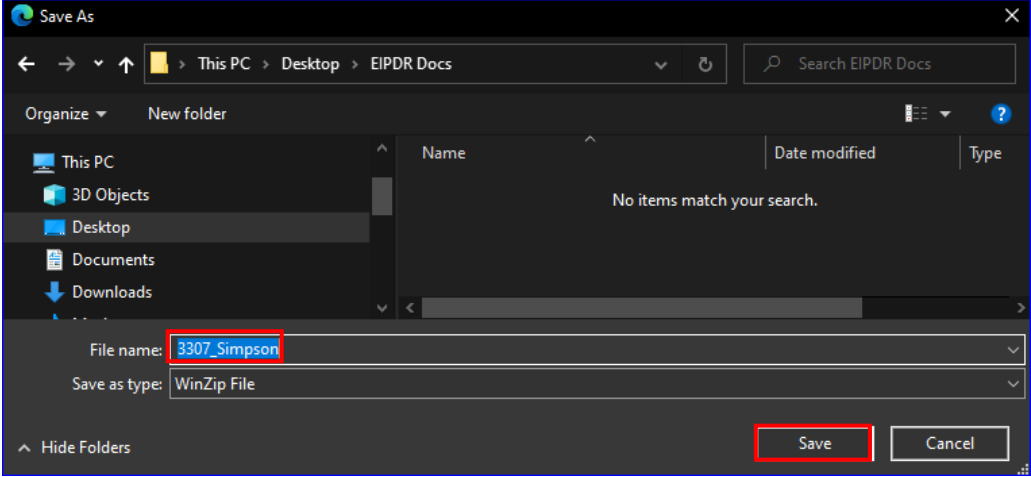
Procedures,  
continued

Step	Action									
6	<p>To open the file, click <b>Open</b> or go to the folder it is saved to.</p>  <p>The screenshot shows the 'View Downloads - Internet Explorer' window. It displays a table of downloaded files:</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Location</th> <th>Actions</th> </tr> </thead> <tbody> <tr> <td>export.zip imgpre01.direct-access.uscg.mil</td> <td>Downloads</td> <td>Open</td> </tr> <tr> <td>documents.zip imgpre01.direct-access.uscg.mil</td> <td>Downloads</td> <td>Open</td> </tr> </tbody> </table> <p>The 'Open' button for the selected 'export.zip' file is highlighted with a red box.</p>	Name	Location	Actions	export.zip imgpre01.direct-access.uscg.mil	Downloads	Open	documents.zip imgpre01.direct-access.uscg.mil	Downloads	Open
Name	Location	Actions								
export.zip imgpre01.direct-access.uscg.mil	Downloads	Open								
documents.zip imgpre01.direct-access.uscg.mil	Downloads	Open								
7	<p>Double-click the <b>PDF</b>.</p>  <p>The screenshot shows the Windows File Explorer window for the 'export.zip' file. The file list contains one item:</p> <table border="1"> <thead> <tr> <th>Name</th> <th>Date modified</th> <th>Size</th> </tr> </thead> <tbody> <tr> <td>301YZ4X_001R2R0YE000BX2.pdf Type: Adobe Acrobat Document</td> <td>8/10/2021 2:43 PM</td> <td>73.4 KB → 68.8 KB</td> </tr> </tbody> </table> <p>The file is selected, and the PDF icon is highlighted with a red box. The right-hand pane shows the 'Actions' menu with 'Unzip Selected File' and 'Convert &amp; Protect Files' options.</p>	Name	Date modified	Size	301YZ4X_001R2R0YE000BX2.pdf Type: Adobe Acrobat Document	8/10/2021 2:43 PM	73.4 KB → 68.8 KB			
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## Exporting Records from Perspective, Continued

Procedures,  
continued

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