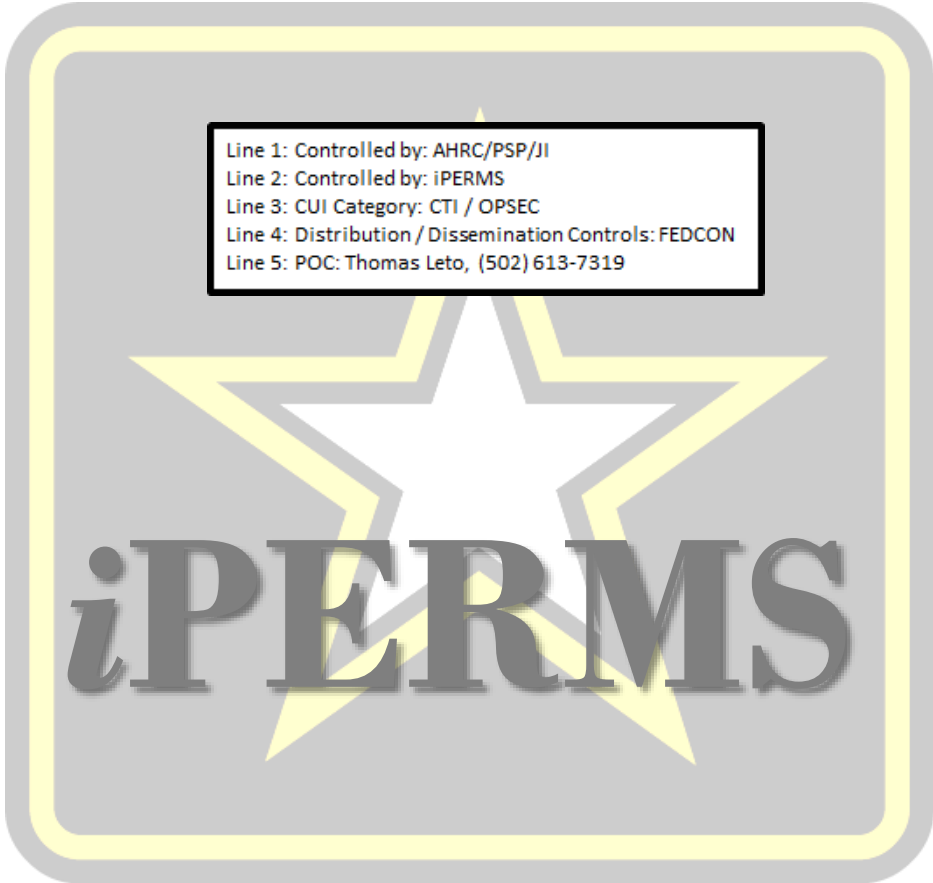Line 1: Controlled by: AHRC/PSP/JI
Line 2: Controlled by: iPERMS
Line 3: CUI Category: CTI / OPSEC
Line 4: Distribution / Dissemination Controls: FEDCON
Line 5: POC: Thomas Leto, (502) 613-7319

iPERMS

U.S. ARMY

User Guide

IV Operator Role

How to Use This Guide

The Table of Contents guides the user on where to find specific information. The page numbers are linked to the pages and the user may skip to specific pages by clicking on the number.

Click the question mark icon ( ) in the user guide for more information.

Click the Pro Tips icon ( )   for helpful tips.

Table of Contents

Introduction to Index Validation Operator

The Index Operator role allows you to upload images, view and enter data from those documents into iPERMS.
The Index Operator role requires document indexing, and will create a batch error if the indexing is not completed. The index data entered enables iPERMS to correctly file documents in Soldiers' records, allowing users to retrieve the correct Soldiers' records and documents.
Successful retrieval depends on the accuracy of the information entered and validated during this process.
The documents must be completed correctly, indexed and validated correctly before being filed in the Soldier's record.
Incomplete documents may remain in the Soldier's record.
Incorrectly filed documents may:
    -Require additional work
    -Appear missing from the Soldier's record
    -Expose PII (A violation of Federal Law)
Not all batches will move from the current unit level to the next unit in the Chain of Command. The Domain Manager (DM) can determine what percentage of an Indexer's work is kept at the same unit level for verification from the IV user's peers.

Like most roles, Index Validation Operator is assigned by an iPERMS Domain Manager or Domain Administrator. You will know what roles are available to you when you log in to iPERMS.

Index Validation Operator at a Glance

After the batch is opened and the images are in view, the batch is ready to be indexed. Below are the indexing steps.

Step 1 View each image to determine if it is readable. Use the Image Viewer Toolbar to enlarge the document view. Click the Open All button to expand/collapse the document tree so that you can easily see how many images are in the batch.

Step 2 Edit or organize the images so that multi-page documents are complete. If necessary, documents/images can be deleted, images can be added, and images can be deleted or marked for rejection.

Step 3 Enter and validate the index data.

Step 4 Check for Duplicate Documents.

Step 5 Finish the batch.

The following gives detailed direction on the system and how to best utilize it.
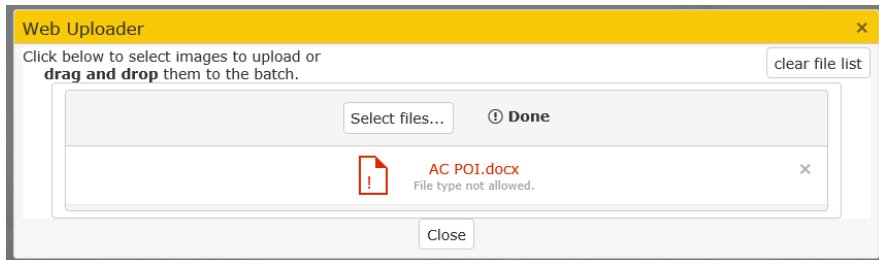
File Types and Document Requirements

iPERMS supports Web Uploading of TIFF and PDF files. Each document should conform to the following standards.
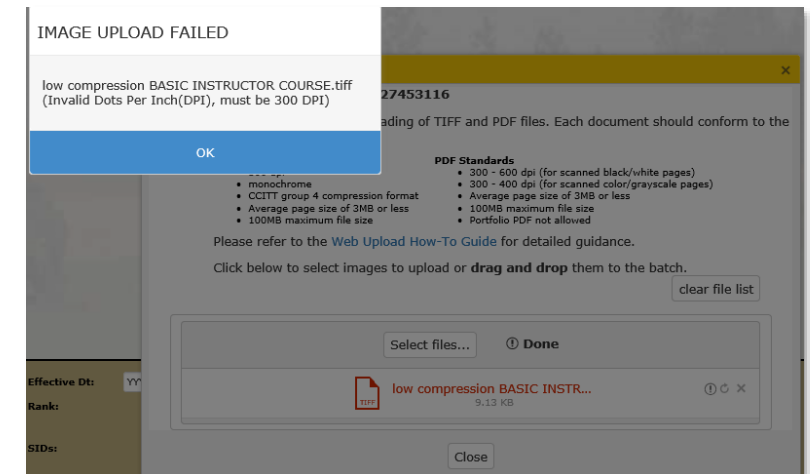
TIFF Standards

- 300 dpi
- monochrome
- CCITT group 4 compression format
- Average page size of 3MB or less
- 100MB maximum file size

PDF Standards

- 300 - 600 dpi (for scanned black/white pages)
- 300 - 400 dpi (for scanned color/grayscale pages)
- Average page size of 3MB or less
- 100MB maximum file size
- Portfolio PDF not allowed

Web Uploader

Click below to select images to upload or **drag and drop** them to the batch.

clear file list

Select files...   ⓘ **Done**

AC POI.docx
File type not allowed.

×

Close

If a file does not meet the above criteria, the file name will appear in red font with a message indicating why the file cannot be uploaded.

IMAGE UPLOAD FAILED

low compression BASIC INSTRUCTOR COURSE.tiff
(Invalid Dots Per Inch(DPI), must be 300 DPI)

OK

27453116

...ading of TIFF and PDF files. Each document should conform to the

	PDF Standards
• 300 dpi	• 300 - 600 dpi (for scanned black/white pages)
• monochrome	• 300 - 400 dpi (for scanned color/grayscale pages)
• CCITT group 4 compression format	• Average page size of 3MB or less
• Average page size of 3MB or less	• 100MB maximum file size
• 100MB maximum file size	• Portfolio PDF not allowed

Please refer to the Web Upload How-To Guide for detailed guidance.

Click below to select images to upload or **drag and drop** them to the batch.

clear file list

Select files...   ⓘ **Done**

low compression BASIC INSTR...
9.13 KB

ⓘ ↻ ×

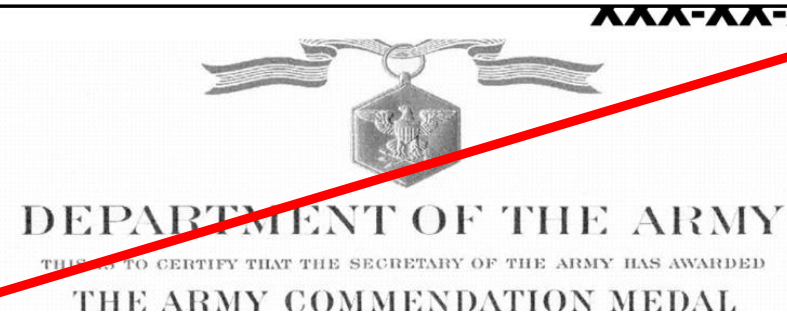Effective Dt: YY...
Rank:
SIDs:

Close

File Types and Document Requirements

In iPERMS, documents must be clearly marked with the Soldiers DOD ID in the upper right hand section of the document. Ensure that the DOD ID is not so close to the top that it gets cut off. The SSN can be used if the DOD ID is not available. If the ID number is embedded in the document, there is no need to write in the upper right corner.

Correct ID number placement

ID number placed too high and not visible

XXX-XX-XXX

XXXXXXXXXX

THE UNITED STATES OF AMERICA

TO ALL WHO SHALL SEE THESE PRESENTS. GREETING:

DEPARTMENT OF THE ARMY

THIS IS TO CERTIFY THAT THE SECRETARY OF THE ARMY HAS AWARDED

THE ARMY COMMENDATION MEDAL

CAC Log In

iPERMS is CAC Log In Only

Primary Records Center

YOU ARE ACCESSING A U.S. GOVERNMENT (USG) INFORMATION SYSTEM (IS) THAT IS PROVIDED FOR USG-AUTHORIZED USE ONLY.

By using this IS (which includes any device attached to this IS), you consent to the following conditions:

- The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.
- At any time, the USG may inspect and seize data stored on this IS.
- Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG-authorized purpose.
- This IS includes security measures (e.g., authentication and access controls) to protect USG interests—not for your personal benefit or privacy.
- Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential. See User Agreement for details.

I ACCEPT

Primary Records Center

DoD Approved Certificate Login:
Login to iPERMS with your CAC or other DoD approved certificate

CERTIFICATE LOGIN

Need help with CAC login?
Please contact your local DEERS office

Problems accessing iPERMS?
Please contact support at 502-608-0217

1.0.10-#DEV
036a2b53a5d1abffcfe97cd08667b1931d3cb672 /
036a2b5

Primary Records Center

iPERMS is the Army's authorized personnel records repository for the Army Military Human Resource Record (AMHRR). The AMHRR is the Army's System of Records protected by the Privacy Act of 1974 (Title 5 U. S. Code 552a) as amended. The Privacy Act protects the privacy of individuals from unwarranted intrusion.

You have been granted access to the AMHRR as an Authorized Official to assist you in the performance of your official duties. Official need to know and the performance of your official duties are the only reasons you have access to iPERMS. You have been authorized to use the Personally Identifiable Information (PII) and other information in the AMHRR only in the performance of your official duties.

You are responsible and accountable for your actions in iPERMS. You are not authorized to allow another individual to view iPERMS using your login information. Unauthorized disclosure of PII or viewing an individual's AMHRR for other than official purposes are violations of the Privacy Act that will subject you to Civil and Criminal penalties. All of your activities in iPERMS are logged automatically by iPERMS and may be made available to management upon an official request to report your iPERMS usage.

Personally Identifiable Information and other information residing in the AMHRR and iPERMS must be treated as "For Official Use Only".

The full "Privacy Act of 1974 as amended" is available at the following link for your reference:
Privacy Act of 1974 (PDF)

"Your clicking on the "I Accept" button signifies your understanding of the Privacy Act of 1974 as amended and your responsibility to safeguard personal information, to properly dispose of any physical copies obtained from iPERMS Online, and to prevent unauthorized use, access, disclosure, alteration, or destruction of records in iPERMS."

I ACCEPT   **LOGOUT**

Select Role:

INDEX/VALIDATION IN CO/P3AT0

RECORD MANAGER IN CO

AUTHORIZED OFFICIAL

SOLDIER

LOGOUT

Click **I ACCEPT** to denote acknowledgement of the use of government systems and personally identifiable information warning. Click on Index Validation Operator role to upload documents.

Announcements Page

Upon logging in, you will see general information and announcements as seen in the image below.

From the Announcements Page the operator may:
See announcements pertinent to the domain, run a Batch Originator Report, create a new batch, access the Batch Manager page, switch roles and set preferences.

Switching Roles

Click on SWITCH ROLE to choose role options

iPERMS will let you switch between any role you are assigned. You may also view your Soldier record with the same login. As an IV Operator, you must finish the batch you are working on, or you will get an error message warning that you are unable to switch roles while editing a batch. After successfully switching roles, your domain flag and profile icons will flash.

Preferences

To change email address or notification preferences, click on PREFERENCES. Change setting appropriately and click on SAVE.

Creating a Batch

Option 1   (This can also be done from the Announcements page)

    1. Click "Batch".

    2. Click "Create Batch" to open the Batch Processing queue.

Option 2

    1. Click on Batch Manager in the menu bar

    2. Users can create a new batch by clicking on the [icon] icon.

Batch Number Identification

NOTE: Your **Batch Number** is created once you have started a new batch.
The Batch Number displays in two places on the screen. (upper left corner and menu bar)
You can also get the Batch Number from the **Batch Originator Report**, see page 32.

There are TWO options for adding images to your batch.

1. **Drag and Drop** the files you need to upload to the queue (see page 15)

2. **Select Files** you would like to upload from a location on your computer (see page 14)

***Please note that you are still able to upload zip files just as you could in the previous version of iPERMS.

Uploading Documents to the Queue
Select Files

Click on document icon with starburst or Document tab>upload document

Click on the Select Files… button

Click and highlight the files for upload.

   ***Users can upload multiple files at one time by holding the CTRL key and selecting each document

If all documents meet the criteria outlined to the right, the document will upload and ready for indexing.

Web Uploader

Upload images to batch 58369

iPERMS supports Web Uploading of TIFF and PDF files. Each document should conform to the following standards.

TIFF Standards
- 300 dpi
- monochrome
- CCITT group 4 compression format
- Average page size of 3MB or less
- 100MB maximum file size

PDF Standards
- 300 - 600 dpi (for scanned black/white pages)
- 300 - 400 dpi (for scanned color/grayscale pages)
- Average page size of 3MB or less
- 100MB maximum file size
- Portfolio PDF not allowed

Please refer to the Web Upload How-To Guide for detailed guidance.

Click below to select images to upload or **drag and drop** them to the batch.

clear file list

Select files…

Close

iPERMS

Check | Hot Keys | Batch #58369 | Document

Batch #58369

Document 1

BATCH FIELDS

Batch Name: 10/21/2020 11:59:53

Container:

Comment:

DOCUMENT FIELDS

SSN/DoD ID:

Soldier Name:

Rank:

Doc Name:

SIDs:

Effective Dt: YYYY-MM-DD

Reject Doc: N - NO PROBLEM

NEXT DOCUMENT

Uploading Documents to the Queue
Drag and Drop

Highlight the documents identified for upload (using the CTRL or Shift key to select multiple documents) Click and drag those documents to the iPERMS window. Let go of the mouse to drop the documents into the queue. If all documents meet the criteria outlined below, all of the documents will be in the queue.

Uploading Documents to the Queue

The documents will upload and this screen will open with all the documents from the batch. Now, the operator may organize the documents or add more documents to this batch.

Batch Processing Queue
Option 1

There are two options for organizing documents in a batch.

Option 1: ***Quickest Way*** - Vertical Toolbar Buttons

Join with Previous Doc – joins a document with the document above it.

Join with Next Doc – joins a document with the next document.

Move Image Up – Moves an image up within a document or into the preceding document.

Move Image Down – moves an image down or into the next document.

Split – Separates images into two separate documents.

Clear Index Values – Clears index values for this document.

Rejection Flag – marks a document for rejection

Delete Selected Document and all of its images – Deletes a document from the batch and all of its images.

Reverse document/image order for the Entire batch – Reverses order of documents and images.

Reverse Image Order in selected Document – Reverse order of images for the selected document.

Upload Images– Allows the user to add images to a batch.

Scan Images – provides access to the Web-Based scanning functions and allows the user to scan images to a batch using a locally connected scanner.

Hovering the mouse over an icon in the vertical toolbar will display a text description of what that button does when selected.

> Image 4.1 pdf
> Image   Reverse Images in Doc
> Image 4.3 pdf
> Image 4.4 pdf
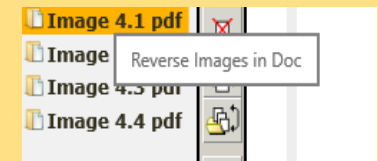
Batch Processing Queue
Option 2

Add Document

Upload Image(s)

Split Document

Join with Previous Doc

Join with Next Doc

Move Image Up

Move Image Down

Delete Selected Doc/Image

Clear Index Values for this Document

Toggle Document/Image Rejection Flag

Scan Images

Sort Images in Doc

Reverse Document/Image Order for Entire Batch

Reverse Images in Doc

Repeat index data in new docs:

☐ **Soldier**

☐ **Document Name**

☐ **Effective Date**

Option 2: Menu Bar Document Tab Dropdown Selections

Click on the Document tab in the Menu Bar. Select the appropriate action from the dropdown list. These options function exactly like the toolbar described on the previous page.

Batch Processing Queue
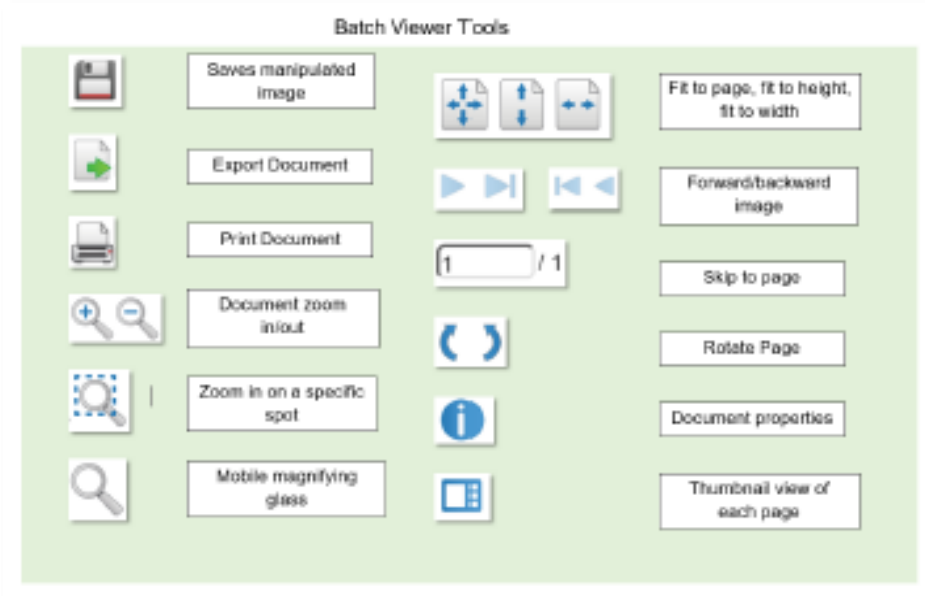
These tools will magnify or decrease the viewing size of the document, or rotate the orientation of the document. The magnifying glass tools are especially helpful to see older, or pixelated documents.

Deleting Documents or Images

Method 1- Vertical toolbar, highlight the document or image on the left that you want to delete then click the delete icon.
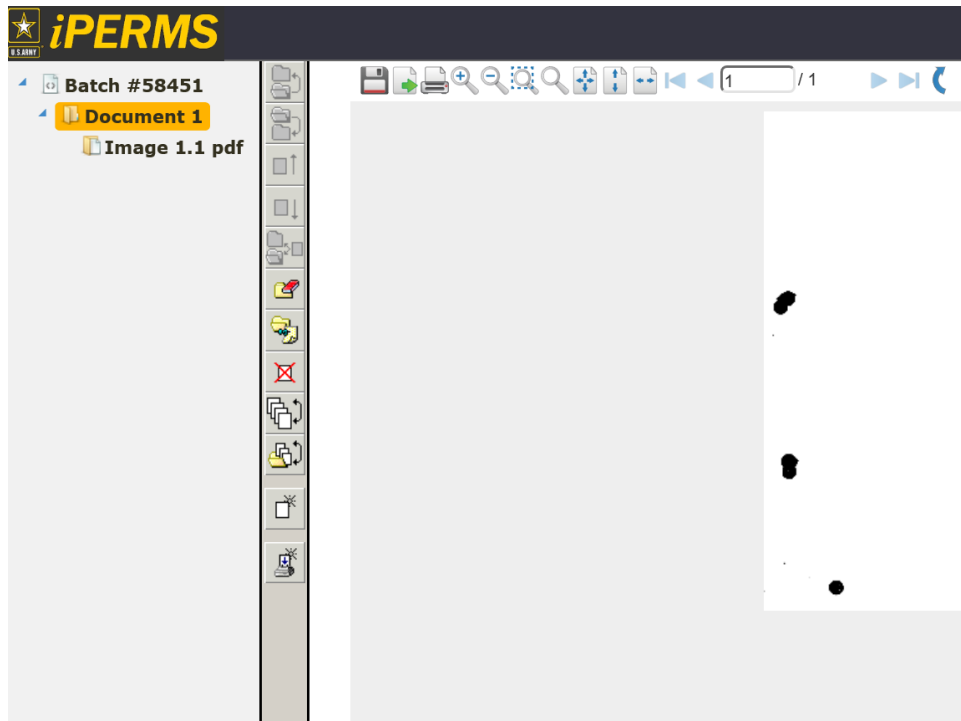
Method 2- Dropdown menu, highlight the document or image on the left that you want to delete then click the **Delete Selected Doc/Image** option.
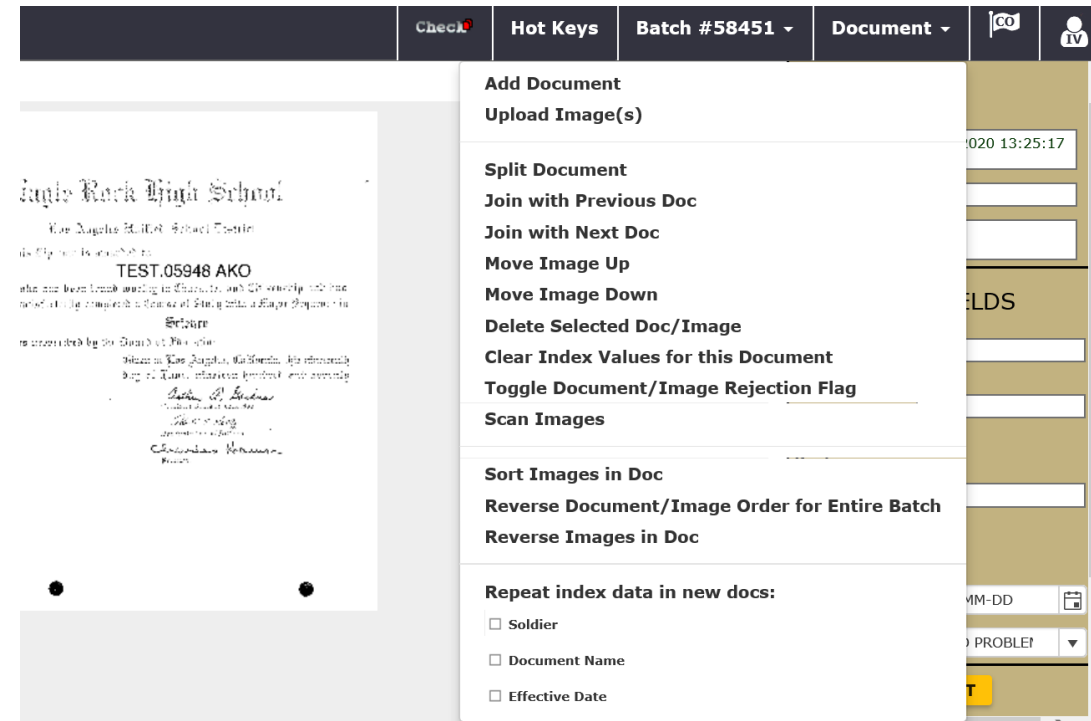
Join Documents

Method 1- Vertical Toolbar, highlight the image you want to join with another and then choose the join up icon, or join down icon.
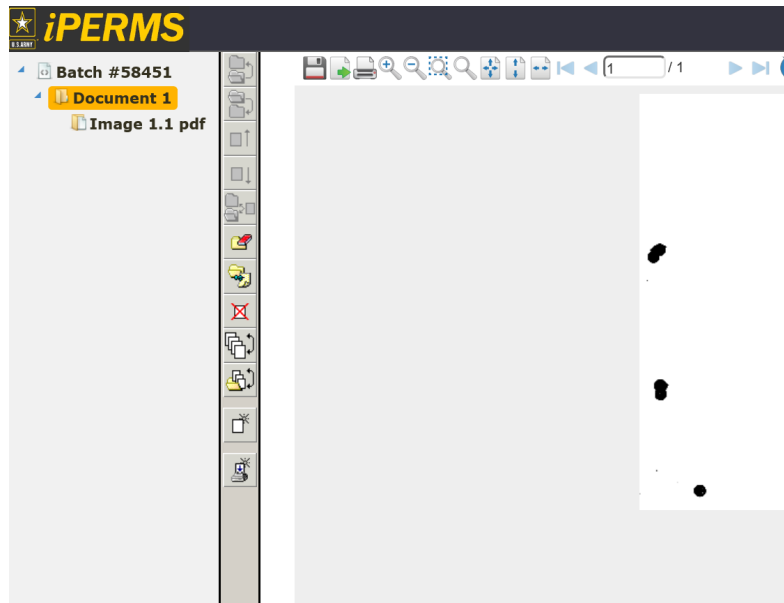
Method 2- Dropdown Menu, highlight the image you want to join with another and then choose the **Join with Previous Doc**, or **Join with Next Doc** option.
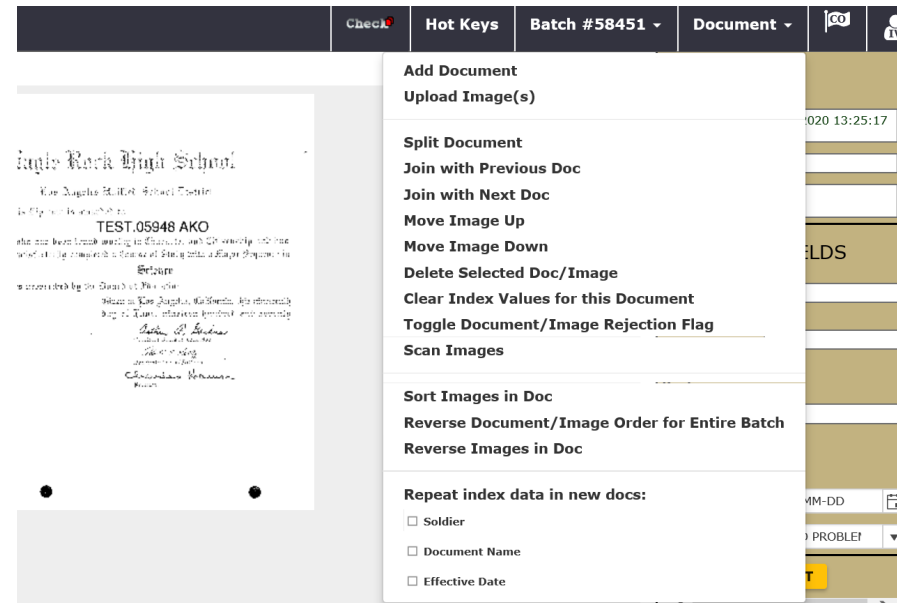
Images must end in the same file type in order to be joined. For example, PDF and PDF images can be joined. A PDF and TIFF cannot be combined. Also, the operator cannot join documents if one has been digitally signed.

Join Documents

Please note: You <u>cannot</u> combine PDF images into one file using third party software. This will create a multi-image file that cannot be properly split into separate documents. When a combined file is uploaded, it will look like this in the iPERMS viewer. As shown, the highlighted image has one icon, but the thumbnail to the right shows both images. You may use the thumbnail on the right to scroll through the images.

Split Documents

Method 1- Vertical Toolbar, highlight the image you want to split from another and then choose the split icon
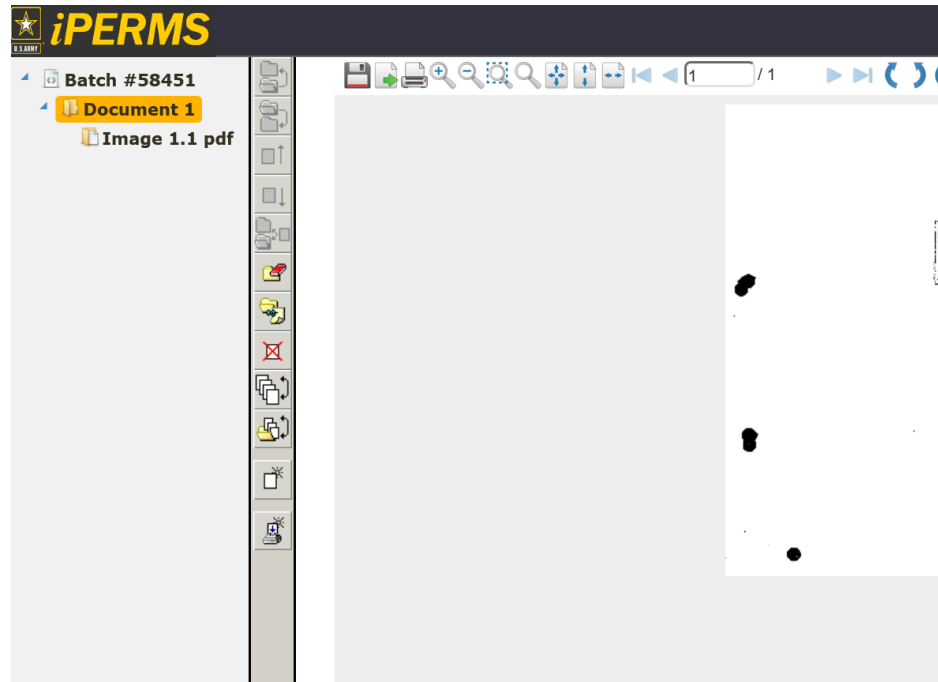
Method 2- Vertical Toolbar, highlight the image you want to split from another and then choose **Split Document** from drop down menu.
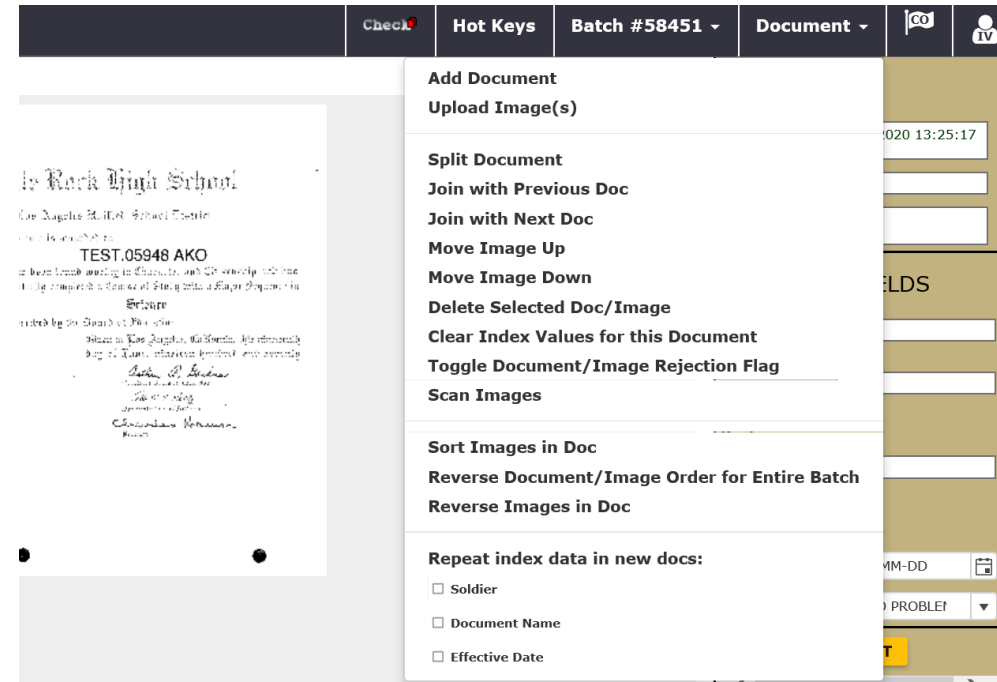
This will split a document with several images, into two documents. The highlighted image and every image after, will split into another document.

Move Images Up and Down

Method 1- Vertical Toolbar, [icon] this moves an image one position up or down.

Method 2- Use this dropdown to move the image from its present position into another document before it or after it
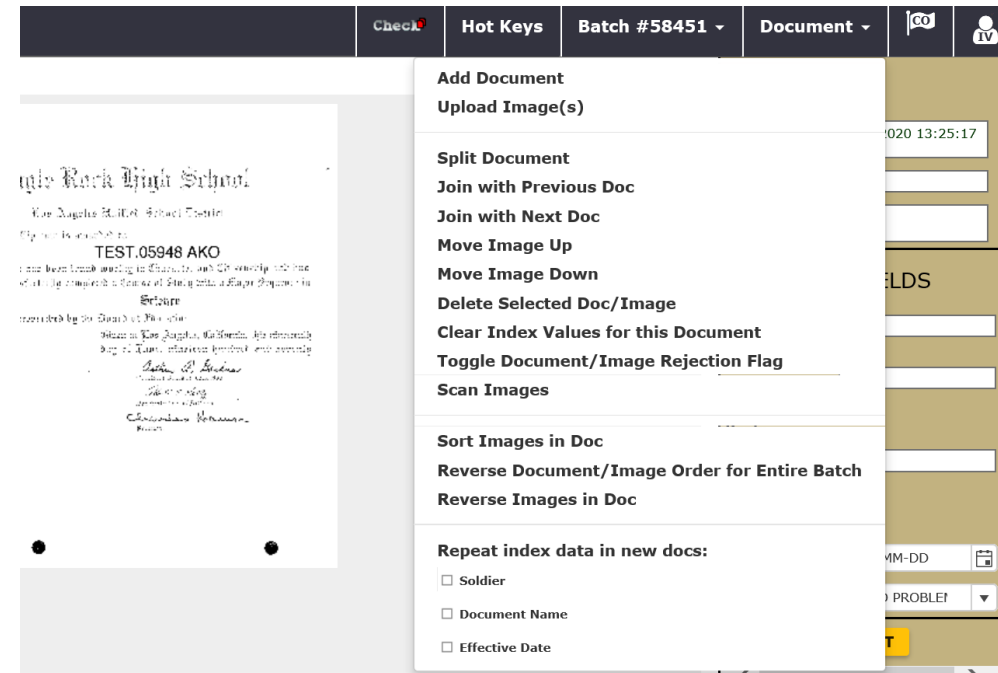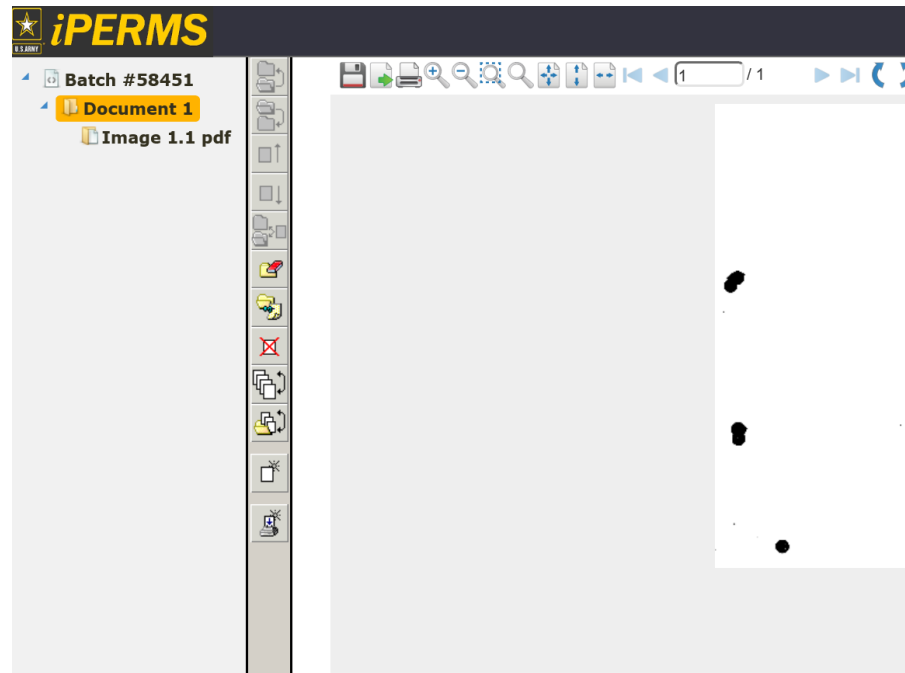
Images must end in the same file type in order to be joined. For example, PDF and PDF images can be joined. A PDF and TIFF cannot be combined.

Indexing Metadata

Batch Name: Automatically populates with date and time stamp batch, but can be customized, if the operator chooses.

Container: Add text to this field to identify batch content.

Comment: Additional information can be included in the comment field. This field can be modified after saving.

The Batch Name, Container, and Comment fields may be filled in accordance with SOPs. Container is often the BDE or MACOM UPC. It may also be the document information (ex: SIDPERS, HRO, etc.) As this can vary greatly, check with your command. The batch name is frequently the operator's name and contact information.

BATCH FIELDS

Batch Name: 10/01/2020 14:02:21

Container:

Comment: Board Docs

DOCUMENT FIELDS

SSN/DoD ID:

Soldier Name:

Rank:

Doc Name:

SIDs:

Effective Dt: YYYY-MM-DD

NEXT DOCUMENT

NEXT IMAGE

AA

DOWNLOAD ALL IMAGES

Indexing Metadata

SSN/DoD ID: Either the SSN or DoD ID can be entered. ***Note: When you enter the SSN, if the Soldier already has an iPERMS record, the field will switch to the Soldier's DoD ID.* All fields with a magnifying glass have the "type ahead" feature. This provides suggestions that match the characters that have already been typed.

Soldier Name: Last Name First Name. This will populate if the ID number is entered first.

Doc Name: Type the document name and select the entry from the list. The Required Documents List can be found at: https://www.hrc.army.mil/asset/14900

Reject Doc: This field details the document issue and will require the document sent to the queue detailed in the rejection code.

Effective Date: Either Select the date by clicking on the calendar next to the date field or type the date in the YYYY-MM-DD field. Note: the date must be entered in the exact order.

SIDs: The SID for each document is automatically populated and cannot be modified.

Filling these fields may be optional or required. The operator will receive an error message upon completion of the batch if fields are left blank and they are required by the domain manager. If these fields are not visible, you will not need to index the batch.

BATCH FIELDS

Batch Name: 10/01/2020 14:02:21

Container:

Comment: Board Docs

DOCUMENT FIELDS

SSN/DoD ID:

Soldier Name:

Rank:

Doc Name:

SIDs:

Effective Dt: YYYY-MM-DD

NEXT DOCUMENT

NEXT IMAGE

AA

DOWNLOAD ALL IMAGES

Duplicate Document Check

If you run the duplicate check on your batch and receive a Duplicate Document Check message as displayed left, you must examine both documents to ensure you are not uploading a duplicate document into a record. Dup docs must be resolved before the batch can be completed. Click **OK** to open the Duplicate Document (aka Dup Doc) Tool.

Duplicate Document Check

From the Input Operator role, the user can only delete the document in the batch. Documents cannot be deleted from the record in the Input Operator role. If the document is not identical (AWD DOC is a common example) select the green tab icon to keep the doc and not create a problem case.

Duplicate Document Check

PERMED DOCUMENT-- 700071981

Icon	Description
	This icon will close the Dup Doc Tool
	This icon will delete the new document, it is a duplicate of a permed record
	This icon will keep the new document and create a problem case
	This icon will keep the new document and will not create a problem case

Finishing the Batch

The Input Operator may finish the batch by clicking "Finish Batch " in the drop down menu. If all fields are filled in appropriately, this batch will proceed to the Index/Validation queue. The Input Operator may also click "Next Image" on the final document. Again, if all fields are filled appropriately, the operator will receive the "Indexing Complete" dialogue box. Click "Finish" in the dialogue box to send the batch to the next stage of the workflow. After this, the operator can run a Batch Originator Report to see which queue of the workflow it is in.

Batch Processing Hot Keys

Hot Keys:
Input Operators can use shortcuts on the keyboard for functions available in the vertical toolbar and batch processing drop down menus.

iPERMS

Batch #58455
📙 Document 1

Indexing Hot Keys

IV Indexing Hot Key Legend

Document Navigation

Key	Function
Up Arrow	Previous Image
Escape + Left Arrow	Previous Document
down Arrow	Next Image
Escape + Right Arrow	Next Document

Indexing

Key	Function
ENTER	Go To Next Index Field/Finish Batch *Performs automatic lookups and validations*
Escape + Z	Finish Document
Ctrl + Left Arrow	Rotate Image Left
Ctrl + Right Arrow	Rotate Image Right
Ctrl + Up Arrow	Move Selected Image Up/Move Selected Image Into Previous Document
Ctrl + Down Arrow	Move Selected Image Down/Move Selected Image Into Next Document
Ctrl + Page Up	Zoom Image Out
Ctrl + Page Down	Zoom Image In
Escape + E	Expand/Collapse All Documents in navigation window
Escape + J	Join selected document with next document
Escape + K	Join selected document with previous document
Insert	Split document starting with selected image
Escape + Insert	Validate/Check Entire Batch
Escape + Delete	Delete selected document/image
Escape + R	Toggle Document/Image Status
Escape + B	Reverse Document/Image Order for Entire Batch
Escape + W	Reverse Image Order in Selected Document
Escape + Y	Clear Indexing Fields for Current Document
Escape + Home	Previous page of multiple page image
Escape + End	Next page of multiple page image

Batch Originator Report

The Batch Originator Report allows the user to see the status of their submitted Batches. Select "Reports" and then "Batch Originator Report" in the menu bar

Select a status to limit the results of the report to a specific status or leave blank for all batches in all queues. Query criteria can be saved by clicking "Save Query". Recall the query by clicking "Load Query". Click "Run Report" for report results.

Batch Originator Report

The operator may filter the report to see only those batches in a particular queue. The operator can see, in this report, which batches have been labeled as priority by their container field.

Batch Originator Status Report

Date of Report: November 4, 2020 5:14:55 PM

Dom...	Batch #	Create Date	Creator	Status	Status Description	Status Date	Name	Comment	UPCs	Container
CO	55841	2019-08-21 13:54:43		D	DELETED	2019-09-05 14:27:39	08/21/2019 13:53:34	cleanup	-/-	
CO	55842	2019-08-21 13:56:36		D	DELETED	2019-09-05 14:27:39	08/21/2019 13:54:48	cleanup	-/-	
CO	55929	2019-09-10 11:20:07		D	DELETED	2019-10-08 16:51:42	09/10/2019 11:16:18	clean up	-/-	

Batch Originator Report

The Batch Originator Report allows the user to see the status of their submitted batches.

The Report Criteria box is available by clicking the yellow box in the upper left hand corner. The box will drop down into view.

Batches are displayed oldest to newest. The user can change the sort order of the report by clicking the column heading.

Users can filter the results by clicking the funnel icon to the right of the column heading.

iPERMS

Batch Manager | Batch ▾ | REPORTS ▾

Batch Originator Status Report

Date of Report: November 4, 2020 5:23:26 PM

Dom...	Batch #	Create Date	Creator	Status	Status Description	Status Date	Name	Comment	UPCs	Container
CO	55836	2019-08-21 12:11:57		X	RELEASE IN PROGRESS	2019-10-08 16:49:55	08/21/2019 12:02:20	Force Release Of Batch.	-/-	
CO	55841	2019-08-21 13:54:43		D	DELETED	2019-09-05 14:27:39	08/21/2019 13:53:34	cleanup	-/-	
CO	55842	2019-08-21 13:56:36		D	DELETED	2019-09-05 14:27:39	08/21/2019 13:54:48	cleanup	-/-	
CO	55929	2019-09-10 11:20:07		D	DELETED	2019-10-08 16:51:42	09/10/2019 11:16:18	clean up	-/-	
CO	58449	2020-11-02 11:41:37		V	VERIFICATION	2020-11-02 11:41:37	11/02/2020 11:27:45		P3AT0/P3A...	

Batch Deletions Report

The Batch Deletions Report shows all of the deleted batch within the operator's domain and visibility is limited to the units they have access to.

A search beginning and ending date is required to run this report.

Repeat queries may be saved by clicking SAVE QUERY and recalled by clicking LOAD QUERY.

Batch Deletions Report
Fields marked with an asterisk (*) are required.

RESET FORM

*Domain:	CO
*Beginning:	2020-11-10 Time: 00:00 ▼
	example: 2017-02-28 13:15 (February 28th, 2017 at 1:15pm)
*Ending:	2020-11-10 Time: 23:59 ▼
	example: 2017-02-28 13:15 (February 28th, 2017 at 1:15pm)
Maximum Rows:	100 ▲▼
	select the maximum number of rows to print on this report.
	notice: A high number of rows will be slower and more difficult for your browser to display.

SAVE QUERY   LOAD QUERY   RUN REPORT

REPORT ID: 11019/US

Batch Deletions Report

Batch Deletions Report

The report below shows the deleted batches, number of documents and pages for the domain. The operator may organize this report by utilizing the blue funnel and blue arrow.

Batch Deletions Report

Date of Report: November 10, 2020 8:32:29 AM

Deleted Batches ▾

Dom... ▼	Operator ↑	▼	Batches ▼	Documents ▼	Pages ▼
CO	lperms.user2		2	2	2
CO	lperms.user3		1	1	1
CO	lperms.user4		16	29	31
CO	lperms.user5		1	1	1
CO	lperms.user6		3	3	3
CO	lperms.user7		1	1	5
CO	lperms.user8		1	1	2
CO	lperms.user9		1	1	1
CO	lperms.user10		3	3	4
			Total: 1462	**Total: 1718**	**Total: 2344**

Batch Document Report

The Batch Document Report show the document information for a specific batch. The batch number is required to run this report.

Batch Document Audit #
Fields marked with an asterisk (*) are required.

RESET FORM

*Batch Number:

User:

This report is run with your User ID

SAVE QUERY   LOAD QUERY   RUN REPORT

REPORT ID: 3010/US

Batch Document Audit #

Batch Document Report

This report details indexing information about the documents in a batch. Like all other reports within iPERMS, the operator can filter, organize, or export these results.

Batch Document Audit #55836   Date of Report: November 10, 2020 10:09:53 AM

Doc	Soldier ID	Name	Document Name	Effective Date	Images	Reject	Errors
0	666000001	TEST.00001 IPERMS	DA 67-10-2	2019-08-21	3	N	0