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

User Guide

U.S. ARMY

Scan 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.

There are a few instances in which the National Guard may have information specific to their system. Click on the ARNG symbol ( )   to view this information.
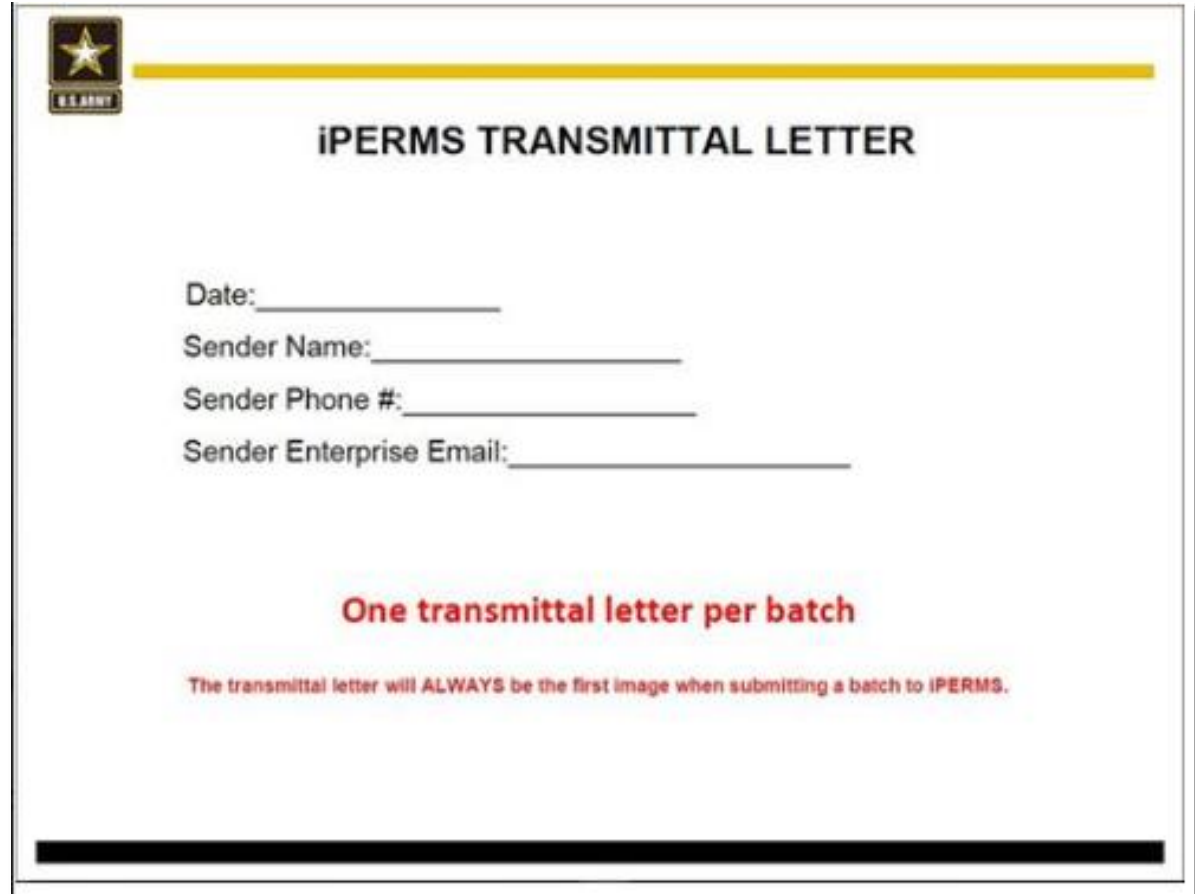
Table of Contents

iPERMS Batch Transmittal Form
https://www.hrc.army.mil/asset/14282

The iPERMS Batch Transmittal form is required if you are not going to index the batch. Using the iPERMS Batch Transmittal Form as the first page of a batch will provide the technician processing the batch quick access to your contact information should there be any questions related to the documents in the batch.

iPERMS TRANSMITTAL LETTER

Date:_____

Sender Name:_____

Sender Phone #:_____

Sender Enterprise Email:_____

One transmittal letter per batch

The transmittal letter will ALWAYS be the first image when submitting a batch to iPERMS.
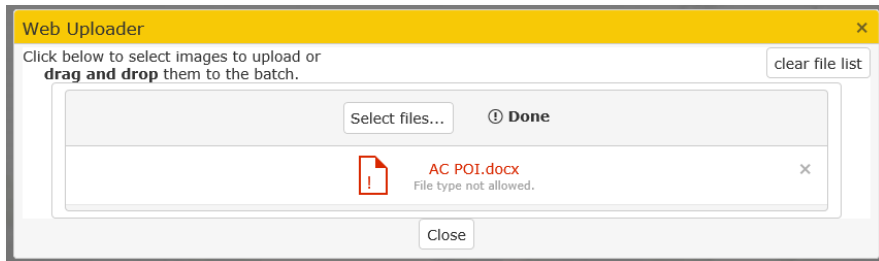
File Types and Document Requirements

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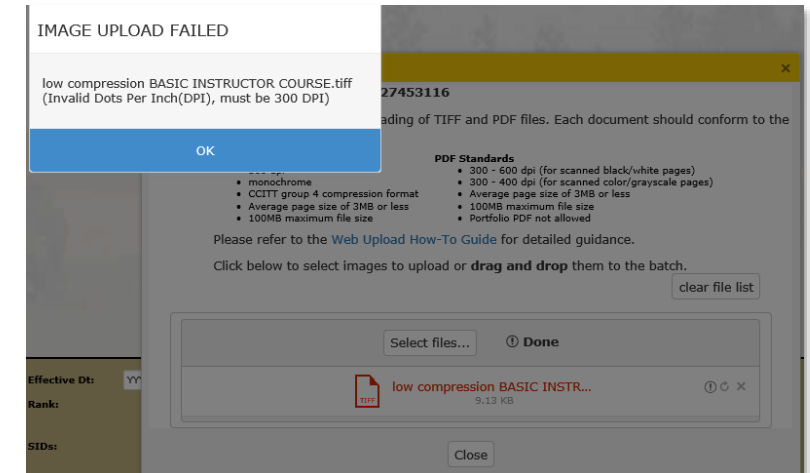
TIFF Standards

- 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
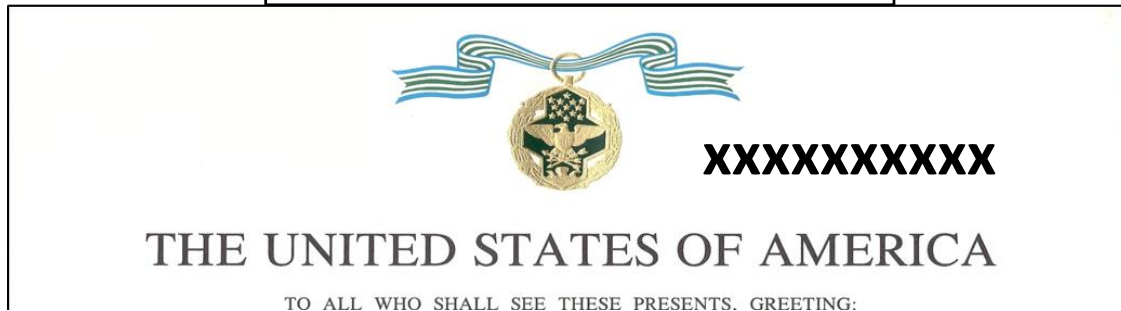- 100MB maximum file size
- Portfolio PDF not allowed

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 - 600 dpi (for scanned black/white pages)
- 300 - 400 dpi (for scanned color/grayscale pages)
- monochrome
- 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

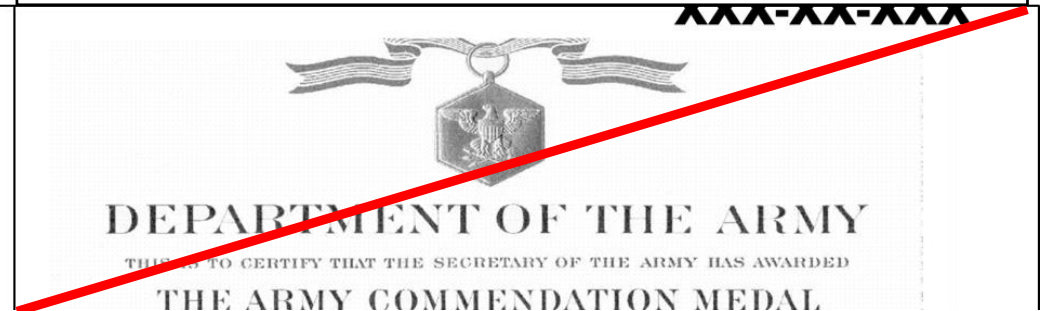Effective Dt: YY...
Rank:
SIDs:

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

XXXXXXXXXX

THE UNITED STATES OF AMERICA

TO ALL WHO SHALL SEE THESE PRESENTS. GREETING:

XXX-XX-XXX

DEPARTMENT OF THE ARMY

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

THE ARMY COMMENDATION MEDAL

DS and CAC Log In

Use the CAC log in to complete work as a Scan Operator. The DS Logon option is only for the user to view their own service/retiree record.

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 individual 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

Authorized Users of iPERMS must log into iPERMS with DoD certificate using the EAMS-A login.

EAMS-A LOGIN

Soldiers, Retirees, and Veterans without a CAC can view their record using DSLOGON.

DS LOGON

For assistance with EAMS-A login, contact the Army Enterprise Service Desk:

https://aesd-w.army.mil
1-866-335-ARMY

To request, activate, or upgrade a DS Logon account, click the DS LOGON button.

For help with DS Logon click here:

DSLOGON Help

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

AMHRR Required Documents List

2.7.0.6
feature/integration / e2115f2
2022-05-06 @ 09:58 EDT
RMA_02-1

...onnel records repository for the Army Military Human Resource Record (AMHRR). The AMHRR is the Army's ...ivacy Act of 1974 (Title 5 U. S. Code 552a) as amended. The Privacy Act protects the privacy of individuals from ...

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

...r your actions in iPERMS. You are not authorized to allow another individual to view iPERMS using your login ...f PII or viewing an individual's AMHRR for other than official purposes are violations of the Privacy Act that will ...es. All of your activities in iPERMS are logged automatically by iPERMS and may be made available to ...o report your iPERMS usage.

...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**

iPERMS

Select Role:

SCAN OPERATOR IN AA

RECORD MANAGER IN AA

AUTHORIZED OFFICIAL

SOLDIER

LOGOUT

Click **I ACCEPT** to denote acknowledgement of use of government systems and personally identifiable information warning. Click on Scan 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

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.
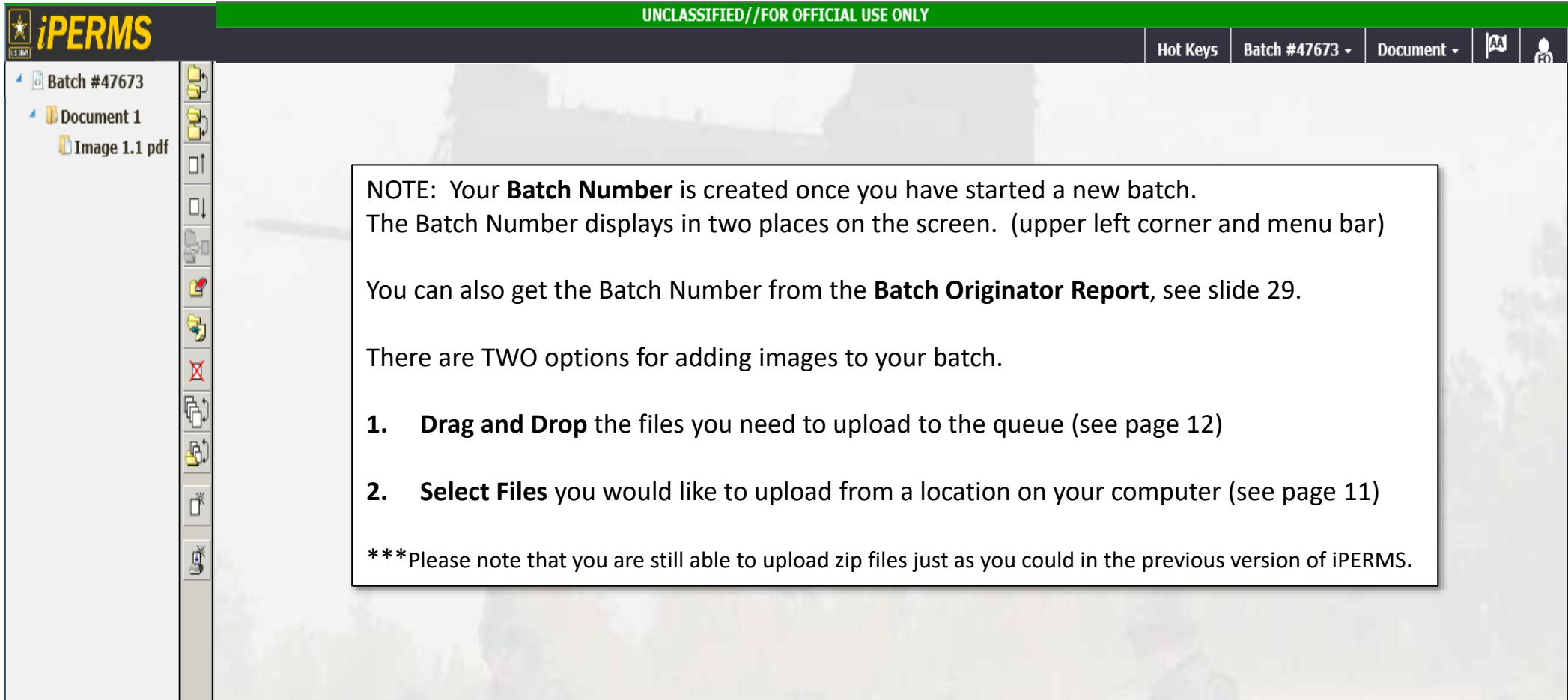
Option 2

    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 slide 29.

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 12)

2. **Select Files** you would like to upload from a location on your computer (see page 11)

***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 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 30937637

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

BATCH FIELDS

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

Container:

Comment:

DOCUMENT FIELDS

SSN/DoD ID:

Soldier Name:

Rank:

Doc Name:

SIDs:

Effective Dt: YYYY-MM-DD

NEXT DOCUMENT

NEXT IMAGE

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.

Batch Processing Queue
Option 2

Option 2: Menu Bar Document Tab Dropdown Selections
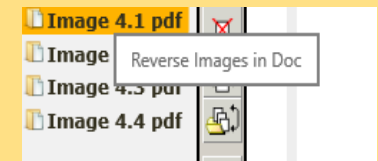
| Check | Hot Keys | Batch #47983 ▾ | Document ▾ | [AA] |

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:
☐ Document Name
☐ Effective Date

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.
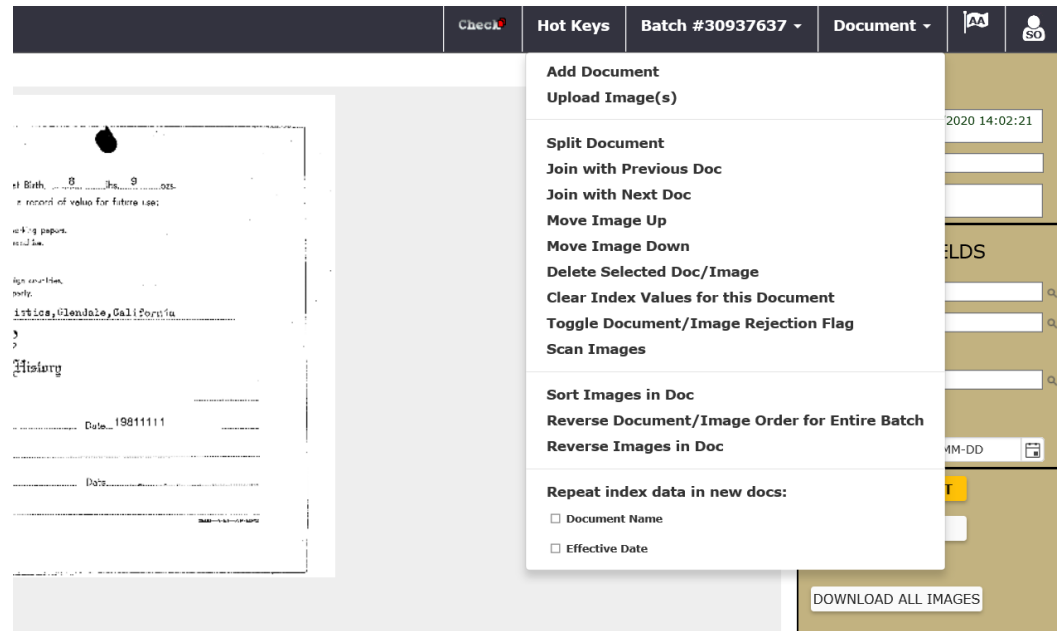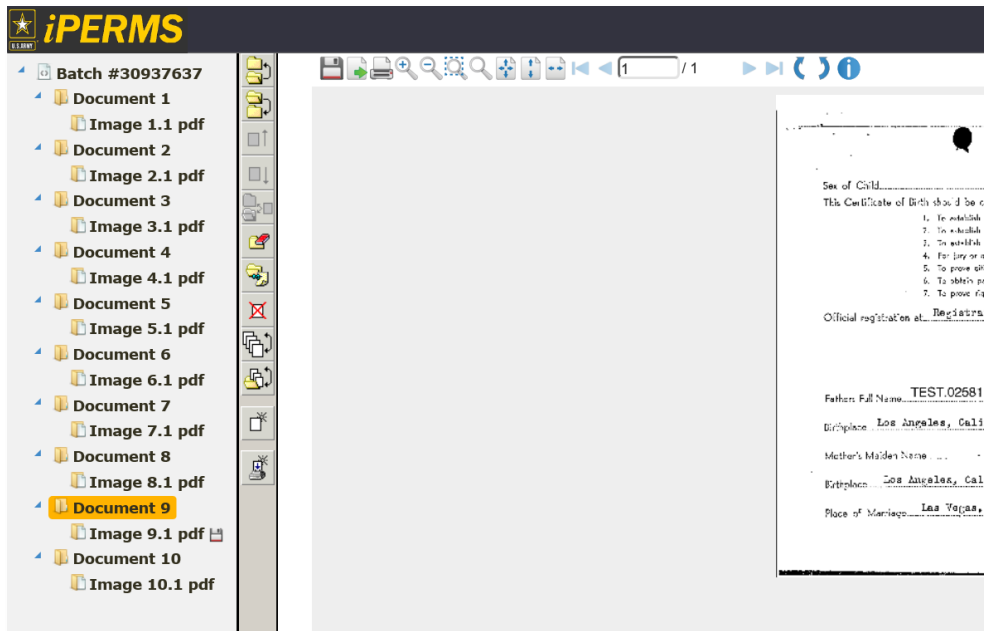
Join Documents

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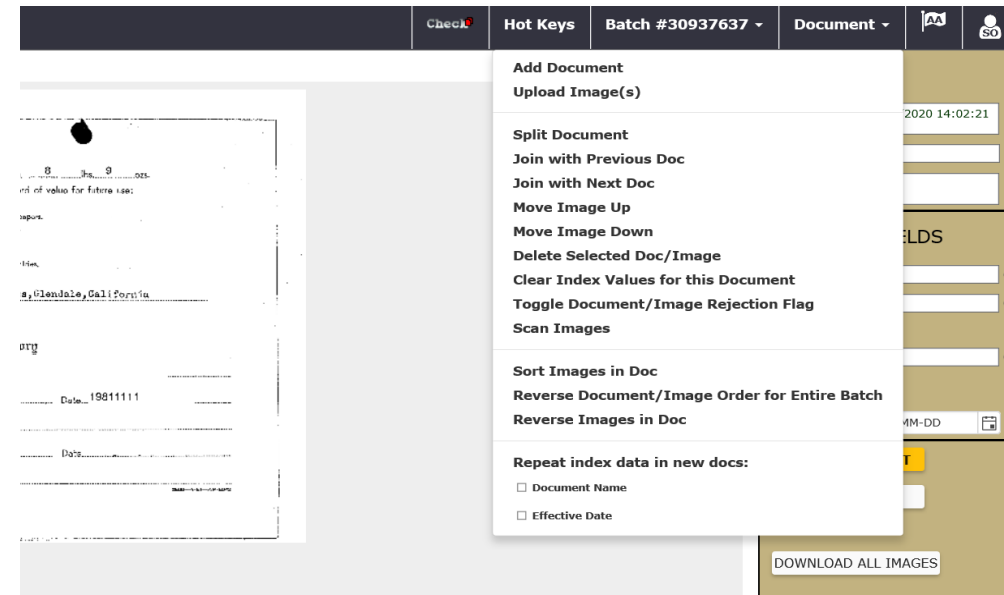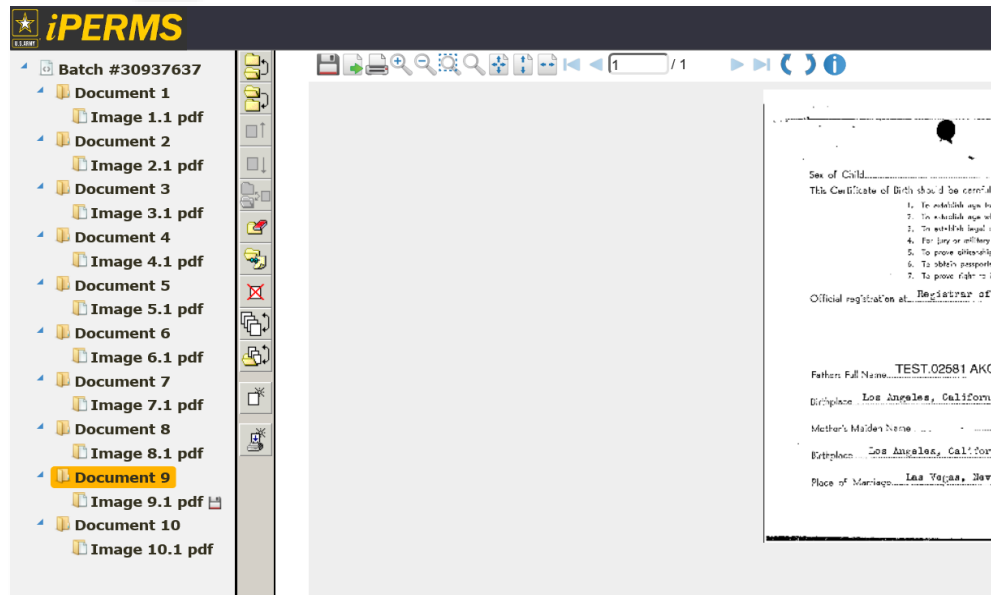
Images must end in the same file type in order to be joined. For example, PDF and PDF images can be joined. A PDF and TIFF cannot be combined. Also, the operator cannot join documents if one has been digitally signed.

Join Documents

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, ⬒⬓ 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.

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.***

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 is not utilized by the Scan Operator role.

Effective Date: Either Select the date by clicking on the 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. Click **OK** to open the Duplicate Document (aka Dup Doc) Tool.

Duplicate Document Check

New Document in Batch	Permed Document in Record

From the Scan Operator role, the user can only delete the document in the batch. Documents cannot be deleted from the record in the Scan 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
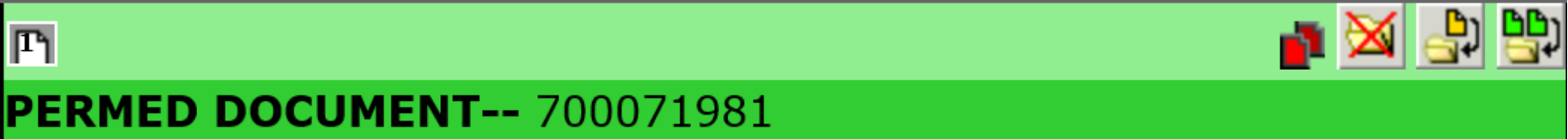
This icon will close the Dup Doc Tool

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 Scan 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 Scan Operator may also click "Next Image" on the final document. Again, if all fields are filled appropriately, the SO will receive the "Indexing Complete" dialogue box. Click "Finish" in the dialogue box to send 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:

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

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. Also, the operator can see, in this report, which batches have been labeled as priority by their container field.

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.

Batch Document Report

The Batch Document Report show the document information for a specific batch. The batch number is required information 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 #