SOFTWARE ASSESSMENT

AN ASSESSMENT OF THE US DEPARTMENT OF STATE POST ADMINISTRATIVE SOFTWARE SUITE (PASS) FOR APPLICABILITY TO USAID MISSIONS

Prepared for:	U.S. Agency for International Development
Prepared by:	Geneva Software, Inc.
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Document Approval / Decisions

Approved by: ______________________ Date: ______________

Reviewed by: ______________________ Date: ______________

Decisions

Please initial next to the selected alternative for each listed decision.

Decision: Work Orders for Web (WOW) – See section 2.4.3

The pilot test will be conducted using WOW.	______________
The pilot test will be conducted without any work orders module.	______________
The pilot test will be conducted using the Administrative Service Request module	______________

Decision: Post Personnel – See section 2.5.4

Modify the PASS applications to interface with USAID's existing eWorld application.	______________
Modify the Post Personnel application to fit with USAID business requirements.	______________
Develop an eWorld like module for PASS to interface with PASS applications.	______________

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Project Management

The resources below have been defined to carry out project management of this project.

Name	Position
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Document Control

The tables below identify various document control items for this document.

Change Record:

All version changes made to this document have been listed in the table below.

Date	Author	Version	Change Reference
Oct 4, 2003	Daniel Dyke	1.0	No previous document.
Oct 15, 2003	Daniel Dyke	2.0	Inclusion of comments provided by USAID reviewers

Reviewers:

This document has been sent for review to the names listed below for their comments and recommendation(s).

Name	Position
Bill Wood	IT Specialist, USAID
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1 Assessment Summary

The purpose of this assessment is to compare functional business and data requirements identified by USAID to the functionality and data elements provided by the separate administrative software applications of the US Department of State PASS Suite. The results of this assessment should answer the following questions:

- How closely does the PASS Suite fulfill the business requirements of USAID?
- Should a more comprehensive pilot test of one or more of these applications be conducted to further ascertain applicability to USAID?
- What changes to PASS, if any, would be required to fulfill USAID's business requirements?
- If changes were required, what would those changes cost in terms of time and money?

The PASS Suite is a web-enabled, integrated suite of applications sponsored by various bureaus within the US Department of State and coordinated through a central PASS Program Office. The suite consists of a number of administrative applications.

In expectation of closer cooperation with the US Department of State and with an eye toward providing USAID missions with a standard set of administrative software tools, PASS is being reviewed as candidate Government Off the Shelf (GOTS) software for USAID missions. Applications found to support business requirements will be pilot tested at four missions to ascertain and document any issues related to installation, implementation, training or usage.

USAID subject matter experts reviewed the entire PASS suite of applications before selecting six for more in depth analysis and consideration.

The PASS Procurement module; although rejected for this current effort, bears consideration for future use. The module is designed primarily to support and facilitate locally authorized procurements. The PASS Procurement module follows US Department of State procurement policies and provides interfaces to State's Comprizon system. USAID currently uses a system known as Mission Accounting and Control System (MACS) for financial and procurement functions. The module was rejected at this time due to expected difficulty in introducing a new procurement system that is not integrated with USAID accounting.

After the initial overview of the entire PASS suite, USAID representatives selected this subset of the suite for further analysis.

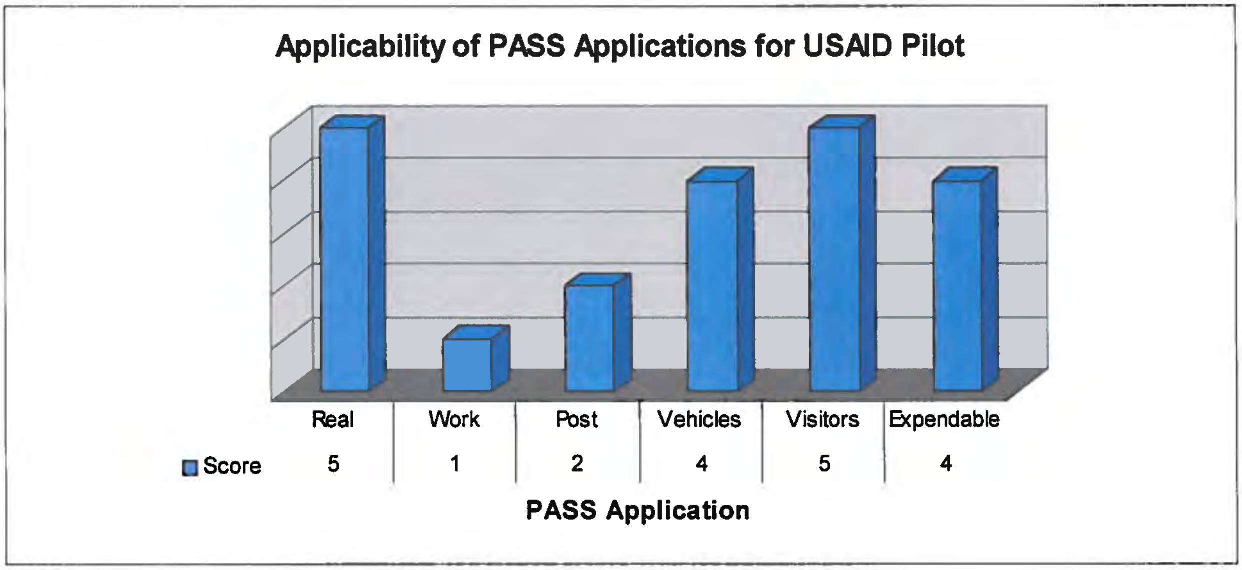
1. Visitor Management – Visitor and event tracking
2. Vehicle Registration Maintenance – Motor Vehicle, driver and motor pool management
3. Real Property Application – Real Estate management
4. Work Orders for Web – Work order scheduling and management
5. Post Personnel – HR management system
6. Expendable Supplies – Stock control

USAID subject matter experts conducted the assessment through hands-on review of each software application. As experts in the applications of the suite, Sr. Analysts from Geneva Software provided technical support during the assessments and documented the results. Geneva Software also provided alternative technical solutions where the software does not sufficiently support USAID business requirements 'as is'.

During hands-on reviews of the software, USAID subject matter experts were asked to assess each application against both functional and non-functional requirements. Applications are scored as follows:

Score	Assessment
1	Does not meet USAID requirements
2	Enhancements or changes would be required in order to pursue further pilot evaluation
3	Enhancements or changes would be required for standard use, but not needed to pursue further pilot evaluation
4	Minor enhancements or changes would add wanted functionality, but are not expected to be needed for standard use
5	Meets USAID requirements 'as is'

Four of the six applications sufficiently fulfill USAID business requirements in their current state. Two applications; Post Personnel and Work Orders for Web do not currently fit with USAID's business or data requirements. Alternatives for both of these major applications are provided.



2 Application Assessments

The PASS Suite was installed in a test lab at the Ronald Reagan Building offices of USAID. Assessors were able to review the applications on-line at their own pace. The contractor responsible for maintaining the applications for the US Department of State provided technical assistance. Full documentation for each application was made available to the assessors.

The contractor also provided controlled review sessions for each application, where the contractor demonstrated functionality, discussed workflow and presented data requirements. Over the course of six weeks, each of six applications application was reviewed by USAID subject matter experts and given a score from 1 to 5. The score takes into account workflow, data requirements and general functionality. A score of less than 3 eliminates an application from further review until specific cited deficiencies are addressed.

In cases where USAID subject matter experts assessed a score of less than 3, Geneva Software was tasked with presenting possible solutions to the deficiencies cited.

2.1 Visitor Management - Release 1.02.00

2.1.1 Functional Overview

The Visitor Management program is used by the Department of State in its embassies, consulates, and domestic offices to account for all government employees and contractors who visit those sites. Information concerning visitors, trips, accommodations, and events is recorded and reported in this program.

The application provides an interface to the personnel system to minimize data entry where employee names are concerned. The application also provides the ability to generate country clearance cables for individuals or groups.

The application records and stores information related to individual visitors, trips, events, hotels and specific reservations as well as event and trip sponsors. The application is capable of producing country clearance cables that interface with CLOUT for individuals or groups.

A complete list of data can be found in Appendix A – Data Summaries.

2.1.2 Findings (Score 5)

USAID subject matter experts found the functionality and data content of the application to be capable of supporting USAID business requirements. Its data is appropriate to the visitor and visit data required and maintained for USAID business. The fact that the generated cables can be sent by CLOUT was seen as a plus for this system.

They did cite deficiencies in the cable formatting capabilities of the system. USAID and the US Department of State require mission-specific language concerning health, travel and security conditions in country to be included on all cables. The current cable functionality does provide a way for end-users to customize the cable however; the custom language must be inserted into the cable each time a cable is generated. Storing the custom language would be a beneficial feature.

The Visitors application can be pilot tested without modification.

2.2 *Vehicle Registration Maintenance - Release 1.01.00*

2.2.1 Functional Overview

The Vehicle Registration Maintenance application is used by the Department of State in its embassies, consulates, and domestic offices to maintain records on all vehicles used at post. Records are kept on employees who request the vehicles and those who operate them. The application provides the functionality to schedule and plan triptychs for drivers. Triptychs include dates, times, destinations, and passenger information. Printed triptychs can be generated for passenger signature.

The application also allows for recordation of scheduled maintenance for vehicles based on dates or mileage. Data related to maintenance costs including parts and labor are maintained as well.

Vehicle-specific information stored includes make, model, licenses, and vehicle options (e.g. armor, telephones).

The application provides an interface to the personnel system to minimize data entry where employee names are concerned.

A complete list of data can be found in Appendix A – Data Summaries.

2.2.2 Findings (Score 4)

USAID subject matter experts found the functionality and data content of the application to be capable of supporting USAID business requirements. The data currently stored is useful. The ICASS statistics report would be useful for missions that are ICASS Alternate Service Providers for motor pool services.

It was noted that spare part inventories for vehicles are stored in this application as well as in the Expendables application. Integration of Vehicles with the Expendables application would eliminate redundant data entry.

Federal agencies are required to produce reports on vehicle usage and related fuel usage. A gap fit of the data required for the reports compared to data found in this application show the application lacking. To obtain the optimal benefit of this application, this data should be made available through the application.

Vehicle Registration Maintenance is a young application that is expected to undergo further enhancement and integration with PASS applications. Depending on the application sponsor's funding availability, future releases should include data necessary for standard vehicle reports.

The Vehicles application can be pilot tested without modification.

2.2.3 Data Gap Fit

Data Element	Motor Vehicle Inventory Report	Circular A-II, COBRA	SF-82	Size Composition and Annual Cost	Vehicle Capitalized Depreciation	Not Available in VRM
Country Code						
Vehicle Series						
Mission						
Method of Acquisition						
PO Date						
PO Number						
Type of Vehicle						
Remarks						
Transmission						
Fuel Type						
Acquisition Cost						
Additional System Cost						
Shipping Cost						
Year Received						
Vehicle Year						
Vehicle Make						
Serial No						
Disposition Authority (PDA #)						
Data of Disposal						
Proceeds from Disposal						
Mileage at Disposal						
Reason for Disposal						
Method of Disposal						
Total Acquisition Cost						
Total Leasing Cost						
Total Fuel Cost						
Total Main. Cost						
Total Disposal Cost						
Type of Vehicle						

2.3 Real Property Application - Release 2.01.00

2.3.1 Functional Overview

The Real Property Application (RPA) provides Posts with tools to manage their Real Property Holdings (specific land or buildings owned or leased by the United States Government) and it provides the US Department of State's Bureau of Overseas Building Operations with a worldwide, automated information system to track the acquisition and disposal of U.S. Government owned and leased properties overseas. Web based, RPA contains real property information by Property ID and/or Lease Number and includes the following features:

- Adding government-owned and leased properties
- Modifying government-owned and leased properties
- Adding residential, office unit, and ancillary structure information
- Modifying residential, office unit, and ancillary structure information
- Sorting lists of properties, leases, and occupants

2.3.2 Findings (Score 5)

There is a need at USAID to be able to maintain lease and property descriptions for US Government owned property and to be able to provide that data to US Department of State in a timely manner. The US Department of State uses the Real Property Application to report generate reports for congress. Historically, USAID provides the required data to State through various means including spreadsheets and custom-written applications.

Subject matter experts see great benefit in being able to maintain lease and property reporting requirements for the US Department of State's bureau of Overseas Building Operations (OBO). Use of RPA will allow the information to be maintained locally and exported to an embassy for subsequent transmission to Washington along with embassy's OBO data.

In interviews, it was cited that RPA does not store a funding source for properties. There are fields to store allotment and allowance. Additional granularity of fund source may be needed.

There are no data points to store seismic zone attributes or utility usage. Both of these are used for USAID internal reporting requirements. None of these missing data points would prevent the usage of the system.

The Real Property Application can be pilot tested without modification.

2.4 *Work Orders for Web - Release 2.01.00*

2.4.1 Functional Overview

Web-Based Work Orders was developed to assist in the maintenance management of all U.S. Government real property and equipment overseas under the authority of the Department of State. The Office of Overseas Buildings Operation (OBO) in the Bureau of Management administers the Web-Based Work Orders program. Within OBO, work order planning and management is the responsibility of the Facility Management Division in the Real Estate Division (OBO/OPS/RE).

Web-Based Work Orders is designed to support the post in planning, accomplishing, and reporting facility maintenance work done at post. It provides the capability to plan preventive maintenance, scheduled, and unscheduled work orders (emergency and one-time tasks) for real property and equipment. Work orders are prepared for buildings (real proper ty), residential units, office units, ancillary units, and equipment. A particular property must be accessible in RPA (Real Property Application) before you can prepare any work orders for it.

The inventory information reduces the amount of work required to prepare a work order. For example, when a generator is added to the Work Order equipment inventory, the location, size, name of manufacturer, and other identifying information is added. Each time a work order is prepared for that generator, Web-Based Work Orders automatically prints the generator information on the work order. The equipment records have all the information needed to maintain an equipment inventory record. Equipment must be entered into the inventory and its location noted before you can prepare any work orders for it.

WOW supports workflow through multiple levels of approval and e-mail notification. The software provides functionality to store file attachments, start and maintain discussions related to work orders and plan periodic, scheduled and unscheduled maintenance.

2.4.2 Findings (Score 2)

After reviewing the application, it was decided that WOW is too complex for the business requirements of USAID missions. Although the application more than fulfills data requirements, subject matter experts agreed that the software provides functionality that would not be used and would require high levels of resources to properly operate.

WOW should not be piloted.

2.4.3 Alternatives

Pilot testing could be conducted without work order functionality.

Another alternative is to use a PASS application called Administrative Service Request (ASR). It was developed for OBO and is currently in use by the Department of State's Bureaus of African Affairs and Western Hemisphere and Americas. The application includes the basic functional requirements of submitting, approving and assigning service requests, yet is simpler that WOW. The ability to use e-mail to submit the requests makes this application useful in situations where the request is made from outside a USAID network.

USAID subject matter experts reviewed ASR and believe that ASR could be used 'as is' to pilot test.

The application does not currently have a sponsor to fund the maintenance and enhancements of the system, however, it is available for pilot testing.

2.5 *Post Personnel - Release 3.00.00*

2.5.1 Functional Overview

The Post Personnel system is keystone to the PASS suite. All other applications interface with Post Personnel for employee data requirements.

The purpose of Web.PS is to create and track positions for both American and Local employees at overseas posts. The program is comprised of two subsystems: American and Local. The American subsystem is a data-tracking module. The official records for American Government employees are maintained in Washington, DC. The Local subsystem is a personnel processing module used to process actions for Direct Hire Foreign National employees, Personal Service Contractor (PSC), and employees hired under a Personal Services Agreement (PSA). Tracking actions for Local employees include reassignments, transfers, grade increases, terminations, etc.

2.5.2 Findings (Score 2)

Review of this application uncovered several issues related to the use of Post Personnel by USAID. The first is that USAID just recently completed implementation of a web-based personnel system called eWorld. This one-year project resulted in a centrally hosted system to maintain position and employee data. Users have been trained. Therefore, introduction of a different personnel system may result in rejection by the field.

Post Personnel and all the PASS applications provide the benefit of storing data locally while at the same time making data available to Washington for global reporting. This feature greatly reduces the response time encountered by users as they perform data entry.

The review of Post Personnel also uncovered basic differences between Department of State and USAID policies of employee and position categorization. USAID utilizes backstop codes that are not part of the Department of State's system. There are also fundamental differences in classifying employees as direct hire or local hire. Section 2.5.3 shows the data deficiencies of Post Personnel when compared to eWorld. The data gap fit does not include all the fields that are in Post Personnel that are not in eWorld. Additional Post Personnel data fields can be reviewed in Appendix A.

The fundamental differences in handling positions and employees makes this application unsuitable for pilot testing as it currently stands.

2.5.3 Data Gap Fit

Data Element	eWorld	Not in Post Personnel
Employee		
Mission (Post)		
First Name		
Middle Name		
Employment Status		
Pay Plan		
Employee Grade		
Citizenship		
Where Hired		
Service Comp. Date		
Retirement System		

Clearance Level		
Spouse of Direct Hire Emp.		
Comments		
Arrival Date		
Contract Number		
Start Date		
End Date		
Fund Source		*Allotment/Project/Object/Function/Org fields are available*
Annual Base Pay		
Other Annual Costs		
Total Pay Cost		
Contract Comments		
Position		
Org Level 5		
Org Level 6		
Org Level 7		
Organization Abbr.		
Organization Name		
MRN		
Position Number		
Group of Authorities		
Employment Authority		
Position Status		
Pay Plan		Tied to Employee in Post Personnel
Position Grade		
Occupation Series Code		
Position Code, Title, Backstop		
Title Prefix		
Title Suffix		
Position Title		
Description Number		
Working Title		
Strategic Objective Title		
Supervisory Level		
Weekly Hours		
Desk		
Comments		

2.5.4 Alternatives

There are three alternative methods of providing the functionality to maintain and access personnel data for pilot testing.

1) Modify the PASS applications to interface with USAID's existing eWorld application. This approach would require changes to each of the PASS applications to be used in the pilot. Code changes and complete testing could be accomplished in approximately 8-10 weeks.

2) Modify the Post Personnel Application to fit with USAID business requirements for position and employee categorization and data needs. Post Personnel is a complex and extensive application.

The difficulty in making such large-scale changes is in keeping a single baseline of code that continues to support the US Department of State. A single baseline is essential to gaining the benefits of using a GOTS solution. Code changes to fit this scenario would require 6-8 weeks.

3) Develop a module for PASS that mimics eWorld and interfaces with existing PASS applications. This alternative could be accomplished in approximately 3 weeks. It would result in an application that is native to PASS, yet retains the look-and-feel of eWorld. Training would not be an issue since it would behave as eWorld does. There is an added benefit in that the application would store data locally, which would improve response time.

2.6 Expendables - Release 1.01.00

2.6.1 Functional Overview

The Expendable Supplies program is used by the US Department of State in its embassies, consulates, and US offices to account for all expendable supplies and keep records on these items. It is used to request, order, and issue supplies, as well as to track all such items from receipt through disposal. There are plans to integrate this application with the PASS Procurement application to streamline ordering and minimize data entry.

The term expendable supplies is defined in the Foreign Affairs Manual, vol. 6 [6 FAM], exhibit 220. (Examples are pens/ pencils, paper, diskettes, toner cartridges.) Any property that does not meet these standards is not considered expendable property and is not tracked by Expendable Supplies.

2.6.2 Findings (Score 4)

Review of the Expendable Supplies application shows that the application is acceptable for tracking expendable supplies stock.

The application can import initial data from the ISIS Stock Control application. At missions where that application is not used, there would be a lot of data entry to initially configure this application. The ability to set initial values for prior fiscal year consumption levels would make trend analysis available from the start. Once configured, the statistical reports in the system will be useful for tracking trends and anomalies in expendable usage.

The shopping cart feature that allows authorized employees to request items over the web would be made more useful if automatic e-mail notification would inform them when their order was ready for pick up. It was also noted that even though users are informed when a certain item is not in stock, there is no automatic mechanism to place the item in an order status.

Expendables can be piloted “as is”.

3 Recommendation

3.1 Software Suite

There are two applications that are not suitable for pilot testing; WOW and Post Personnel. In order to pilot a full complement of functional applications, it is recommended to use alternative applications in their stead. This would result in a suite of six applications for pilot testing.

Replace Work Orders for Web with Administrative Service Request. ASR provides similar and simpler functionality to schedule and maintain work orders for missions. There is no time or cost associated with this substitution since the application is available.

To replace the personnel maintenance functionality, the contractor can develop a PASS module that mimics e-World functionality to replace Post Personnel. This would provide personnel functionality and data that can be accessed by other PASS applications and would require minimal time and effort. The resulting application would belong to USAID.

In the long term, inconsistencies in HR policies should be addressed with USAID and DoS senior management and the Office of Management and Budget (OMB).

Proposed Suite for Pilot Testing

- eWorld functionality coded for PASS
- Administrative Service Request
- Vehicle Registration Maintenance
- Visitor Management
- Expendable Supplies
- Real Property Application

3.2 Pilot Tests

Over the course of approximately three months, three to four in country pilot tests using the PASS software should be conducted. During these tests, the software should be installed and users should be introduced to the suite. Each pilot installation will require four to five days depending on availability of local staff for training and evaluation. Once installation and training has been completed, the software will be left for the pilot site to run for approximately 3 months.

At the conclusion of the three month period, local subject matter experts should be polled for issues that would potentially interfere or prevent worldwide distribution of the PASS suite of administrative applications to USAID missions.

The goal of the pilot testing is to identify and attempt to resolve technical, policy-related, administrative or human issues that would prevent or inhibit standard usage of the PASS suite in USAID missions.

Following is a proposed agenda for each pilot test. The agenda will be duplicated at each separate pilot location.

Day 1	Installation and orientation for system managers
Day 2	Training for Visitors, Administrative Service Request
Day 3	Orientation to Personnel (eWorld), Training for Real Property
Day 4	Training for Expendables / Vehicles
Day 5	Survey and Out Briefing

Posts must have SQL Server 7.0 or higher installed. They must have a server running Microsoft Internet Information Server (IIS).

3.3 Locations and Schedule

Proposed pilot sites have been selected by USAID. The sequence and proposed schedule of the trips is dependent on availability of resources for the pilots and the mission staff. The schedule below is tentative and subject to change.

Belgrade, Serbia–	Oct. 27 – Oct. 31
Gabarone, Botswana –	Nov. 17 – Nov. 21
Bogotá, Colombia –	Dec. 1 – Dec. 5
New Delhi, India –	Dec. 8 – Dec 12

4 Appendix A – Data Summaries

4.1 Vehicles Application

4.1.1 Vehicle Details

Name of Box	Status	Description
Inventory No	Optional	Number assigned to vehicle at purchase, up to 9 numbers..
Request No	Optional	Number given to the request for vehicle, up to 9 numbers.
NEPA No	Optional	Number assigned from Non-Expendable Properties for vehicles. Click the Cross-Reference button to display the option list. Select the number from this list.
Status	Required	Status of the vehicle. This is automatically assigned if you are adding a private or other vehicle. There are 3 options when adding a government vehicle: 1 Official Non-Pooled - Government-owned; not used for trips and picking up visitors. 2 Official Pooled - Government-owned; *can* be used for trips and picking up visitors. 3 Non-Official - Government-owned; for a specific use. *Cannot* be used for trips and picking up visitors.
Actual Odometer Miles	Optional	Odometer reading in miles. The odometer reading is automatically calculated for km after you enter the miles.
Actual Odometer KM	Optional	Odometer reading in kilometers. The odometer reading is automatically calculated for miles after you enter km.
Make/Model/Category	Required	Make, model, and category of the vehicle. Click to select the correct description. If the option you need is not listed, click the **Add** button. See "Vehicle Make/Model/Category" on page 82 of Chapter 7 for more details.
VIN No.	Conditional	Vehicle Identification Number of the vehicle. Either this box or the **Chassis No.** box must be completed.
License Number	Required	Number on the vehicle's license plate. Type the license number.
Primary License	Optional	Indicates the license is the primary license for the vehicle. Click to select if the license is the primary license. If not checked, the license becomes an alternate license.
Assigned Date	Required	Date the license plate was assigned. Click to select the date.
Deactive Date	Optional	If the vehicle was used for any trips when it had this license plate, the license number cannot be deleted. When it is no longer used, it must be deactivated. Click to select the deactive date.

4.1.2 Maintenance Detail

Name of Box	Status	Description
Start Date	Required	Date maintenance began. Click to select the date.
Completion Date	Optional	Date maintenance is completed. Click to select the date.
Description	Required	Description of the service performed on the vehicle. Type a brief description.
Periodic Service	Conditional	Service that is routine and performed at regular intervals. Click the List button to select the type of periodic service being performed. • This box only needs to be completed if periodic service is being performed. • The information that appears on the list comes from the **Periodic Services** tab for the vehicle. If service has not been performed and entered on the **Periodic Service** tab, it does not appear as an option on the list for this vehicle.
Odometer Miles	Optional	Odometer reading in miles at the start of this maintenance. Odometer reading in KM is automatically calculated from this figure.
Name of Box	Status	Description
Odometer KM	Optional	Odometer reading in KM at the start of this maintenance. Odometer reading in miles is automatically calculated from this figure.
Unit Cost	Conditional	If the job was not broken out into material cost and labor cost, the entire cost of the job is entered here. Type the number.
Material Cost	Conditional	Cost of the materials used in the maintenance. If the material came from a vendor outside the post, record in External Costs; otherwise, record in Internal Costs. • If information is completed in the **Spare Parts** tab, the material costs are updated from information on the tab. Choosing a vendor updates the costs in **External Costs**. Internal costs have no vendor selected on the **Spare Parts** tab. • Type the cost of the materials.
Labor Cost	Conditional	Cost of the labor used for the maintenance. If the labor was completed by mechanics outside the post, record in External Costs; otherwise, record in Internal Costs. • If information is completed in the **Labor** tab, the ***External Costs*** are updated from information on the tab. • Type the figures for Internal Costs.
Total Internal Cost	Automatic	Total cost of the maintenance. This number is automatically calculated after the other numbers are entered.
Total External Cost		

4.1.3 Spare Parts Details

Name of Box	Status	Description
Spare Parts No.	Required	Post defined identification number of the part. Click to select the spare part from the option list. This information comes from the Spare Parts file. If the part is not listed, click Add. See "Adding a Spare Parts Record" on page 59 of Chapter 5 for more information.
Description	Automatic	Description of the spare part is automatically entered from the spare part record.
Quantity	Required	Number of parts used. Type the quantity.
Cost Per Unit	Automatic	Post cost per unit is automatically entered in this box. Type the cost per unit if it is different from this figure.
Vendor	Optional	Vendor that supplies the part. If the spare part used to complete the maintenance was not in stock, click to select the vendor.
Currency	Automatic	Currency used by the vendor. US$ appears by default. Click to select a different currency.
Total Costs	Optional	Total cost of part(s). This is automatically calculated for you based on the Quantity and Cost Per Unit selected.

4.1.4 Labor

Name of Box	Status	Description
Cost	Required	Type the cost of the vendor's labor.
Vendor	Required	Click to select the vendor. Vendor information comes from the Vendor file in Table Administration.

4.1.5 Owners / Drivers

Name of Box	Status	Description
Employee	Required	Employee name. Click to select an employee. Data on the option list comes from the Employees file.
Assigned Date	Required	Date the employee was registered as owner of the vehicle. Click to select the date from the calendar.
Deactive Date	Optional	If the vehicle was used for any trips when it was owned by this person, the owner cannot be deleted. When the employee no longer owns the vehicle, the owner record must be deactivated. Click to select the date from the calendar.

4.1.6 Periodic Service

Name of Box	Status	Description
Periodic Service	Required	Kind of periodic service. Click ▾ to select a type of periodic service from the Available Periodic Services list. This information comes from the Periodic Services file.
Status	Required	There are two status options: *Pending* and *Complete*. *Pending* is the default setting, which is the correct status for a new periodic service. After the service is performed, click ▾ to change the status to *Complete*. Once it is *Complete*, the record may not be edited.
Due Date	Conditional	Date the periodic service is due. Click ▾ to select the date. Either this box or the **Odometer Miles** box must be completed.
Odometer Miles	Conditional/ Automatic	The odometer reading in miles at the time the service is to be performed. Either this box or the **Due Date** box must be completed.
Odometer KM	Conditional/ Automatic	The odometer reading in km at the time the service is to be performed. If **Odometer Miles** is completed, this is automatically calculated. Either this box or the **Due Date** box must be completed.

4.1.7 Optional Vehicle Data

Name of Box	Status	Description
Original Cost	Optional	Original cost of the vehicle. Type the cost.
Replacement Cost	Optional	Cost to replace the vehicle. Type the cost.
Replacement Year	Optional	Anticipated replacement year. Type the four digits of the year.
Insurance Company	Optional	Name of the company that insures the vehicle. Type the name.
Policy Number	Optional	Insurance policy number. Type the number.
Renewal Date	Optional	Date the insurance needs to be renewed. Click ▾ to select the date.
Insurance Cost	Optional	Cost of the insurance. Type the cost.
Armed Type	Optional	Kind of armor the vehicle has. Click ▾ to select the type.
Fuel Type	Optional	Kind of fuel used in the vehicle. Click ▾ to select the type.
Air Conditioning	Optional	Presence of air conditioning. Select the box if the vehicle has air conditioning.
Power Steering	Optional	Presence of power steering. Select the box if the vehicle has power steering.
Type of Transmission	Optional	Transmission type. Automatic transmission is the default setting. Click **Standard** if the transmission is not automatic.
Number of Cylinders	Optional	Number of cylinders in the engine. Type the number of cylinders.
Tire Size	Optional	Size of tire used on the vehicle. Type the tire size.

4.1.8 Fuel Details

Name of Box	Status	Description
Date	Required	Click to select the date the fuel was purchased.
Odometer Miles	Required	Type the odometer reading in miles at the time the fuel was purchased. Odometer KM is automatically calculated.
Odometer KM	Required	Type the odometer reading in km at the time the fuel was purchased. Odometer Miles is automatically calculated.
Fuel Type	Required	Click to select the type of fuel purchased.
Fuel Quantity	Required	Type the quantity of fuel purchased.
Liters/ Gallons	Required	Liters is the default setting. Click to select Gallons, if the quantity is measured in gallons.
Cost Per Unit	Required	Type the cost per liter or gallon of fuel.
Currency Used	Automatic	United States Dollar is automatically entered into the detail box. Click if another currency was used to purchase the fuel.
Card Number	Optional	If a card was used to purchase the fuel, type the card number.
Driver	Optional	Click the list button to select the driver who purchased the fuel.
Total Costs	Automatic	The total cost is calculated in US$. If a currency other than US$ was selected in Currency Used, a total cost figure is calculated in that currency, as well, and appears to the right of the US$ Total Cost.

4.1.9 Oil Details

Name of Box	Status	Description
Date	Required	Date the oil was added. Click to select the date.
Odometer Miles	Required	Odometer reading in miles at the time the oil was added. Type the odometer reading. Odometer KM is automatically calculated.
Odometer KM	Required	Odometer reading in km at the time the oil was added. Type the odometer reading. Odometer Miles is automatically calculated.
Oil Quantity	Required	Quantity of oil added. Type the amount added.
Liters/ Quarts	Required	Liters is the default setting. Select the Quarts button, if the quantity is measured in quarts.
Cost Per Unit	Required	Cost per liter or quart of oil. Type the cost.
Currency Used	Automatic	United States Dollar is automatically entered into the detail box. If another currency was used to purchase the oil, click to select it from the list.
Total Costs	Automatic	The total cost is calculated in US$. If a currency other than US$ was selected in Currency Used, a total cost figure is calculated in that currency, as well, and appears to the right of the US$ Total Cost.

4.1.10 Drivers / Employees

Name of Box	Status	Description
Last Name	Required	Last name of the employee. Click to select the employee from Post Personnel. Both this box and the First Name box are completed when you select the employee. You may also type the last name of the employee.
First Name	Required	First name of the employee. This box is automatically completed when you select the last name. This must be typed if you did not use the cross-reference button to select the employee's last name.
Employee Type	Required	Type of employee. Click to select an employee type. You cannot type in this dialog box. Information comes from the Employee Types file.
Agency	Required	ICASS agency for which the employee works. Click to select the agency. You cannot type in this dialog box. Information comes from the Agencies file.
Office	Optional	Office where the employee works. Click to select the office for with the employee works. Information comes from the Offices file. You cannot type in this dialog box.
Position	Optional	Employee's position.
Requestor	Optional	Authority to request vehicles through Trip Tickets. Click to select this box if this employee may Add a Trip Ticket.
Motor Pool	Optional	Click to select this box if this employee is a Motor Pool employee.
Available	Optional	Authority to drive vehicles assigned through Trip Tickets. Click to select this box if the employee may be assigned as a driver. This is only available to motor pool employees and may be the same person that requested the Trip Ticket.
Work Phone	Optional	Work phone number of the employee.
Last Accident	Optional	Date of the employee's accident. Click to select the date of the employee's accident from the calendar.
Home Phone	Optional	Home phone number of the employee.
Passport No	Optional	Passport number of the employee.
Cell Phone	Optional	Cell phone number of the employee.
Email Address	Optional	Email address of the employee.
Remarks	Optional	Any clarifying remarks can be typed in this box.
Deactive Date	Optional	Date the employee will no longer be associated with trips. Click to select a deactive date from the calendar. See "Deactivating an Employee Record" on page 57 for more information.

4.1.11 Licensing

Name of Box	Status	Description
License No.	Required	Driver's license number of the employee.
License Class	Required	Click to select the class of the driver's license. Information comes from the License Classes file.
Issued Date	Required	Click to select the date the driver's license was issued.
Expiration Date	Optional	Click to select the date the driver's license expires.

4.1.12 Spare Parts

Name of Box	Status	Description
Spare Part No.	Required	Post-defined identification number
Description	Required	Description of the spare part
Location	Optional	Location in the warehouse where the spare part is stored.
Deactive Date	Optional	When a spare part is no longer used, the spare part record cannot be deleted if it was listed on any maintenance records. It must be deactivated instead. Click ▾ to select a deactive date from the calendar. See "Deactivating a Spare Part Record" on page 62 for more information.
Qty on Hand	Optional	Quantity of the part in stock.
Unit Price	Optional	Cost per issue unit of the spare part.

4.1.13 Vehicle Types that Use the Specified Spare Parts

Name of Box	Status	Description
Year	Required	Year of the vehicle that can use the spare part. Type the four digits of the model year.
Make/Model/Category	Required	Click ? to select the make, model, and category of the vehicle that can use this spare part. Information comes from the **Vehicle Make/Model/Category** table.

4.1.14 Trip Details

Name of Box	Status	Description
Passenger Pick Up Date	Required	Date the passenger will be picked up. Click to select the date from the calendar.
Passenger Pick Up Time	Required	Click to select the time the passenger needs the driver to arrive for pick up.
Driver Return Date	Required	Click to select from the calendar the date the driver will return.
Driver Return Time	Required	Time the driver will return the vehicle. Click to select the correct time.
Trip Ticket No	Automatic	Number of the trip ticket. This is automatically entered following post-determined conventions.
Request Date	Automatic	This date is automatically entered based on the date the request was made.
Name of Passenger	Required	Click to select the name of the passenger, or type the passenger's name here.
No of Passengers	Required	Number of passengers is typed here. '1' is the default entry. Type a different number if there will be more than one passenger.
Requestor/Agency/ Office	Required	Name of agency, office, and individual making the request. Click to select the name of the requestor. The **Requestor Help** list comes from the **Requestors** file.
Pick Up Point	Required	Place the passenger will be picked up. Click to select the pickup point from the **Pick Up Point Help** list. If your pick up point is not listed, see "Add (Records to Tables)" on page 11 for more information.
Destination	Optional	Name of the destination is typed here.
Vehicle	Optional	Particular vehicle requested for the trip. Click to select the vehicle. The **Vehicle Help based on Category/Number of Seats** list comes from the **Vehicles** subfolder.
Category	Optional	Kind of vehicle needed for trip. Click to select the category of the vehicle. The **Category Help** list comes from the **Vehicle Categories** file.
Driver	Optional	Name of driver who will complete this trip. Click to select the name of the driver. The **Driver Help** list comes from the **Employees** file.
Purpose	Optional	The purpose of the trip can be typed into this box.
Remarks	Optional	Any clarifying remarks can be typed into this box.
Odometer Start	Optional	The beginning odometer reading can be typed in the box.
Odometer End	Optional	The end of the trip odometer reading can be typed in the box. This number must be greater than the **Odometer Start** number and will update the mileage information in the **Vehicle** record.
Trip Ticket Completed	Optional	Indicates that ALL elements of the trip ticket are complete. You may not see this check box if you do not have permissions from the System Administrator. Once this is checked, no information can be added or removed from the trip ticket record.

4.1.15 Reports

Name of Report	Description	Report Categories
Agency	Lists the US Government agencies working with Vehicle Registration Maintenance at post. From the Agencies table.	• Agency Code • Agency Description • Agency Deactive Date
Employee	Lists the employees working with Vehicle Registration Maintenance. From the Employees file.	• Employee Name • Type • Location • Phone Number • Available (to drive) • Last Accident Date • Deactive Date • Agency
Employee Type	Lists the different employee types as recorded in the Employee Types table.	• Employee Type Code • Employee Type Description
License Class	Lists the different driver's licenses as recorded in the License Classes table.	• License Class Code • License Class Description • License Class Deactivation Date
Periodic Service	Lists all of the periodic services as recorded in the Periodic Services table.	• Code • Description • Month Interval • Miles Interval • KM Interval • Significance • Deactivation Date
Pickup Points	Lists the locations where arrivals are to be picked up, as recorded in the Pick Up Points table.	• Description • Deactivation Date
Radio & Telephone Type	Lists the different types of radios and telephones in the vehicles, as recorded in the Radio and Phone Types table.	• Radio Telephone Description • Radio Telephone Deactivation Date
Spare Parts	Lists the spare parts used for maintenance. From the Spare Parts file.	• Spare Part Number • Spare Part Description • Spare Part Location • Spare Part Deactivation Date
Trip Ticket	Lists information about the trip tickets. From the Trip Tickets files.	• Ticket Request Date • Ticket Disp. Time • Ticket Return Time • Ticket Number • Last Name • First Name • Vehicle Year • Vehicle Color • Vehicle Description • License Number • Number of Passengers • Requestor's Name • Pick Up Points • Destination

Vehicle Category	Lists the categories of vehicles as recorded in the Vehicle Make/Model/Category file.	• Vehicle Model Code • Category Description • Deactivation Date
Vehicle Inventory by Post	Lists the vehicles located at a specific Post or Posts. Information is from the Vehicles subfolder.	• Org Code • Agency • License Number • Year • Make • Model • Category • Chassis Number • VIN Number • Number of Seats
Vehicle	Lists information about the vehicles. Information is from the Vehicles subfolder.	***For the Vehicle:*** • Chassis Number • VIN Number • Year • Color • Make Description • Model Description • Category Description • Agency • Status • Agency • Status • Number of Seats • Registration Date ***For the Vehicle License:*** • Vehicle License Assigned Date • Vehicle License Number • Vehicle License Deactive Date ***For the Owner:*** • Last Name • First Name • Assigned Date • Deactive Date ***For Periodic Service:*** • Due Date • Odometer Reading • Periodic Service Description • Periodic Service Status ***For the License Class:*** • License Class Description ***For the Radio/Telephone:*** • Radio/Telephone Type Description

4.2 Visitors Application

4.2.1 Visitors

Name of Detail	Type of Requirement	Description
Last Name	Required	Last name of the visitor.
First Name	Required	First name of the visitor.
Sec Clearance	Required/ Automatic	Visitor's security clearance. *None* appears by default. Click ▾ if you need to select a different security clearance.
Visitor Category	Optional	Category of the visitor. Click ▾ to select the visitor category. The available choices are contained in the **Visitor Category** file in the **Table Administrator** folder.
Agency	Conditional	Government agency for which the visitor works. You are required to identify either an agency or a company that employs the visitor. If you identify an agency, you cannot also select a company. Click ▾ to select the agency. If the correct agency is not listed, see "Add (Records to Tables)" on page 18.
Company	Conditional	Company for which the visitor works. You are required to identify either a company or an agency that employs the visitor. If you choose a company, you cannot also select an agency. Click ▾ to select the company. If the correct company is not listed, see "Add (Records to Tables)" on page 18.
Country	Optional	Country where the visitor works. Click ▾ to select the country.
Title	Optional	Job title of the visitor.
Office Phone No	Optional	Visitor's office phone number.
Fax Number	Optional	Visitor's fax number.
Job Description	Optional	Description of the visitor's job.
Email Address	Optional	Visitor's email address.
Notes	Optional	Any pertinent notes about the visitor may be typed here.
Deactive Date	Optional	Prevents a visitor from being associated with trips in the future. Click ▾ to select a deactive date from the calendar. See "Deactivating a Visitor Record" on page 32 for more information.
Exclude from View	Optional	Prevents personnel of a highly classified nature from being reported at post to those workers who do not have a need to know. Select the **Exclude from View** check box if this visitor should not be included on reports for personnel without the appropriate mask.

4.2.2 Trips

Name of Detail	Type of Requirement	Description and Needed Action
Visitor	Required	Name of visitor. Click [icon] to select a visitor from the option list. If the visitor is not listed, see "Add (Records to Tables)" on page 18 for more information. The information on the option list comes from the **Visitors** file.
Event	Optional	Event that the visitor is attending. Click [icon] to select an event from the option list. If the event is not listed, see "Add (Records to Tables)" on page 18 for more information. The information in the option list comes from the **Event Types** file.
Sponsor	Required	Sponsor of the visitor. The sponsor works at post. Click [icon] to select a sponsor from the option list. If the sponsor is not listed, see "Add (Records to Tables)" on page 18 for more information. The information in the option list comes from the **Sponsor/Control Officer** file.
Title	Automatic	Sponsor's tile. This is automatically recorded based on the sponsor chosen.
Accommodations Rqrd	Optional	Hotel accommodations need to be made for the visitor. Select the check box if staff is arranging hotel accommodations. *If this box is selected, you will not be able to **Add the Trip Ticket** without entering confirmed hotel reservations.*
Exclude	Optional	Prevents the display of the visitor name on any reports for this trip. If **Exclude** was selected when the visitor record was added, the name is automatically excluded. This is done for highly classified personnel. Select the check box to exclude the visitor's name from the trip report.
Arrival Date	Required/ Automatic	Arrival date of the visitor. This is automatically completed with the Start Date of the Event. If the visitor is arriving on a different date, click [icon] to select the arrival date from the calendar.
Depart Date	Required/ Automatic	Departure date of the visitor. This is automatically completed with the **End Date** of the **Event**. If the visitor is departing on a different date, click [icon] to select a departure date from the calendar.
Submitted on Date	Automatic	Date the trip record is added. This is automatically recorded in this box.
Per Diem Rates	Automatic	Per Diem Rates applied to the visitor. The *Standard* rate is applied by default. Click [icon] to apply the *VIP* rate.

Lodging	Automatic	Maximum amount a visitor can be reimbursed for lodging. This rate is automatically completed based on the **Per Diem Rates** selected and the location of the hotel. This does not affect the amount charged by the hotel, but should be considered when making a reservation. If the rate has changed or has never been entered, you can type the rate. The rate you type is automatically applied the next time that Per Diem Rate is selected.
M&IE	Automatic	Maximum amount a visitor can be reimbursed for *Meals and Incidental Expenses*. This rate is automatically completed based on the **Per Diem Rates** selected and the location of the visitor's hotel. If the rate has changed or has never been entered, you can type the rate. The rate you type is automatically applied the next time that Per Diem Rate is selected.
Travel Method	Optional	Method of travel to be used by the visitor. Click to select a means of transportation from the option list. If the travel method is not listed, see "Add (Records to Tables)" on page 18 for more information. The information in the option list comes from the **Travel Methods** file.
Purpose	Optional	The purpose of the trip. This information appears in the **Purpose** column on the Explorer. Type a brief description of the purpose of the trip.
Visit Request Source	Optional	Source (person or event) that is the reason for the visit. Type the source of the visit request.
Country Clearance Cable	Optional	Cable from the post providing clearance the trip. Type the number of the cable.

4.2.3 Telephone Details

Name of Detail	Type of Requirement	Description and Needed Action
Phone Type	Required	Kind of telephone. Type a brief description of the type of phone.
Phone No.	Required	Telephone number of the phone assigned for the visitor's use.
Comments	Optional	Additional comments may be typed here.

4.2.4 Hotel Reservation Details

Name of Detail	Type of Requirement	Description and Needed Action
Hotel Name	Required	Name of hotel that has a confirmed reservation for the visitor. Click [?] to select a hotel from the option list. The information on the option list comes from the Hotels file.
Check In Date	Automatic/ Required	Date the visitor will check in to the hotel. The visitor arrival date is automatically displayed. If the check in date is different from the visitor arrival date, click [▾] to select a different check in date from the calendar.
Check Out Date	Automatic/ Required	Date the visitor will check out of the hotel. The visitor depart date is automatically displayed. If the check out date is different from the visitor depart date, click [▾] to select a check out date from the calendar.
Check In Time	Optional	Time the visitor will check in to the hotel. Click [▾] to select a check in time from the list.
Check Out Time	Optional	Time the visitor will check out of the hotel. Click [▾] to select a check out time from the list.
Room Reservation	Optional	Specific details about the room being reserved for the visitor. Click [?] to select a room. The information on the option list is specific to the hotel selected and is from the Hotels file.
Confirmation #	Optional	Confirmation number of the reservation.
Cancel Reservation	Automatic	Indicates the hotel reservation has been cancelled. The check box should be selected if the hotel reservation has been cancelled.
Cancellation Date	Conditional	Date the hotel reservation is cancelled. This detail box becomes active and required if you have selected Cancel Reservation. Click [▾] to select a date from the calendar.
Cancellation Note	Optional	Any helpful comments about the cancellation may be typed here.

4.2.5 Travel Details

Name of Detail	Type of Requirement	Description and Needed Action
Arrival Time	Optional	Time the transportation is scheduled to arrive with the visitor. Click [▾] to select the arrival time.
Arrival Flight No.	Optional	Number of the flight bringing the visitor.
Train No.	Optional	Number of the train bringing the visitor.
Notes	Optional	Brief comments may be typed in this box.
No Bags Arrival	Optional	Number of bags the visitor will have on arrival.
Depart Time	Optional	Time the transportation is scheduled to depart with the visitor. Click [▾] to select the departure time.
Depart Flight No.	Optional	Number of the flight which will depart with the visitor.
No Bags Depart	Optional	Number of bags the visitor will have on departure.

4.2.6 Event Details

Name of Detail	Type of Requirement	Description and Needed Action
Event Name	Required	Type the name of the event.
Event Type	Required	Click [?] to select an event type. The information in the option list comes from the Event Types table. See "Add (Records to Tables)" on page 18 if the event type is not listed.
Event Sponsor	Optional	Type the name of the event sponsor.
Start Date	Required	Click to select a start date from the calendar.
End Date	Required	Click to select an end date from the calendar.
Start Time	Optional	Click to select a start time for the event.
End Time	Optional	Click to select an end time for the event.
Control Officer	Optional	Click [?] to select a Control Officer for the event. The information in the option box comes from the Sponsor/ Control Officer table. See "Add (Records to Tables)" on page 18 if the control officer is not listed.
Event Description	Optional	Type a description of the event.
Notes	Optional	Any other helpful information about the event can be typed here.

4.2.7 Telephone Contact Details

Name of Detail	Type of Requirement	Description and Needed Action
Employee	Optional	Name of a Control Officer. Click [?] to select a name from the option list. The information in the option list comes from the Sponsor/Control Officer table.
Comments	Required	Comments to identify the phone or its location must be typed in this box.
Phone No.	Required	Telephone number available for general use during the event.

4.2.8 Hotel Details

Name of Detail	Type of Requirement	Description and Needed Action
Name	Required	Type the name of the hotel.
Street	Required	Type the street address of the hotel.
City	Optional	Type the city where the hotel is located.
Zip Code	Optional	Type the Zip code where the hotel is located.
Phone	Optional	Type the phone number of the hotel.
Fax	Optional	Type the Fax number of the hotel.
W/Perdiem	Optional	Select this check box if the rates charged are within the government Per Diem rates.
Contact	Optional	Type the person to contact at the hotel when making reservations.
Email Address	Optional	Type the Email address of the hotel or contact person.
Deactive Date	Optional	Hotels cannot be deleted once they have been used. When a hotel is no longer being used to schedule reservations, click to select a deactive date. You can reactivate a hotel record at any time by removing the deactive date or selecting a future date.
Room Type/ Room Rate	Optional	Type the description of the type of room available and the rate that is charged. More than one record can be added for each hotel. See "Add Hotel Rooms" for more details.

4.2.9 Room Type Details

Name of Detail	Type of Requirement	Description and Needed Action
Room Type	Required	Type the description of the type of room. For example: Suite, Double, King, etc.
Room Rate	Required	Type the rate charged for the room per night.
Currency	Required	Currency used to pay for room. Click to select the currency. The list comes from the Currency file.

4.2.10 Sponsor / Control Officer

Name of Detail	Type of Requirement	Description and Needed Action
Agency	Required	Name of the sponsor's agency. To select an agency: 1 Click ▾ to open the **Select Agency** list. 2 Select the agency. If the agency is not listed here, click **Add**. "Add (Records to Tables)" on page 18 contains more information about the add feature. "Agencies" on page 73 contains information about the details needed to add an agency. 3 Click **Accept**. The agency appears in the detail box
Office	Required	Name of the sponsor's office. Type the office name.
Title	Required	Title of the sponsor. Type the title.
Last Name	Required	Last name of the sponsor. Click ▾ to choose the correct last name. The cross-reference list comes from the **Employees** file in the **Post Personnel** program. If the name is not listed, type the last name.
First Name	Required/ Automatic	First name of the sponsor. This is automatically completed if you used the cross-reference arrow to choose the Last Name. If you typed the sponsor's last name, you also need to type the first name.
Middle Initial	Automatic/ Optional	Middle initial of the sponsor. This is automatically completed if you used the cross-reference arrow to choose the **Last Name**. If you typed the sponsor's last name, you may type the middle initial.
Work Phone	Optional	Work phone number of the sponsor. Type the number.
Cell Phone	Optional	Cell phone number of the sponsor. Type the number.
Office Location	Optional	Office location of the sponsor. Type the location.
Email	Optional	Email address of the sponsor. Type the email address.
Deactive Date	Optional	Sponsors cannot be deleted once they have been used. When a sponsor is no long in use, click ▾ to select the date the sponsor was made deactive. A sponsor is no longer available for use after the deactive date.

4.2.11 Reports

Name of Report	Description	Parameters
Company Report	Lists the companies in the database. These companies can send visitors to post. Information comes from the Company table. Report includes: Company Name, (Employee) Visitor's Name, Arrival and Departure Date.	Report parameters may be set for the following areas: • All Companies • One Company • Excluded visitors (Available only with granted permissions)
Control Officer	Lists the employees who are control officers for specific events, and information about those events. Report includes: *Control Officer information* — Name, Agency, Office, Email Address, Office/Location, Work Phone *Event information* — Event, Event Type, Start Date, Description, End Date *Visitor information* — Arrival and Departure Date, Visitor Names (of those sponsored by officer), Title, Work phone, FAX number, Agency/Company	Report parameters may be set for the following areas: • All Control Officers • One Control Officer • Event Date Range (From and To) • Past Trips • Current and Future Trips • Excluded visitors (Available only with granted permissions)
Event	Lists specific events. Information comes from the Events file. Report includes: *Event information* — Event, Start Date, End Date, Event Type, Description, Control Officer, Control Officer Agency, Phone Number, Remarks *Visitor information* — Arrival and Departure Date, Visitor Name (of those attending the event), Agency/Company Name, Hotel, Check In Date, Check Out Date	Report parameters may be set for the following areas: • All Events • One Event • Event Starting Date Range (From and To) • Past Events • Current and Future Events • Excluded visitors (Available only with granted permissions)
Hotel	Lists hotels recorded in the Hotels file, as well as the visitors staying at each hotel. Report includes: *Hotel Information* — Hotel Name, Address (Street, City, Zip Code), Per Diem (*No* = Rates not within per diem rate or *Yes* = Rates within per diem rate), Email Address, Deactivation Date, Hotel Contact, Phone Number, Fax Number *Visitor Information* — Arrival and Departure Date, Event, Visitor Name (of those staying at the hotel)	Report parameters may be set for the following areas: • All Hotels • One Hotel • Hotel Arrival Date Range (From and To) • Past Hotels Stays • Ongoing and Future Hotels Stays • Excluded visitors (Available only with granted permissions)

ICASS Statistics	Provides reservation counts by ICASS agency for a given period. Report includes: Agency Code, Agency Description, Number of Reservations, Sum total of Reservation	Report parameters may be set for the following areas: • Submit From Date (required) • Submit To Date
Sponsor	Lists information about the employee sponsors of visitors and those visitors. Report includes: *Sponsor information*—Name, Agency, Office Location, Email Address, Phone Number, Office *Visitor information* — Event, Arrival and Departure Date, Visitor (being sponsored), Agency/Company, Trip Purpose	Report parameters may be set for the following areas: • All Sponsors • One Sponsor • Visitor Arrival Date Range (From and To) • Past Trips • Current and Future Trips • Excluded visitors (Available only with granted permissions)
Visitor List	Lists visitors whose visit begins and/or ends within the specified date range. It also includes visitors whose visit extends both before and after the specified dates. Report includes: Dates, Name and Position, Company/ Agency, Sponsor name, Sponsor Office, Sponsor's (phone) Number, Remarks (about the purpose of the visit), Hotel Name(s)	Report parameters must be set for the following areas: • Visitor Arrival Date • Visitor Departure Date
Visitor	Lists the visitors recorded in the Visitor file. Report includes: *Visitor information* —Visitor Name, Company/ Agency, Visitor Notes, Clearance, Work Phone *Event information* —Sponsor Name, Purpose, From and To Dates, Sponsor Phone, Train Number, Arrival Flight Number, Departing Flight Number, Event, Travel Method, Travel Notes, Hotel Name, Check-in and Check-out Dates	Report parameters may be set for the following areas: • All Visitors • One Visitor • Visitor Arrival Date Range (From and To) • Past Trips • Current and Future Trips • Excluded visitors (Available only with granted permissions)

4.3 *Expendables Application*

4.3.1 Order Details

Name of Detail	Type of Requirement	Description
Trans No	Automatic	Transaction number that is used to identify the order. This is automatically entered when the order is added.
Order No	Required	Number of the order. Follow post conventions in assigning this number.
Supplier	Required	Supplier who fills the order. Click the list button if you wish to select the supplier. • If you select a supplier, your initial choice of items is limited to the stock connected with the supplier. • If you do not select a supplier, this box is automatically completed when you select an item to order.
Currency	Automatic	Currency that the supplier accepts.
Item Count	Automatic	Number of different items ordered.
Total Quantity	Automatic	Total number of items ordered.
Total Price	Automatic	Total price of items. This appears using converted currency rates.
Order Date	Automatic	Date the order is place. The default is the current date. Click the list button if you need to select a different date.

4.3.2 Order Items

Name of Detail	Type of Requirement	Description
Local Stock No	Required	Stock number used at Post to identify the item. Click the list button to select the item. • If a supplier has been designated in **Add Order** or **Add Item to Order**, the items listed are those listed for the supplier. If the item does not appear on the list, click **Edit**. See "Edit Local Stock Item" on page 26 for further details. • If no supplier was designated, all stock items are listed. If the item is not listed see "Add Local Stock Item" on page 26 for further details.
Supplier	Required/ Automatic	The company or store that will provide the item. • The supplier is automatically entered if one was selected at the top of the **Add Order** dialog box. • To select a supplier, click the list button to select one from the list of those that supply the item being ordered. • If the supplier you wish to use is not listed, click **Edit** next to **Local Stock No.** See "Edit Local Stock Item" on page 26 for further details.
Name	Automatic	Name of supply item is provided based on selected **Local Stock No.**
Description	Automatic	Description of supply number is provided based on selected **Local Stock No.**
Order Quantity	Required/ Automatic	Quantity in Units of Order of the item. Quantity is automatically calculated based on stock minimums, amount currently on shelf, and amount currently on order. You may type a different amount if needed.
Unit Order Price	Automatic	Price per unit order of item is automatically entered based on supplier prices. You can change the unit price. If you modify it, a confirmation message appears. Click **Yes** on the confirmation message to update the price on the supplier records. Click **No** to change the price on this order only.
Total	Automatic	Total price is automatically entered based on quantity ordered and unit price.
Exchange Rate	Automatic	Automatically provided from the **Currency Table** for the currency used by the supplier.
Converted Price	Automatic	Price automatically entered based on the unit order price and the exchange rate. This price is listed in the *Unit Price* column for the item in the **Add Order** dialog box.
Total Converted Price	Automatic	Total price automatically entered based on the converted price and the quantity ordered. This price is listed in the *Total Price* column for the item in the **Add Order** dialog box.

4.3.3 Receiving Details

Name of Detail	Type of Requirement	Description
Trans No.	Optional	Number of the transaction is typed here.
Receiving Report Number	Required	Number of the receiving report is typed here.
Date Received	Required/ Automatic	Date the item is received. The current date is automatically provided. Click the list button if you wish to select a different date.
Receive		Select the check box if any of the item is being received.
Local Stock No		Stock number of the item ordered as defined by the post (not the supplier's stock number).
Item Description		Description of the item based on the stock number selected.
Qty Ordered		Quantity of the item ordered.
Qty Received		Quantity received from the order. To receive an item: 1 Highlight the table cell for the item. 2 Type the number of items received. 3 Use the TAB key to record your entry.
Qty Remain		Quantity of the item not yet received is automatically calculated based on the number ordered and received.

4.3.4 Issue Stock

Name of Detail	Type of Requirement	Description
Transaction	Automatic	Issue Transaction number.
Customer	Required	Customer who will receive the supplies.
Agency/Office	Automatic	Agency and office of the customer.
Item Count	Automatic	Number of different items ordered.
Total Quantity	Automatic	Total number of items ordered.
Total Price	Automatic	Total price of items.
Item	Required	Specific item to issue. Click the list button to select from the available stock items, or type in the name of the item.
Name	Automatic	Name of stock item selected.
Description	Automatic	Description of stock item selected.
Quantity	Required	Number of the items to issue. You cannot issue more of an item than is in stock. Type the number.
Unit Price	Automatic	Price of each unit of item to issue.
Total	Automatic	Total price of items based on quantity and unit price.

4.3.5 Turn In Stock (same tables as Issue Stock)

Name of Detail	Type of Requirement	Description
Transaction	Automatic	Issue Transaction number.
Customer	Required	Click the list button to select the customer who will receive the supplies.
Agency/Office	Automatic	Agency and office of the customer.
Item Count	Automatic	Number of different items ordered.
Total Quantity	Automatic	Total number of items ordered.
Total Price	Automatic	Total price of items.

Item	Required	Click the list button to select the item being turned in.
Name	Automatic	Name of the item.
Description	Automatic	Description of the item.
Quantity	Required	Number of items being turned it.
Unit Price	Automatic	Price for one of the items being turned in.
Total	Automatic	Total price of items based on quantity and unit price.

4.3.6 Stock Disposal

Name of Detail	Type of Requirement	Description
Transaction	Automatic	Transaction number is automatically assigned when the dispose transaction record is added.
PDA	Required	Property Disposal Authorization number. Type the number in the format ##/####.
Quantity Count	Automatic	Number of different types of local stock disposed.
Item Count	Automatic	Number of items disposed.
Total	Automatic	Value of items disposed.

Item	Required	Click the list button to select the item being disposed.
Name	Automatic	Name of the item.
Description	Automatic	Description of the item.
Quantity	Required	Number of items being disposed.
Unit Price	Automatic	Price for one of the items being disposed.
Total	Automatic	Total price of items based on quantity and unit price.

4.3.7 Customer Details

Detail Box	Type of Requirement	Description
Customer Name	Required	Name of the customer who place orders. Click the cross-reference box to select a name from the Post Personnel Employee list, or type the name.
Customer User Id	Automatic	User identification of customers who have the ability to use the Shopping Cart. This is their ID to sign into the program. This is automatically completed if you selected the Customer Name using the list button.
Agency	Required	Agency of the customer that is billed for the supplies. Click the list button to the right of the detail box to select the agency.
Office	Required	Office that receives the supplies. Click the list button to the right of the detail box to select the office.
Building	Optional	Building where the office is located.
Room	Optional	Room where the customer is located.
Telephone	Optional	Telephone number of the customer.
Email Address	Optional	Email address of the customer.
Remarks	Optional	Type additional information into this box.
Deactive Date	Optional	Only customers who do not have stock transactions associated with them can be deleted from the system. When a customer who has transactions in the program is no longer needed, that person must be deactivated instead of being deleted. Use this option when you know that the customer you are adding will only be at post for a specific time and who is therefore temporary. Click the list button to select the date that the customer is no longer active.

4.3.8 Supplier Details

Detail Box	Type of Requirement	Description
Abbreviation	Required	Abbreviation for the supplier.
Supplier Name	Required	Name of the supplier.
Currency	Required	Currency that is used to pay the supplier. Click the list button to select the currency.
Address 1	Optional	Address of the supplier.
Address 2	Optional	Additional information to direct mail to the correct address.
City	Optional	City of the supplier.
State	Optional	State of the supplier.
Postal Code	Optional	Postal code of the supplier.
Country	Optional	Country of the supplier.
Contact	Optional	Person to contact concerning supplies ordered from the supplier.
Phone Number	Optional	Telephone number of the supplier.
Fax Number	Optional	Fax number of the supplier.
Mobile Number	Optional	Mobile telephone number of the supplier.
Email Address	Optional	Email address of the supplier.
Accepts Purchase Orders	Optional	If the supplier accepts purchase orders, select the check box.
Accepts Purchase Card	Optional	If the supplier accepts purchase cards, select the check box.
Memo	Optional	Any additional comments that may be helpful about ordering from or contacting the supplier may be typed here.
Deactive Date	Optional	Only suppliers who have not been used can be deleted. When a supplier who has been used is no longer needed, that supplier must be deactivated instead of being deleted. Use this option when you know that the supplier you are adding will only be available for a specific time and who is therefore temporary. Click the list button to select the date that the supplier will no longer be active.

4.3.9 Local Stock Details

Detail Box	Type of Requirement	Description
Local Stock No	Required	Stock number of item assigned following the post-described format.
Item Name	Required	Name of the item.
Item Description	Optional	Description of the item.
Item Category	Required	Category of the item. Click the list button to select.
Unit of Issue	Required	Unit in which the item is packaged. Click the list button to select.
Deactive Date	Optional	Only stock items that have not been used can be deleted from the system. When a stock item that has been used in the past will no longer be ordered or used, it must be deactivated. Click the list button to select the date that the stock item will no longer be active.
Local Stock On Order	Automatic	Total units on order from all the suppliers. This number is automatically calculated.
Available	Automatic	Total units available for issue. This number is automatically calculated.
Set Aside	Automatic	Total units set aside to be issued or disposed. These units are identified in *pending* transactions. This number is automatically calculated.
Stock on Hand	Optional	Number of units in stock that can be issued. This must be the sum of the Quantity of stock at all Locations.
Maximum Level	Optional	Maximum number of units that should be kept in stock. This figure is used to determine the default Quantity to Order for a Quick Order. *Once you have completed the **Add Stock** record, it cannot be modified.* *This is based on the units that are issued to the customer, not the units in which they are ordered.*
Reorder Level	Automatic	Inventory level when the item should be reordered based on customer daily usage. It is used to determine if an adequate amount of the item is being ordered in a Quick Order and when an item appears on the Quick Order. This detail box cannot be modified. It is calculated based on the following formula: *(Lead Time * Min Safety * Order Cycle) * (Avg Consumption per day)*
Total Price for Stock	Automatic	Total value of stock based on Stock on Hand and Issue Price.
Issue Price ($)	Required/ Automatic	Issue price of each item, based on the units that are issued to the customer. You must initially type the issue price. If you need to later modify the issue price, you may click to update the value of the stock on hand.

4.3.10 Supplier Stock Details

Detail Box	Type of Requirement	Description
Supplier	Required	Name of the supplier. Click the list button to select the name. If the supplier is not listed, you may add it to the list. See Table 4.2 on page 78 for more information about completing the **Add Supplier** dialog box.
Order Price	Required	Supplier's price for the stock item.
Unit of Order	Required	Unit in which the stock is sold. Click list button to generate an option list from which you can select the unit in which the stock item is ordered.
Conversion	Required	Number of distributable items (units of issue) in each unit of order. Items may be purchased in quantity, but issued individually. For example, if paper is sold in cases containing 10 reams, and is issued by the ream, type 10 in the conversion box.
Stock Number	Required	Supplier's stock number. This may be different from the local stock number.
Units of Issue	Automatic	Unit used for issue is entered from **Local Stock** tab when stock is on hand.
Deactive Date	Optional	Only a supplier that has not been used can be deleted. When a supplier which has been used is no longer needed, that supplier must be deactivated instead of being deleted. Click the **Calendar** arrow to select the date that the supplier will no longer be active. You may pre-select this option when you know the supplier will only be used for a certain time.
Description	Optional	Description of the stock item.
Lead Time	Required	Amount of time needed to receive the item from the supplier once it is ordered.
Min. Safety	Required	Fastest amount of time the supplier can safely assure the item will be received once it is ordered.
Minimum	Automatic	Minimum number of days needed to receive the item from the supplier once it is ordered. This is automatically calculated based on the following formula: ***(Lead Time + Min. Safety + Order Cycle)*** * *Avg. Daily Use of Stock Item*
Order Cycle	Required	Number of days in an ordering cycle for the item. For example, orders may be placed every 30 days.
Max. Safety	Required	Greatest number of days needed to receive the item from the supplier once it is ordered. This is automatically calculated as double the Min. Safety time.
Maximum	Automatic	Maximum amount of time needed to receive the item from the supplier once it is ordered. This is automatically calculated based on the following formula: ***(Lead Time + Max. Safety + Order Cycle)*** * *Avg. Daily Use of Stock Item*

4.3.11 Consumption Details

Name of Detail	Type of Requirement	Description
To-date in present FY	Automatic	The amount of items consumed by unit for the present fiscal year is automatically calculated, based on the units that are issued to the customer, not the units in which they are ordered.
Previous FY	Automatic	The amount of items consumed by unit for the previous fiscal year is automatically calculated, based on the units that are issued to the customer, not the units in which they are ordered.
Two FY Previous	Automatic	The amount of items consumed by unit for the previous two fiscal years is automatically calculated, based on the units that are issued to the customer, not the units in which they are ordered.
Three FY Previous	Automatic	The amount of items consumed by unit for the previous three fiscal years is automatically calculated, based on the units that are issued to the customer, not the units in which they are ordered.

4.3.12 Stock Location

Name of Detail	Type of Requirement	Description
Location	Required	The warehouse or storage location of the stock item. Use the list button to select the location.
Description	Optional	Description of where the stock is found at the specified location.
Bin	Optional	The bin identifier where the stock is found.
Quantity	Optional	The number of stock items on hand. This number must match the Stock on Hand on the Local Stock tab. This detail box cannot be modified once you Add the Location.
Transfer	Optional	Number of stock items being transferred to a location.
From	Optional	The location where the stock originated. Use the list button to specify the previous location of the stock.
Deactive Date	Optional	Date when the stock is no longer stored at the specified location. Use the Calendar arrow to select the date.
Primary	Automatic	Indicates that this location is the primary location where the stock item is stored. The quantity of a stock item is *modified* at the *Primary* Location whenever it is disposed, issued, received, or turned in. This check box is automatically selected for the first location you provide for the stock item. The check box is automatically cleared for all subsequent locations. The Primary location may be modified. However, you *must* have a Primary location for each item, and each item may have *only one* Primary location.

4.3.13 Shopping Cart

Name of Detail	Type of Requirement	Description
Transaction	*Automatic*	Number is assigned to the supply request when the transaction is complete. The transaction number is not visible in the Add Item to Shopping Cart dialog box. It is visible in the detail box when you View and Edit the supply request.
Customer	*Automatic*	Name of customer who places the order appears in this detail box. Your name is automatically entered.
Total Price	*Automatic*	Total price of your order is automatically calculated.The Total Price is not calculated in the Add Item to Shopping Cart dialog box, but is visible when you View or Edit your order.
Agency	*Automatic*	Agency of customer who places the order appears in this detail box.
Quantity		Number of the item ordered based on the unit of issue. A quantity of "1" may be one carton which yields a *dozen items*.
Stock No.		Stock number used at post.
Name		Brief description of the item.
Unit of Issue		Unit of issue for the item. One unit may include more than one item. For example, one *package* of light bulbs may include four individual bulbs.
Price		Price per unit order of the item.
Total Price		Total cost based on the quantity ordered and the price of each unit.
Stock on Shelf		Number of items currently in stock. This number does not necessarily indicate that the stock on hand is available. Some stock on the shelf may not be available due to pending issue transactions.
Stock Available		Number of stock items available for distribution.

4.3.14 Reports

Name of Report	Function	Parameters
Disposal Transaction	Displays a report of items disposed grouped by disposal transaction. Pending (unconfirmed) transactions are not included.	You may choose to define report parameters in the following areas: • All • One Transaction • Range of Transactions • Date Range
Issue Transaction	Displays a report of items issued grouped by issue transaction. Pending (unconfirmed) transactions are not included.	You may choose to define report parameters in the following areas: • All • One Transaction • Range of Transactions • By Customer • Date Range
Order Transaction	Displays a report of items ordered grouped by order transaction. Pending (unconfirmed) transactions are not included.	You may choose to define report parameters in the following areas: • All • One Transaction • Range of Transactions • By Supplier • By Order Number • Date Range
Receiving Transaction	Displays a report of items received grouped by receiving transaction. The Status of received items may appear in either Received - Filled or Received- Not Filled records. Transactions and items that are not received are not included.	You may choose to define report parameters in the following areas: • All • One Transaction • Range of Transactions • Date Range
Turn In Transaction	Displays a report of items turned in. Items are grouped by transaction. Pending (unconfirmed) transactions are not included.	You may choose to define report parameters in the following areas: • All • One Transaction • Range of Transactions • By Customer • Date Range
Disposal Transaction	Displays a listing of pending (unconfirmed) disposal transactions.	You may choose to define report parameters in the following areas: • All • One Transaction • Range of Transactions • Date Range
Order Transaction	Displays a listing of pending (unconfirmed) orders.	You may choose to define report parameters in the following areas: • All • One Order • Range of Orders • Date Range

Customer	Displays a report, by customer, of total quantities of items issued for the current Fiscal Year.	You may choose to define report parameters in the following area: • All or One Customer
Stock Catalog by Category	Displays a report, by stock category, of all items listed in stock.	No parameters for this report. It is automatically generated.
Stock Catalog by Stock Number	Displays a report, by local stock number, of all items listed in stock.	No parameters for this report. It is automatically generated.
Stock Report	Displays a detailed listing of all items in stock including quantities on order and quantities on the shelf.	You may choose to define report parameters in the following areas: • All or One Stock Item
Suppliers Report	Displays a listing of suppliers. Suppliers with a deactive status are not shown.	You may choose to define report parameters in the following areas: • All Suppliers • One Supplier
Annual Consumption	Displays the consumption figures for all stock items.	You may choose to define report parameters in the following areas: • All Stock • One Stock Number
Customer Statistics	Displays a list of stock issued to, or turned in from, a selected customer.	You may choose to define report parameters in the following areas: • Customer • Issue • Turn In
Customers Account	Displays the issue statistics by customer by month for the current Fiscal Year.	You may choose to define report parameters in the following areas: • All or one Customer • Date Range
Customers Consumption	Displays the issue statistics by customer by month for the current Fiscal Year.	You may choose to define report parameters in the following areas: • All or One Customer
Depleted Stock Items	Displays a list of all stock items with no quantity on the shelf.	No parameters for this report. It is automatically generated.
ICASS Statistics	Displays the total issue cost and percentage by agency for the fiscal year.	You are required to specify the following: • Fiscal Year You may choose to define report parameters in the following area: • All or One Agency

Issues for Customers	Displays the stock issued by customer for the current Fiscal Year.	You may choose to define report parameters in the following areas: • All or One Customer
Office Consumption	Displays the stock issued by office.	No parameters for this report. It is automatically generated.
Order versus Receiving	Displays a comparison of quantities of stock received vs. stock ordered.	You may choose to define report parameters in the following areas: • All Stock • One Stock Number
Reorder Level Statistics	Displays, by stock item, the quantity required to order based on current stock levels and minimum levels.	No parameters for this report. It is automatically generated.
Reorder Stock Items	Displays, by stock item, the on shelf, on order, and reorder levels.	No parameters for this report. It is automatically generated.
Stock Statistics	Displays the transaction history for a stock item.	You may choose to define report parameters in the following areas: • Stock Number • Dispose • Issue • Order • Receive • Turn In
Stock Transactions Analysis	Displays the order information, on shelf information, and issue information for a stock item.	You may choose to define report parameters in the following areas: • All Stock • One Stock Number • Date Range

4.4 Work Orders for Web Application

4.4.1 Types of Work Orders

Type of Work Order	Description
PM (Preventive Maintenance)	Work order that completes regularly scheduled maintenance of equipment. Example: Monthly furnace filter replacement.
Scheduled	Work Order not involving equipment breakdown and not part of the regular PM schedule. Tasks that require some coordination or advanced planning should be scheduled. An Unscheduled, PM, or Administrative work order can be changed to Scheduled. Examples: Installation of storm windows or fumigation for insects.
Unscheduled	Work order that can be completed at any time. This includes unexpected problems such as equipment breakdown. This is the default setting when you add a work order. Example: Dripping faucet.

4.4.2 Work Order Status

Status Number	Status Code	Description
1	***Outstanding***	Work request being processed for approval.
2	***Approved***	Work request status is changed to work order. Access to this change is restricted.
3	***On Hold***	Work is to stop temporarily. Reason should be typed in the text box located on the **Text** tab of the **Edit Work Order** dialog box.
4	***Completed***	Work has been completed. Labor hours or contract costs must be added before completion. Material information should be added.
5	***Cancelled***	Work order is no longer valid. Reason for cancellation should be typed in the text box located on the **Text** tab of the work order.

4.4.3 Work Orders

Name of Column	Description
WO#	Unique number automatically assigned to the administrative work order. Found on the **Edit Administrative Work Order** dialog box.
Pri	There are three priority codes for work orders. They are listed according to urgency level. Each priority code (from acceptance of work order to completion of work) can be between one and thirty days, and is set by your Systems Administrator in the **SCF Maintenance** file of the **System** folder (See "SCF Maintenance" on page 213 of Chapter 11). The three priority codes are: • Routine - If this priority code is selected, nothing is listed in the **Pri** column of the Explorer. • Priority - **P** (Priority) is the next level of importance. When this priority code is selected, a **P** is listed in the Pri section of the Explorer. • Immediate - **I** (Immediate) is the most urgent. When this priority code is selected, a red **I** is listed in the **Pri** section of the Explorer.
P	An asterisk (*) in this column indicates that the work order has been printed.
Type	Lists they type of work order, as found in the first **WO#** box of the **Edit Work Order** dialog box. Work order types are: • S - Scheduled • U - Unscheduled • PM - Preventive Maintenance
Status	Lists the status of the selected work order, as found in the **Status** box of the **Edit Work Order** dialog box. Status types are: **1** = Outstanding (waiting for approval) **2** = Approved **3** = On Hold **4** = Completed **5** = Cancelled
Requestor	Full name of the person or department requesting the work, as listed in the **Reqr** box of the **Edit Work Order** dialog box. In a Preventative Maintenance work order, the name of the equipment appears.
Request Date	Date the work order was requested, as listed in the **Req** box of the **Edit Work Order** dialog box. In a PM work order, the date reflects when the preventative maintenance should begin.
Property ID	Unique property identifier defined in RPA which identifies where work is to be performed. Taken from the **Prop** box of the **Edit Work Order** dialog box.
Unit	RPA's identifier of a residential unit, or office unit, or an ancillary structure. Codes are: • RES = Residential • OFF = Office • ANC = Ancillary

4.4.4 Work Order Details

Detail Label	Type of Requirement	Description
WO#	Automatic	U appears in the **WO#** box by default, meaning the work order is unscheduled. Click the arrow to select **S**, if the new work order will be scheduled. See Table 3.1 on page 20 for more information about U and S work orders. A work order number is automatically assigned when you complete all the information and click **Add** at the bottom of the dialog box.
Project	***Optional***	If the work order is part of a special project, click [?] next to the **Project** box and select the project from the **Select Project** list. New projects are added in the **Special Projects** file of the **Tables** folder. See "Special Projects Table" on page 146 of Chapter 8 for more information.
Prop	***Required***	If you know the **Property ID** number, you can type it in the detail box. If you do not know the number, click the list button to select the property for which the work order is being created.
Status	Automatic	**Outstanding** is in this detail box, meaning that no action has been taken on the work order. See Table 3.2 on page 20 for information about other status codes. The information in this box can only be altered if you have "modify status" permissions from the System Administrator.
Date	Automatic	The current date is automatically entered. Each time there is a status change, the date is also updated to the current date. You can click the list button to select a different date from the calendar. For PM work orders, this is the date the PM work order was generated.
Unit Indicator	Conditional	If you already know the unit number, you can type it in the box. To determine if there are any associated units in the property, click the list button and follow the instructions in "Unit Indicator" on page 27.
Pri	Conditional	Select one of the priority categories: • I – Immediate • P – Priority • R – Routine Each priority code (from acceptance of work order to completion of work) can be between one and thirty days. The length of time for each priority is set by your Systems Administrator in the **SCF Maintenance** file of the **System** folder (See "SCF Maintenance" on page 213 of Chapter 11.)
Zone	Not functional in this release.	
Post	Automatic	Post where the work is to be completed.

Name	Automatic	Name of the property where the work is to be completed. This is automatically completed based on the property selected.
Addr	Automatic	Address of the property where the work is to be completed. This is automatically completed based on the property selected.
Unit	Automatic	Unit of the property where the work is to be completed. This is automatically completed based on the unit selected.
Agcy	Automatic	Agency assigned the property where the work is to be completed. This is automatically completed based on the property selected.

4.4.5 Work Order Task

Detail Label	Type of Requirement	Description
Reqr	***Required***	The name of the requestor. There are four ways this box may be completed: **1** Type the requestor name in the box. **2** Click [?] to find the name of the individual that is requesting the maintenance. • If the **Property** ID box and/or **Unit** ID box already contains data, you can choose a name from the occupant list. • If the **Property** ID box and/or **Unit** ID box do not contain data, the name you choose will automatically complete the property ID associated with the name. **3** If you have access to the Post Personnel system, you see a [P] next to the Reqr box. Click [P] to view a list of all paid personnel at post. You can choose a name from the list. **4** This box is automatically completed with the equipment description for PM work orders.
Email	Optional	Type the email address of the requestor. If the requestor's email address in on your email list, you can select it by clicking [?] to the right of the detail box.
Tel	***Required***	Telephone number of the requestor. If you selected the requestor using [P], the office phone number may automatically be completed.
Req	***Required***	This is the date the maintenance is requested. • For scheduled and unscheduled work orders, the current date is automatically entered as the default. If you need to enter a different date, click [▾] to the right of the detail box. • For PM work orders, the request date is assigned based on the PM schedule. It is the date that work should *begin* and cannot be modified.
Due	***Required***	This is the date that the maintenance needs to be completed. • For scheduled and unscheduled work orders, a default date from one to 30 days automatically appears. (This function can be changed by your System Administrator.) If you need to enter a different date, click [?] to the right of the detail box. • For PM work orders, the due date is assigned based on the PM schedule. It is the date that work should be *completed* and cannot be modified. • A due date cannot be selected for Distributed WOs.

Shop	Optional	The shop that is primarily responsible for completing the task should be entered here. Click to the right of the detail box to select a shop. If you are working with Distributed Work Orders, you cannot choose a shop.
Shop 2	Optional	If another shop is responsible for completing part of the task, it should be entered here. Click to the right of the detail box to select a shop. If you are working with Distributed Work Orders, you cannot choose a shop.
Location	Optional	If the equipment is assigned, this is automatically completed. Type information in this box to further pinpoint the location of the work to be completed. For example: "Electrical outlet *to the left of the kitchen sink.*"

4.4.6 Equipment

Detail Label	Type of Requirement	Description
DOWNTIME		
Start Date	Optional	Click the list box to select the date the equipment failure occurred.
(Start) Time	Conditional	Type the time of day the equipment failure occurred. This is required only if a Start Date has been provided.
Stop Date	Optional	Click the list button to add the date the repair was made. This box is not completed until the repair has been made.
(Stop) Time	Optional	Type the time of day the equipment failure was repaired. This is required only if a Stop Date has been provided.
FAILURE		
Failure Code	Optional	Click the list button to select the appropriate failure code for the equipment malfunction.
Repair Code	Optional	Click the list button to select the appropriate repair code once the equipment has been repaired.

4.4.7 Labor Details

Detail Label	Type of Requirement	Description
Employee ID	Required	Either type the ID number of the employee who completed the work, or click the list button to select it from the **Select Employee** list.
Name	Automatic	The name of the employee is automatically added when you select the Employee ID.
Date	Required/ Automatic	The date the work was completed. Today's date is automatically added. If you need to add a different date, click the list button to do so.
HOURS - ***Work order status cannot be Completed without at least .1 hour assigned in the Labor tab (or one dollar of contract cost assigned in the Contractor tab).***		
(Work) Reg	Conditional	Actual, active hours spent completing the work order.
(Work) OT	Conditional	Number of overtime work hours for a specific work order.
(Travel) Reg	Conditional	Regular working hours spent in travel for work order completion. This may include time spent to get a needed part, etc.
(Travel) OT	Conditional	Overtime working hours spent in travel for work order completion. This may include time spent to get a needed part, etc.
(Wait) Reg	Conditional	Time spent waiting in work order completion that does not involve overtime hours. This may be used to indicate time spent waiting for a machine to complete a "cycle" to verify the repair is effective.
(Wait) OT	Conditional	Number of overtime waiting travel hours for a specific work order.
OT Work Cost	Optional	Click the list button to select an overtime work cost from the **Select Work Cost** box. Codes are from the SCF Maintenance and are used to calculate overtime costs automatically.

4.4.8 Contract Details

Detail Label	Type of Requirement	Description
Contract #	Required	Click the list button to select the appropriate contract.
Date	Required/ Automatic	The date the work was completed. Today's date is automatically added. If you need to add a different date, click the list button to do so.
Cost	Required	Type the cost of the job in US Dollars. You must type at least one dollar.
Description	Automatic	The description is automatically completed when the Contract # is selected.
Invoice #	Optional	Type the contractor's invoice number in this box.

4.4.9 Materials

Detail Label	Type of Requirement	Description
Part Number	Optional	Type the post-assigned number. To facilitate reporting, the number should be assigned to a part and used whenever the part is used.
Description	Required	Type a short description of the part.
UI	Optional	Type the unit of issue. For example, GL (gallon) or FT (foot).
Qty	Required	Type the amount or number of units used.
Unit Cost	Required	Type the cost per unit.
Currency Quoted In	Required	Click the list button to select the currency the materials were quoted in.

4.4.10 Equipment

Name of Column	Description
Eq	Equipment type, as listed in the Equipment Type box of the Edit Equipment Information dialog box.
Property ID	ID number of the property where the equipment is used and located.
Property Name	Name of the property where the equipment is used and located.
Location	Area where the equipment is located.
Qty	Number of units of equipment used.
Status	Indicates the status of the record. The status codes are: • A = Active • B = (Deleted) Abandoned in place • D = (Deleted) Input Error • M = (Deleted) Removed • R = Relocated
Eq ID	ID number of the equipment. Automatically assigned when the equipment record is added.
Wrty	An asterisk (*) in this column indicates that there is a warranty for the equipment.
PM Sched	An asterisk (*) in this column indicates that the equipment is used for PM schedules.

Equip Type	***Required***	Click the list button to select the type of equipment. The **Select Equipment Type** list shows the equipment code and description. Equipment can be added to the list and then selected. (See "Table Information" on page 18 of Chapter 2 for more information.)
Unit Indicator	Conditional	If the equipment is to be located at a unit within a property, click the list button to select the unit.
Post	Automatic	The post where the equipment is located.
Name	Automatic	Property name. Automatically added when the **Prop** detail box is completed.
Addr	Automatic	Address of property. Automatically added when the **Prop** detail box is completed.
Unit	Automatic	The type of property (Residence, Office, etc.) is automatically added when you save the record.
Location	***Required***	Type the location of the equipment within the building or unit where the equipment is found.
Sched	*Automatic*	Preventative Maintenance Schedule for the equipment. an asterisk (*) appears when the equipment is scheduled for Preventative Maintenance.
Qty	***Required***	Quantity of equipment to be used at this location. The number 1 appears automatically. If another quantity of equipment is to be used, type a different number.
Status	Automatic	Describes the status of the equipment record. • A = Active • B = (Deleted) Abandoned in place • D = (Deleted) Input Error • M = (Deleted) Removed • R = Relocated When a record is created, it automatically has Active status. The other statuses are determined when you delete the record. See "Deleting or Relocating Equipment" on page 86.

4.4.11 Equipment Information

Detail Label	Type of Requirement	Description
Model	Optional	Model number of the equipment.
Manufacturer	Optional	Name of the company that manufactures the equipment.
Address	Optional	Address of the company that manufactures the equipment.

Year Installed	Optional	Year the equipment was installed.
Volts AC: Input	Optional	Amount of alternating current voltage required to operate the equipment.
Volts AC: Output	Optional	The voltage that expresses the amount of power generated or produced by the equipment.
Amps	Optional	Amount of ampheres needed to operate the equipment.
Hz	Optional	Number of cycles in the sine wave; for example 50Hz.
Ph	Optional	The number of electrical legs needed to provide power for the equipment. For example, one PH, two PH, etc.
DC	Optional	Amount of DC voltage needed to start or run a piece of equipment.
Hp	Optional	Horse power generated by the equipment.
Prev Prop ID	Automatic	When a property is relocated, the previous address is automatically generated at the bottom of the **Information** tab of the **Delete Equipment Information** window. Up to three addresses can be stored. If you need to see the fourth address, look at the record for the previous address and then check the three previous addresses listed for that record.
Remarks	Optional	Text box for any additional information.
Serial Number	Optional	Serial number of the equipment.
Phone	Optional	Telephone number of equipment manufacturer.
Capacity	Optional	Capacity of the equipment measured as tons or gallons (British Thermal Units (BTU), Kilowatts (KW), Kilovolt Amphere Hours (KVA), etc.)
Motor Number	Optional	Motor number of the equipment component.
CFM Rating	Optional	Amount of air moved by a fan measured as cubic feet per minute. This box is *not* available on the **Equipment Information** windows of generators.
GPM Rating	Optional	Equipment output of liquid expressed as gallons per minute. Used for generators.
Arrangement #	Optional	Special number assigned only to caterpillar generators that identifies a particular type of generator.

Warranty Number	Optional	Warranty number or warranty serial number.
Company	Optional	Name of the company providing the warranty.
Address	Optional	Address of the company providing the warranty.
Telephone	Optional	Telephone number of the company providing the warranty.
Contact	Optional	Name of person to contact in the company providing the warranty.
Start Date	Optional	The first day warranty coverage is in effect.
End Date	Optional	The last day warranty coverage is in effect.
Rnwl Opt	Optional	Indicates whether a choice to renew the warranty is available. Type "Y" for "Yes" or "N" for "No".
Remarks	Optional	Text box for any additional comments related to the warranty.

Meter ID	***Required***	Post-defined number of meter.
Meter Offset	Optional	Indicates that the meter reading has been reset due to breakage/replacement or due to roll over - from 99999 to 00000. If either situation has occurred, type 100000 as the Meter Offset.
Desc	***Required***	Text box reserved for a description of the meter.
UOM	***Required***	Unit of Measure that the meter records. For example: **GAL** for gallons or **KWH** for Kilowatt hours.
Reading Date	***Required***	Click the list button to select the meter reading date.
Actual Reading	***Required***	Type the number of the meter reading.
Effective Reading	Automatic	The actual reading plus the meter offset. Automatically calculated.
Future Reading	Automatic	Estimate of the next meter reading based upon meter history. Automatically calculated.

4.4.12 Preventative Maintenance Schedule

Name of Column	Description
Eq	Equipment type of the selected equipment. Taken from the **Equipment Type** box on the **Edit Preventive Maintenance Schedule** dialog box.
Freq	Frequency of the maintenance. From the **Frequency** box on the **Edit Preventive Maintenance Schedule** dialog box.
Property ID	ID number of the property where the equipment is located. From the **Prop** box on the **Edit Preventive Maintenance Schedule** dialog box.
Property Name	Name of the property where the equipment is located. From the **Name** area on the **Edit Preventive Maintenance Schedule** dialog box.
Description	Description of the equipment. From the **Edit Preventive Maintenance Schedule** dialog box.
Active Qty	Lists how many pieces of equipment are located at this property. From the **Edit Preventive Maintenance Schedule** dialog box.
Status	The status of the preventive maintenance schedule. From the **Edit Preventive Maintenance Schedule** dialog box.
Sched ID	The ID number of the preventive maintenance schedule. From the **Edit Preventive Maintenance Schedule** dialog box.

4.4.13 Preventative Maintenance Detail

Detail Label	Type of Requirement	Description
Prop	Required	Lists the property ID number of the property to which the equipment is added. Type the number or click the list button to select the property.
Equipment Type	Required	Click the list button to select the type of equipment. The **Select Equipment Type** list shows the equipment code and description. Equipment can be added to the list and then selected. (See "Table Information" on page 18 of Chapter 2 for more information)
Post	Automatic	The post where the PM work order will be performed.
Name	Automatic	Property name.
Addr	Automatic	Address of property.
Status	Automatic	Status of the preventive maintenance.
Last PM Date	Automatic	Last date the preventive maintenance was performed. If PM has not yet occurred, "99/99/9999" appears here.
Frequency	Required	Two-digit alphanumeric code that is used as a short name for time intervals to conduct preventive maintenance. Frequency intervals can be set for weeks or months. (For example, **AN** = annual; **MO** = monthly.) Click the list button to generate the **Select Frequency Code** list.
PM Checklist	Required	Code that uniquely identifies a specific preventive maintenance checklist. Click the list button to generate the **Select PM Checklist** list box. The **Select PM Checklist** list box provides a specialized list for completion of the maintenance procedure. It includes a description of the required maintenance, safety and special instructions, steps for completion, a tool/material list, and the estimated amount of time it takes to perform specific preventive maintenance.
Est Time	Automatic	Time estimated to complete the PM schedule. This is generated automatically when the **PM Checklist** detail box is completed.

PM Start Date	Required	The **PM Start Date** represents the date the first PM is planned and is assigned by the user at the time the PM schedule is created. There are several considerations when selecting a date. • Once you have created the PM work order, the **PM Start Date** cannot be changed. • If a weekly frequency is designated as the **PM Start Date**, PM dates will be scheduled on the same day each week. For example, if the **PM Start Date** falls on a Thursday, subsequent PM dates will always be on a Thursday. • If a monthly PM frequency is designated, PM dates will occur on the same date each month. For example, if the start date is Sept. 15, the next monthly PM will occur on Oct. 15. Exception: Monthly PM dates that occur on non-recurring days (29th - 31st) are automatically moved to the last day of the month when those dates do not occur. Eventually this causes all monthly PM dates to be scheduled no later than the 28th day of the month. • Any PM start date must be greater than or equal to the next Generated PM schedule date. The date is found in the **Post Maintenance** file of the **System** folder. Click the list box to select a date.
Lead Shop	Required	Primary shop being used to perform the PM. Click the list button to select a lead shop.
Second Shop	Optional	Additional shop to perform secondary functions in work order completion. Since a PM work order involves one task, leave this box blank. You should not choose a second shop.
Seasonal Stop Month	Optional	Beginning month when preventive maintenance is *not* required for this schedule. Some equipment is used seasonally, and preventive maintenance would stop during the off-season. For example, during winter months, PM is not required on a swimming pool pump. The seasonal stop month would be the first month of autumn or the first month PM is not required. If PM is going to be done on a piece of equipment that is used seasonally, type the number of the month when the PM will stop. For example, type 9 for September.
Start Month	Optional	Beginning month when preventive maintenance is required for this schedule. Some equipment is used seasonally. Preventive maintenance needs to be scheduled during the season of use. For example, during summer months, PM is required on a swimming pool pump. The start month would be the first month of summer or the first month PM is required. If PM is going to be done on a piece of equipment that is used seasonally, type in the number of the month when the PM will begin. For example, type 5 for May.

4.4.14 Contractor

Name of Column	Description
Contractor	Contractor number. Automatically assigned when the contractor is added.
Type of Service	Type of service the contractor provides. From the **Type of Service** box on the **Edit Contractor Information** dialog box.
Company Name	Name of contractor or company. From the **Company** box on the **Edit Contractor Information** dialog box.
Status	If the Contractor record is active, there is no entry in this column. If the Contractor record has been deleted, there is a "D" in the column.

Post	Automatic	Name of Post.
Contractor #	Automatic	Number that uniquely identifies the contractor.
Status	Automatic	If the record has been deleted, "D" appears here.
Type of Service	Optional	Type of service the contractor renders.
Company	Optional	Name of the company or contractor providing the service.
Address	Optional	Address of the contractor or company providing the service.
Contact	Optional	Name of the person in the company who should be contacted about any issues regarding fulfillment of the contract.
Phone	Optional	Phone number of the contact person.
Fax	Optional	Fax number of the contractor.
Telex	Optional	Telex number of the contractor.
Remarks	Optional	Text box for any comments about the contractor or the preferred methods of contacting the company.
Status	Automatic	Status of the contract. A "D" appears if the contract has been deleted.
Contract Description	Optional	Describes the type of work the contract covers.
Contract Amount	Optional	Total amount allocated for this contract expressed in US dollars. Cannot exceed $100,000.
Effective Date	Optional	The date the contract goes into effect. Click the list button to select a date.
Expire Date	Optional	The date the contract expires. Click the list button to select a date.
Remarks	Optional	Text box for additional information.
Performance	Optional	After the work is complete, click the **Performance** arrow to select either: • S - Satisfactory • U - Unsatisfactory • E - Excellent

4.4.15 Employee

Detail Label	Type of Requirement	Description
Post	Automatic	Name of Post.
Emp ID	Required	Unique code assigned to each employee. It is recommended that it be the same code used by the personnel/payroll system. This is not the employee badge number. This number is automatically added when you complete the Name box by clicking P.
Name	Required	Employee name. If you have permissions to Post Personnel, select it by clicking the P. Otherwise, type it in the box.
Status	Automatic	Employee status. This is blank unless the employee has been deactivated; in that case, a "D" appears.
Address	Optional	Employee address. This is automatically added when you complete the Name box by clicking P.
Phone	Optional	Phone number of employee.

Hourly Rate	Automatic	Hourly pay rate. Automatically completed when the pay plan is selected.
Default Annual Hours	Automatic	Automatically completed when the pay plan is selected.
Start Date	Required	Beginning date of employment. Click the list button to select the date.
End Date	Optional	Last date of employment. Click the list button to select the date.
Pay Plan	Required	Pay plan on which employee's salary is based. Click the list button to choose the appropriate pay plan. The grade and step are components of the pay plan. They are automatically completed when the pay plan is selected.
Grade	Automatic	Component of the pay plan. Automatically completed when the pay plan is selected.
Step	Automatic	Component of the pay plan. Automatically completed when the pay plan is selected.
Annual Salary	Optional/ Automatic	The employee's actual annual salary may differ from the default hourly rate associated with the chosen pay plan. Type the annual salary of the employee. This figure is used to calculate the employee's hourly and OT pay rates. Automatic when you complete the **Name** box by clicking .
Annual Hours	Optional	The expected annual hours of the employee is typed in this detail box. This figure is used to determine the employee's hourly and OT pay rates. For example, the expected hours for a full time employee (working 52 weeks a year for a 40 hour week) would be 2080 hours annually.
Skill	Optional	Primary skill code of the employee. Click the list button next to the **Skill** box to generate the **Select Skill** list. Only one skill can be selected.
Skill Level	Optional	Indicator of level of proficiency. For example, whether the employee is an apprentice, journeyman or master.
Shop	Optional	The shop to which employee could be assigned. Click the list button to select from the **Select Shop** list.
Contact Name	Optional	Name of the contact or emergency contact for the employee. If you have permissions to Post Personnel, select it by clicking the . Otherwise, type it in the box.
Contact Phone	Optional	Telephone number of the emergency contact.
Comments	Optional	Text box for additional information regarding the employee.

4.4.16 Reports

Report Name	Function	Parameters
Component Manufacturer by MFG	List of manufacturers of components used at post. This report may be used for ordering component orders. Includes address, telephone number, serial number and model, and component description.	• Manufacturer • Model Number • Serial Number
Component Manufacturer by Model	Lists models of components used at post. This report may be used for ordering component orders. Includes serial number, description, component manufacturer, address and telephone number.	• Manufacturer • Model Number • Serial Number
Equipment by Property ID	Lists post equipment by property ID. This report may be used for inventory purposes. Includes property name and maintenance zone, address, equipment description, quantity and year installed, location of equipment and manufacturer.	• Property ID • Property Name • Equipment ID • Equipment Description • Equipment Manufacturer
Equipment Component	Lists equipment components by post name and property ID. This report may be used for inventory purposes. Includes equipment code and description, equipment manufacturer and model, component serial number and description, component manufacturer and model.	No additional report parameters
Equipment Inventory by Type	Lists equipment at each post by type. This report may be used for inventory purposes. Includes equipment code and description, quantity, location, manufacturer model, year installed, property ID and name.	• Property ID • Property Name • Equipment ID • Equipment Description • Equipment Manufacturer

Equipment Manufacturer	List of equipment manufacturers. This report may be used for ordering and inventory purposes. Includes manufacturer's address, telephone, model serial number, equipment description, and year installed.	• Manufacturer • Equipment ID • Equipment Description
List of Component Codes	List of component codes. This report is useful when completing work orders. Includes component description, template number, and record status.	No additional report parameters
List of Equipment Codes	List of equipment codes. This report is useful when completing work orders. Includes equipment description and record status.	No additional report parameters
List of Frequency Codes	List of frequency codes. This report is useful when completing work orders. Includes frequency descriptions, the length of time in weeks or months, and record status.	No additional report parameters
List of PM Checklists	List of preventive maintenance checklist numbers. This report is useful for administering PM work orders. Includes description, and estimated time of work completion.	No additional report parameters
List of Shop Codes	List of shop codes. This report is useful when completing work orders. Includes descriptions, and record status.	No additional report parameters
List of Wage Table	List of wage plans. This report is useful when completing work orders and reviewing the wage structure. Includes grade, step, and hourly wage.	No additional report parameters
PM Schedule Generated Thru	PM schedule sorted by post's most current maintenance schedule for each piece of equipment. This report is useful for administering PM work orders. Lists post, generated thru date, property ID and name, address, equipment code and equipment ID/location, frequency and PM checklist, lead shop/2nd shop, and estimated time of completion.	• Property ID • PM Start Date • PM Due Date
PM Schedule List - Air Handler	PM schedule for Air Handlers, sorted by schedule ID, equipment code, and property ID. This report is useful for administering PM work orders. Lists PM frequency and description, PM checklist and estimated time, lead shop and 2nd shop, PM start date, PM last generated date, and seasonal stop/start dates.	• Property ID • PM Start Date • PM Due Date

PM Scheduling Listing by Eq Type	PM Schedule sorted by type of equipment. This report is useful for administering PM work orders. Lists schedule ID, equipment code and property ID, PM freq, PM checklist and estimated time, lead shop and 2nd shop, PM start date, PM last generated date, and seasonal stop/start dates.	• Property ID • Equipment ID • PM Start Date • PM Due Date
PM Schedule Listing by Frequency	PM schedule sorted by frequency code. This report is useful for administering PM work orders. Lists schedule ID, PM freq and description, equipment code and property ID, PM checklist and estimated time, lead shop and 2nd shop, PM start date, PM last generated date, and seasonal stop/start dates.	• Property ID • Equipment ID • PM Start Date • PM Due Date • Shop • Frequency
PM Schedule Listing by Shop Code	PM Schedule sorted by shop, equipment code, property ID and post. This report is useful for administering PM work orders. Lists schedule ID, PM freq, PM checklist and estimated time, PM start date, PM last generated date, and seasonal stop/start dates.	• Property ID • Equipment ID • PM Start Date • PM Due Date • Shop
PMI Checklist	PM checklist information kept on an independent data base. This form is used to assure accurate PM task completion by the employee/contractor. Includes equipment code and description, maintenance description, safety and special instructions, maintenance procedures, tools and materials.	• PMI# • Frequency

Approved Work Order Report	Lists approved PM, Scheduled, and Unscheduled WOs, sorted by shop. This report identifies work orders to review for completion. Includes WO number, WO type, request/approval/due dates, approver, priority, estimated hours, lead shop, WO tasks, requestor and phone number, and property ID/name.	• Property ID • Shop • WO Number • Request Date • Approve Date • Due Date • WO Type
Cancelled Work Order Report	Lists cancelled work orders. This report identifies work orders to be removed from the schedule for completion. Includes WO number/type, property ID/name, cancellation date and reason, shop, estimated hours, and WO tasks.	• WO Number • Cancelled Date • WO Type • Shop
Completed Work Order Costs	Lists total labor hours and costs. This report identifies how many WOs have been completed, how much money was spent on materials, contracts, labor, and how many hours were spent on labor, travel, and waiting. Includes WO number, WO type, property ID and name, shop, completion date, main task, comments, number of tasks, estimated hours, work/travel/wait hours and costs, contractor and materials costs.	• WO Number • Completed Date • WO Type • Shop
Completed Work Orders (By Agency)	Lists all PM, Scheduled, and Unscheduled WOs completed; it is sorted by agency. This report helps identify WOs that might require additional review due to unexpected high costs or a high differential between total estimated time and total labor hours. Includes WO number, WO type, request/due/completion dates, agency code, property ID/name/address, shop, work/travel/wait hours and costs, contractor and materials costs.	• WO Number • Completed Date • WO Type • Shop

Completed Work Orders (By Prop ID)	Lists all PM, Scheduled, and Unscheduled WOs completed; it is sorted by Prop ID. This report identifies WOs that might require additional review due to unexpected high costs or a high differential between total estimated time and total labor hours. Includes WO number, WO type, request/due/completion dates, property ID/name/address, shop, task description, estimated hours, work/travel/wait hours and costs, contractor and materials costs.	• WO Number • Completed Date • WO Type • Shop
Completed Work Orders (By Shop)	Lists all PM, Scheduled, and Unscheduled WOs completed by a shop in a given month. This report identifies WOs that might require additional review due to unexpected high costs or a high differential between total estimated time and total labor hours. It can also identify staffing needs for a shop. Includes WO number, WO type, property ID and name, request/due/completion dates, lead shop, estimated hours, WO task, comments, work/travel/wait hours and costs, contractor and materials costs.	• WO Number • Completed Date • WO Type • Shop
Cost per Square Feet/Meters	Lists total size of a property at a post divided by the total costs of the completed work orders for that property. This report identifies property that is either costly or efficient to maintain. Includes property ID, name, work order cost, square meters or feet and cost/unit of measure.	No additional report parameters
Current Occupants by Property ID	Lists information about who lives at a certain property. This report can be used as a reference when you create a WO for a property. Includes property ID, unit number, current occupant, number of occupants, title/rank, property address, phone number, agency, date arrived and estimated departure date.	No additional report parameters
Employee Activity Report	Lists all WOs that each employee worked on. This report identifies employee productivity. Includes employee name and ID, shop, WO number, type and work date, work order description, property name, overtime/regular work, travel and wait hours and their costs. The summary report provides the total work, travel, and waiting hours for regular and overtime hours by each employee.	• Employee Name • Employee ID • Shop

Future Occupants by Property ID	Lists all future occupants within a post. This report can be is used as reference when you create a WO for a property that will change occupants soon. You can type the occupant's name in the WO request or schedule work when the property is vacant. Includes property ID, unit number, future occupant, comments, number of occupants, title/rank, property address, phone number, agency, date arrived and estimated departure date.	No additional report parameters
List of Failure Codes	List of available equipment failure codes. This report can be is used as reference when identifying the problem on a WO or to update codes. Includes description and record status.	No additional report parameters
List of Overtime Work Costs	List of overtime work costs that have been defined. This report identifies employee productivity and patterns of overtime costs. Includes code, description, pay plan, and rate factor.	No additional report parameters
List of Repair Codes	List of available equipment repair codes. This report can be is used as reference when identifying the repair performed on a WO or to update codes. Includes description and record status.	No additional report parameters
Mean Time to Repair	Lists mean time an equipment is being repaired (if the equipment goes down two times, the amount of time is divided by 2). This report identifies equipment needing further PM scheduling to prevent break down and identifies the need for equipment replacement. Includes equipment description, model, serial number, property ID and name, WO number and type, start date/time, downtime, stop date/time, repair hours.	No additional report parameters
On Hold Work Order Report	Lists work orders that are on hold. This report identifies work orders that need attention. Includes WO number/type, property ID and name, shop, task description, on-hold date and reason. Summary report includes both PM and Unscheduled WOs and is sorted by shop.	• Shop • On-Hold Date

Open Calls - PM	Lists PM work orders that are not completed or cancelled (all outstanding, approved, and on-hold Unscheduled WOs). This report identifies work orders that need attention. Includes WO number, status, priority, type, approval, estimated hours, request/status/due dates, requestor and phone number, shop, property ID and name, and work order comments/tasks.	• Property ID • Shop • WO Number • Request Date • Due Date
Open Calls - PM & Unscheduled	Lists, by shop, PM and Unscheduled WOs that are not completed or cancelled (all outstanding, approved, and on-hold PM WOs). The report is helpful in administering shop assignments. Includes WO number, status, priority, type, approval, estimated hours, request/status/due dates, requestor and phone number, shop, property ID and name, and work order comments/tasks.	• Property ID • Shop • WO Number • Request Date • Due Date
Open Calls - Unscheduled	Lists Unscheduled WOs that are not completed or cancelled (all outstanding, approved, and on-hold Unscheduled WOs). This report identifies work orders that need attention. Includes WO number, status, priority, type, approval, estimated hours, request/status/due dates, requestor and phone number, shop, property ID and name, work order comments/ tasks.	• Property ID • Shop • WO Number • Request Date • Due Date
Outstanding Work Order Report	Lists outstanding work orders. This report identifies work orders that need attention. Includes WO number and type, request date, priority, shop, WO tasks, requestor and phone number, property ID and name.	• WO Number • Requested Date • WO Priority
Past Due Report	Lists approved WOs that are past due. The summary report is sorted by shop. The report helps administrators determine shop assignments and staffing needs. Includes WO number and type, request/ approval/due dates, approver, priority, estimated hours, lead shop, WO tasks, requestor and phone number, property ID and name.	• WO Number • Requested Date • WOType
Planned vs. Unplanned	Lists planned and unplanned work orders by post. This report summarizes the hours/ percentage of Scheduled and Preventative Maintenance work orders compared to Unscheduled WOs. The report can be used to schedule PM to prevent equipment break down. Includes WO number, date completed, regular and overtime work, travel, and wait hours, and total hours. Reported for PM and Scheduled WOs vs. Unscheduled WOs.	No additional report parameters

Shop Activity Report	Lists employee activity by shop. This report identifies employee and shop productivity and can be used to determine staffing needs. Includes WO number/status, WO type/priority, shop, employee ID and name, date of work, WO description, property name, regular and overtime hours, travel and wait hours. The report summarizes the total work, travel, and waiting hours by shop.	• Shop • WO Type • WO Number • Request Date • Status Date • Due Date • Status
Standard Task Listing	Lists standard WO tasks and the associated time estimates. This report can be is used as reference when identifying the work needed on a WO or to update task codes. Includes task description in English and the local language.	No additional report parameters
Summary - # of PM & Unsched Hours	Lists work order completion information by property. This report can be used to schedule PM to prevent equipment break down and determine facility efficiency. Includes the fiscal year, property ID and name, unit number, equipment ID and description, total number of completed PM and Unscheduled work orders and associated labor hours.	No additional report parameters
Total Maintenance By Property	The report lists the total maintenance costs (completed WOs only) for each property by building units, such as office units or ancillary structures. This report identifies property that is either costly or efficient to maintain. Includes fiscal year, property ID and name, unit number, equipment ID and description, number of PM and unscheduled work orders, labor, materials, and contractor costs of PM and unscheduled work orders.	• Property ID • Equipment ID • Equipment Desc
Unscheduled Work Order Activity Report	Lists all unscheduled work orders. This report can be used to schedule PM to prevent equipment break down and determine facility efficiency. Includes shop, priority, requestor, work order task, requestor phone, own type/ request date, property ID and name, WO number, status and date. The report is sorted by shop and work order number.	• Property ID • Shop • WO Number • Request Date • Approve Date • Due Date

Uptime vs. Downtime	Lists total time a piece of equipment is functional vs. in repair, and gives percentages on both totals. This report identifies inefficient equipment and recurring equipment problems. Information for this report is generated from the Work Order **Equipment** tab when adding/ editing a work order. Includes equipment description, model, serial number, property ID and name.	No additional report parameters
Work Order by Property	Lists work orders by property ID. This report identifies property that is either costly or efficient to maintain. Includes WO number/status/type, property ID and name, request and status date, priority, shop, WO tasks, requestor and phone number.	Tabs (**Main**, **Sorting**, and **Status**) allow report parameters to be modified by the following: • Property ID • Shop • WO Number • Request Date • Status Date • Due Date • WO Type • Status Type
Work Order Contract Costs	Lists work orders which used contractors. This report identifies contract costs and can be used to compare contractors' expenses. Includes WO number and type, property ID and name, WO description, contract number and description, contractor number and name, and invoice date and amount.	• Contract # • Status Date
Work Order Costs by Agency	Lists WOs costs by agency. This report identifies agency costs for financial planning. Includes WO number, WO type and status, WO description, requestor's name/shop, property ID and name, completion date, work/travel/wait costs, contractor and material costs.	• Agency • Status Date
Work Order Labor Costs	Lists WO labor costs for a post. This report identifies labor costs to determine how expensive a property is to maintain and to determine average labor cost for particular tasks. Includes WO number and type, property ID and name, WO description, work hours, travel hours, wait hours, and total hours.	No additional report parameters
Work Order Labor Hours	Lists WO labor hours. This report identifies average labor cost for particular tasks and properties. Includes WO number and type, property ID and name, WO description, work hours, travel hours, wait hours, and total hours.	No additional report parameters

Work Order Material Costs	Lists work orders that used a particular part. (To provide useful information, all material listed on a completed work order must have an accurate part description.) This report identifies average material cost for particular tasks and properties. Includes WO number and type, WO description, property ID and name, completion date, part description, quantity, unit cost, and extended cost.	• Parts Description
Work Order Project	Lists work orders that are associated with projects, when the project starts/ends, the funds allocated, and the balance remaining. This report identifies total cost of a project and can be used for financial projections. Includes WO number, labor costs, material costs and contractor costs.	No additional report parameters

4.5 Real Property Application

4.5.1 Property ID

Name of Column	Description
Property ID	The Property ID Number of the selected property, as shown in the **Property ID** box on the **Edit Real Property Application** dialog box.
O	The Owner Type of the selected property from top of the **Edit Real Property Application** dialog box.
Property Name	The name given to the property, as shown in the **Property Name** box on the **Edit Real Property Application** dialog box.
Address	The property address, as shown in the **Prop Address** box on the **Edit Real Property Application** dialog box.
Agency	The cabinet-level parent agency for the property, as shown in the **Agency** box on the **Edit Real Property Application** dialog box.
Use	The use of the property, as shown in the **Property Use** box on the **Property** Tab.
Status	The status of the property, either *Active* or *Retired*, as shown in the **Status** box on the **Edit Real Property Application** dialog box.
RES	Lists how many residential units, if any, are in the property.
OFF	Lists how many office units, if any, are in the property.
ANC	Lists how many ancillary structures, if any, are in the property.

4.5.2 Standard Property Information

Detail Label	Type of Requirement	Description
Owner Type	Required	Identifies the type of interest the US Government has in a property. Displayed as a prefix to Property ID (i.e. X, R, L, S, Q, and C). Codes: • X = US Government-owned (GO). Properties acquired through purchase, construction, grant (gift), transfer or exchange. Owned in Fee Simple. • R = Restricted Government-owned (RGO). Applies to land and/or buildings, which are not owned in Fee Simple by the USG (i.e. "Crown Lease", Use Agreement, etc.). If a USG building is on "R" land, the building is also "R" and the land must be linked to the building by entering the Property ID into the Associated Lot field in the Building Property record. • C = Construction work in progress (CWIP). A building which is being constructed from the ground up, under the A/FBO capital program is considered Government-owned or Restricted Government-owned, but it is not listed as "X" or "R" until it is occupied by the UASG. A Property ID number should be assigned when the ground is broken and construction begins. Ownership Type must be converted from "C" to "X" or "R" when the property is occupied. ***An addition or refurbishment is NOT considered "Construction Work in Progress" as far as RPA entry is concerned.*** • L = Long-term lease (LTL). A property for which the lease grants possession for 10 or more years. Lease Start and Lease End dates must be changed when a lease renewal is executed. • Q = Living Quarters Allowance (LQA). Applies to properties acquired through LQA program (formerly known as "Private Leases".) The employee seeks his own housing and deals directly with the landlord. • S = Short-term Lease (STL). A property for which the lease term is less than 10 years, Start and expiration dates must be changed when a lease renewal is executed. ***A lease that has indefinite renewal options which extend the use of the property to ten years or more is still considered an "S". Lease costs for "indefinite" short-term leases are direct charged to the occupying agency.***

Property ID	Required	Unique reference number assigned by post to identify each property in Web-based RPA. Formerly was called BIN or Bldg#. Property IDs, once assigned, can neither be reused nor changed. Property IDs should be assigned as follows: • Each property (lot and/or structure) that was separately leased, purchased, or constructed and is regularly used as a residence, office, warehouse, garage, etc. must have a separate Property ID. • If multiple structures exist on, or may in the future be constructed on one lot, separate Property IDs must be assigned to the lot and to each structure (applies to both owned and leased properties). • If multiple structures are leased under a single contract or exist in a Government-owned (X) or Restricted Government-owned (R) building, only one Property ID should be assigned and a residential unit record should be entered for each apartment. The Property Use is "RESMLT" for a multiple residential unit property. Since Property IDs are not automatically generated by the Web-based RPA program, post should maintain a Property ID assignment log.
Property Name	Required	A definitive name, other than an address, to describe a specific property. Property name cannot be the same as the first address line. Must be entered for all types of properties. When post holds several leases within the same physical building, whether residential, office, or functional, use the building name as a common Property Name.
Status	Automatic	The status code indicates whether the property is included in post's current housing inventory (*Active*), or if the property is not included in post's housing inventory (*Retired*). The default setting when adding a property record is *Active*. This setting is not modifiable. The status code should be set to *Retired* when a property is sold, or a lease has been terminated, or if the property was entered in error. Once the status code is set to *Retired*, no further changes to property information are allowed.
Agency	Required	The cabinet-level agency (for example: STATE). • Government-owned Property—Identifies the USG organization which owns the property (STATE, AID, or DOD only). If X, R, C, or L are selected as the Owner Type, then the Cabinet-Level Agency entered in the property record must be AID or STATE. • Leased Property—Identifies the USG organization which is funding/paying for the leased property Only cabinet-level agencies are valid entries for Agency of the Add Real Property Application dialog box. Cabinet-level and detail level agencies are valid entries on Current and Future Occupant dialog boxes.

4.5.3 Property Details

Detail Label	Type of Requirement	Description
GENERAL INFORMATION		
Prop Address	Required	Local street address of a property. City name of property must be included when it is different from the name of the managing post. Address should include number and/or letter of an apartment, condominium, townhouse, etc., if applicable. Standardize address entries as Street Name, Apt. No. When entered in this manner, post reports created and sorted on Address are sorted correctly. *The first line of the address cannot be the same as the Property Name.*
District	Optional	Post-designated description of sector, neighborhood or area where property is located.
Year Constructed	Conditional	Year that the building was constructed. Must be greater than the year 1500. Required if X, R, or L are selected as the Owner Type. Cannot be a future year.
Right to Convey	Conditional	Checked box indicates the USG holds the right to convey (sell, trade, or transfer) property to another entity. In some cases it may mean the right to sell the remaining years of leasehold to another entity. Required if R or X are selected as the Owner Type.
Const. Start Date	Conditional	Identifies the date that the OBO project construction began. Must be a past or current date. Cannot be prior to July 4, 1776 or later than today's date.
Date First Acq	Required	Date when USG first occupied a property whether by purchase or lease. This refers to the effective date of the lease, not the day the agreement to lease was signed. Once entered for a property, it does not change. • If X, R, or C are selected as the Owner Type, this date cannot be in the future. • If Q, S, or L are selected as the Owner Type, a warning is given but a future date is accepted. • A date earlier than 7/4/1776 is invalid. • For leased properties, date cannot be later than the Lease Start Date.

Land Acres	Required/ Conditional	Total lot size reported in acres. Contains *0.00* by default. The default must be amended if **Property Use** is 'LOTxxx' or if the **Owner Type** is X, R, or L. To calculate land size: If the lot or compound size is provided in feet: 1 Multiply the length and width to get square feet. 2 Divide the square feet by 43,560 to get acres. If the lot or compound size is provided in meters: 1 Multiply the length and width to get square meters. 2 Divide the square meters by 4,047 to get acres. **Conversion:** 1 acre = 4,047 square meters Square meters/4,047 = acres 1 Hectare = 2.471 acres
Associated Lot	Conditional	Identifies a land record (by its Property ID) associated with a specific building. If the land is purchased or leased prior to construction of a building, the Property ID for the land can be found in the **Associated Lot** box of the building record. The size of the land is entered into the Land record. The Property ID for the land record must be entered into the **Associated Lot** box if records for building whose land records are as follows: • A single plot of land with more than one building on it • A plot of land on which construction is in progress • A plot of land on which a building has been constructed • A plot of land which is associated with a Restricted Government-owned property (i.e., a Government-owned building is located on land which is a crown lease or held under a Use Agreement) Must be a unique Property ID if C is selected as the Owner Type. Cannot be entered if **Property Use** is 'LOTxxx' (i.e., LOTVAC, LOTMP, etc.) or land size is not blank.
Maintenance Zone	Optional	Represents a post-designated code for grouping property by location or by any other criteria.

Indefinite Use	Conditional	Indicates whether possession of a Restricted Government-owned (R) or Long-term leased (L) property is for an indefinite period of time. • A checked box indicates there is an Indefinite Use Period of the property. • An unchecked box indicates there is a definite period the property is to be used (for example, the lease has an end date).
Use Expr Date	Optional	Expiration date of leasehold or use agreement for Restricted Government-owned property (R), if applicable. See Indefinite Use if there is no expiration date.
Property Use	Required	Identifies the category of property by functional use. Residential properties should reflect the category that the Property represents in Post's housing inventory based on unit net size, for example: RESSTD, RESMID, RESEXC. If the property has more than one use, the primary or greatest use of the property is specified as **Property Use**. For example, if one or more floors of a building are used for office space and one floor or unit is used as a residence, the Property Use would be *OFFxxx* (office). • If the **Owner Type** is C, the **Property Use** cannot be LOTxxx, RES, OFF, or ANC. • Entry must be a valid Property Use code. • If multiple residences exit, **Property Use** or **Property Use #2**, must be RESMLT. The secondary use of the property should be specified in **Property Use #2**.
Entry in Feet	Optional	Select this check box to enter the measurements in feet instead of meters.

Gross Size	Required	Gross size is to be represented in square feet or meters. These measurements should represent the area of all floors enclosed within the normal outside surface of the exterior walls. In keeping with the Department metrification program, metric measurements are preferred. If, however, the local measuring system is in feet, post may enter in feet by selecting the **Entry in Feet** check box and appropriate conversions are made by the Web-based RPA system. • Not Available when **Property Use** equals "LOTxxx". • Optional if the **Owner Type** is C or Q. • **Gross size** may not equal **Net size**, unless **Property Use** is "FCTWHE" (Warehouse) or "xxxGAR" (Garage). • For multiple use properties, the sum of **Net Size** and **Net Size #2** may not equal **Gross Size**. • **Gross meters** can be entered in numeric format up to 999999.99. Gross feet can contain up to seven characters, with no decimals (9999999).
Net Size	**Required/** Conditional	Net usable area of building in square feet or meters. Net Size should include only usable space. In keeping with the Department metrification program, metric measurements are preferred. However, if the local measuring system is in feet, post may enter in feet by selecting the **Entry in Feet** check box. This disables the **Gross Size** and **Net Size** in meters boxes and enables the **Gross Size** and **Net Size** in Feet boxes. Appropriate conversions are made by the Web-based RPA system. • Not Available if **Property Use** Provided is "LOTxxx". • Optional if the **Owner Type** is C or Q. • **Gross Size** must be greater than **Net Size** (or Net Size + Net Size #2 if both are entered), for all properties, except where **Property Use** is "FCTWHE" or "xxxGAR". • Gross meters can be entered in numeric format up to 999999.99. Gross feet can contain up to seven characters, with no decimals (9999999).

Property Use #2	Optional/ Conditional	If the property has more than one use, the secondary use of the property is specified as Property Use #2. For example, if one or more floors of a building are used for office space and one floor or unit is used as a residence, Property Use would be "OFFxxx" (office), and Property Use # 2 would be "RESxxx" (residence). • If the Owner Type is C, Property Use # 2 should be entered if property is used for more than one function. • Required if Net Size #2 is greater than zero. • Not Available for a property which has a primary Property Use of "LOTxxx". • If the Owner Type is C, Property Use #2 cannot be RES, OFF, or ANC. • If multiple residences exit, Property Use or Property Use #2, must be RESMLT
Net Size #2	Conditional	Net Size # 2 is required if Property Use # 2 is entered. See Net Size above for more details.
Comments	Optional/ Conditional	This box is required to explain an entry equivalent to "Other" is entered into a detail box. It is also required if a property is acquired by Transfer. It is used to maintain any information that RPA users find useful, e.g., negotiated rent increases, description of the unit, or remarks regarding access or security. Located on various dialog boxes. Do not change any of the entries in the Comments box on the Property record if the information entered pertains to purchase documentation. This type of entry was made in A/FBO based on information located in the Title/Deed files in A/FBO and must remain in the record.
Post Data	Optional	Button that allows an individual post to define and track data needed to support Post's individual management style. See "Post Data Button" on page 15 of Chapter 2.

FINANCIAL INFORMATION		
Acq Method	Optional	Method by which the State Department or AID acquired the property. Required if the Owner Type is X or R. Click ▾ to select the method: • OBO Constructed • Gift • Lease/Purchase (Lease with option to buy) • Other • Purchase • Transfer (from another Agency) • If you select *Other* or *Transfer*, you must enter additional information in **Comments**.
Acq Cost	Conditional	Represents total purchase price of property, including closing costs, attorney fees, and other costs related to the purchase reported as the US dollar equivalent at time of purchase. • Acquisition Cost should include land and buildings if purchased together at one price. • If the land or lot was purchased and a building was constructed later, the land is entered into RPA as a separate property record and its Acquisition Cost listed in the record. The building is entered into RPA as either "Construction Work in Progress" or as a separate property. The Property ID for the land record is entered into the **Associated Lot** detail box of the structure record. • If Acq Method is Purchase or Lease/Purchase, total cost in US dollars must be entered.
Constr Cost	Conditional	Provides cost in US dollars of constructing property, including Architectural and Engineering (A & E) costs, materials cost, and project management costs. Do not include land costs, which are reported in an Associated Lot property record. TBP project managers assist posts in obtaining this information. • Must be entered in US dollars for properties constructed by the US Government (OBO Constructed). • Optional, but preferred, for properties acquired through a Transfer.

Date Purch	Conditional	Date property was purchased. If a leased property is purchased, the Date First Acquired remains the same as in the original lease record (the first time property was occupied by USG), and the date the purchase agreement is signed becomes the Date Purchased. • Cannot be a future date. • Required if **Acq Method** is Purchase or Lease/ Purchase. • Optional if **Acq Method** is Transfer. • Not Available for any other **Acq Method**.
Trans Agency	Conditional	Agency that transferred Government-owned property (X) or Restricted Government-owned property (R) to the Department of State under the Single Real Property Manager Program. • Required if **Acq Method** is Transfer. • Not Available for any other **Acq Method**.
Office Occupancy Code	Conditional	A numeric code, which describes the utilization of office space. • Required when either **Property Use** or **Property Use #2** is an office (such as Office Building Annex - OFFOBX). • The valid codes are: 0 - None 1 - DOS employees and support staff only 2 - Mixed agencies, including DOS 3 - One agency, no DOS personnel 4 - Multiple agencies, no DOS personnel
Appraisal Type	Conditional	Identifies the property appraisal as an informal estimate, or as an official valuation prepared by a professional appraise. This box should be completed any time an appraisal of a Government-owned property is obtained, even if no disposal action is completed. • An appraisal is required if **Retire Type** is *Sale*. • A second appraisal is optional. • Codes are: E- Estimate of property value P - Professional appraisal of property value
Appraisal Value	Conditional	Estimated or appraised value of a property, expressed in US dollars. Required when an Appraisal Type is indicated.
Appraisal Date	Optional	Month, day and year of property appraisal. Two appraisals are required prior to the purchase or sale of USG Real Property. • Required if **Retire Type** is *Sale* • Required if **Appraisal Type** is provided. • Cannot be a future date.
Pool, Fence Tennis	Optional	Used to indicate whether the property includes a security fence, tennis courts, or a swimming pool. Click on the check box to enter a check mark if any of these amenities are included with the property. • A checked box indicates the facility exists with the property. • An unchecked box indicates the facility does not exist. • Pool may be selected only if the **Owner Type** is X, R, or L.

4.5.4 Retirement Information

Detail Label	Type of Requirement	Description
RETIREMENT INFORMATION		
Retire Date	Conditional	Date property was disposed of through sale, exchange, or lease termination, etc. Enter actual date of retirement. Invalid if date entered in the future. Defaults to Lease Expiration Date or System Date, whichever is earlier. Required for all property being retired.
Retire Reason	Conditional	Reason for retirement of a property. Required for all property being retired. Choices are as follows: *Both Over Standard and High Cost* *High Cost* *Over Cost* *Surplus* *Other*
Retire Type	Conditional	Type of property disposal. Choices are as follows: *(NONE)* *Destruction* *Error/Duplicate entry* *Revert to Host Government* *Sale* *Lease Terminated* *Exchange* *Expropriation* • If the Owner Type is L, S, or Q, **Retire Type** cannot be *Sale*. • If the Owner Type is X or C, **Retire Type** cannot be *Lease Terminated*. • Use *Revert to Host Government* only for properties for which USG interest is RGO or Property Agency is AID.
Sale Price	Conditional	Amount received from sale of property. Enter in US Dollars. • Required if **Retire Type** is *Sale*.
Retire Comments	Conditional	General information on why the property was retired. It is recommended that comments be made for all retired properties. This information is useful when researching the history of a property. • Required if **Retire Type** is *Exchange*, *Lease Terminated*, or *Sale*. • If **Retire Type** is *Exchange*, enter Property ID of the acquired property.

4.5.5 Occupant Information

Name of Column	Description
Current Occupant	The present occupant of the selected property, as shown on the Current Occupant tab of the Edit Residential Unit dialog box.
Future Occupant	The future occupant of the selected property, as shown on the Future Occupant tab of the Edit Residential Unit dialog box.
O	The Owner Type of the selected property from the top of the Property record.
Property ID	The Property ID Number of the selected property, from the Property ID box on the top of the Property record.
Unit	The Unit ID of the selected property, as shown on the Edit Residential Unit dialog box.
Property Name	The name given to the property from the Property record.

CURRENT OR FUTURE OCCUPANT		
Name	Required	Name of the person occupying the residence. Name should be entered Last name, First name, Middle initial, then any extensions (Jr., Capt., etc.) for correct sorting on reports. • If you have permissions to Post Personnel, click and select the correct name. • If there is no current occupant, Name states *Vacant*.
Grade	Required	Personal grade of Current or Future occupant.
# of Occupants	Required	Number of official occupants. Include employee, plus spouse and dependents on official travel orders residing full-time at post. Comments may include the number of dependents residing away from home so that they can be considered in the net space allowed for the employee.
Comments	Optional	Type any useful information regarding the occupant.
Rank	Required	Rank attached to the position of an occupant as defined in housing policy. Position Rank is based on Foreign or Civil Service grade or Military Rank. See 6FAM 700 and Housing Policy for definitions and further guidance.
Date Occupied	Required	Date the tenant moved in to the property. Date Occupied cannot be later than the Tour End Date.

Detail Level Agency	Required	Detail-level agency of the parent Agency occupying a residential or office unit. For example, JUST-DEA or COMM-FCS.
Title	Required	Position title of occupant (Admin Officer, Military Attache, etc.)
Tour End Date	Required	Day Month, and Year that occupant ends tour of duty. Should be later than Date Occupied. You may need to modify the Unit Available Date at the top of the dialog box based on the Tour End Date. The Available Date must indicate when the unit will *next* be available.
TANDEM OCCUPANT		
Name	Conditional	Spouse of a primary occupant who is also assigned to post in an official working capacity. Recommended format is Last Name, First Name, Middle Initial. • If you have permissions to Post Personnel, click and select the correct name. • Agency Grade, Rank, and Title are also required.
Grade	Conditional	Personal grade of Tandem Occupant.
Rank	Conditional	Rank attached to the position of an occupant as defined in housing policy. Position Rank is based on Foreign or Civil Service grade or Military Rank. See 6FAM 700 and Housing Policy for definitions and further guidance.
Detail Level Agency	Conditional	Detail-level agency of the parent Agency occupying a residential or office unit. For example, JUST-DEA or COMM-FCS.
Title	Conditional	Position title of tandem occupant (Admin Officer, Military Attache, etc.)

4.5.6 Residential Unit Info.

Detail Label	Type of Requirement	Description
Unit ID	Required	For multiple unit properties, indicates the apartment number for each unit. • Where no specific number is available, post may enter "H" for house. • If the unit is a Townhouse, enter "TH".
# Bedrooms	Required	Number of bedrooms in the residential unit (excluding those in servants' quarters). Zero indicates a Studio/Efficiency unit.
# Bathrooms	Required	Number of bathrooms in a residential unit (excluding those in servants' quarters). Half-baths should be noted in the Res. Units Comments box.
Detached Res	Required	Check the box to indicate that the house stands alone and does not share a common surface or wall with any other residential unit. An apartment or townhouse in not a detached residence.
Comments	Optional	Comments relating to the property unit can be typed here. Any half-baths should be noted in this space.
Available Date	Required	Date the unit is *next* available for occupancy. This must be modified when current or future occupants are assigned to the unit.
Profile	Required	Represents where the residential unit falls in Post's housing inventory based on net size. The Profile Category for each property is identified by comparing each property to the Space Standards Chart in 6 FAM 720.2-4 according to the Post's Locality Code. For example, a residential unit with a net size of 1865 square feet in Locality 1 would most closely match, without exceeding, the maximum size of 1870 square feet, putting the property into category MID 3-4. In Web-based RPA, the code 00 represents properties not included in Post's Housing Profile. This includes only designated housing: RESEMR, RESDCR, RESPOR or RESMSG. A brief description of each code is found on the option list. Available codes are: 00, E2, E3, E5, E7, M2, M3, M5, M7, S2, S3, S5, S7

Dedicated	Required	Check the box if the housing is for one of the five Foreign Affairs Agency Directors -- USIS, USAID, FCS, FAS or DOD. This can only be chosen if the Resident Use is RESFCS, RESAID, or RESDAO.
Phone	Optional	The phone number assigned to a residential unit. This number remains the same even if the occupants change.
Res Use	Required	Code indication the designation of each residential unit and cannot be modified once the record is added. • For single units, the code is entered by default and cannot be changed. It reflects the Property Use from the **Edit Real Property Application** dialog box. • For residential properties with multiple units (Prop Use equals RESMLT), the code represents the Post's approved housing profile according to the Unit Net Size for the Post Locality Code (RESSTD, RESMID, RESEXC). • For dedicated units, the code should be RESDAO, RESPAO, RESAID, RESFCS, or RESFAS.
Net Meters/Net Feet	Required	Net usable area of building in square feet or meters. Net Meters/Net Feet should include only usable space. In keeping with the Department metrification program, metric measurements are preferred. If, however, the local measuring system is in feet, post may enter in feet by selecting the **Entry in Feet** check box. This disables the **Net Meters** boxes and enables the **Net Feet** boxes. Appropriate conversions are made by the Web-based RPA system.
Location	Optional	Written description of the location of the residence.
Move Out Current	Conditional	When a current occupant moves out and there is no future occupant listed, click this button. The information about the current occupant is removed from the **Current Occupant** tab, and is replaced with the word "Vacant".
Move In Future	Conditional	When it is time for the current occupant to move out and the future occupant to move in, Click **Move In Future**. The record is automatically transferred from **Future** to **Current**. You need to modify the Unit **Available Date** at the top of the dialog box based on the **Tour End Date**. The **Available Date** must indicate when the unit will *next* be available.
Entry in Feet	Optional	Select this check box to enter the measurements in feet instead of meters.
Post Data	Optional	Button that allows an individual post to define and track data needed to support Post's individual management style. See "Post Data Button" on page 15 of Chapter 2.

4.5.7 Lease Info.

Name of Column	Description
Lease ID	Lease identification number, from the **Lease #** box on the **Edit Real Property Application** dialog box.
O	The **Owner Type** of the selected property from the top of the **Property** record.
Property ID	Identification number of the selected property, as shown in **Property ID** from the top of the **Property** record.
Property Name	The name given to the property, as shown in the **Property Name** box from the top of the **Property** record.
Address	Address of the property as shown in the **Prop Address** box on the **Property** tab.
Agency	Parent agency as listed in the **Agency** box from the top of the **Property** record.
Use	Indicates the functional use of the property as shown in the **Property Use** box on the **Property** tab.
Expires	Lists the date the lease expires, as shown in the **Lease Expire Date** box on the **Lease** tab.

Lease #	Required	Unique number assigned by post for identifying contract or lease. • Required if Ownership Type is "S" or "L" • If Ownership Type is "O", the Lease Number defaults to "Private" and can not be modified. The following format is used for Lease numbering: • State = S-(3-digit Currency Code)-OBO-sequential#) • USIA = S-(3-digit Currency Code)-OBO-sequential#)-IA • AID = AID-(Country/Geographic Code)-LE-(2 digit number identifying fiscal year lease became effective)-### • All other Agencies should conform to the State format *For example: AID-681-LE-90-215*
Lease Start Date	Required	Beginning date of the current lease term. Lease Start Date must be updated each time a lease is renewed. This date differs from **Date First Acq** (Acquired) on the **Property** tab, which represents the first time a property was leased by any USG agency, and does not change when a lease is renewed.
Lease Expire Date	Required	Date the current lease term expires, disregarding any renewal option. This date must be updated each time a lease is renewed. The **Date First Acq** (Acquired) on the **Property** tab remains unchanged.
Annual Rent	Required	Amount of rent paid for one year as specified in lease. If the lease specifies payment in local currency, the **Annual Rent** amount should be reported in the local currency. When the local currency type has been selected, the conversion to US dollars is displayed to the right of **Annual Rent**.
Quote In	Required	Currency in which rental amount is quoted in the lease and entered into the **Annual Rent** box. If the lease is not quoted in US dollars: RPA uses the selected currency to calculate the annual rent in US dollars and displays it to the right of **Annual Rent**. See "Rate (Eff Date)" on page 59 if you need to modify the exchange currency rate.

Paid In	Required	Currency in which the rent is paid. See "Modify Exchange Rate Information" on page 71 of Chapter 8 if you need to modify the exchange currency rate.
Post Data	Optional	Button that allows an individual post to define and track data needed to support Post's individual management style. See "Post Data Button" on page 15 of Chapter 2.
Rate (Eff Date)	Optional	Button that allows you to keep track of what the exchange rate was at the time the lease became effective. See "Rate (Eff Date)" on page 59.
Payment Freq:	Required	Identifies how often lease payments are made. Payment options are: • Annual • Monthly • Other • Quarterly • Semi-Annual • Weekly If the payment frequency is *Other*, details of how the lease is paid must be entered into Comments.
Reference Date	Optional	This date is generally established as one to three months prior to the Renewal Notification Date to give the Housing Staff enough time to contact the landlord and exercise/negotiate a renewal option or arrange for termination of the lease prior to the Renewal Notification Date.
Renewal Notif. Date	Conditional	Date by which post must notify landlord if it wishes to exercise a renewal option for a lease. Must be after Lease Start date but before Lease Expiration Date. Required if # Renewal Options is 1 or more. Not Available if # Renewal Options is zero.
# Renewal Options	Optional	Indicates the number of lease renewal options specified in the lease contract.
Renewal Period	Conditional	Number of years and/or months in each lease renewal option period. • Required if # Renewal Options is entered. • Number entered in months may not exceed *11*.
Purchase Option	Optional	Select the box if there is an option to purchase the leased property.

Date	Conditional	Identifies the latest date a purchase option can be exercised during the lease term. • Required if **Purchase Option** is selected. • Must be later that the **Lease Start Date**, but before the **Lease Expiration Date**.
Paid In Advance	Optional	Any payment made beyond one year of the annual lease amount due, as written in the lease contract. • Entered as years/months lease has been paid in advance. • Number entered in months may not exceed *11*.
Advance Payment	Conditional	Monetary amount of payment beyond one year of the current lease amount due. • Enter the amount using the **Adv Pay Currency**. • Required if **Paid in Advance** is selected.
Adv. Payment Date	Optional	Day, month, and year advance payment was made. Not available unless an **Paid in Advance** is completed.
Adv. Pay Currency	Conditional	Three digit code identifying type of currency of advance payment. Required if **Paid in Advance** is completed.
Landlord Info	Optional	Local addresses or other contact information for Short-Term Lease (S) or Long-Term Lease (L) property as determined by post. The information can include and Agent name, address, and phone number.
Phone	Optional	Phone number of landlord or agent for Short-Term Lease (S) or Long-Term Lease (L) property.
Paying Approp	Optional	Accounting code that indicates the agency receiving the appropriation, the transferring agency (if any), the fiscal year for which the money is made available, and the major fund classification of the appropriation account.

Expend Auth	Optional	Accounting Code which identifies the source of funds used by an organization for rental payments. The code for the USDoS is divided as follows: • Characters 1-4 = Allotment—Divides the appropriation funds by country code as defined by the USDoS. • Characters 5-6 = Operating Allowance—Subdivides the country allotment according to various post-related activities, as defined by post. (The post may decide whether or not to subdivide the country allotments.) The operating allowance box is zero-filled if funds are divided directly from the country allotment.
Other Charges	Optional	Total amount of additional expenses associated with leasing a property (such as: broker fees and condominium charges). Amount should be entered using the currency in which it is paid.
Currency Code	Conditional	Identifies currency used for Other Charges. Required if there are Other Charges. Otherwise this is Not Available.
Exchange Rate	Optional	Exchange rate for lease payments, advance payments or other charges. This is automatically completed based on the rate of the selected Currency Code. The applied rate is from the Currency File in the Tables folder. If necessary, the rate which appears here can be modified.
Security Deposit	Optional	Additional money, usually one or two months' rent, held by landlord to ensure against damages by tenant. Enter amount in the currency in which it is paid.
Sec Deposit Date	Conditional	Day, month, and year security deposit was paid to the landlord. Required if amount entered in **Security Deposit**.
Sec Deposit Currency	Optional	Currency in which security deposit is paid.
Comments	Optional	Additional helpful information regarding the lease.
Local Currency	Automatic/ Optional	The number next to the Local Currency label lists the Currency Code (from the Currency table) for the local currency. The number below the Local Currency label lists the exchange rate. • When you leave the check box blank, the exchange rate is listed as US Dollars to the Local Currency. • When you select the check box, the exchange rate is listed as Local Currency to US Dollars.
New Rent Date	Optional	If there is an escalation clause in the lease, this indicates the date the new rent becomes active.

4.5.8 Ancillary Structure

Detail Label	Type of Requirement	Description
Structure ID	Required	A *unique letter within a property* that identifies the support structure of a primary residence, warehouse, office, or housing complex. The alpha character can be determined by each post. For example: Prop ID 202 may use *H* to represent a Guest House. This letter could not be used again for another ancillary structure on Property ID 202, but could be used for Property ID 203.
Structure Name	Required	Descriptive name given to the ancillary structure.
Gross Meters/Gross Feet	Conditional	Gross size is to be represented in square feet or meters. These measurements should represent the area of all floors enclosed within the normal outside surface of the exterior walls. In keeping with the Department metrification program, metric measurements are preferred. If, however, the local measuring system is in feet, post may enter in feet by selecting the Entry in Feet check box. This disables the Gross and Net Meters boxes and enables the Gross and Net Feet boxes. Appropriate conversions are made by the RPA system. • Not Available when Property Use equals *LOTxxx*. • Gross size may not equal Net size, unless Property Use is *FCTWHE* (Warehouse) or *xxxGAR* (Garage). • Gross meters can be entered in numeric format up to seven characters, including a decimal (9999.99). Gross feet can contain up to ten characters, including a decimal.
Net Meters/Net Feet	Conditional	Net usable area of building in square feet or meters. Net Size should include only usable space. All specifics pertaining to Gross Meters and Gross Feet also apply to Net Meters and Net Feet.
Comments	Conditional	This area is for any descriptive or qualifying information regarding the ancillary structure.
Entry In Feet	Optional	Select this check box to enter the measurements in feet instead of meters.
Post Data	Optional	Button that allows an individual post to define and track data needed to support Post's individual management style. See "Post Data Button" on page 15 of Chapter 2.

4.5.9 Office

Detail Label	Type of Requirement	Description
Unit ID	Required	Room or suite number assigned to office space. Where no specific number is available, post may enter *H* for house or *TH* for townhouse. • Always right justify the unit number for correct sorting on Search Screens and reports. • The Unit Number must be unique for that Property ID. For example: Prop ID 202 may use *H1* to represent an office in a house. This could not be used again for another office in Property ID 202, but could be used for Property ID 203.
Description	Required	Descriptive name given to the office unit. Examples: GSO office, Admin section
Detail Level Agency	Required	USG agency which *owns* the property (STATE, AID, or DOD only). Leased property is identified by the USG agency which is funding the lease.
Net Meters/Net Feet	Required	Net usable area of building in square feet or meters. Net Size should include only usable space. In keeping with the Department metrification program, metric measurements are preferred. If, however, the local measuring system is in feet, post may enter in feet by selecting the Entry In Feet check box. This disables the Gross and Net Meters boxes and enables the Gross and Net Feet boxes. Appropriate conversions are made by the Web-based RPA system. system. Net Size must be greater than zero. Total Net Size for all Office Units must not exceed the Net Size of the Property.
Entry In Feet	Optional	Select this check box to enter the measurements in feet instead of meters.
Post Data	Optional	Button that allows an individual post to define and track data needed to support Post's individual management style. See "Post Data Button" on page 15 of Chapter 2.

4.5.10 Reports

Report Name	Description	Comments
Data Capture Sheets	The Data Capture Sheets report provides detailed property information. It includes all of the available detail information for each particular property. This is a very large report that may take a long time to run and print.	You can choose to filter the report by Ownership Type. The Ownership Type descriptions are: • GO = Government-owned • RGO = Restricted government-owned • LTL = Long-term lease • STL = Short-term lease • CWIP = Construction work in progress • LQA = Living quarter allowance
Departing Occupants	The Departing Occupants report generates a list of occupants whose departure date is approaching.	You can choose to apply the Residential Info filter. This allows you to select the first and/or last tour end dates.
Housing Profile	The Housing Profile report gives property information based upon Ownership Type. If applicable, it also lists the Annual Rent and Residential Occupant information.	You can choose to filter the report by Ownership Type. The Ownership Type descriptions are: • GO = Government-owned • RGO = Restricted government-owned • LTL = Long-term lease • STL = Short-term lease • CWIP = Construction work in progress • LQA = Living quarter allowance
Inventory by Address	The Inventory by Address report lists all property at a selected post, sorted by address.	This report is created immediately when it is selected. No filters can be applied to limit report data.

Landlord by Property	The Landlord by Property report lists the name, address, and telephone number of the landlords. It also lists the basic property information for the specific properties which are leased from the landlords.	This report is created immediately when it is selected. No filters can be applied to limit report data.
Lease Payment	The Lease Payment report displays all leases with due dates along with the amount due.	You can choose to filter the data by Next Payment Date or Date Range.
Leased Property	The Leased Property report lists all property that is leased within a selected post.	You can choose to filter the report by Ownership Type. The Ownership Type descriptions are: • GO = Government-owned • RGO = Restricted government-owned • LTL = Long-term lease • STL = Short-term lease • CWIP = Construction work in progress • LQA = Living quarter allowance
Leases Due to Expire	The Leases Due to Expire report lists all leased property and gives information on lease start and expiration dates.	You can choose to filter the report by Lease Expiration date.
Occupant Landlord	The Occupant Landlord report lists the lease information and landlord name and address by occupant name.	This report is created immediately when it is selected. No filters can be applied to limit report data.
Office Property Book	The Office Property Book report gives detailed property information for offices at a selected post.	You can choose to filter the report by Ownership Type. The Ownership Type descriptions are: • GO = Government-owned • RGO = Restricted government-owned • LTL = Long-term lease • STL = Short-term lease • CWIP = Construction work in progress • LQA = Living quarter allowance

Property Book	The Property Book report gives detailed property information at a selected post.	You can choose to filter the report by Ownership Type. The Ownership Type descriptions are: • GO = Government-owned • RGO = Restricted government-owned • LTL = Long-term lease • STL = Short-term lease • CWIP = Construction work in progress • LQA = Living quarter allowance
Residential Property Book	The Office Property Book report gives detailed property information for residential properties at a selected post.	You can choose to filter the report by Ownership Type. The Ownership Type descriptions are: • GO = Government-owned • RGO = Restricted government-owned • LTL = Long-term lease • STL = Short-term lease • CWIP = Construction work in progress • LQA = Living quarter allowance
Vacant Residential Units	The Vacant Residential Units report gives a listing of all property without current occupants.	This report is created immediately when it is selected. No filters can be applied to limit report data.

4.6 *Post Personnel Application*

4.6.1 American Direct Hire Positions

Detail Label	Type of Requirement	Description
PER Section	Required	This is the Department of State Bureau of Personnel official section identifier. Click the list button to select the right PER section. The section number makes up the seventh and eighth numbers of the Position Number.
ID Number	Required	Enter a unique, three-digit number in the space. This number is added to the Position Number as the last 3-6 digits.
Position	Automatic	This 11-14 digit number comprises the Post Code of the Post where the position is located (the first six digits), the PER Section Code (the next two digits), and the Position Number (the final three-six digits). The number is added automatically as you add the values for the Post Code, PER Section Code, and Position Number.
Agency	Required	Identifies the primary agency funding this position. Click the list box to specify the agency to which the position is currently assigned.
Post Section	Required	Click the list box to specify the Post's section location for the position. This six-digit code specifies the position's section, unit, and sub-unit within the Post's organizational structure. This detail box also sorts the Combined Staffing Pattern. Set up the section tables according to how you wish to format the report.
Service	Required	Click the arrow to specify the type of government service to which the position is assigned. The Service Types are: Foreign Service, Civil Service, Contractor or PSC, and Military.

Pay Plan	Required	Click the list box to specify the proper pay schedule code for the position. If the service type is Foreign Service or Civil Service, the Pay Plan value is validated against Foreign Service or Civil Service classes. If Service Contractor, it can be any Foreign/ Civil pay plan.
Class / Grade	Required	Click the list box to specify a pay classification or grade level.
Pos Skill Code	Optional	Click the list box to specify the skill group required for the validated position. You must fill this detail box if Service is Foreign Service or Civil Service. Do not enter a skill code for military; no Military skill codes are in PSTAB. If the position is a PIT position with section number 97, only skill code 9040 will be accepted.
Pos Skill Ind	Optional	Click the list box to specify the skill group required for the position. If the service is Foreign or Civil, this detail box must be filled. If the service is Military or Contractor this detail box cannot be modified. If the position is a PIT position with section number 97, only skill code 9040 will be accepted by the system.
Official Title	Required	Click the list box to specify the official American position title. Required if Service is C or F; not required if Service is M or P.
Working Title	Required	Click the list box to specify the official Working Title. You may also enter Post-specific titles in this detail box.
Key Officer	Optional	A check in the box indicates that the position is held by a key officer. The Key Officer Report lists all of the positions with the Key Officer check box selected.
Staff Pattern Ind	Optional	Indicate if the position is to appear. Place a check in the box for "Yes" and leave empty for "No." The default setting is Yes.
Staff Pattern Loc	Optional	Type in three digits to specify the placement of the position within the agency/section on the Staffing Pattern Report. (For example, Chief of Mission might be in the 001 slot in the 00 section for State).
Complement Contl No.	Required	Type in the complement control number assigned by the Department of State.
Auth/ UnAuth Ind	Required	Click the arrow to indicate whether the position is authorized or unauthorized.
F / P / I Indicator	Required	Click the arrow to indicate whether the position is Full-time, Part-time or Intermittent.
DOS Funding Type	Required	Click the list box to select the Position funding type code for State Department positions.
Position Type	Required	Click the list box to specify the type of work schedule that the position has.
PIT Indicator	Optional	Indicate if the position is Part time, Intermittent, or Temporary. If 97 is the section code for the position, the program displays PIT in this detail box, and you will be unable to make an entry. Section code 98 will not generate PIT in this detail box even if the position is a PIT position.
Language	Optional	Click the list box to specify the language required for the position. If you enter a value, you must also enter values for both the Speaking and Reading detail boxes.

Speaking	Optional	Click the arrow to specify the speaking level required for the position. The range is from 0- to 5+. If a language code is entered in the Language Code detail box, Speaking and Reading must have a value.
Reading	Optional	Click the arrow to specify the reading level required for the position. The range is from 0- to 5+. If a language code is typed in the Language Code detail box, Reading and Speaking must have a value.
Language Preferred	Optional	Indicate if the employee is required to speak the language checked in this list box.
Agency	Optional	Specify the agency to which the position, employee, etc. is currently assigned.
Project	Optional	Type a Project Number on any line for which a distribution is specified.
Bureau	Optional	Specify the bureau within the agency to which the position is currently assigned.
Object	Optional	You may type in an Object Code on any line for which a distribution is specified.
Approp	Optional	Specify the fiscal appropriation for the position.
Function	Optional	Type in a function code on any line for which a code distribution is specified.
Allotment	Optional	Specify the fiscal allotment for the position.
Organization	Optional	You may type in an Organization Code on any line for which a distribution is specified.
Staffing Pattern Remark	Optional	Record any information on the position you want to appear on the Staffing Pattern Report.
Remarks	Optional	Record any desired pertinent information.
Established Date	Optional	The date that the position was established.
Vacated Date	Optional	The date that the position was vacated.
Abolished Date	Optional	The date that the position was abolished.
Expired Date	Optional	The date that the position expired.
Last Reviewed Date	Optional	The date that the position was last officially reviewed.
Reprogrammed Date	Optional	The date that the position was officially reprogrammed.
Reinstated Date	Optional	The date that the position was reinstated.
Archived Date	Optional	The date that the position was archived.
Restored Date	Optional	The date that the position was restored.

4.6.2 American Direct Hire Employees

Detail Label	Type of Requirement	Description
Date of Birth	Optional	Click the arrow to display a calendar to set the person's date of birth. American employees must be at least 18 years old. The program will reject any year less than 17 from the current year. For example, in 2002, the year 1986 would be rejected.
Sex	Required	Click the arrow to select 'M' for male or 'F' for female.
Country of Birth	Optional	Click the list box to select the Country Code or the country where the person was born.
City of Birth	Optional	Type in the name of the city where the applicant was born.
State / Province of Birth	Optional	Click the list box to select the name of the State or Province where the person was born.
State of Legal Residence	Optional	Click the list box to select the name of the state or province where the person legally resides. This also specifies the official home leave destination.
Marital Status	Optional	Click the list box to select person's marital status.
Courtesy Title	Optional	Click the list box to select the person's courtesy title (Mr., Miss, Mrs., etc.) for the applicant.
Diplomatic Title	Optional	Click the list box to select the diplomatic title of the person. The diplomatic title specifies the person's internationally recognized diplomatic title, as it should appear on printed reports.
Number of Dependents	Optional	Type in the number of employee's dependents. Entries in this detail box are added automatically when dependents are added to the employee's record on the Dependents tab (see the section titled "Dependents Tab" later in this chapter).
Dependents at Post	Optional	This detail box identifies the number of dependents living at post. The system generates this number when the At Post Indicator is marked in the Employee Dependents dialog box (see the section titled "Dependents Tab" later in this chapter).
Type of Service	Required	Click the list box to select the type of service.
Tour	Optional	Click the arrow to select the length of tour and type of leave for employee's tour of duty.
Description	Optional	Briefly characterize the tour.

Tenure	Optional	Click the list box to select the employee's level of tenure and type of appointment. The designations in the list box are not allowed for Military, Civil Service, or Contractor type of service positions.
Staffing Pattern Indicator	Optional	Indicate if the position is to appear. Place a check in the box for "Yes" and leave empty for "No." The default setting is Yes.
Employee Status	Optional	Click the list box to select the employee's status category. • An employee may be either a Contact Employee, an Eligible Family Member, and Over Complement Individual, a Part Time / Intermittent / Temporary Employee or a Regular Employee. • Employees are assigned to their positions using the **Add Employees** function. • You designate an employee's Pending assignment, that is, the employee's next assignment, in the **Change Employee Information** function.
FSC Number	Optional	Type in the FSC Number.
Staffing Pattern Remark	Optional	Record any information on the position you want to appear on the Staffing Pattern Report.
Position Status	Required	Click the list box to indicate whether the employee is Current or Incoming.
Position	Required	Click the list box to select the Position Number, together with its associated Post, Work Title, Agency, and Status.
Work Schedule	Required	Click the list box to select the employee's work schedule. The work schedule indicates whether the employee is full-time, part-time, etc.
Pay Plan	Required	Click the list box to select the proper pay schedule code for the position. • If the Service Type is F (Foreign) or C (Civil Service), the Pay Plan value is validated against Foreign Service or Civil Service classes. • If Service Type is P (Contractors or PSCs), it can be any Foreign / Civil pay plan. • If the Service Type is M (Military), the Pay Plan follows military schedules.
Class/Grade	Required	Click the list box to select a pay classification or grade level.
Step	Required	Select the new step of the employee.
Work Hrs	Required	Type in the number of hours per pay period the employee works. A pay period is a two-week period.
Salary	Automatic	This amount is entered based on the information entered in the Class/Grade and Step detail boxes.
Remarks	Optional	Type in any helpful remarks regarding Employment

Arrival Date	Conditional	Employee's actual arrival date for the assignment.
Departure Date	Conditional	Employee's actual date of departure from the assignment.
Estimated Arrival Date	Conditional	Employee's estimated arrival date for the assignment.
Estimated Departure Date	Conditional	Employee's estimated date of departure from the assignment.
Home Leave Eligibility Date	Conditional	Date the employee is eligible for Home Leave.
R&R Eligibility Date	Conditional	Date the employee is eligible for R&R.
Return from Absence Date	Conditional	Date the employee returns from an absence, such as LWOP.
Start of Absence Date	Conditional	Date the employee begin an absence, such as R&R.
Transfer Eligibility Date	Conditional	Date the employee is eligible to be transferred.
Absence from Post	Optional	List of reasons to be absent from Post. Click the list box to select the type.
Assignment Cancelled	Optional	A check in this box indicates that the assignment is to be canceled. The default setting is No.
Org. Code	Optional	The post/organization being charged.
TA Authorization	Optional	The code for the document authorizing the employee's next assignment.

4.6.3 Additional Fields for American Direct Hires

There are additional fields available for recording information about American Direct Hire employees. These fields are related to:

- Travel Messages
- Documents
- Privileges
- Languages, Training, Education
- Dependents
- Dependent Documents
- Contact Information

4.6.4 Local Positions

Detail Label	Type of Requirement	Description
Alt. Position Number	Optional	Any previous position number that may have been associated with the position.
Post Section	Required	The Post's own section location for the position. This six-digit code specifies the section, unit, and sub-unit of the position in the Post's organizational structure. Click the list button to make a selection.
Agency	Required	The agency to which the position is currently assigned. This identifier specifies the primary agency funding this position. Click the list button to make a selection.
Bureau	Optional	The bureau in the agency to which position is currently assigned. Click the list button to make a selection.
Grade	Required	The grade for this position. Click the list arrow to make a selection.
Series	Required	Series code for the position. Unless an exception grade code has been entered, the series code determines the acceptable grade for this position and the entered position grade is checked against these criteria. In addition, some series may hold more than one job title. If the series holds only one job title, the official title becomes the same as the series title. Click the list button to select the series number.
Official Title	Required	The official title of the position. Click the list button to make a selection.
Working Title	Optional	Post-specific position title.
Key Officer	Optional	A check in the box indicates that the position is held by a key officer. The Key Officer Report lists all of the positions with the Key Officer check box selected.
Grade Exception	Optional	The exception grade code. If the position is assigned a grade inconsistent with the grades permissible for the series, you must type in an exception grade code as a two-digit number. Click the list button to make a selection.
Staffing Pattern Loc	Optional	The placement of the position in the agency/section on the Staffing Pattern Report. (For example, Chief of Mission might be in the 001 slot in the 00 section for State).
Complement Contl No	Optional	The complement control number assigned by the Department of State.

Detail Label	Type of Requirement	Description
Direct/PSC/PSA	Required	Identification of the position as Direct Hire, Personnel Services Contract, or Personnel Service Agreement. Click the list arrow to make a selection.
FPI Indicator	Required	Indicates full time, part time, or intermittent status of the position. Click the list arrow to make a selection.
Supervisory Managerial Code	Required	Supervisory status of the position. Click the list arrow to select Supervisory, Managerial, or Non-supervisory.
Sensitivity Code	Optional	Level of sensitivity of the position. Click the list arrow to select Confidential, LOU, or Unclassified.
DOS Funding Type	Optional	Funding type for State Department positions. Click the list button to make a selection.
Appropriation	Optional	Fiscal appropriation for the position.
Allotment	Optional	Fiscal allotment for the position.
Staff Pat Ind	Optional	Indicates if the position is to appear on the Staffing Pattern report. Check the box for "Yes" and leave empty for "No." The default is "Yes".
Project	Optional	A project number that specifies a distribution of resources for the position.
Object	Optional	An object code that specifies a distribution of resources for the position.
Function	Optional	A function code that specifies a distribution of resources for the position.
Organization	Optional	Type an organization code that specifies a distribution of resources for the position.
Percent	Conditional	The percent of the earnings of an employee occupying this position to be distributed to the account described on this position accounting record. Required if other position accounting boxes hold data. Type a number with two decimal places. The total of all entered percentages must be 100.
English Proficiency	Optional	Click the list box to type in a recommended proficiency level in English for the position.
Education	Optional	Click the list box to type in a recommended education level for the position.
Base Hours in Work Week	Required	Type in the number of hours per week required for the position.
Reference Document No.	Optional	Type in a number that identifies work processing documents.
Staffing Pattern Remarks	Optional	Record any information on the position you want to appear on the Staffing Pattern Report.
Remarks	Optional	Record any desired pertinent information.
Effective Date	Optional	Use the calendar to select the date in which the specified action is to become effective.

Classified Date	Required	The date that the position is officially classified.
Established Date	Optional	The date that the position is officially established.
Abolished Date	Optional	The date that the position is officially abolished.
Archived Date	Optional	The date that the position is archived into the Post's records.
Expiration Date	Optional	The date that the position is to expire.
Last Reviewed Date	Optional	The date that the position was last officially reviewed.
Reinstated Date	Optional	The date that the position is reinstated.
Reprogrammed Date	Optional	The date that the position is reprogrammed with the position's official duties and requirements.
Requested Date	Optional	The date that the position is requested at Post.
Restored Date	Optional	The date that the position is officially restored.

4.6.5 Local Employees

Detail Label	Type of Requirement	Description
Employee Number	Automatic	This number is automatically generated.
Listing Name	Required	Type in the applicant's number as it would appear on reports and SF50/JF62s.
Full Name	Optional	The employee or employee applicant's complete name.
Surname	Optional	The employee or employee applicant's family name.
Sex	Optional	The employee or employee applicant's gender. Click the Sex arrow to select the gender.
DOB	Optional	The employee or employee applicant's date of birth. Click the DOB arrow to select the date.
Marital Status	Optional	The employee or employee applicant's marital status. Click the list button to make a selection.
Courtesy Title	Optional	The employee or employee applicant's courtesy title (Mr., Miss, Mrs., etc.). Click the list button to make a selection.
Appointment Type	Automatic	Codes are "L" for Limited, "T" for Temporary or "I" for Indefinite.
City of Birth	Optional	The name of the city in which the employee or employee applicant was born.
Country of Birth	Optional	The name of the country in which the employee or employee applicant was born. Click the list button to make a selection.
Citizenship	Optional	The country code of the employee or employee applicant present citizenship. Click the list button to make a selection. The latest citizenship shown in item 14 of form OF-174 is to be used. When the screen is redisplayed, the country name is shown if a code has been added.
Citizenship of Birth	Optional	The country of the employee or employee applicant's citizenship at the time of birth. Click the list button to make a selection.
SSN	Optional	The employee's social security number (example: [redacted] This box is required only if the employee is a permanent U.S. resident (see "Permanent U.S. Resident" below).
Alien Number	Optional	The employee or employee applicant's alien number. Required only if the employee is a permanent U.S. resident (see "Permanent U.S. Resident" below). Leave this box empty if the employee is not a permanent resident.
Permanent Resident Alien	Optional	Indicates if the person is a permanent resident alien. Place a check in the box for "Yes" and leave empty for "No." The default is No.
No. of Dependents	Optional	The number of dependents associated with the employee.
TCN	Optional	Indicates if the person is a Third Country National. Place a check in the box for "yes" and leave empty for "no." The default is No.
Country of Origin	Conditional	Country of Origin for Third Country Nationals. Required only if the TCN indicator is marked. Click the list button to select the proper country of origin.
Tax Exemptions	Optional	Indicates the number of tax exemptions claimed by a permanent resident alien.

FSC Number	Optional	The payroll office ID number.
Retirement Code	Optional	The retirement plan that applies to the employee. Click the Retirement Code arrow to select the plan.
Local Plan	Optional	The name of the local retirement plan the employee uses. Click the list button to make a selection.
Annuitant	Optional	The annuitant. Click the list button to make a selection.
In Duty Status	Optional	Indicates the employee's current duty status. Click the list button and select the correct category.
In Pay Status	Optional	Indicates if the employee remains on pay status in the current duty status. Place a check in the box for "Yes" and leave empty for "No."
Staffing Pattern Ind	Optional	Indicates if the position is to appear on the Staffing Pattern report. Place a check in the box for "Yes" and leave empty for "No." The default is No.
Office Street Address	Optional	The street address of the office where the employee works.
Staffing Pattern Remarks	Optional	Text box to record any desired pertinent information.
Work Week	Optional	The number of hours of the employee's basic workweek.
Grade	Optional	The employee's grade.
Appropriation	Optional	The fiscal appropriation for the position.
Compensation Plan	Required	The employee's compensation plan number. Click the list button to make a selection.
Step	Required	The employee's step in a pay grade. Click the Step arrow to make a selection.
Leave Plan	Optional	The employee's leave plan. Click the Leave Plan arrow to make a selection.
Ratio of Default Currency to US Dollar	Optional	The number of units of local currency required to equal one U.S. dollar.
Basic Rate	Automatic	Entered automatically by the system after the compensation plan is chosen.
Fringe Benefits	Automatic	Entered automatically by the system after the compensation plan is chosen.
Adjusted Basic Rate	Automatic	Entered automatically by the system after the compensation plan is chosen.
Contract Number	Required	The contract number.
Authority Cable	Required	The authorization cable number.
Allotment	Optional	Specifies the fiscal allotment for the position.
Project	Optional	Specifies the project code to which funds are allotted.
Object	Optional	Specifies which services are being paid for.
Function	Optional	The function code for the position.
Organization	Optional	Specifies which post/organization is being charged.
Remarks	Optional	Text box for pertinent remarks regarding the position.

Hire Date	Optional	The employee's date of hire.
Entry on Duty Date	Optional	The employee's date of entering on duty.
Eligibility Date	Optional	The employee's date of eligibility for being accepted into the retirement plan.
WGI Due Date	Optional	The date that the employee's WGI is due.
Service Comp Leave Date	Optional	The employee's date of entry on Service Comprehensive Leave.
Service Comp Severance Date	Optional	The date that the employee terminates the Service Comprehensive Leave.
Evaluation Due Date	Optional	The date that the employee's evaluation is due
Applicant Final Security Date	Optional	The date that the applicant receives a security clearance.
Security Certification Date	Optional	The employee's date of security certification.
Security Update Date	Optional	The date that the employee's security classification was updated.
Medical Results Date	Optional	The date that the employee officially received results from his or her medical exam.
Medical Update Date	Optional	The date that the employee received his or her medical update.
APP Expires Date	Optional	The date that the employee's APP expires.
Prior Appt. Exp. Date	Optional	The date that the employee's prior appointment expires.
Retirement Date	Optional	The employee's date of retirement.
End Probation Date	Optional	The date that the employee's probation period ends.
End Suspension Date	Optional	The date that the employee's period of suspension ends.
Category Indicator	Optional	Indicates the employee category. Uses only an alpha-numeric character.

4.6.6 Additional Fields for Local Employees

There are additional fields available for recording information about Local employees. These fields are related to:

- Documents
- Languages, Training, Education
- Contact Information

4.6.7 Nature of Action Codes

NOACs are used for all personnel actions generated by the Post Personnel system for local employees. The following is a list of NOACs the system supports.

NOAC	Description
P02	Change Number of Dependents
002	Correction
292	Return to Duty
301	Retirement - Disability
304	Retirement - ILIA
317	Resignation
350	Death
353	Termination - Mil
355	Termination - Exp of Appt
357	Termination
450	Suspension - NTE
460	LWOP NTE Leave Without Pay NTE
473	Furlough - MIL
713	Change to Lower Grade
730	Detail NTE
732	Termination of Detail
737	Frozen Grade/STEP
760	Extension of Appointment NTE
773	Ext of LWOP NTE
781	Change in Work Schedule
790	Realignment
800	Change in Data Element

NOAC	Description
001	Cancellation
130	Transfer
300	Retirement - Mandatory
302	Retirement - Voluntary
312	Resignation - ILIA
330	Removal
352	Termination - Appointment in Agency
354	Termination - Disability
356	Termination - Involuntary
386	Discharge
452	Suspension - Indefinite
472	Furlough - NTE
702	Promotion
721	Reassignment
731	Ext of Detail NTE
736	Grant GRD RET
750	Continuance NTE
772	Ext of Furlough NTE
780	Name Change Form
782	Change in Hours
792	Change in Duty Station
866	Term of Grade Retention