



CPPA MNCC eCRM

User Guide v 3.0

Effective Date: June 23, 2023



Table of Contents

REFACTOR	2
LOGGING ON TO MNCC eCRM	3
NAVIGATING eCRM	4
ACCOUNT SETTINGS	4
CREATING A CASE	5
SUBMITTING A CASE TO TSC	7
TRACKING YOUR CASES	8
CREATE A CUSTOM CASE LIST	8
ADDING OTHER CPPAS TO A CASE	9
HOW TO CHANGE OWNERSHIP	9
CPPA ACTION REQUIRED	9
HOW TO ADD INTERNAL COMMENTS	10
DOCUMENTING CASE RESOLUTION	10
EMAIL AND eCRM	10
BUILD, VIEW, AND PRINT A REPORT	10
QUICK LINKS	13

REFACTOR

The MNCC Refactoring of Personnel and Pay (PERSPAY) and the Human Resource Service Center (HRSC) into a single application (MNCC). The refactor has also resulted in:

- Consolidated 445 queues down to 33.
- The approval process was removed.
- New process to submit a case to the queue using RT/PC/Routed to fields.
- The new Case tracker provides the functionality to move the case through the process.
- Status
 - Some statuses have been removed.
 - \circ $\;$ The matrix for who can use what status has been updated.
- The case layout out has been updated with some fields being removed.
- Updating the Case Team to only include CPPAs.
- Removing Approval History from the case layout.

The "22 June 2023 Go Live" is the first of three refactor increments.





Directly to the **Home Tab** unless you have both **MNCC & PRIMS2.**

NAVIGATING eCRM

	Q, Search						*• 🖬 🎕	🕸 يە 🤉	(\mathfrak{A})			
MNCC	Home	~										
Cases Recently Viewed C 2 items - Sorted by Case Number - Fi Viewed - Updated a few seconds ago	ases tered by Recently	Q, Seard	w Cha	nge Owner	Printable Vi	ew C'				You wi where	ll log onto t you logged	he same tab off.
1 024607 test test	L PERSPAY	Status V	Medium	Date/T ∨ 4/25/2023	PP LEG	•				To mo	ve between	functional
2 024607 testAct	ive PersPay E	Submitted	Medium	5/3/2023 9	PP ESO	•			- 1	tabs us	se the drop	down and
Contact Neccos Recently Viewed C J items - Sorted by Name - Filtered b Updated a few seconds ago	ontact Records	Q, Search	h	New	Printable Vi	ew Q s	earch				*•	? ‡ 👂 🕱
Name † 🛛 🗸 A	ccount Name \lor Ph	L V Emai		MNCC		Cases	~					
1 testActive te	stactive	testA	8	Cases Recently Vi	ewed -	<u>,</u> 🖸	Home				New	Change Owner
3 testActiveMale3010 te	stActiveMale3010	test	2 items	Updated a few s	econds ago	6	Cases	٩	Search th	is list	\$ • III •	₽
Cases by Origin and Open	Status		1	Case N 02460751	V Subject	t 🗳	Contact Records Accounts		V Stat	us	Date/Time 0 4/25/2023 6:47 PM	Case Owner Al V
0 70	140 true		2	02460794	PersPa	y ES 🔡	Reports		Sub	mitted	5/3/2023 9:53 AM	PP ESO
						0	Dashboards					

Favorites - $\boxed{}$ - Add contact records or cases to your favorites list.

Global Actions – 🕀 - Quick access to start a New Contact, New Case, New Note.

Guidance Center – - If you were assigned learning it would be located here.

Salesforce Help & Training – ? - Another source for system help.

Setup – 🧖 - (Reserved for Salesforce administrators)

Notifications – 📮 - Bell icon, for any cases you have submitted.

View Profile – 🥙 - Your specific customizations. Use to get to Account Settings.

ACCOUNT SETTINGS

Step 1: Click your "Avatar" in the upper right-hand corner Step 2: Click the word "Settings"

Step 2: one word "sectings" Step 3: On the left-hand side of the screen, click "Advanced User Details". If prompted to "view in classic mode" click the link to do so which will open up a new tab.

Step 4: Review key items such as Queue Membership, Role, and Email to ensure you have the correct information listed. Remember to switch back to the Lightening Experience when done. If something appears wrong, you can edit certain parts of your account, but other parts will require a new SAAR or an administrator to fix.

	★▼ ■ � ? ☆ !	i 🛞
₩	navynpcdev027.sandbox.my.salesford <u>Settings</u> Log Out	ce.mil
DISPLA	Y DENSITY	
~ co	mfy	
Cor	mpact	
OPTION	vs	
Switch Add Us	to Salesforce Classic 👩 sername	

1ÓI

4

CREATING A CASE

To create a case, add members, upload documents, and route to the appropriate processing center follow these steps.

On the "Cases" screen/tab, click the "New" button.

	Q Search			*- 🖿 🌣 ? 🌣 🤔 🗱	
MNCC	Cases	~			
Cases Recently Viewed 2 items • Updated 5 minutes ago	Ŧ		Q Search this list	New Change Owner	
Case N 🗸 Subje	ct		 ✓ Status 	\checkmark Date/Time O \checkmark Case Owner Al \checkmark	
1 02460751 PERSF	AY Case RM		Submitted	4/25/2023 6:47 PM PP LEGAL	
0 00460704 DoreD	W ECO		Cubmittad	5/2/2022 0/52 AMA DD 550	
		New Case: Per	sPay Case		
				* = Required information	
scription					
Internal Comments					
Caue Status Comment				Fill in case deta	ils
				in the appropria	ate fields
* Subject					
Description				within the "Des	cription
ase information				(5	
Case Number			Recuest Type	(Examples on no	ext page)
			-Nore	*	
		1	New all dependencies		
Date Submitted		:	voblem Code		
			-Nore	Ŧ	
- smeanve Date			-None	v	
		-	Anne all dependencies		
Case Origin			Status		
None		Ŧ	Initiated	*	
Priority			CPRA. UIC		
Medium		*	Search Accounts	Q,	
Web Smail			Contact Name 0		
			Search Contact Records	Q,	
		2	zue Oumer É		
elated Users			······································		
Learning .			998. Alternate Email		
			and the second se		

Q

Q

	Q Search				*	₿ 🎄 '	? 🏚 🖞	
MNCC	Cases	~	* 💼 New Case:	PersPay Case ×				
		N	ew Case: Per	sPay Case		*		
				*	= Required Informatio	'n		
	Description							
	Internal Comment	s			5			
	NOTE: This fie	ld may conta	in PII.					
	Case Status Comm	ient						
	*Subject				5			
	LAST FIRST							
	* Description				5			
	What the Sailo NO PII ir	r needs to ha n this field!!!	ve taken care of.		<i>h</i>			
	Case Information	ı						
	Case Number			* Request Type MILPAY	5			
				View all dependencies				
	Date Submitted			* Problem Code	5			
				Basic Allowance for I	Housing (BA 🔻	_		
		C	ancel Save &	A New Save				
ibiect Line for	mat: IASTNAM		TNAME					
ibject Line for								
			U	se the drop	down menu	IS		
* Request Type			້ to	o select requ	uired options	s. *	Request Type	
Transients View all dependencies			• D	epending or	n the choice		Transients	
			_ in	the "Reque	est Type"		ew all dependent	ues.
* Problem Code				ntions may	be limited in		Problem Code	
View all dependencies			th	e "Problem	Code" or th		Students	
Routed To				Poutod To"			None-	-
None			-	vouleu 10,	some may		Activity	Gains (ACC - 10
View all dependencies			a	uto-populat	e.		Activity I	Loss
* Status							PRECON	1s
Initiated			•				✓ Students	5
* CPPA UIC							CPPA UIC	
Search Accounts			Q				Search Acco	unts
*Contact Name 🕚						*	Contact Name	0
Search Contact Record	s		Q				Search Conta	act Records

Set "Status" to "Initiated"

Enter your UIC in the "CPPA UIC" field.

Locate and fill in the "Contact Name" for the Service Member requesting the case. You can search by SSN, DODID (preferred), or Name (not preferred). Again, this is the Member's info NOT the CPPAs.

"Effective Date" click the Calendar icon and enter the effective date of pay. Identifies when this transaction took/takes effect. (i.e. – Separation – date must reflect date member starting PTDY/Terminal Leave)

The "Submitted Date" is auto-populated.



TRACKING YOUR CASES

CPPAs are only able to see cases they have created **or** cases where they were added as a team member.

There are two preferred ways for CPPAs to find cases to which they are assigned:

			Q Search						
MNCC	Cases	\sim							
Cases Recently Via 2 items 2 items 1 1 2 MNCC Tra 2	wed F								
MNP FATT MNP OPS My Open	ases			***	MNCC	Home	Searc	ch: All ▼ Q. CPPA T1FS CPPA Public Dashboard + LF	F
MyApps_1 Navy Rese NETC N33	chnical Support ve Project Office (NRPO) Detailers			2 item	Cases Recently View	ed Cases per • Filtered by Re	0	Dashboard T2ASME CPPA Public Dashboard + DD Dashboard T1FS CPPA PUBLIC DASHBOARD Dashboard	0 ite
				1	Case ↑ ∨ 02460751	Contact Name		Copy of CPPA CASE TRACKER Report CPPA action required Report	
ou can pin "	"the list to ke	ep it availa	ble and	2	Contact Records	ed Contact	iii i	MNCC CPPA Tier 1 Cases List PP MILPAY-TSC NRFK CPPA LEVEL II Cases List	
en select the	case you want	to process:	:	3 item	ns • Sorted by Name • Filt	ered by Recently \		CPPA Cases List	

(If you know the Sailor's name or case number, you can use the search field.)

CREATE A CUSTOM CASE LIST

- 1. On the "CASES" tab, click the "Gear" icon for the LIST VIEW CONTROLS.
- 2. Select "New" or "Clone".
- 3. Give your list a name and select who can see your list.
- 4. Click the "Gear" icon for the LIST VIEW CONTROLS again.
- Click "Select Fields to Display". Highlight the field to be added (from left field) or removed (from the right field) use the middle triangles to make the move. Visible fields can be rearranged by highlighting then moving up/down using the triangles on the right. Click "Save".





6. Filters can be added. Click "**Add Filter**". In the pop-up under "Field" select the column that is to be filtered, followed by the operator and the Value (may be more than one value). Click "**Done**". May add multiple filters, once complete select "**Save**". You may remove any filters later by clicking the "x" to the right of the particular filter.

ADDING OTHER CPPAS TO A CASE

To add a Case Team Member use the "CPPA" field in the "Related Users" section on the Details tab for that particular case.

- Click on the pencil icon.
- Search for the CPPA in the box.
- Select the CPPA's name to add.

To delete a current Case Team Member, click the CASE TEAM MEMBERS, click the next button at the end...find the number of the CPPA you wish to remove, enter the number in the box at the bottom and click Next.

HOW TO CHANGE OWNERSHIP

		Q Search.					* -	•	? 🌣 🌲 🚷	L Í						
***	MNCC	Cases	~							If		are the Ca	se Ow	ner (c	urre	ntly PP
1 item	Cases Recently Viewe selected	d Cases 🔻 🌶		Q. Search this lis	t	N	lew Ch	hange Owner	Printable View		EGAI nside t	L), you se the case's	lect the box or	e case the l	by c left (licking places
	- Case ↑ ∨ (Contact Name 🛛 🗸	Subject	 ✓ Status 	~ Pr	rior ∨	Date/Ti	me Ope 🔻	Case Owner Ali	ias th	ne che	ck mark)	then se	elect (Chan	ge
1	✓ 02460338 1	testActiveMale533	PersPay Legal Restricted	Submitte	d M	ledium	4/13/20	23 12:49 PM	PP LEGAL	0	wner					
2	02460343	testActiveFemale633	Restricted PersPay Cases es	o Submitte	d M	ledium	4/14/20	23 7:00 AM	PP ESO							
3	02460751 1	test test	PERSPAY Case RM	Submitte	H M	ledium	4/25/20	23 6:47 PM	PP I FGAI							
Or,	,				0 0 0 0 0 0 0 0 0	MNC	C	Case	Q Search	✓ 🖽 testAct	tiveFemale633	v X	*•	 	\$	¥
You	a can click	the down a	rrow box at th	he		Cases Recer	ntlv View	ed Cases					New Chang	je Owner	Printable	View
righ	nt side of th	e case line	and select "C	hange	4 item ago	s • Sorted I	by Case Numl	ber • Filtered by	Recently Viewed • Upda	ted 4 minutes	Q. Sear	ch this list	\$			¢ 🔻
Ow	ner" (must	t still have	been the curre	ent		_	Case 🕇 🗸	Conta 🗸	Subject \lor	Status 🗸	Prior \vee	Date/Time Ope 🗸	Case Owner	Alias 🚿	~	
case	e owner).				1	0	2460338	testActive	PersPay Legal R	Submitted	Medium	4/13/2023 12:49 PM	PP LEGAL			
					2	0	02460343	testActive	Restricted Pers	Submitted	Medium	4/14/2023 7:00 AM	PP ESO		Edit	
					3		2460751	test test	PERSPAY Case	Submitted	Medium	4/25/2023 6:47 PM	PP LEGAL		Delete	
					4	0	2460794	testActive	PersPay ESO	Submitted	Medium	5/3/2023 9:53 AM	PP ESO		Chang	e Owner

CPPA ACTION REQUIRED

Any case returned with a status of "CPPA Action Required" will generate a notification (bell icon). Click the bell icon and select the case to open.

Review all the case comments to be sure what is being requested. Provide additional/updated documents or required comments; review the Guidance for Success then add a comment in the "Case Status Comment" field. Clear comments save time. Click "**Save**".

Click "Submitted" status, and then click "Mark as Current Status". The case is now back in the queue.

HOW TO ADD INTERNAL COMMENTS

III MNCC	Home 🗸 🗰 6224	Q Search	Open the case and select th "Details" tab and click on th	ne he""
Key Fields CPNA Trainur 1 Case Status Comment)	Action Regulated Assigned Supervisor Review Pending East Guidance for Success Once the case has been updated with the ad Status button.	pencil icon in the "Internal Comments" field and enter comments and save.	your
Sailor Record	Phone	02241553	Case Comments (3)	
D0010 0000000004	Mobile	+ folion Edit •	Trainer Z Neelice	
Mailing Address	Email	Details Feed Activity	Created Cute: 4/9/202 Comment: Case Su	
Rate	uc	~ Description	Public	
Paygrade	Activity Name	Internal Comments	Created Date: 4/9/202 Commerci Return 1 Trainer 1	
Click Next to display SSN		Subject .	Public: Created Date: 4/9/202	

DOCUMENTING CASE RESOLUTION

As a CPPA, it may be rare for you to close a case it, but if you do, adding a Case Resolution is mandatory in MNCC. This clearly states the end state of the ticket and can show why you made your decision. Even the most basic case may be reviewed at some time in the future to answer a question. A clear resolution comment is the key. Additionally, after a case is closed the Key Supporting Documents and comments are locked.

EMAIL AND eCRM

Always remember the email function within eCRM is **NOT** as secure as NMCI's Outlook email (always encrypt emails containing PII). You may **NOT** send any PII through the eCRM email tool.

NOTE: Document any emails you send using Outlook within the case's internal comments, (cut and paste).

NOTE: If using eCRM email, MNCC will check that the email address is still valid before sending.

NOTE: If corresponding with someone who has MNCC eCRM access in another office about a case use the case number to minimize the amount of PII being sent

BUILD, VIEW, AND PRINT A REPORT

There are already over 120 reports and 40 report types.

		Q Se	earch	
MNCC	Home		\sim	
		Home		New
0 items • Sorted by Case Number • Fi	ltered	Cases		Search this
		Contact Re	cords	Deignite
		Accounts		
		Reports		зу.
	0	Dashboard	5	

MNCC			Q Search	n						ð 5 🌣 🛉		
		Reports	~	/								
eports ecent item						Q Searc	h recent reports		New Report	New Folder	\$	
REPORTS	Report Na	ime 🗸	Description	~	Folder	✓ Created	By 🗸 🗸	Created On	√ Sub	scribed		
Recent	Cases by C	rigin and			Service Dashboard	s		11/13/2018	10:32 AM			
Created by Me	Open State	15			Reports							
ck " New Re j	port".											
		Q Se	arch				*• • •	ı تې (
MNCC	Repo	rts	✓ 💼 Report E	Builder	~ ×							
									×			
		_	_	<i>c</i>		_	_		You c	an search t	hrough	all
				Create F	Report				availa	ble report	s or sear	ch by
Category		Select a Repo	ort Type						repor	t name.		
Recently Used		Q <u>cas</u>					Q					
All												
Accounts & Cont	tact	Report Type Na	me			Category			^			
Records	. E	Contact Records	with PFAs with BCAs	5		Custom						
Customer Suppor Reports	ort	Cases				Standard						
Activities		Case Lifecycle				Standard		•				
									_			
						C	reate Repo	rt				
ce you locat	te the r	needed) —	Cale	act a Papart Tu	C	reate Repo	rt		Details		
ce you locat port click the	te the r e " Start	needed : Report '	,	Sele	ect a Report Ty	C	reate Repo	rt		Details		
ce you locat oort click the tton.	te the r e " Stari	needed t Report '	,	Sele	ect a Report Ty	C	reate Repo	rt ©		Details	es dard Report	Туре
ce you locat port click the tton.	te the r e " Starl	needed t Report '	,) —	Sele	ect a Report Ty cas ilter (0)	C	reate Repo	ert ©		Details Case Start Repo	es dard Report	Туре
ce you locat port click the tton.	te the r e " Starl	needed t Report '	,	Sele	ect a Report Ty cas iiter (0) port Type Name	c rpe FAs with BCAs	reate Repo Cate	gory gom		Details Case Start Repo	es dard Report	Туре
ce you locat oort click the ton.	te the r e " Start	needed : Report '	,	▲ Sele	ect a Report Ty cas ilter (0) oort Type Name itact Records with P es	Ppe FAs with BCAs	reate Repo Cate Cust	rt © gory om dard		Details Case Stan Start Repo	es dard Report ort 💌	Type i≣ Fie
ce you local ort click the ton.	te the r e " Star l	needed t Report '	,	Sele Cor Cas Cas	ect a Report Ty cas iiter (0) bort Type Name itact Records with P es e Lifecycle	C PPE FAs with BCAs	reate Repo Cate Cust Stand	rt © gory om dard dard		Details Case Start Repo O Deta	es dard Report ort 🔍	Type :≡ Fie
ce you locat port click the tton.	te the r e "Start	Report	,	Sele Cor Cor Cas	ect a Report Ty cas ilter (0) oort Type Name itact Records with P es e Lifecycle	FAs with BCAs	Cate Cust Stand Stand	gory om dard dard	With "Up	Details Case Start Repo O Deta Created Ru	es dard Report ort • ils you ew Auto	Type ∷≣ Fie matic
ce you local port click the tton.	te the r e "Start	eeded Report'	Report Builder	Sele Reg Cor Cas Cas	ect a Report Ty cas ilter (0) nort Type Name itact Records with P es e Lifecycle	C Ppe FAs with BCAs	Cate Cust Stand Stand	gory om dard dard	With "Up	Details Case Start Repo O Deta Created Ry date Previo	es dard Report ort 🔍	Type ∷≣ Fie matic
ce you local port click the tton. MNCC	te the r e "Start Reports	Report Report	Report Builder	Sele Q T F Rep Cor Cas Cas	ect a Report Ty cas iiter (0) wort Type Name ttact Records with P es e Lifecycle	C ppe FAs with BCAs	Cate Cust Stand Stand Cust	gory om dard dard	With "Up selected, time.	Details Case Start Repo O Deta Created Ru Odate Previo the list wil	es dard Report ort 🔍	Type ∷≡ Fie matic e in re
Ce you local port click the cton.	Reports	Report'	Report Builder	Sele Rep Cor Cas Cas Cas Cas the report to	ect a Report Ty cas iiter (0) port Type Name ttact Records with P es e Lifecycle e Lifecycle	C PPE FAs with BCAs Save & Run Save	Cate Cust Stand Stand Cust Cust	gory om dard dard Run kcally	With "Up selected, time.	Details Case Start Repo O Deta Created By odate Previo the list wil	es dard Report ort v ils / You ew Auto I update	Type i≡ Fie matic e in re
Ce you local port click the tton.	Reports	Report' Report' Q Search V Previewing a limited Case Owner V	Report Builder	Sele Sele Cor Cas Cas Cas Cas Cas	ect a Report Ty cas iiter (0) port Type Name itact Records with P es e Lifecycle @ Add Chart 1 see everything. Date/Time Opened V	FAs with BCAs	Cate Cust Stand Stand Cust Cust Cust	gory om dard dard Run ically	With "Up selected, time.	Details Case Start Repo O Deta Created Ru Odate Previo the list wil	es dard Report ort • ils (You ew Auto I update	Type ∷≣ Fie matic e in re
Ce you locat port click the tton. MNCC Tr Cases Report 2 Case Outline Filter oups I GROUP ROWS	Reports	Report'	Report Builder ■ Report Builder subject Selection Board Supe Due Empil T=1 PD	Sele Sele Cor Cas Cas Cas Cas Cas Cas Cas Cas	ect a Report Ty cas iiter (0) oror Type Name ttact Records with P es e Lifecycle Add Chart	FAs with BCAs	Cate Cust Stand Stand Transformer Close Close Cust Close	gory om dard dard	With "Up selected, time.	Details Case Start Repo O Deta Created Ru date Previo the list wil	es dard Report ort v ils y You ew Auto I update by case	Type ∷≣ Fie matic e in re
Ce you local port click the ston.	Reports	Report Report	Report Builder number of records. Rur Subject Selection Board Super ePar Email Test DO	Sele Rep Cor Cas Cas Cas Cas v X the report to v visor	ect a Report Ty cas iiter (0) bort Type Name ttact Records with P es e Lifecycle	FAs with BCAs	Cate Cust Stand Cust Cust Close Close Close Close	gory om dard dard Run ically	With "Up selected, time.	Details Case Start Repo O Deta Created Ru date Previo the list will	es dard Report ort val ils y Yau ew Auto I update by case	Type ∷≣ Fie matic e in re
Ce you local port click the tton.	Reports	Report'	Report Builder number of records. Run Subject Selection Board Super ePar Email Test DD Process Release 9.0.0	Sele Rep Cor Cas Cas Cas Cas the report to where the report to the report to	ect a Report Ty cas iiter (0) port Type Name itact Records with P es e Lifecycle	FAs with BCAs	Cate Cate Custo Stand Stand Cose Cose Cose Cose Cose	gory om dard dard Run ically	With "Up selected, time.	Details Case Start Repo O Deta Created By date Previo the list will group rows on. Select	es dard Report ort v ils (You ew Auto I update by case the "CAS	Type ∷≡ Fie matic e in re SE
Ce you local port click the tton.	Reports	Report' Report' Report' Support Group Support Group poort Group poort Group	Report Builder Report Builder Subject Selection Board Super ePar Email Test DD Release 9.0.0 Release 9.0.0	Sele Rep Cor Cas Cas Cas Cas the report to visor	ect a Report Ty cas iiter (0) port Type Name itact Records with P es e Lifecycle	C pe FAs with BCAs Save & Run Save Age © Open © 0 0 2,662 © 2,662 © 2,659 ©	Cate Cust Stand Stand Tose ? \$ 1	gory om dard dard	With "Up selected, time. You can g informati INFORMA	Details Case Start Repo O Deta Created By date Previo the list will group rows on. Select - ATION" dro	es dard Report ort v ils (Vou ew Auto I update by case the "CAS pdown f	Type ∷≡ Fie matic e in res
Ce you locat port click the tton. MNCC T Cases Report ✓ Case Outline ▼ Filter roups GROUP ROWS Add group Case Owner Case Owner Case Owner Alias Case Owner Role	Reports	Report' Report' Report' Support Group Support Group port Group port Group port Group	Report Builder Rumber of records. Rur Subject Selection Board Supe ePar Email Test DD Release 9.0.0 Release 9.0	Sele	ect a Report Ty cas iiter (0) oort Type Name itact Records with P es e Lifecycle	FAs with BCAs	Cate Cust Stand Stand Close Close Close Close	gory om dard dard clard	With "Up selected, time. You can g informati INFORMA criteria.	Details Case Start Repo O Deta Created Ry date Previo the list will group rows on. Select ATION" dro	es dard Report ort • ils / You ew Auto I update by case the "CAS	Type ∷≡ Fie matic e in rea

				Q search.						i tắt	÷¢
	MNCC	Repor	ts	Rep	ort Builder 🔍 🗙						
RE Ne	ew Cases Report 🖌 🕐	ases			•	C & Add Chart	Save	a Run	Save 💌	Close	Run
	≡ Outline ▼ Fil	ters 📵	O Previewing a lin	nited number	of records. Run the report to see everything.				Update P	review Autor	natically
	Grouper	- 1	Case Owner 1		Subject	Date/Time Opened	Age 💌	Open 💌	Closed 💌	i	
	GROUP ROWS		PP ACTIVITY GAINS	EAST (1)	PP case	3/1/2023 4:45 PM	19				
	Add group	Q	Subtotal					-	-		
	Case Owner	×	PP ACTIVITY GAINS Subtotal	OCONUS (1)	PP Case submission	2/23/2023 11:23 AM	168				
	GROUP COLUMNS		PP ACTIVITY GAINS	WEST (2)	PP Case submission/Dual # 7	3/2/2023 9:31 AM	2				
	Add group	Q			Clerk in the refactor	2/22/2023 4:44 PM	187				
			Subtotal								
			PP ESO (5)		Create Restricted PersPay Cases	3/2/2023 10:30 AM	1				
	Columns	•			NOT A TEST MAP PKG TEST, BUT NOT A TEST	3/2/2023 10:22 AM	2				
	Add column	Q.			Create Restricted PersPay Cases	3/2/2023 10:45 AM	1				
	Subject	×			PP Case submission/Dual # 9	3/2/2023 9:44 AM	2				
	Date/Time Opened	×			Create Restricted PersPay Cases	3/2/2023 8:38 AM	3				
	# Age	×	How Courts	Detail Ro	aut CO Subtotals CO Grand Ta						

i.e. – Cases grouped by Case Owner.

					Q S	earch			
	MNCC		Reports	;		\sim	📓 Report Builder	~ ×	
R N	EPORT ▼ lew Cases Report	Cases)					5 0	
>	≡ Outline	Filters	1	🕑 Pi	reviewing	a limited	number of records. Run	the report to s	see e
	Groups	-			Case Or	wner 💌	Subject	-	Dat
				1	Support	Group	Selection Board Super	visor	
	Add group		0	2	Support	t Group	ePar Email Test DD		
	, laa groopin			3	Support	t Group	Release 9.0.0 GIMME		
				4	Support	t Group	Release 9.0.0		
	Columns			5	Support	t Group	Release 9.0.0		
	Add column		0	6	Support	t Group	Selection Board Agent	03022023	
	Care Ourner		~	7	Support	t Group	ePAR Email Test CH		
	Case Owner		× 8		Support Group		test zc surveyt		
	Subject		×	0	<u> </u>	~	0.1.10		

You can add columns to your report by selecting "Add Column" under Columns section.

Available items can be added to your report.

Items already within your report can be removed by clicking the "x" after the item below the "Add Column..." box.

-Filters:		REPORT V			ts v	🖬 Report Builder 🗸 🗸
Adding Filters sets the report to display only the requested info.		> sp	> = Outline Filters 3		Previewing a limited number of records. Run the repor	
Click "Filters", Click "Add Filter" select needed filters.			Filters Add filter			
(Note: The default Units is in hours.) 🛛 🗖		\rightarrow	Show Me All cases Opened Date Jun 26, 2022 - Ar Units Days Queue Name starts with MyAp	ug 26, 2022	Edit Filter Units Hours Minutes	×
Once parameters are set click the "Run" by the area.	utton in top right of	Q Searc	Support		Hours Days	×⊽ ⊞ ⇔ ? ¢ ≜ (a
To save the report, to be run later, click the drop down arrow (top right) next to "Edit". Then click "Save". Update report name, also advisable to add a thorough description, and where you want to look for it next time; can create your own folder (button bottom left of select	Image: MNCC Reports Image: Report Builder Image: X REPORT I 30 Day Monthly Cases Jul 26 to Aug 26 Image: Cases Ima					
	Bill Filters Eilers Add filter Q Show Me All cases Opened Date Jun 26, 2022 - Aug 26, 2022		Tickets for JUN 26 2022 to AUG 26, 2022			
area).	Units Days Queue Name starts with MyApps_Technical # Support	a.				

If you want to save a copy of the report click "Export" vice "Save".

QUICK LINKS

MNCC Website https://flankspeed.sharepoint-mil.us/sites/MyNavyHR_MNCC/

CPPA Resources https://www.mynavyhr.navy.mil/Support-Services/MyNavy-Career-Center/Pers-Pay-Support/CPPA-Resources/

CPPA Pro-to-Pro Cell can be reached Mon-Fri from 0700-1900 Central Time by calling 1-833-330-6622 and pressing 2 when prompted.

eCRM **Refactor Training** for CPPAs: <u>https://rise.articulate.com/share/3XU1GWwraDqJtsXnNUCRrjPreIJ6pLAO#/</u>