

Direct Access User Roles and Functions

Overview

Introduction This guide provides the procedures for **requesting, removing, and withdrawing** User Roles and Functions in Direct Access (DA).

For procedures to **recertify** Roles, see the Recertifying DA User Roles and Functions user guide.

Allow 24 hours after PPC approval to see any requested changes to Roles.

Direct Access Functional User Roles DA Functional User Roles are position based. It is important to **review the requirements** of each User Role and Function to ensure all criteria is met, such as appropriate Approval Authority and/or a Designation Memo provided to PPC. For a list of DA Functional User Roles and the requirements associated with each role, refer to PPC’s website at: <https://www.dcms.uscg.mil/ppc/da/functionalroles/>.

The below User Roles require a **Designation Memo** that must be submitted to PPC Customer Care prior to submitting a User Role request:

- CG Educational Services Officer
 - CG Passport Acceptance Agent
 - CG Recruiter in Charge (see “Recruiter in Charge” on next page)
 - CG Training Officer
 - CG Urinalysis Coordinator
-

Pending Requests It is important to follow up with the Approver. If the User Access Request is not approved within 30 days, **DA will automatically terminate the request and email the submitter to submit a new request.**

Once the Approver approves the request, it will be sent to PPC for final approval.

Termination of Roles If a Command requires termination of User Roles prior to transfer or separation, notify PPC Customer Care. Include the member’s Employee ID number and the User Role(s) and Function(s) to be revoked.

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Overview, Continued

Recruiter In Charge For those requesting the **CG Recruiter In Charge** role and the member's position data in Direct Access does **NOT** indicate Recruiter In Charge, a Designation Memo is required and **MUST** be submitted to PPC Customer Care prior to submitting a User Roles Request (see the [Understanding Job Data](#) user guide for reviewing a member's position data in DA).

Mobilization Roles **CG Mobilization Administration:** Provides access to Mobilization setup tables, components, reports, and the ability to approve and cancel Mobilization requirements. This role is intended only for DOL, AREA, PSC, and District personnel in charge of surge staffing and is approved on a case by case basis. This role **requires** the User Roles Request to be sent separately to PSC, with justification listed.

CG Mobilization Approver: Provides access to Mobilization components, reports, and the ability to approve and cancel Mobilization requirements.

CG Mobilization Processor: Provides access to Mobilization components, reports, and the ability to approve Mobilization requirements.

CG Mobilization Resume Endorser: Provides access to endorse Mobilization resumes.


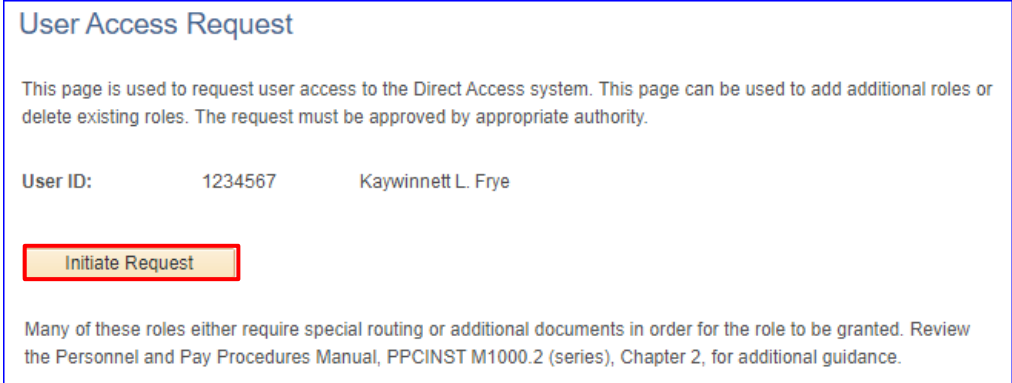
CG Mobilization View Only: Provides view only access to the Mobilization components.

Requesting New User Roles

Introduction This section provides the procedures for requesting new User Roles and Functions in Direct Access (DA).

Allow 24 hours after PPC approval to see any requested changes to Roles.

Procedures See below.

Step	Action
<p>1</p>	<p>From the Requests tab, select User Access Request in the Self Service Requests pagelet.</p>  <p>The screenshot shows a navigation bar with 'My Page', 'Self Service', and 'Requests' tabs. Below is a 'Self Service Requests' section with a grid of links: 'Submit an Absence Request', 'View My Absence Requests', 'View My Requests (all types)', 'Submit a Drill Request', 'Non-Chargeable Absence Request', 'Submit a Delegation Request', 'PHS Submit Retirement Docs', and 'User Access Request'. The 'User Access Request' link is highlighted with a red rectangular box.</p>
<p>2</p>	<p>The User Access Request page will display. Click Initiate Request.</p>  <p>The screenshot shows the 'User Access Request' page header and a description: 'This page is used to request user access to the Direct Access system. This page can be used to add additional roles or delete existing roles. The request must be approved by appropriate authority.' Below this, it displays 'User ID: 1234567 Kaywinnett L. Frye'. A yellow 'Initiate Request' button is highlighted with a red rectangular box. At the bottom, there is a note: 'Many of these roles either require special routing or additional documents in order for the role to be granted. Review the Personnel and Pay Procedures Manual, PPCINST M1000.2 (series), Chapter 2, for additional guidance.'</p>

Continued on next page

Requesting New User Roles, Continued


Procedures,
continued

Step	Action																								
<p>3</p>	<p>Any Current Roles and Current Functions for the member will display. Click View All (if necessary) to view the entire list of Current Roles and Current Functions.</p> <p>NOTE: When members PCS, their User Roles are reset to Self Service only.</p> <div data-bbox="357 551 1369 1070" style="border: 1px solid black; padding: 5px;"> <p>User Access Request</p> <p>Request Details</p> <p>User Access Request For: 1234567 Kaywinnett L. Frye</p> <p>Request ID: Request Status:</p> <p>Current Roles Personalize Find View All First 1-3 of 3 Last</p> <table border="1"> <thead> <tr> <th>Keep Role</th> <th>Remove Role</th> <th>Role Name</th> <th>Role Description</th> <th>Role Details</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CGSSCIV</td> <td>CG Self Service Civilian</td> <td>Role Details</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CG_SECURITY_ADMIN</td> <td>CG_SECURITY_ADMIN</td> <td>Role Details</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CG_SS_MBR_RET2</td> <td>RET2 Member Self Service</td> <td>Role Details</td> </tr> </tbody> </table> <p>Current Functions Personalize Find View All First 1 of 1 Last</p> <table border="1"> <thead> <tr> <th>Function Name</th> <th>Function Description</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> </tr> </tbody> </table> </div>	Keep Role	Remove Role	Role Name	Role Description	Role Details	<input type="checkbox"/>	<input type="checkbox"/>	CGSSCIV	CG Self Service Civilian	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CG_SECURITY_ADMIN	CG_SECURITY_ADMIN	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CG_SS_MBR_RET2	RET2 Member Self Service	Role Details	Function Name	Function Description		
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<p>4</p>	<p>Under the Add Functions section, click View All.</p> <div data-bbox="357 1133 1369 1341" style="border: 1px solid black; padding: 5px;"> <p>Add Functions Personalize Find View All First 1-3 of 40 Last</p> <table border="1"> <thead> <tr> <th>Add Function</th> <th>Function Name</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td>CG Admin Supervisor</td> </tr> <tr> <td><input type="checkbox"/></td> <td>CG Admin Technician</td> </tr> <tr> <td><input type="checkbox"/></td> <td>CG Assignment Officer (EPM)</td> </tr> </tbody> </table> </div>	Add Function	Function Name	<input type="checkbox"/>	CG Admin Supervisor	<input type="checkbox"/>	CG Admin Technician	<input type="checkbox"/>	CG Assignment Officer (EPM)																
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Requesting New User Roles, Continued

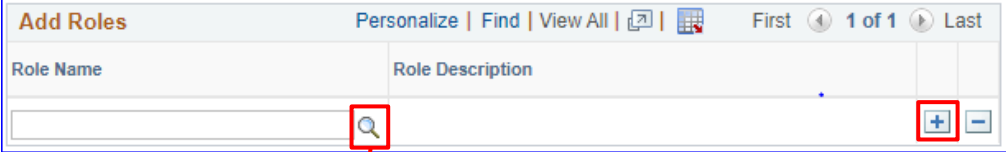
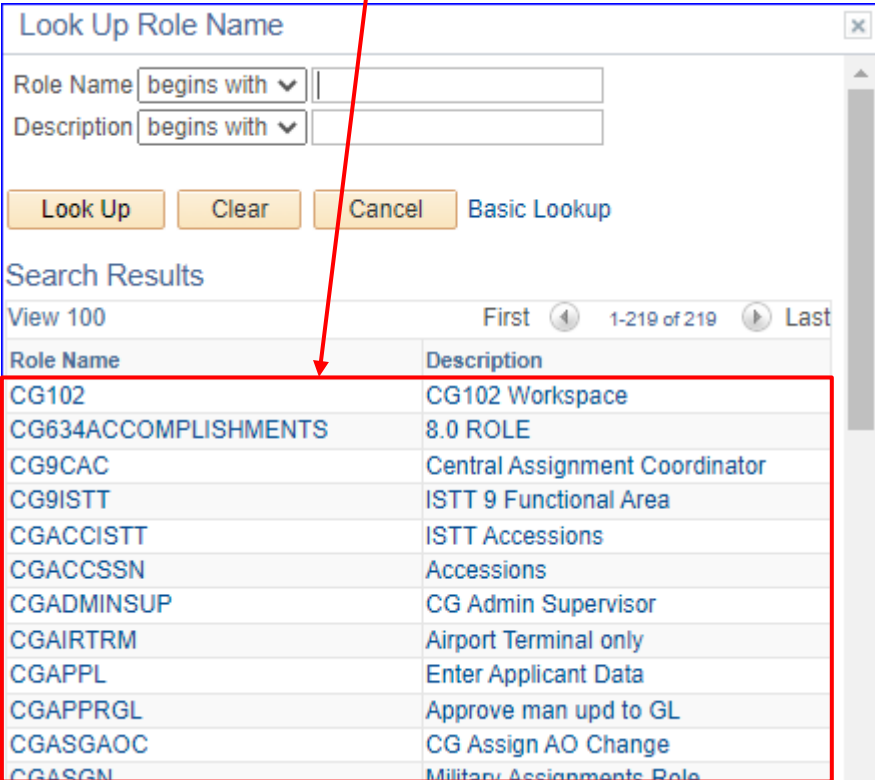
Procedures,
continued

Step	Action																				
5	<p data-bbox="352 439 1139 474">Scroll through and select the Functions the position requires.</p> <p data-bbox="352 510 1366 656">NOTE: It is important to review the requirements of each User Role and Function to ensure all criteria are met, such as appropriate Approval Authority and/or a Designation Memo provided to PPC. See the DA Functional Roles webpage for a list of requirements.</p> <div data-bbox="352 656 1366 1218"><table border="1"><thead><tr><th data-bbox="355 712 536 739">Add Function</th><th data-bbox="536 712 1362 739">Function Name</th></tr></thead><tbody><tr><td data-bbox="355 752 536 797"><input type="checkbox"/></td><td data-bbox="536 752 1362 797">CG Recruiter</td></tr><tr><td data-bbox="355 797 536 842"><input type="checkbox"/></td><td data-bbox="536 797 1362 842">CG Recruiter in Charge</td></tr><tr><td data-bbox="355 842 536 887"><input type="checkbox"/></td><td data-bbox="536 842 1362 887">CG Reserve Manager</td></tr><tr><td data-bbox="355 887 536 931"><input checked="" type="checkbox"/></td><td data-bbox="536 887 1362 931">CG Reserve Order Funding Approver</td></tr><tr><td data-bbox="355 931 536 976"><input type="checkbox"/></td><td data-bbox="536 931 1362 976">CG Roles Recertification</td></tr><tr><td data-bbox="355 976 536 1021"><input type="checkbox"/></td><td data-bbox="536 976 1362 1021">CG SPO Auditor</td></tr><tr><td data-bbox="355 1021 536 1066"><input type="checkbox"/></td><td data-bbox="536 1021 1362 1066">CG SPO Auditor (CG Academy)</td></tr><tr><td data-bbox="355 1066 536 1111"><input type="checkbox"/></td><td data-bbox="536 1066 1362 1111">CG SPO Auditor (PSC (RPM-3))</td></tr><tr><td data-bbox="355 1111 536 1155"><input type="checkbox"/></td><td data-bbox="536 1111 1362 1155">CG SPO Technician</td></tr></tbody></table></div>	Add Function	Function Name	<input type="checkbox"/>	CG Recruiter	<input type="checkbox"/>	CG Recruiter in Charge	<input type="checkbox"/>	CG Reserve Manager	<input checked="" type="checkbox"/>	CG Reserve Order Funding Approver	<input type="checkbox"/>	CG Roles Recertification	<input type="checkbox"/>	CG SPO Auditor	<input type="checkbox"/>	CG SPO Auditor (CG Academy)	<input type="checkbox"/>	CG SPO Auditor (PSC (RPM-3))	<input type="checkbox"/>	CG SPO Technician
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Requesting New User Roles, Continued

Procedures,
continued

Step	Action																										
6	<p>If a specific User Role or Function is not listed: under Add Roles, use the Lookup to locate the Role Name, then select the appropriate role.</p> <p>Click the (+) button to add additional Roles as appropriate.</p>  <p>The screenshot shows the 'Add Roles' window with a search icon (magnifying glass) and a '+' button highlighted with red boxes. A red arrow points from the search icon to the 'Look Up Role Name' dialog box below.</p>  <p>The 'Look Up Role Name' dialog box contains search criteria for 'Role Name' and 'Description', both set to 'begins with'. It includes 'Look Up', 'Clear', and 'Cancel' buttons. Below is a 'Search Results' table with 10 columns and 10 rows. The first row is highlighted with a red box.</p> <table border="1" data-bbox="357 1070 1193 1480"> <thead> <tr> <th>Role Name</th> <th>Description</th> </tr> </thead> <tbody> <tr style="border: 2px solid red;"> <td>CG102</td> <td>CG102 Workspace</td> </tr> <tr> <td>CG634ACCOMPLISHMENTS</td> <td>8.0 ROLE</td> </tr> <tr> <td>CG9CAC</td> <td>Central Assignment Coordinator</td> </tr> <tr> <td>CG9ISTT</td> <td>ISTT 9 Functional Area</td> </tr> <tr> <td>CGACCI</td> <td>ISTT Accessions</td> </tr> <tr> <td>CGACCSSN</td> <td>Accessions</td> </tr> <tr> <td>CGADMINSUP</td> <td>CG Admin Supervisor</td> </tr> <tr> <td>CGAIRTRM</td> <td>Airport Terminal only</td> </tr> <tr> <td>CGAPPL</td> <td>Enter Applicant Data</td> </tr> <tr> <td>CGAPPRGL</td> <td>Approve man upd to GL</td> </tr> <tr> <td>CGASGAOC</td> <td>CG Assign AO Change</td> </tr> <tr> <td>CGASGN</td> <td>Military Assignments Role</td> </tr> </tbody> </table>	Role Name	Description	CG102	CG102 Workspace	CG634ACCOMPLISHMENTS	8.0 ROLE	CG9CAC	Central Assignment Coordinator	CG9ISTT	ISTT 9 Functional Area	CGACCI	ISTT Accessions	CGACCSSN	Accessions	CGADMINSUP	CG Admin Supervisor	CGAIRTRM	Airport Terminal only	CGAPPL	Enter Applicant Data	CGAPPRGL	Approve man upd to GL	CGASGAOC	CG Assign AO Change	CGASGN	Military Assignments Role
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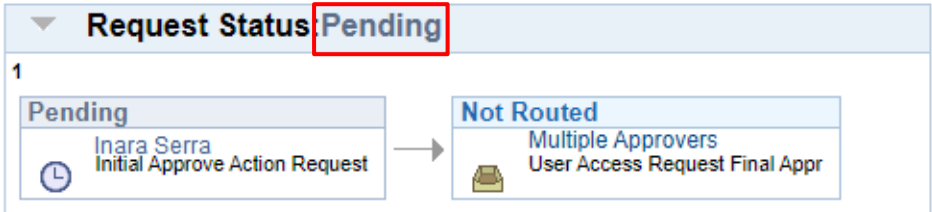
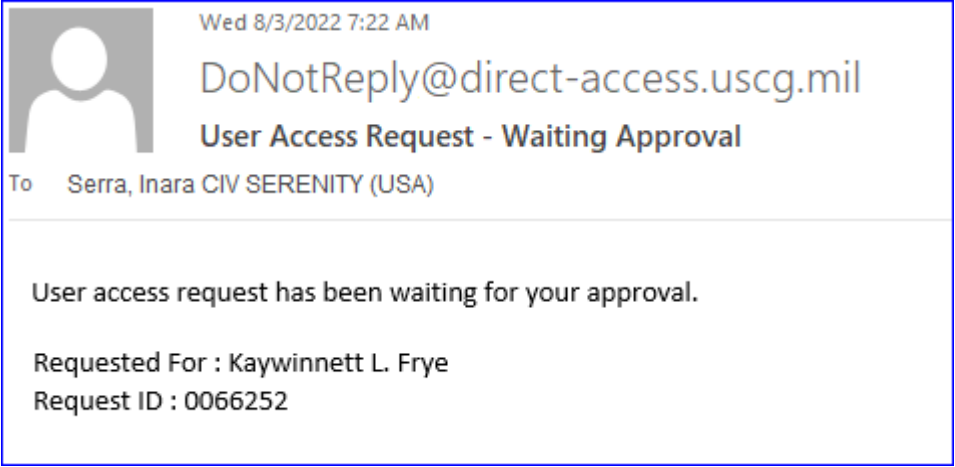
Procedures,
continued

Step	Action
7	<p>Scroll to the bottom of the page and enter the Justification for requesting the User Role(s)/Function(s) (required). Enter the Approver ID (approver's Employee ID number) or use the Lookup to locate the approver's Employee ID number.</p> <p>Review the statement and check the Acknowledgement box. Click Submit for Approval.</p> <div data-bbox="357 692 1370 952" style="border: 1px solid black; padding: 5px;"> <p>Approver Selection</p> <p>*Justification: <input type="text" value="Enter the justification (explanation) for the DA User Roles requested."/></p> <p>*Approver ID: <input type="text" value="9876543"/> <input type="button" value="Q"/> Inara Serra Position: 00003199 - MGMT & PRGM ANALYST</p> <p><input checked="" type="checkbox"/> Acknowledgement: I understand that I am authorized to access the Direct Access system and that accessing it for purpose 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-5500A) which is required for all U.S. Coast Guard AIS users it contains the full Scope of Authorization and Acknowledgement.)</p> <p><input type="button" value="Submit for Approval"/></p> </div>

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Requesting New User Roles, Continued

Procedures,
continued

Step	Action
8	<p>Once submitted, the request will be placed in a Pending status and email notification will be sent to the Approver. It is important to follow up with the Approver. If the User Roles request is not approved within 30 days of submission, DA will automatically terminate the request and email the submitter to submit a new request.</p> <p>NOTE: Once the Approver approves the request, it will be sent to PPC for final approval. The submitter will receive email notification upon final approval or denial of the request.</p> <div data-bbox="357 689 1369 969" style="border: 1px solid blue; padding: 5px;"> <p>User Access Request</p>  </div> <div data-bbox="357 1008 1315 1473" style="border: 1px solid blue; padding: 5px;">  </div>

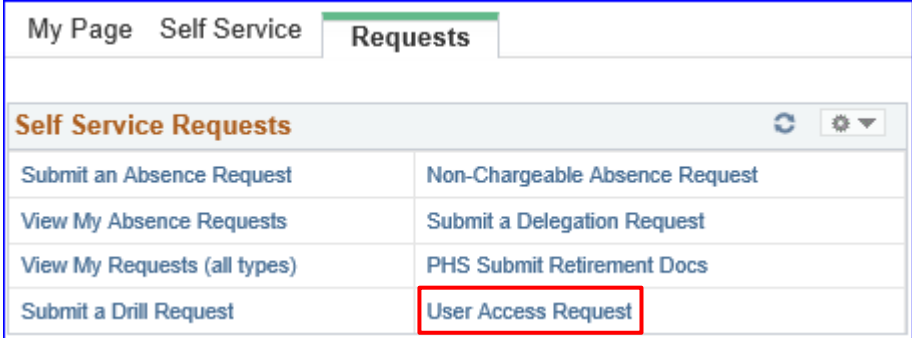
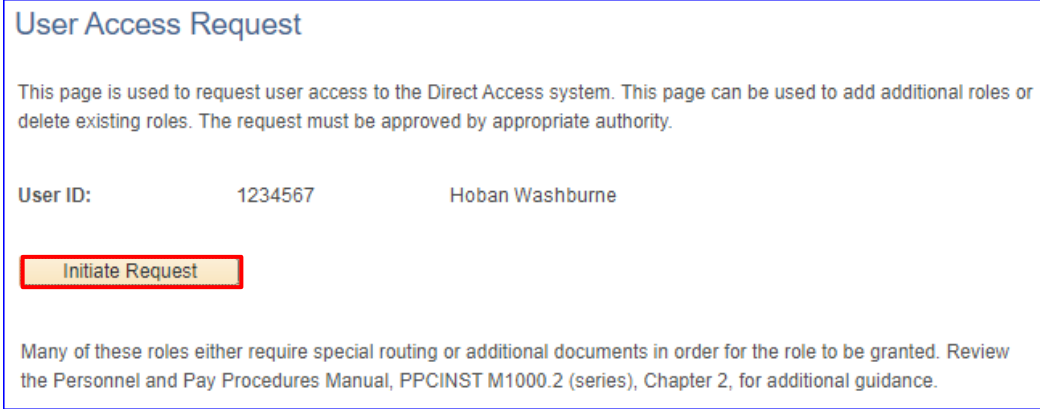
Removing User Roles

Introduction This section provides the procedures for removing User Roles and Functions in Direct Access (DA).

Allow 24 hours after PPC approval to see any requested changes to Roles.

Termination of Roles If a Command requires termination of User Roles prior to transfer or separation, notify PPC Customer Care. Include the member's Employee ID number and the User Role(s) and Function(s) to be revoked.

Procedures See below.

Step	Action
1	<p>From the Requests tab, select User Access Request from the Self Service Requests pagelet.</p> 
2	<p>The User Access Request page will display. Click Initiate Request.</p> 

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Removing User Roles, Continued

Procedures,
continued

Step	Action																												
3	<p>Any Current Roles and Current Functions for the member will display. Click View All (if necessary) to view the entire list of Current Roles and Current Functions.</p> <div data-bbox="331 544 1377 1120" style="border: 1px solid black; padding: 5px;"> <p>User Access Request</p> <p>Request Details</p> <p>User Access Request For: 1234567 Hoban Washburne</p> <p>Request ID: Request Status:</p> <p>Current Roles Personalize Find View All [Print] [Export] First 1-3 of 6 Last</p> <table border="1"> <thead> <tr> <th>Keep Role</th> <th>Remove Role</th> <th>Role Name</th> <th>Role Description</th> <th>Role Details</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CGFIELDADM</td> <td>Unit ADMIN access to limited HR</td> <td>Role Details</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CGHRS</td> <td>Coast Guard HRS/PERSRU</td> <td>Role Details</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CGHRSWW</td> <td>HRS/PERSRU Display Only</td> <td>Role Details</td> </tr> </tbody> </table> <p>Current Functions Personalize Find View All [Print] [Export] First 1 of 1 Last</p> <table border="1"> <thead> <tr> <th>Keep Function</th> <th>Remove Function</th> <th>Function Name</th> <th>Function Description</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CG SPO Technician</td> <td>CG SPO Technician</td> </tr> </tbody> </table> </div>	Keep Role	Remove Role	Role Name	Role Description	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGFIELDADM	Unit ADMIN access to limited HR	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGHRS	Coast Guard HRS/PERSRU	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGHRSWW	HRS/PERSRU Display Only	Role Details	Keep Function	Remove Function	Function Name	Function Description	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CG SPO Technician	CG SPO Technician
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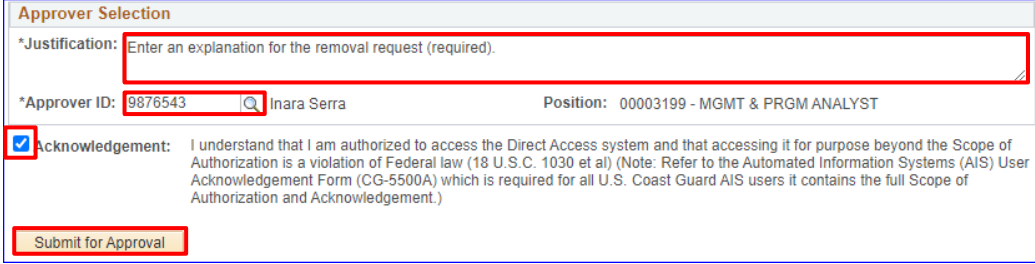
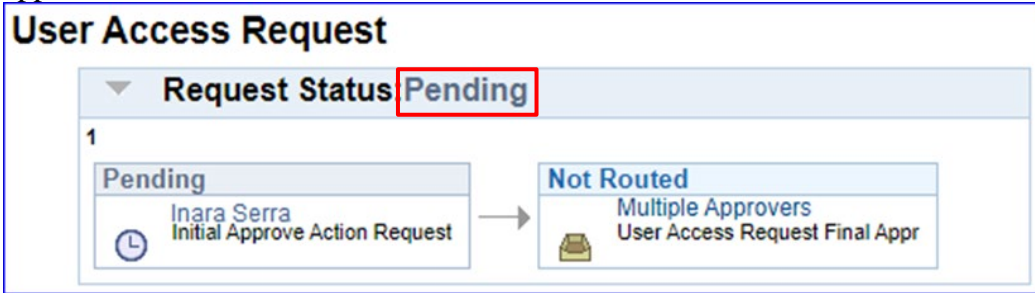
Procedures,
continued

Step	Action																																											
4	<p>Check the Remove Role box for each Role and/or Function to be removed. DO NOT REMOVE THE CGROWSEC_CGAD ROLE.</p> <p>NOTE: For information on adding User Roles and Functions, see the Requesting New User Roles section.</p> <div data-bbox="331 618 1369 1361" style="border: 1px solid black; padding: 5px;"> <p>User Access Request</p> <p>Request Details</p> <p>User Access Request For: 1234567 Hoban Washburne</p> <p>Request ID: Request Status:</p> <hr/> <p>Current Roles Personalize Find View 3 [Print] [Refresh] First 1-6 of 6 Last</p> <table border="1"> <thead> <tr> <th>Keep Role</th> <th>Remove Role</th> <th>Role Name</th> <th>Role Description</th> <th>Role Details</th> </tr> </thead> <tbody> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CGFIELDADM</td> <td>Unit ADMIN access to limited HR</td> <td>Role Details</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>CGHRS</td> <td>Coast Guard HRS/PERSRU</td> <td>Role Details</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CGHRVW</td> <td>HRS/PERSRU Display Only</td> <td>Role Details</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CGROWSEC_CGAD</td> <td>CG Active Duty Row Security</td> <td>Role Details</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CGSSCMD</td> <td>CG Self Service Command</td> <td>Role Details</td> </tr> <tr> <td><input checked="" type="checkbox"/></td> <td><input type="checkbox"/></td> <td>CGSSMBR</td> <td>CG Self Service Member</td> <td>Role Details</td> </tr> </tbody> </table> <hr/> <p>Current Functions Personalize Find View All [Print] [Refresh] First 1 of 1 Last</p> <table border="1"> <thead> <tr> <th>Keep Function</th> <th>Remove Function</th> <th>Function Name</th> <th>Function Description</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><input checked="" type="checkbox"/></td> <td>CG SPO Technician</td> <td>CG SPO Technician</td> </tr> </tbody> </table> <p>Add Functions Personalize Find View All [Print] [Refresh] First 1-3 of 48 Last</p> </div>	Keep Role	Remove Role	Role Name	Role Description	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGFIELDADM	Unit ADMIN access to limited HR	Role Details	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CGHRS	Coast Guard HRS/PERSRU	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGHRVW	HRS/PERSRU Display Only	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGROWSEC_CGAD	CG Active Duty Row Security	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGSSCMD	CG Self Service Command	Role Details	<input checked="" type="checkbox"/>	<input type="checkbox"/>	CGSSMBR	CG Self Service Member	Role Details	Keep Function	Remove Function	Function Name	Function Description	<input type="checkbox"/>	<input checked="" type="checkbox"/>	CG SPO Technician	CG SPO Technician
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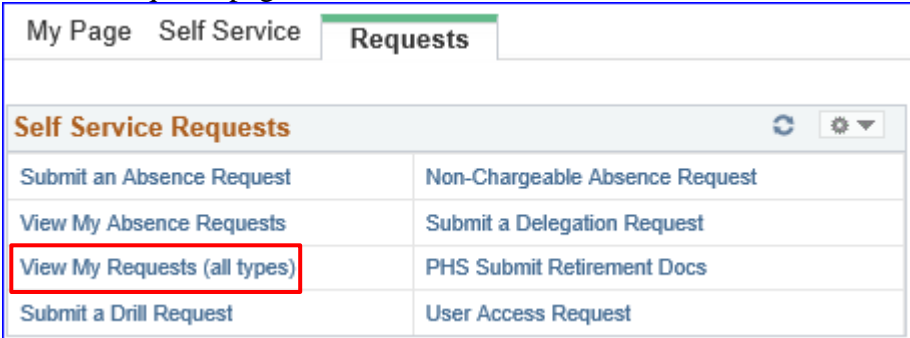
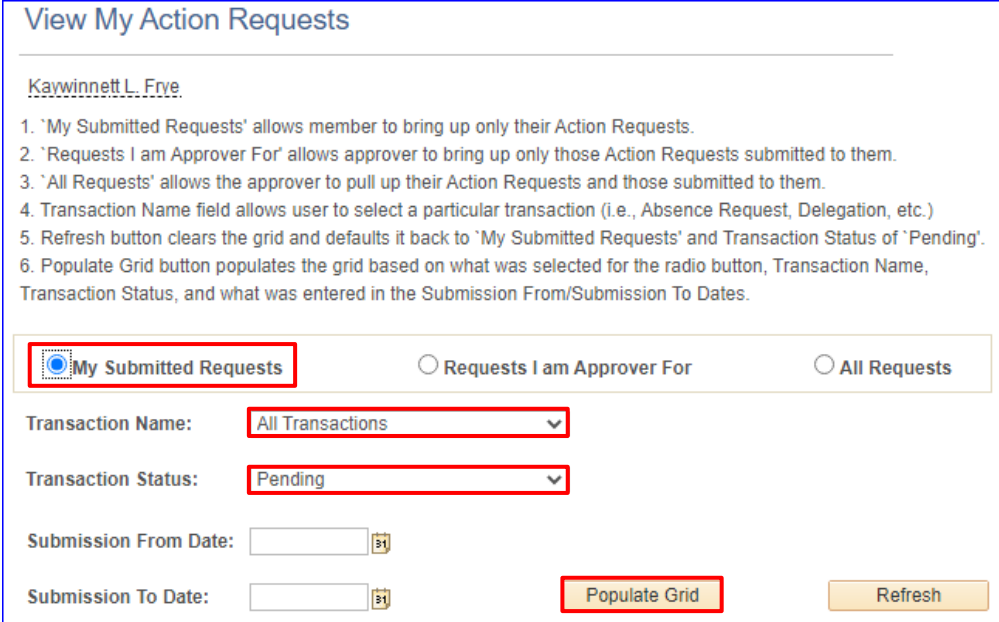
Procedures,
continued

Step	Action
5	<p>Scroll to the bottom of the page and enter the Justification for removing the User Role/Function (required). Enter the Approver ID (approver's Employee ID number) or use the Lookup to locate the approver's Employee ID number.</p> <p>Review the statement and check the Acknowledgement box. Click Submit for Approval.</p> 
6	<p>Once submitted, the request will be placed in a Pending status and email notification will be sent to the Approver. It is important to follow up with the Approver. If the User Access Request is not approved within 30 days, DA will automatically terminate the request and email the submitted to submit a new request.</p> <p>NOTE: Once the Approver approves the request, it will be sent to PPC for final approval.</p> 

Withdrawing a User Roles Request

Introduction This section provides the procedures for withdrawing a User Roles Request in Direct Access (DA) in the event the Approver becomes unavailable (transferred, separated, TDY, etc.).

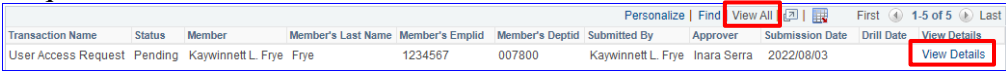
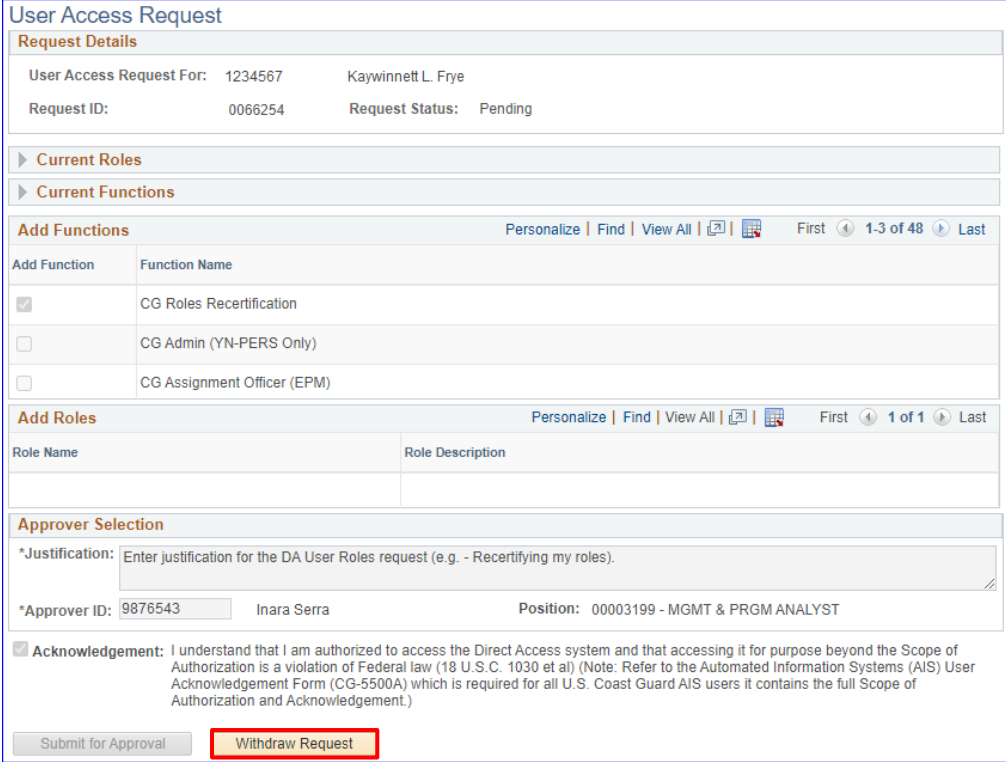
Procedures See below.

Step	Action
<p>1</p>	<p>From the Requests tab, select View My Requests (all types) in the Self Service Requests pagelet.</p> 
<p>2</p>	<p>The View My Action Requests page will display. Ensure the My Submitted Requests button is selected. The Transaction Name will default to All Transactions and the Transaction Status will default to Pending. Click Populate Grid.</p> 

Continued on next page

Withdrawing a User Roles Request, Continued

Procedures,
continued

Step	Action
<p>3</p>	<p>All pending requests will be listed. It may be necessary to click View All to see all pending requests. Scroll through the list and locate the User Access Request. Click View Details.</p> 
<p>4</p>	<p>The User Access Request will open in a new tab. Click Withdraw Request.</p> 
<p>5</p>	<p>The Request Status will update from Pending to Terminated. 'X' out of the tab to return to View My Requests (all types).</p> <p>A new User Access Request will need to be submitted (see the Requesting New User Roles section for assistance).</p> 