

**RELEASE**

**4.2**

**MAY03**

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**COMPANY  
INFORMATION  
SYSTEM**

# Summary of Changes

## Version 4.1

- UMR Report – moved/renamed items
- Morning Status Report – add display of Att/Det Unit
- Morning Status – add check to insure that soldiers who are attached or detached have a unit indicated
- Initial Setup – forces all screens to maximize
- PT – fix problem that incorrectly calculated 2M run time/score
- Height/Weight – fixed display of block 11H on DA 5501 Female Body Fat worksheet.

## Version 4.2

- Complete redesign of Search for Soldier
  - Fix “rounding” problem on PT Report
  - Redesign of how Age is calculated in PT and Height/Weight screens. This is a work around a limit of MS Access. MS Access has a limit to the number of table that can be open at once.
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# Table of Contents

<b>Chapter 1 Introduction .....</b>	<b>1</b>	<b>4-1. Admin Data .....</b>	<b>20</b>
<b>1-1. General .....</b>	<b>1</b>	a. Adding Soldiers .....	20
<b>1-2. Using a database .....</b>	<b>1</b>	b. Slotting Soldiers .....	20
a. General .....	1	c. Deleting Soldiers .....	20
b. Terms .....	1	d. Alpha Roster .....	20
c. The "Esc" Key .....	2	e. Height/Weight and Tape .....	21
d. Saving A Record .....	2	f. Personal Information Sheets .....	22
e. The "Tab" Key .....	2	g. Morning Status .....	22
<b>Chapter 2 Initial Setup .....</b>	<b>3</b>	h. Unit Manning Report .....	23
<b>2-1. General .....</b>	<b>3</b>	i. Dependent Information .....	24
<b>2-2. Welcome Screen .....</b>	<b>3</b>	j. Basic Information – Personal .....	24
<b>2-3. Importing / Restoring from previous version .....</b>	<b>3</b>	k. Basic Information – ID Tags .....	25
a. From Version 3 .....	3	l. Basic Information – Military .....	25
b. From Version 4 .....	4	m. Basic Information – Clothing .....	26
<b>2-4. Initial Setup .....</b>	<b>4</b>	n. License – By Name .....	26
a. Step 1 – Unit Name .....	4	o. License – By Vehicle .....	27
b. Step 2 – Platoon Names .....	4	p. MTOE .....	27
c. Step 3 – Squad Names .....	5	<b>4-2. Training Records .....</b>	<b>27</b>
d. Step 4 – MTOE Sections .....	5	a. General use of Training Sheets .....	27
e. Step 5 – MTOE .....	5	b. PT .....	28
f. Step 6 – Unit Manning Numbers .....	6	c. Weapons .....	29
g. Step 7 – Error Resolution .....	11	d. Schools .....	31
h. Step 8 – Basic Information for Personnel .....	11	<b>4-3. Tracking Sheets .....</b>	<b>31</b>
<b>Chapter 3 Database Layout (Using this Database) .....</b>	<b>13</b>	a. General .....	31
<b>3-1. General .....</b>	<b>13</b>	b. Personnel Actions .....	32
a. Exit Buttons .....	13	c. Awards .....	33
b. Program Life Cycle .....	13	d. Leaves/Passes .....	34
c. Network .....	13	<b>4-4. Compare with Battalion Information System (BIS) .....</b>	<b>35</b>
<b>3-2. Main Screen .....</b>	<b>13</b>	a. Import New Information .....	35
<b>3-3. Database Information .....</b>	<b>14</b>	b. Assignments .....	35
a. Edit Drop Down List .....	14	c. Change in Rank / Date of Rank .....	36
b. Backup/Export .....	16	d. Change in ETS .....	36
c. Import and compare with BIS .....	16	e. Change in UMR .....	36
<b>3-4. Searches .....</b>	<b>16</b>	<b>Chapter 5 Known Issues .....</b>	<b>38</b>
a. Step 1 – Enter Criteria .....	16	<b>5-1. Height/Weight .....</b>	<b>38</b>
b. Step 2 – Select the correct soldier .....	17	a. Incorrect Age Calculation .....	38
c. Search Display Screen .....	18	<b>5-2. PT Report .....</b>	<b>38</b>
<b>3-5. Data / Tracking .....</b>	<b>18</b>	a. Incorrect Age Calculation .....	38
<b>3-6. Reports .....</b>	<b>18</b>	<b>5-3. Printing .....</b>	<b>38</b>
a. Admin Information .....	19	<b>Chapter 6 Future Updates .....</b>	<b>39</b>
b. Training Reports .....	19	<b>6-1. Items to Add .....</b>	<b>39</b>
c. Tracking Reports .....	19	a. Editable List .....	39
<b>Chapter 4 Updating Data / Functional Areas .....</b>	<b>20</b>	b. New Reports .....	39
		c. New Areas .....	39
		d. Automatically Check for Incorrect Data .....	40
		e. Medical Screening .....	40
		f. ....	40
		<b>6-2. Items to Modify .....</b>	<b>40</b>
		a. Leaves/Passes .....	40
		b. Compare with BIS .....	40
		c. Awards Tracker .....	40

# Index of Figures

<b>Figure 2-1 Intial Setup - Welcome Screen .....</b>	<b>3</b>	<b>Figure 2-8 Manning Numbers - None Authorized Slots, Method 2, At end of each Platoon.....</b>	<b>10</b>
<b>Figure 2-2 Initial Setup - Main Menu .....</b>	<b>4</b>	<b>Figure 3-1 Main Screen .....</b>	<b>14</b>
<b>Figure 2-3 MTOE Information .....</b>	<b>5</b>	<b>Figure 3-2 Editing Drop Down List.....</b>	<b>16</b>
<b>Figure 2-4 Manning Number Breakdown .....</b>	<b>7</b>	<b>Figure 3-3 Search for soldier .....</b>	<b>17</b>
<b>Figure 2-5 Example of Manning Numbers.....</b>	<b>7</b>	<b>Figure 3-4 Select the correct soldier .....</b>	<b>17</b>
<b>Figure 2-6 Manning Numbers - None Authorized Slots, Method 1, Placed at end of HQ Plt .....</b>	<b>8</b>	<b>Figure 3-5 Search Display Screen .....</b>	<b>18</b>
<b>Figure 2-7 Manning Numbers - None Authorized Slots, Method 1, Placed as separate Plt at end .....</b>	<b>9</b>		

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## Chapter 1 Introduction

### 1-1. General

This database is intended for use at the company level. Due to some specific design features, it will not work with any unit above that. However, it can be used below that, for separate sections or detachments.

This database is a complete redesign of a database that I developed and used when I was a unit training NCO. Mind you that when I say a complete redesign, I am referring to how the database does the different task. However the database purpose and functions haven't changed. The purpose of any database is to store and, hopefully, allow easy retrieval of information. With a company level database the main information is considered unit manning and training records. With the redesign, I did not remove any function of the database. However, some input was received from other training NCO's and Ops SGT's to find out what else could be added. Thanks to all of them for their support.

With that said, lets begin.

### 1-2. Using a database

#### a. General

Two basic assumptions can be made about most company operations. 1. They are staffed from soldiers indigenous to the unit (infantry unit use 11B's, engineers units use 12B's, artillery units use 13B's, etc). 2. They track lots of information. With these two basic assumptions in mind, most company ops NCO's are not computer savvy. That is not to say that they cannot use the computers, it's to say that they probably don't know all of what a computer can do for them. The end result of this is that most of the information tracked by company ops is done in several Excel spreadsheets. While this is not bad, it does lead to some inherent problems. First, data accuracy, if a soldier is promoted or moved within the company, he must be updated in several places. Second, multiple copies, it can become difficult to insure which copy of a file is accurate if the files are traded back and forth on floppy disk or by email.

Solution, use an Access database to consolidate the information and then share that database over a network so everyone has access to the same information. Databases are generally more versatile than spreadsheets because of their ability to create predefined searches and calculations. They then can be used to present a user-friendly format for entering information and simple reports for outputting the information.

#### b. Terms

##### (1) Form

This is the section of the database that you use to enter information. The forms are used to create a user-friendly way of looking at and inputting information. Forms may contain information on a single record or may allow the entry of many records at once. However some forms are based on calculated information and these forms cannot be updated directly. You must update the base information and then re-open for form.

##### (2) Sub Form

This is a form within another form. Typically they show information relative to the main form.

##### (3) Report

This is the preferred method to output information from a database. They allow information to be easily arranged in a user-friendly format. Reports are not updateable. They provide a snapshot of the information stored in the database and any calculations based on that information.

##### (4) Sub Report

Similar to s Sub Form except they follow the rules for reports. They provide relative information to the main report and are not updateable. If a sub report does not have any information to display it will not be seen. The headings for that sub report will also not be seen. It will appear as if the sub report does not exist.

## Company Information System (CIS)

### (5) Record

This is how each line of a database is seen. If you thought of each row on an Excel spread sheet (numbered down the left) as it's own entry you would have the correct idea.

### (6) Field

Within each record (or row) are individual blocks of information. These are the fields. In the example used for records you assumed that each row was a record. Following that, each column (labeled A, B, C, across the top) would then be a field.

### c. The "Esc" Key

This is probably the most powerful key on the keyboard. If you are entering something and mess up you can fix it by using the Esc key. Pressing it once will undo all changes for the current field. Pressing it twice will undo all the changes for that record.

### d. Saving A Record

You will notice that there are no save buttons within the database. This is because, by their nature, databases treat each record as it's own "file." What this means is that as soon as you click off that record, the database saves that record. So if something happens and your computer locks up or the power goes out, you only loose the last record that you were changing. This can save lots of time.

### e. The "Tab" Key

The "Tab" key should be used as the primary means to move from one field to another.

## Chapter 2 Initial Setup

### 2-1. General

During the initial setup you will be asked for various types of information about your unit. Most of this information is used to create drop down lists for later use within the setup. However, the whole purpose of this setup is to create the Manning Numbers used for slotting soldiers against the MTOE and UMR. You should have a copy of your MTOE and UMR readily available.

### 2-2. Welcome Screen

The database will automatically open to the welcome screen until the initial setup has been completed.

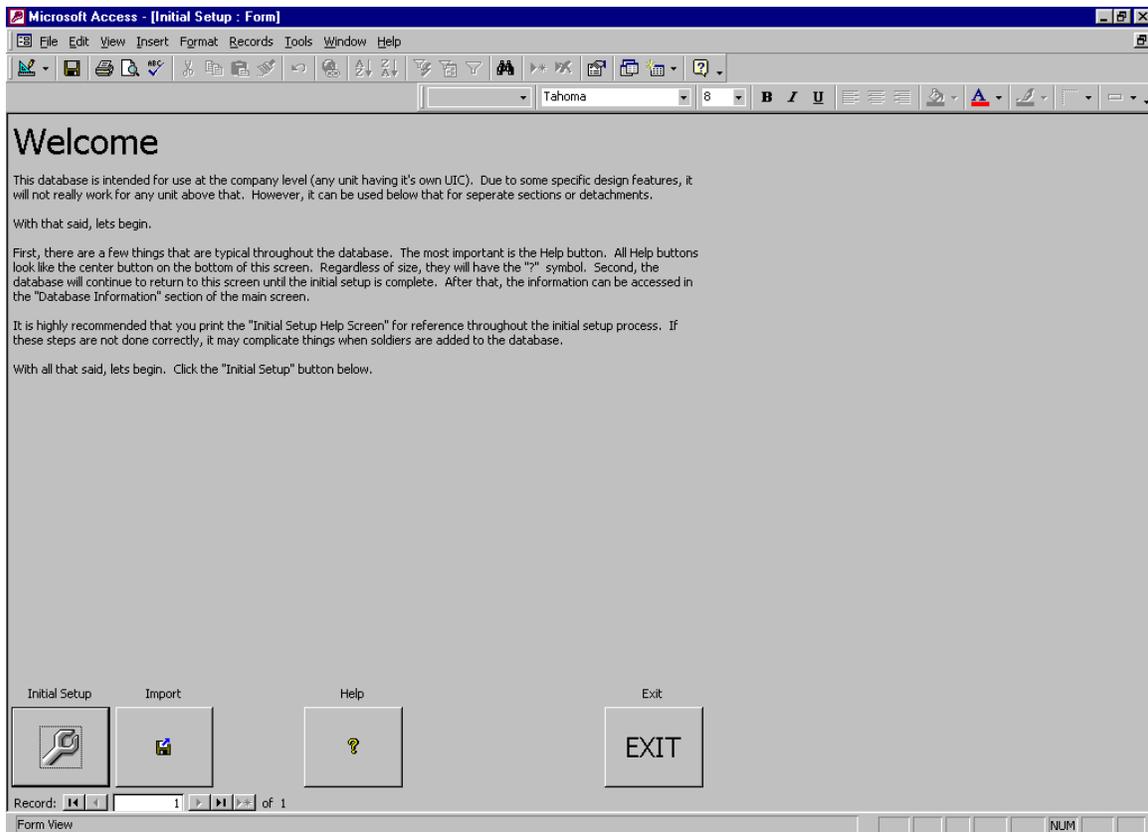


Figure 2-1 Initial Setup - Welcome Screen

### 2-3. Importing / Restoring from previous version

#### a. From Version 3

Click the Import button on the bottom of the Initial Setup Welcome screen. You will be prompted to insert the most recent backup from Version 3. The database then begins an automated process to import all the information from your previous database. This may take some time as some of the initial setup systems have changed. Upon completion of transferring all the information you will be prompted to input new required information. The only new information that is required is the UIC. This is used for comparison with the Battalion Information System (BIS).

If any errors occur, please contact the designer of the database. Hyperlinks to his email are provided throughout the database.

**b. From Version 4**

Click the Import button on the bottom of the Initial Setup Welcome screen. You will be prompted to insert the most recent backup disk. The database then begins an automated process to import all the information from your backup disk. Upon completion, the database will automatically open the Main Page.

If any errors occur, please contact the designer of the database. Hyperlinks to his email are provided throughout the database.

**2-4. Initial Setup**

Click the Initial Setup button (with the wrench) to enter the Setup Main Menu. The Initial Setup – Main Menu allows you to step through the Initial Setup. The database will not let you perform the steps out of order. If you have to stop and finish the Initial Setup later you can click Exit. When you return, if you click on the incorrect step you will be told which step needs to be completed next.

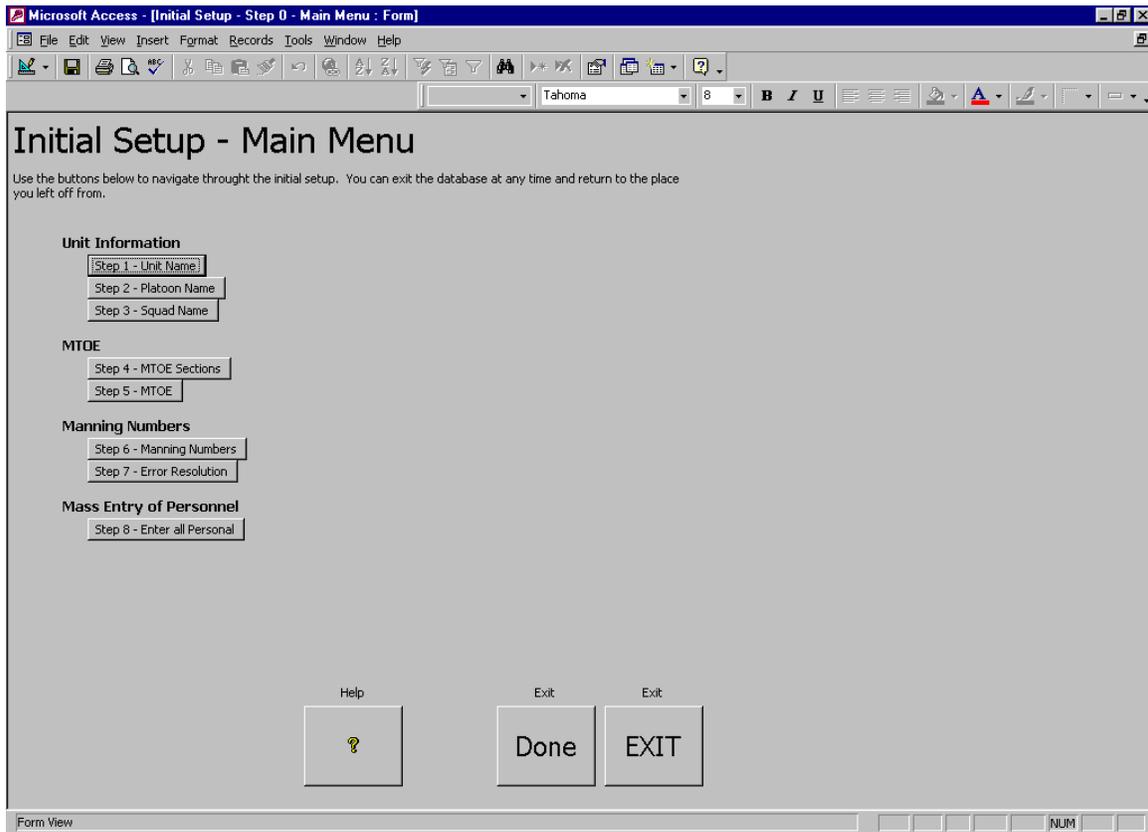


Figure 2-2 Initial Setup - Main Menu

**a. Step 1 – Unit Name**

Here you enter two things. First, the unit name: This information is used to create the report headers throughout the database. Since this database is designed for only one unit, you can only have one unit name. The database will not let you continue beyond this screen if you have more than one name. If you need to delete a unit name, right click the record selector on the left and select cut from the drop down menu. Second, the UIC: The UIC is used to compare information from the Battalion Information System (BIS). Check with your S1 if you are unsure of your UIC.

**b. Step 2 – Platoon Names**

Enter the commonly used names for your platoons. These names will be used as subheadings in reports and be available as a drop down list in the Manning Number table.

**c. Step 3 – Squad Names**

Enter the commonly used names of your squads. Again, these names will be used as sub-headings in reports and be available as a drop down list in the Manning Number table. If the same squad name is used in different Platoons, you only need to enter it once.

**d. Step 4 – MTOE Sections**

Enter the Section Names as they appear in the MTOE. These entries will be available as a drop down list in the MTOE table. This speeds up the process and prevents accidental misspellings.

**e. Step 5 – MTOE**

Enter your MTOE information directly from the MTOE. This database does not use ASI's. When entering the MTOE MOS you should enter only the three character MOS (I.E. 11B, 12B, 13C, etc.). For warrant officers, enter the three (3) number career field.

Enter the 999x sections from the Unit Manning Report (UMR)

Although these slots are not on the MTOE they are a vital part of any unit. There may be a time when you need to slot someone in an "Unauthorized" slot. Usually the 999x sections on the UMR are where these soldiers are slotted. Reassignable Overstrength, Surplus/Excess, Incoming Personnel, Known Loss, and Attached are the usually the only positions used by permanent party units. If a training unit is using this database, you may need to enter all of them. You should enter each of the 999x sections *once* on the MTOE Screen.

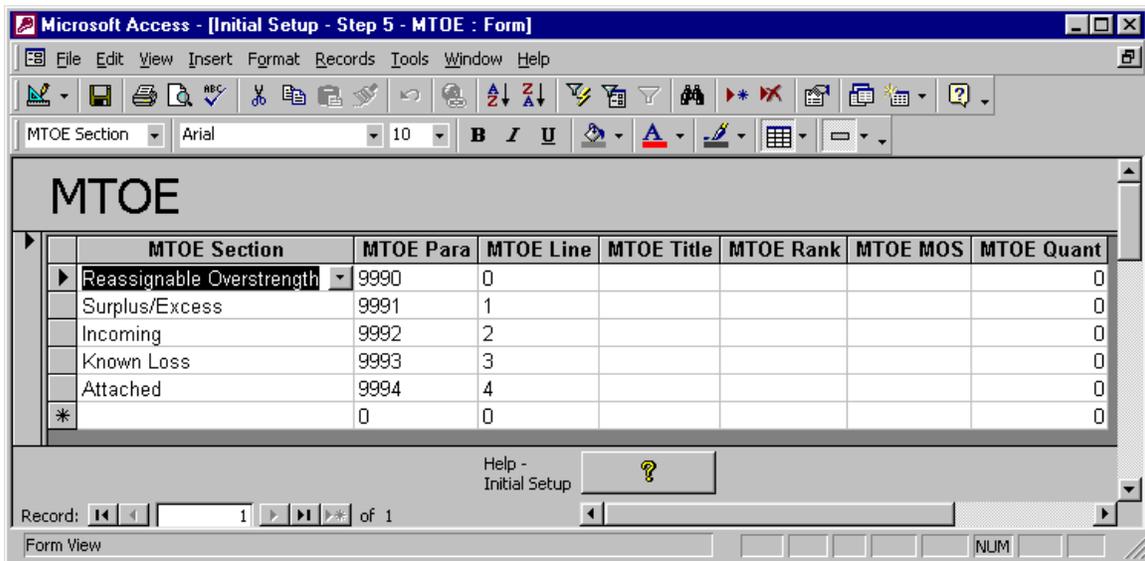


Figure 2-3 MTOE Information

Use the following guidelines when adding these "Unauthorized" slots

1. MTOE Section: This is the title for that slot. You CAN enter a value that is NOT on the drop down list.
2. MTOE Para: Use the full four (4) digit UMR Code.
3. MTOE Line: Use the last digit of the UMR Code.
4. MTOE Title: Leave blank, normally there is not title for these positions. You may enter a title later if it is a position that is regularly filled.
5. MTOE Rank: Leave blank, there is no authorized rank for these positions.
6. MTOE MOS: Leave blank, there is no authorized MOS for these positions.
7. MTOE Quant: Leave as 0, the database will automatically enter a 0.

## f. Step 6 – Unit Manning Numbers

This is the only thing that is new to the unit. Everything so far has been familiar, MTOE's and UMR's. Special care must be taken to insure that this step is done correctly. Be sure to read this entire section before you enter any information.

### (1) Reason for Manning Numbers

Certain things require that a squad or platoon be listed in the order in which they stand in formation. Sorting by any of the existing systems does not allow this. The MTOE authorizes people in groups. If you are authorized six identical squads, they would all be the same Para and Line numbers. This does not distinguish which one is 1<sup>st</sup> Platoon, 1<sup>st</sup> Squad or 1<sup>st</sup> Platoon, 2<sup>nd</sup> Squad. The UMR gets us closer in that we can distinguish which squad the squad leader is associated to because they are typically filled in that order. However, you cannot show all of 1<sup>st</sup> Platoon, 1<sup>st</sup> Squad in order. They are spread over several UMR positions, intermixed with all the other soldiers assigned in the six duplicate squads. For those reasons a further system had to be used, one that allows you to list each soldier in relation to where they stand in formation. This system is the Manning Numbers. With a little planning, this is done with very little trouble.

### (2) Creating the Manning Numbers

#### Manning List

Your unit probably already has a file that lists your soldiers as described above. Many units use it for the Unit Status Report (USR) each month. If not, the file is easily created using MS Excel (see Figure 2-5 Example of Manning Numbers). Either way, insure that the file includes the soldiers MTOE Para and Line numbers and the UMR # for that position. The file should list all the soldiers in the order that they stand in formation. For the time being don't worry about which soldier is associated with the slot as long as the slot is created. Once finished, check the list against your MTOE and UMR for accuracy. Currently this information cannot be changed after the initial setup has been completed. Future versions of the database will allow you to change it.

If the soldier is normally assigned to your company HQ but is slotted against one of your normal platoons, you would enter the MTOE information for the MTOE slot the soldier is assigned. This will ensure that the soldier is slotted correctly on the UMR. However when you create the Manning Numbers, you will create a number that shows the person in the platoon and squad that they actually work. This is common for armorers and training NCO's

#### Manning Numbers

##### Guidelines for creating Manning Numbers

1. Use a simple, self-explanatory numeric system. You are creating something that should be simple. If you find yourself re-inventing the wheel, backup and look at it again.
2. Use a cascading system (see Figure 2-4 Manning Number Breakdown).

All the slots of a platoon will have the same first two digits. In the example, all of the Company HQ Platoon slots start the "00." All of the 1<sup>st</sup> Platoon slots start with "01." It then follows that all of 2<sup>nd</sup> Platoon would start with "02."

All of the slots for each squad will have the same second set of two numbers. Using 1<sup>st</sup> Platoon from above, all of the slots for the HQ squad would start with "0100," all of the slots for 1<sup>st</sup> Squad would start with "0101," it then follows that all of 2<sup>nd</sup> Squad would start with "0102."

All of the slots within the squad are listed numerically. Continuing the example of 1<sup>st</sup> Platoon, 1<sup>st</sup> Squad, whichever slot you want first would be "010101," the second slot would be "010102," the third slot would be "010103," etc.

### 3. Sorting

The database sorts several reports based on the Manning Numbers. If you want a particular platoon or squad to be listed in a particular order, their manning number must be sorted numerically that way. The key is to remember that you can use "00" as a position number. This is normally the case with the HQ Platoon. They line up first in the formation. The 1<sup>st</sup> Platoon (title) then lines up second. Using "00" for the HQ Platoon will let you use "01" for the 1<sup>st</sup> Platoon. This makes more sense then using "01" for HQ and then "02" for 1<sup>st</sup> Platoon.

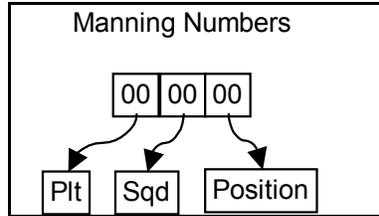


Figure 2-4 Manning Number Breakdown

Platoon		Squad			
Manning #	Title	Para	Line	UMR	Soldier
<b>Company HQ Plt</b>		<b>HQ Squad</b>			
000101	Commander	201	1	AO01	Not displayed
000102	XO	201	11	AO29	Not displayed
000103	1SG	201	12	AO33	Not displayed
000104	Operations SGT	201	4	AO05	Not displayed
000105	Armor	9992	2		Not displayed
<b>1st Platoon</b>		<b>HQ Squad</b>			
010001	Platoon Leader	202	1	AP01	Not displayed
010002	Platoon SGT	202	2	AP05	Not displayed
010003	Vehicle Drv	202	3	AP09	Not displayed
010004	Track Veh Drv	202	4	AP13	Not displayed
<b>1st Platoon</b>		<b>1st Squad</b>			
010101	Squad Leader	203	1	AQ01	Not displayed
010102	Team Leader	203	2	AQ05	Not displayed
010103	Team Leader	203	3	AQ09	Not displayed
010104	Soldier	203	4	AQ13	Not displayed

Figure 2-5 Example of Manning Numbers

Now create spaces for the normally unfilled, unauthorized slots. These slots are typically filled only for a short time. I.E. a new soldier arrives, you want to input them into the company database but don't know which slot they will be assigned, so you slot them as "Incoming Personnel" for the time being. It is recommended that you create a few slots for each type of positions. A HHC unit may need to create as many as 10 or 20 Incoming Personnel (UMR 9992) slots. Each unit needs to determine how to do this. Basically it comes down to one of three methods. From experience, it is best to use Method 3, combining each of the other two methods.

Method 1. Place ALL of these slots as a separate squad at the end of the company headquarters or create an entire platoon for them.

Company Information System (CIS)

Platoon		Squad		
Manning #	Title	Para	Line	UMR
<b>Company HQ Plt</b>		<b>HQ Squad</b>		
000101	Commander	201	1	A001
000102	XO	201	11	A029
000103	1SG	201	12	A033
000104	Operations SGT	201	4	A005
000105	Armor	9992	2	
<b>Company HQ Plt</b>		<b>Temp Squad</b>		
000201	Reassignable Ov	9990	0	
000202	Reassignable Ov	9990	0	
000203	Surplus/Excess	9991	1	
000204	Surplus/Excess	9991	1	
000205	Incoming	9992	2	
000206	Incoming	9992	2	
000207	Incoming	9992	2	
000208	Incoming	9992	2	
000209	Incoming	9992	2	
000210	Known Loss	9993	3	
000211	Known Loss	9993	3	
000212	Known Loss	9993	3	
000213	Known Loss	9993	3	
000214	Known Loss	9993	3	
000215	Attached	9994	4	

Figure 2-6 Manning Numbers - None Authorized Slots, Method 1, Placed at end of HQ Plt

<b>Platoon</b>		<b>Squad</b>		
Manning #	Title	Para	Line	UMR
<b>Company HQ Plt</b>		<b>HQ Squad</b>		
000101	Commander	201	1	A001
000102	XO	201	11	A029
000103	1SG	201	12	A033
000104	Operations SGT	201	4	A005
000105	Armor	9992	2	
<b>1st Plt</b>		<b>HQ Squad</b>		
010001	Plt Ldr	202	1	AP01
010002	Plt Sgt	202	2	AP05
010003	Driver	202	3	AP09
010004	Driver	202	4	AP13
<b>2nd Plt</b>		<b>HQ Squad</b>		
020001	Plt Ldr	202	1	AS01
020002	Plt Sgt	202	2	AS05
020003	Driver	202	3	AS09
020004	Driver	202	4	AS13
<b>Temp Plt</b>		<b>Temp Squad</b>		
030001	Reassignable Ov	9990	0	
030002	Reassignable Ov	9990	0	
030003	Surplus/Excess	9991	1	
030004	Surplus/Excess	9991	1	
030005	Incoming	9992	2	
030006	Incoming	9992	2	
030007	Incoming	9992	2	
030008	Incoming	9992	2	
030009	Incoming	9992	2	
030010	Known Loss	9993	3	
030011	Known Loss	9993	3	
030012	Known Loss	9993	3	
030013	Known Loss	9993	3	
030014	Known Loss	9993	3	
030015	Attached	9994	4	

Figure 2-7 Manning Numbers - None Authorized Slots, Method 1, Placed as separate Plt at end

Company Information System (CIS)

Method 2. Place AT LEAST ONE OF EACH SLOT within each platoon. This is best done as a separate squad, after the normal squads.

Platoon		Squad		
Manning #	Title	Para	Line	UMR
<b>1st Plt</b>		<b>HQ Squad</b>		
010001	Plt Ldr	202	1	AP01
010002	Plt Sgt	202	2	AP05
010003	Driver	202	3	AP09
010004	Driver	202	4	AP13
<b>1st Plt</b>		<b>1st Squad</b>		
020101	Sqd Ldr	203	1	AS01
020102	Tm Ldr	203	2	AS05
020103	Sqd Member	203	3	AS09
020104	Driver	203	4	AS13
<b>1st Plt</b>		<b>Temp Squad</b>		
020401	Reassignable Ov	9990	0	
020402	Reassignable Ov	9990	0	
020403	Surplus/Excess	9991	1	
020404	Surplus/Excess	9991	1	
020405	Incoming	9992	2	
020406	Incoming	9992	2	
020407	Incoming	9992	2	
020408	Incoming	9992	2	
020409	Incoming	9992	2	
020410	Known Loss	9993	3	
020411	Known Loss	9993	3	
020412	Known Loss	9993	3	
020413	Known Loss	9993	3	
020414	Known Loss	9993	3	
020415	Attached	9994	4	

Figure 2-8 Manning Numbers - None Authorized Slots, Method 2, At end of each Platoon

Method 3. This is a combination of the previous two. The most common two or three unauthorized slots would be listed as described in method 2, with each of the platoons. The remaining slots would be listed as described in method 1, at the end of the company headquarters or the end of the unit.

(3) Transfer to the Database

Once this list is complete it is a simple matter of transferring it into the database. The screen on the computer is laid out in the same format as used in the figures throughout this section.

## g. Step 7 – Error Resolution

### (1) Double/Under Slotted

This compares how many positions you listed in the MTOE and how many positions are used in the Manning Numbers. If the numbers don't match, they will show here.

Fix 1: Check your MTOE to insure that you entered the correct number of authorized slots. If it doesn't, simply enter the correct number.

#### Fix 2: Over slotting

1. You should check to insure that you are slotting the person against the correct MTOE Para and Line.
2. Delete the line from the Manning Numbers

#### Fix 3: Under Slotting

1. Check to see if all the slots that are suppose to be used by this MTOE Para and Line are assigned to the Para and Line. If they are not, correct the appropriate field.
2. Create a position in the Manning Numbers that uses the MTOE Para and Line.

### (2) Not Authorized

This section checks the Manning Numbers for slots that do not appear anywhere on the MTOE.

Fix: Check to ensure that you entered the correct MTOE Para and Line in the Manning Numbers. Fix that line if needed, or delete it.

### (3) Not Used

This is the exact opposite of Not Authorized. There is a slot in the MTOE that does not show up anywhere in the Manning Numbers.

Fix 1: Check to ensure that the line should be on the MTOE. If it is not, delete it.

Fix 2: Check to ensure that you didn't skip a line when entering the Manning Number information.

### (4) UMR 999x

This is a simple error; you have assigned a UMR number to a 999x position.

Fix 1: Check to ensure that the UMR position should be used. If not, then simply clear that field from the line.

Fix 2: If the UMR number is valid, check to see which line it should be used against. Delete it from the 999x position and enter it in the correct slot.

### (5) UMR Blank

This is the exact opposite of UMR 999x. You left the UMR code blank for a position that is slotted against the MTOE.

Fix 1: Check to ensure that the position is an MTOE position or a 999x position. Correct as needed.

Fix 2: Enter the correct UMR code for the position.

## h. Step 8 – Basic Information for Personnel

### (1) Manually Entering Personnel

Here you will enter only the required fields for each person in you unit. This allows you to use the Alpha Rosters, Morning Status, and UMR sections of the database. See 4-1.b Slotting Soldiers for how to lookup the manning numbers. For fields that have drop down menus, the value must be selected from that menu. Later in the database, you will be given the option to change some drop down menus and even be able to input information that is not listed.

## Company Information System (CIS)

### (2) Import from Battalion Information System (BIS)

If your battalion S1 is using the Battalion Information System (BIS) Release 1, you can import all of the personnel that they have assigned to your unit. First you need to get a backup disk from the S1. Insert the disk and click the “Import from BIS” button at the bottom of the “Basic Information for Personnel” screen. A screen will open showing all the personnel the S1 has assigned to your unit. This should not be considered a complete list. If the S1 has a soldier assigned to a different unit (based on the UIC you entered), if there is no Sidpers information for that soldier in the S1 database, or if some of the basic *required* information is missing from the S1 database.

To add a soldier, click the “Add this soldier” button next to the soldier you wish to add. A new window will open. From there click the “Use” button next to the Manning Number you want this soldier to be slotted against. This will continue until 1) all of the personnel from the S1 database have been added or 2) you click the “Done” button on the bottom of the “Import from Battalion Information System” screen.

## **Chapter 3** Database Layout (Using this Database)

### **3-1.** General

#### **a.** Exit Buttons

There are no exit buttons on each screen (the little “X” shown by Windows). This is done deliberately so you don’t end up looking at a blank screen. Each screen has a “Close” button located at the bottom right. You are forced to use these buttons, but it makes the database consistent throughout.

#### **b.** Program Life Cycle

No program is perfect. No matter how much testing is done, this database will never be perfect. A certain amount of flexibility has been designed into the database, but even this will only lengthen the life span of this database for a certain time. All programs have a life span that is limited and this database should not be used if something better is available. If only small changes are needed please contact the designer to see if the changes have been made in newer versions of the database.

#### **c.** Network

##### (1) Sharing

This database is designed with the intent of being shared over a network. Having all the key personnel of a unit viewing the same information reduces the amount of misinformation that floats throughout the unit. Because of this, each unit should use only one copy of the database. There may be times when you need to copy the database (I.E., you are going to the field, but the rear detachment needs a copy too). The key thing to decide is which database is the primary database. This is the one that is considered “real” and “accurate.” As soon as possible, the “copy” database should be deleted. This will reduce conflicts in information. Contact your system administrator for help.

Note to System Administrators: Anyone who has been deemed to need access must have, at a minimum, “Modify” access. Many of the macros throughout the database include the command “Save Record.” Even if no information has been changed, this prompts a modify action to the file.

##### (2) Security

Access provides a means of setting up a user level password system. Before attempting to setup one up you should contact your system administrator and read the help file that is included in Access (search for “Security Wizard”).

### **3-2.** Main Screen

Once the initial setup has been completed you will no longer see the Welcome or Initial Setup Screens. The database will automatically detect that the initial setup has been completed and proceed to the Main Screen. The Main Screen is divided into four basic sections. Each area is described below.

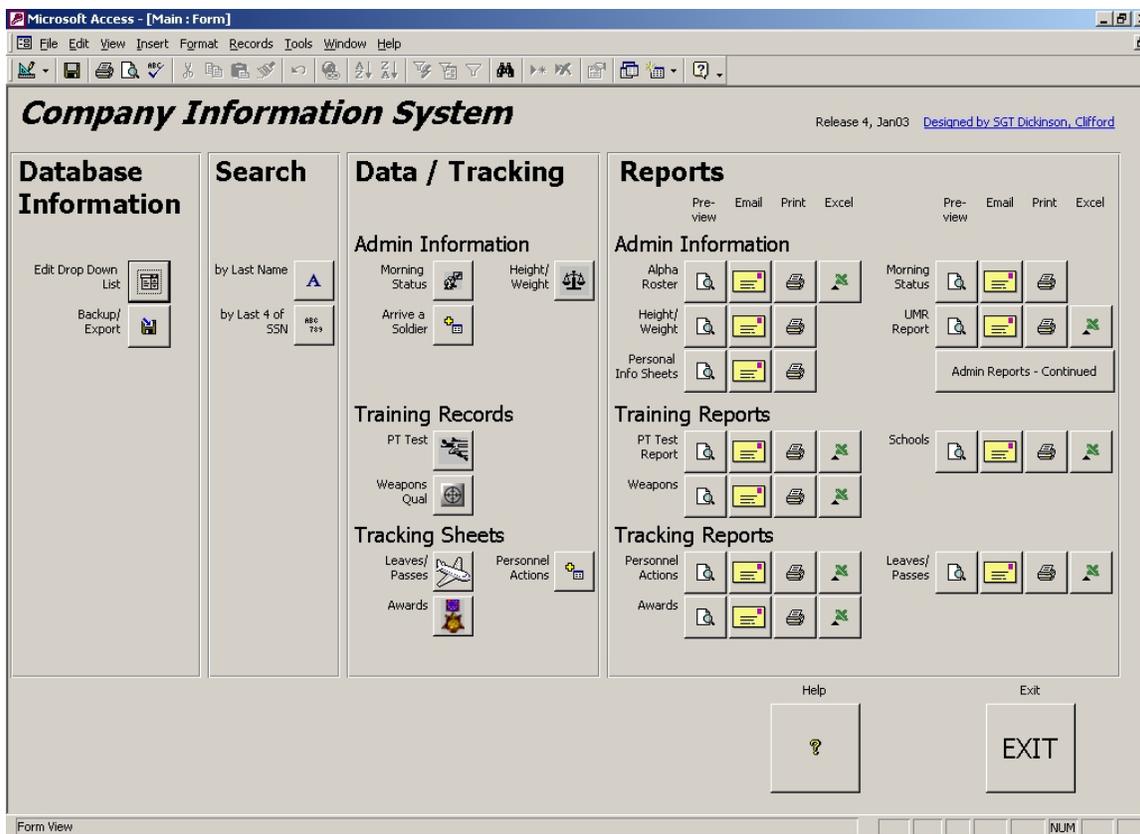


Figure 3-1 Main Screen

### 3-3. Database Information

#### a. Edit Drop Down List

##### (1) Personal Information

City, State, and Zip: These fields are seen on the Search Display Screen. They are the fields used to show the soldier's, the soldier's NOK, and the soldier's dependents contact information. *(Limited to list: No)*

Race: These are the race values used on the Search Display Screen. *(Limited to list: No)*

##### (2) Awards

Award Type: These are the types of awards that are available in the Search Display Screen and the Awards Tracking Sheet. *(Limited to list: No)*

Reason: These are used in the Reason field of the Awards Tracking Sheet. *(Limited to list: No)*

##### (3) Daily Status

Daily Status: These are the daily status codes used by your unit. They are available in the Search Display Screen and the Morning Status Data Entry Screen. They are used to create the cover sheet of the Morning Status Report. *(Limited to list: Yes)*

Att/Det Unit: These are the Att/Det units that you can use for reference in the Morning Status Data Entry Screen. They are also the Att/Det units that are shown on the Alpha Roster Report. *(Limit to list: No)*

## Company Information System (CIS)

### (4) Leaves/Passes

Leaves/Passes Type: These are the types of Leaves/Passes used on the Search Display Screen and the Leaves/Passes Tracking Sheet. (*Limited to list: Yes*)

### (5) Licenses

Vehicle: These are the types of vehicles that soldiers in your unit can be licensed on. They are available in the Search Display Screen. (*Limited to list: No*)

### (6) Personnel Actions

Types of Actions: These are the types of Personnel Actions tracked by the unit. They are available in the Search Display Screen and the Personnel Actions Tracking Sheet. (*Limited to list: No*)

### (7) PT

Remarks: These are available in the remarks section of the PT Test. They are available in the Search Display Screen and the PT Test Mass Entry Screen. (*Limited to list: No*)

### (8) Schools

Schools: This information is used to add new schools for tracking throughout the database. Enter the name of the school and how many months the school is valid for. If it is a one time only school (does not expire), leave the Term field as "0." (*Limited to list: Yes*)

### (9) Unit Name/UIC

Unit Name: This is the unit name that appears at the top of the reports. If you find that text is overlapping or that some text is being cropped off, you should shorten the unit name.

UIC: This is used for comparison with the Battalion Information System. If you are having trouble matching information with the Battalion Information System you should check to insure that the UIC is correct.

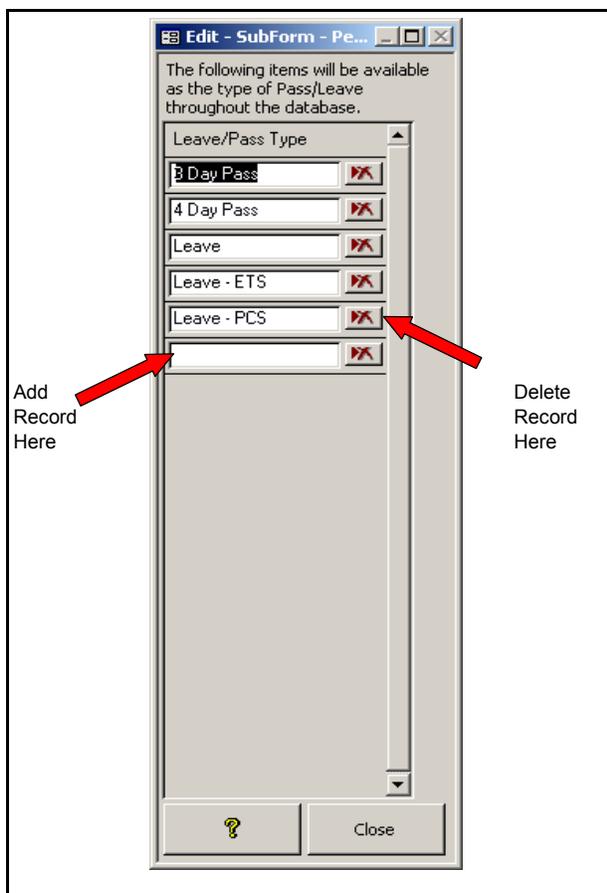


Figure 3-2 Editing Drop Down List

Adding a value: Simply go to the first available line at the bottom and type in the value that you want.

Deleting a value: Next to each value is a delete button, simply click it.

NOTE 1: If you edit a drop down list from the screen that it is used, the changes will not take affect until you open that screen the next time.

NOTE 2: You may not be able to delete or modify some values if they are currently in use. For example, you cannot delete a value in the daily status list if a soldier is currently being listed under that status. You must change all of those statuses before you can delete the status from the list

## b. Backup/Export

This button automatically exports all the important data from the database onto a floppy disk. It only exports the data that has been added to the database. None of the calculations on the information is exported. Ensure that you use a blank disk for this. The person responsible for maintaining the database should do backups regularly.

The backups can be used to restore the information in a new copy if your copy becomes damaged or for import into future releases of the database. This means that you will not lose any information when upgrading to the next release.

## c. Import and compare with BIS

This section is used to compare information with the battalion level version of these databases (Battalion Information System). Since this can be a very particular process, it is discussed in detail in Para 4-4 Compare with Battalion Information System (BIS).

## 3-4. Searches

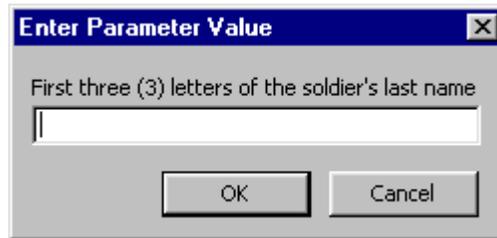
### a. Step 1 – Enter Criteria

A search for a soldier can be done based on their last name or the last four numbers of their SSN. Click the “Search for Soldier” button on the main screen. If searching by the soldiers’ last name, enter the first two to six letter of the last name. Entering too few (one letter) or too many (seven or more letters) will result in finding no soldiers. If searching by the soldiers’ SSN, enter the last four numbers of the SSN. Press Enter or click the

## Company Information System (CIS)

“Search” button to execute the search. If no soldiers match the criteria entered, or if incorrect criteria were entered, you will see a screen saying so. If only soldier matches the criteria entered, the Search Display screen will automatically open. If more than one soldier matches the criteria you will be prompted to select the correct soldier (see 3-4.b Step 2 – Select the correct soldier).

Need new picture



Enter Parameter Value

First three (3) letters of the soldier's last name

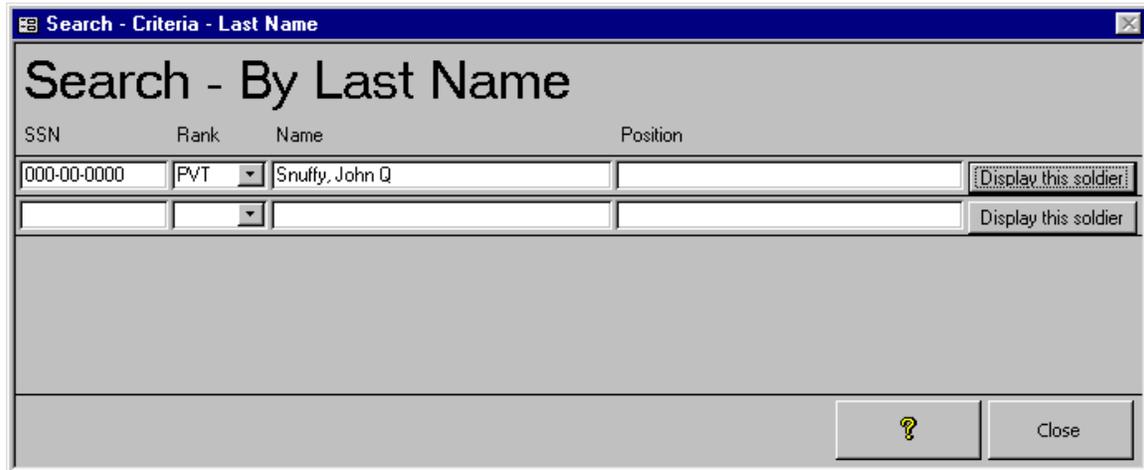
OK Cancel

Figure 3-3 Search for soldier

### b. Step 2 – Select the correct soldier

Here, all the soldiers that matched the selected criteria will be listed. Their Rank and Position are listed to ensure that you can identify the soldier you are looking for. Simply click the “Display This Soldier” button to the right of the soldier you wish to view.

Need new picture



Search - Criteria - Last Name

### Search - By Last Name

SSN	Rank	Name	Position	
000-00-0000	PVT	Snuffy, John Q		Display this soldier
				Display this soldier

?

Close

Figure 3-4 Select the correct soldier

### c. Search Display Screen

This display screen can be divided into two sections. The upper section displays the basic information about this soldier, and the tabbed selectors dividing the lower section. Each tab displays information pertaining to the label. Clicking the label will display information relative to that soldier in regards to the information area of that tab. Each of these functional areas are discussed in Chapter 4 Updating Data / Functional Areas.

The screenshot shows a Microsoft Access window titled "Microsoft Access - [Search - Criteria - Transfer]". The main form is titled "Personal Information". It is divided into several sections:

- Personal Information:** Last Name (Snuffy), First Name (John), MI (Q), DOB (27-Jan-75), SSN (000-00-0000), Marital Status, Race, Male/Female (M).
- Military Information:** Rank (PVT), Arrival Date (27-Jan-03), DOR, Loss Date, BASD, Remarks, BEPD, GT Score (0), ETS, HIV Test.
- Manning Information:** Manning Number (5T0215), PMOS (12B), SMDS, Search button.
- Morning Status Information:** Att Det, Att/Det Unit.
- Contact Information:** Address Box, City, State, Zip, Phone #, Sec Phone #, E-Mail.
- Next of Kin Information:** NOK, Relationship, Address, Box, City, State, Zip, Phone Number.
- Daily Status:** Daily Status, Daily Status Remarks.
- ID Tag Information:** Blood Type, Religious Preference, Notes (Allergies).

Below the form is a table with the following columns: Test Date, Age, PU, Score's (SU, 2M), Point's (PU, SU, 2M), Total, Event, Alt Event, Time, Max, Remarks, Add, Edit, Delete, PT Test Individual Report (705). The table is currently empty. At the bottom of the window, there are buttons for "Delete this soldier", "Close", and a "NUM" indicator.

Figure 3-5 Search Display Screen

### 3-5. Data / Tracking

These buttons allow you to view screens where you can input information on multiple soldiers at once. See Chapter 4 for information on each area.

### 3-6. Reports

The report section of the Main Display Screen has three or four buttons for each report. Each of the icons should be self-explanatory. The first button is the standard Print Preview button. If you are printing multiple copies or using special printing features you should use this button. The second button looks like an envelope. This is the email button. It automatically converts the report into the Rich Text Format (RTF) and attaches it to an email. If you need a copy of the report that can be used in word, you can save this file or email it to yourself. The third button has the standard print icon. It does exactly that, it prints one copy of the report. If the information can be exported to Excel, there will be a fourth button. It has the standard Excel icon (a green X). Some may argue that you can use the print preview button and then use the "Analyze with Excel" button. In some cases this is exactly what the export button does. In other cases the report itself doesn't really export to Excel. In these cases, the Excel button will output one of the base queries.

This is a simple list of all available reports. Each of the reports are described in detail in Chapter 4 Updating Data / Functional Areas.

## Company Information System (CIS)

### a. Admin Information

1. Alpha Roster (see 4-1.d Alpha Roster)
2. Height/Weight (see 4-1.e Height/Weight and Tape)
3. Personal Information Sheets (see 4-1.f Personal Information Sheets)
4. Morning Status (see 4-1.g Morning Status)
5. UMR Report (see 4-1.h Unit Manning Report)
6. Dependent Information (see 4-1.i Dependent Information)
7. Basic Information – Personal (see 4-1.j Basic Information – Personal)
8. Basic Information – ID Tags (see 4-1.k Basic Information – ID Tags)
9. Basic Information – Military (see 4-1.l Basic Information – Military)
10. Basic Information – Clothing (see 4-1.m Basic Information – Clothing)
11. License – By name (see 4-1.n License – By Name)
12. License – By Vehicle (see 4-1.o License – By Vehicle)
13. MTOE (see 4-1.p MTOE)

### b. Training Reports

1. PT Test (see 4-2.b PT)
2. Weapons (see 4-2.c Weapons)
3. Schools (see 4-2.d Schools)

### c. Tracking Reports

1. Personnel Actions (see 4-3.b Personnel Actions)
2. Awards (see 4-3.c Awards)
3. Leaves/Passes (see 4-3.d Leaves/Passes)

## **Chapter 4** Updating Data / Functional Areas

### **4-1.** Admin Data

#### **a.** Adding Soldiers

To add soldiers to the database click the “Arrive A Soldier” button in the Data/Tracking Section of the Main Screen. Fill in all of the fields. Each of the fields should be completed. This is the minimum information needed to add a soldier. If you don’t know the manning number that the soldier will be slotted against see 4-1.b(1) Initial Slotting. When complete, click the “Close” button. A search will automatically be performed for the soldier you just entered. This allows you to input the rest of the information for the soldier.

#### **b.** Slotting Soldiers

##### (1) Initial Slotting

Before a soldier can be added to the database, the soldier must be slotted against the UMR and MTOE. Click the “Search” button next to the manning number field. This brings up a form showing only the manning numbers that are not currently being used by other soldiers. Scroll through the list and click the “Use” button next to the manning number slot that the soldier will be filling. If the exact slot the soldier will be filling is not known, use one of the UMR 999x slots for the time being.

##### (2) Updating / Changing Manning Numbers

Perform a search for the soldier (see 3-4 Searches). Click the “Search” button next to the manning number displayed in the upper right corner of the Search Display Screen. This brings up a form showing only the manning numbers that are not currently being used by other soldiers. Scroll through the list and click the “Use” button next to the manning number that the soldier will be filling.

#### **c.** Deleting Soldiers

Perform a search for the soldier (see 3-4 Searches). Click the “Delete this soldier” button at the bottom of the screen. You will be prompted to confirm the deletion of the soldier. One thing to consider is that when a soldier is deleted from the database all of the information about that soldier is also deleted. Re-entering (adding) the soldier back into the database will not re-enter all of the information about the soldier.

#### **d.** Alpha Roster

##### (1) Data Limitations

The Alpha Roster will display ALL the soldiers that are in the database.

##### (2) Individual Information

###### 1. Updating

To update the Alpha Roster you need to add or delete soldiers’ as individuals. See 4-1.a Adding Soldiers and 4-1.b Slotting Soldiers respectively.

##### (3) Mass Information

###### 1. Updating

There is no mass update to the Alpha Roster. You must update it by adding or deleting soldiers individually. See 4-1.a Adding Soldiers and 4-1.b Slotting Soldiers respectively.

###### 2. Report

The Alpha Roster Report is only accessible from the Reports section of the Main Display Screen.

The report includes the Att/Det section from the Morning Status information. This is done for reference.

e. Height/Weight and Tape

(1) Reference

AR 600-9 (10Jun87)

(2) Data Limitations

1. Weight: Enter rounded to the nearest pound
2. Length (Height and Tape): Enter rounded to the nearest ¼ (.25) inches. Since the Height/Weight screening tables only requires the Height measurement to the nearest ½ (.5) inches, the database will automatically compensate for this. However if the soldier then requires a tape the Height information would have to be re-entered to the nearest ¼ (.25) inches. So to simplify it, you should always enter the measurements to the nearest ¼ (.25) inches.

Value (in inches)		Min	Max	
Males	Height	60	84.75	
Female	Height	55	84.75	
	Tape	Hips	30	53.75
		Forearm	5	15.75
		Neck	5	15.75
Wrist		5	15.75	

(3) Individual Information

Updating

1. Perform a search for the soldier (see 3-4 Searches).
2. Click the “Height/Weight” tab.
3. Click the “Add, Edit, Delete” button for correct gender of the soldier. Males are displayed on the left. Females are displayed on the right.
4. Add a Record: On the last line of the upper section, enter the soldiers SSN, Date, Height, and Weight of the soldier. If the soldier was taped, enter the tape information in the bottom section of the screen.
5. Edit Height/Weight: Simply edit the record that is incorrect.
6. Edit Tape: Click the Height/Weight with the corresponding date to the Tape. This will show the correct Tape information in the lower section. Edit the information as required.
7. Delete: Click the Delete button next to the record that you want to delete.
8. Click Close. The Search Display Screen will automatically update with the new information.

Report

All Height/Weight and Tape information is display on the Personal Information Sheet.

The Male/Female Body Fat Worksheet can be printed from the Search Display Screen. On the Search Display Screen, click the Height/Weight tab. Then click the Print Preview / Email / or Print buttons next to the Height/Weight you want to print the Body Fat Worksheet for.

Conditional Formatting

If a soldier exceeds their Max Allowed Weight, their Current Weight will be displayed in red. If a soldier has not had a tape test performed (resulting in a negative Current Body Fat %) it will be displayed in white text (so it does not show). If a soldier exceeds their Max Allowed Body Fat %, their Current Body Fat % will be highlighted in red.

## Company Information System (CIS)

### (4) Mass Information

#### Updating

1. Click the “Height/Weight” button under the Data / Tracking section.
2. At the top of the page, enter the date that this group was measured.
3. In the first available line, type the soldiers SSN, the soldiers name will automatically be displayed. Then enter the raw information for the soldier.

#### Report

The Height/Weight and Tape Report is accessible from the Height/Weight Mass Update Screen and the Reports section of the Main Display Screen.

The report is divided into five basic sections. The first section shows all personnel that failed the last Height/Weight but don't have any information regarding a Tape for the same date. The second section shows all male personnel that failed the last Height/Weight Screening and then failed the Tape. The third section shows all male personnel that failed the last Height/Weight Screening and then passed the Tape. The fourth section shows all female personnel that failed the last Height/Weight Screening and then failed the Tape. The fifth section shows all female personnel that failed the last Height/Weight Screening and then passed the Tape.

Any soldier who required a tape test at any point will remain on the report until the soldier departs from the unit. This is because if a soldier repeatedly goes back on the overweight program the command should be able to recognize it.

#### Conditional Formatting

Since the report is divided there is no need for conditional formatting.

## f. Personal Information Sheets

Each of the areas throughout the database are displayed on the Personal Information Sheets. You should refer to each topic for how to update or change the information. Each section will also explain the conditional formatting for that section.

### (1) Individual Information

#### Report

1. Perform a search for the soldier (see 3-4 Searches).
2. Click the Print Preview / Email / or Print button at the bottom of the screen.

### (2) Mass Information

#### Report

ALL of the Personal Information Sheets for the unit can be printed from the Reports section of the Main Display Screen.

## g. Morning Status

### (1) Data Limitations

The Morning Status values are limited to the values listed on the drop down list. See Para 3-3.a(3) Daily Status for changing the list.

No soldier can be attached and detached at the same time. The soldier should be released from their first attachment and then attached to the second unit. The database will automatically catch any attempt to have a soldier attached and detached at the same time. You will not be able access the Morning Status reports until this error is fixed. Also, once a soldier is counted as detached, no further information is required. You should include the Unit or Organization they are attached / detached to, but not a daily status (from the drop down menu). Reporting them as detached fulfills your reporting requirements. If you include a status such as “Detail” that will simply be ignored when the database calculates the values shown on the Morning Status Cover page.

## Company Information System (CIS)

If a soldier is indicated as attached or detached, you must indicate the unit that the soldier is attached or detached to. If you do not input a value (or select a value from the drop down list) you will be prompted to do so before you can access the Morning Status Reports.

### (2) Individual Information

#### Updating

1. Perform a search for the soldier (see 3-4 Searches).
2. The Morning Status information is located in the upper portion of the Search Display Screen. You can change the information as described below.

### (3) Mass Information

#### Updating

1. Print a copy of the Morning Status Report – By Position.
2. Have the platoon/section sergeants update the report during the units daily meetings.
3. Click the Morning Status button under the Data / Tracking section of the Main Display Screen.
4. To change the soldiers' daily status, simply choose a new value from the drop down menu. If the status is not on the menu, you can add it (see 3-3.a(3) Daily Status). You can also indicate if a soldier is attached or detached and the unit that they are attached to or detached from.

#### Report

##### General

The Morning Status Reports are accessible from the Morning Status Update Screen and the Reports section of the Main Display Screen.

The Morning Status Reports can be divided into two sections. The first section is the cover sheet. This is a complete break down, by number, of the statuses that have been entered. The top section breaks down the number assigned, attached, and detached to the unit. The total displayed in the bottom right of this block shows the total number of soldiers that your unit is responsible for. The bottom section breaks down daily status for those soldiers (the one's your unit is responsible for). The total displayed in the bottom right of this block shows the total number of soldiers that are not available.

##### Morning Status Report – By Position

Following the cover sheet, all soldiers in the unit are sorted by their manning numbers. They are grouped by platoon and squad for convenience.

##### Morning Status Report – By Position

Following the cover sheet, only soldier with a daily status are listed. First, all attached soldiers are listed. Second, all detached soldiers are listed. After that, each of the daily statuses are listed in alphabetical order. This report is designed for situations when you need a list showing only soldier who are not "available" (doing something else).

## h. Unit Manning Report

### (1) Data Limitations

The UMR is based on the Manning Numbers. If a slot is listed on the Sidpers/E-Milpo UMR but is not listed on your UMR, it is because that position was not listed during the initial setup. Currently the database does not have a method for correcting this. It is one of the planned updates that will be release soon (see 6-1.a(1) Manning Numbers). This report is used for reference only. The actual UMR Report should be obtained from the S1.

### (2) Mass Information

#### Updating

## Company Information System (CIS)

1. To change to position of a soldier on the UMR you have to change the individuals Manning Number (see 4-1.b(2) Updating / Changing). To add a soldier they have to be entered in the database (see 4-1.a Adding Soldiers). To remove a soldier they have to be removed from the database (see 4-1.c Deleting Soldiers).

### Report

The UMR Report is only accessible from the Reports section of the Main Display Screen.

### Conditional Formatting

Conditional formatting used on the UMR is based on the Loss Date (see 4-1.1 Basic Information – Military). If a soldier has already passed their projected Loss Date, their name will be highlighted in red. If a soldier is within 30 days of their projected Loss Date, their name will be highlighted in yellow. If a soldier is within 90 days of their projected Loss Date, their name will be highlighted in green.

## i. Dependent Information

### (1) Individual Information

#### Updating

1. Perform a search for the soldiers (see 3-4 Searches).
2. The dependent information is located in the tabbed lower section of the Search Display Screen. Simply input or change the information as needed.

NOTE 1. Phone Numbers: The phone number fields are designed for use CONUS as well as OCONUS. The area code will accept three (3) or four (4) numbers. Recently, OCONUS phone numbers have added a fifth digit to the end of the phone numbers. The database is designed to accept these phone numbers as well.

NOTE 2. If the dependents have the same contact information as the soldier you can click the “Same as Soldier” button on the dependents tab. If all of the contact information for the soldier has been entered, it will automatically be copied to the dependent that is currently selected. If some or all of the soldiers contact information is missing you will be prompted to enter it.

### Report

The dependent information is included on the Personal Information Sheet.

### (2) Mass Information

#### Report

The Dependent Information Report is only accessible from the Reports section of the Main Display Screen.

## j. Basic Information – Personal

### (1) Data Limitations

This is the basic information about a soldier. The information includes:

Last Name	SSN	Date of Birth
First Name	Sex	Place of Birth
Middle Name	Race	Marital Status

### (2) Individual Information

#### Updating

1. Perform a search for the soldier (see 3-4 Searches).

## Company Information System (CIS)

2. The information is displayed in the upper section of the Search Display Screen. Update it as needed. Depending on which particular field you are updating you may receive a warning screen to verify that you are changing critical information.

Report

This information is included on the Personal Information Screen.

### (3) Mass Information

Report

The Basic Information – Personal Report is only accessible from the Reports section of the Main Display Screen.

## k. Basic Information – ID Tags

### (1) Data Limitations

This is the basic information needed on an ID Tag. The information includes:

Blood Type

Religious Preference

Notes (Allergies)

The drop down list for the blood type is limited to the list. This list is not updateable because all possible blood types are included.

### (2) Individual Information

Updating

1. Perform a search for the soldier (see 3-4 Searches).
2. The information is displayed in the upper section of the Search Display Screen. Update it as needed.

Report

This information is included on the Personal Information Sheet.

### (3) Mass Information

Report

The Basic Information – ID Tags Report is only accessible from the Reports section of the Main Display Screen.

## l. Basic Information – Military

### (1) Data Limitations

This is the basic information about a soldier that is used exclusively by the military. The information includes:

PMOS

BASD

Loss Date

SMOS

BEPD

Loss Date Remarks

Rank

Arrival Date

GT Score

Date of Rank

ETS

HIV Date

Note that a Loss Date space is provided. For overseas locations, this would be the soldiers DEROS. You should enter the reason the soldier is leaving in the Remarks section just below the Loss Date.

### (2) Individual Information

Updating

1. Perform a search for the soldier (see 3-4 Searches).
2. This information is displayed in the upper section of the screen. Update it as needed.

## Company Information System (CIS)

### Report

This information is included on the Personal Information Sheet.

### (3) Mass Information

#### Report

The Basic Information – Military Report is only accessible from the Reports section of the Main Display Screen.

## m. Basic Information – Clothing

### (1) Data Limitations

Clothing Sizes are simply what they look like. One thing to consider is that the drop down menu is standardized and should not be considered to list all the options available. IE: The drop down list for MOPP Suit includes sizes like SR (Small Regular), however this size is not available for MOPP suits. This is done to save space within the database. Simply choose the appropriate size for the items.

### (2) Individual Information

#### Updating

1. Perform a search for the soldier (see 3-4 Searches).
2. Click on the Clothing Tab.
3. Update the information as required.

#### Report

This information is on the Personal Information Sheet.

### (3) Mass Information

#### Report

The Basic Information – Clothing Report is only accessible from the Reports section of the Main Display Screen.

## n. License – By Name

### (1) Data Limitations

While the License fields are not limited to the drop down list, it is recommended to use the list whenever possible. This will prevent errors on the reports due to misspellings of the vehicles names.

### (2) Individual Information

#### Updating

1. Perform a search for the soldier (see 3-4 Searches).
2. Click the License Tab.
3. Update the information as needed.

#### Report

This information is on the Personal Information Sheet.

### (3) Mass Information

#### Report

The License – By Name Report is only accessible from the Reports section of the Main Display Screen.

This is a list of all soldiers with the vehicles listed under each.

## o. License – By Vehicle

### (1) Data Limitations

While the License fields are not limited to the drop down list, it is recommended to use the list whenever possible. This will prevent errors on the reports due to misspellings of the vehicles names.

### (2) Individual Information

#### Updating

1. Perform a search for the soldier (see 3-4 Searches).
2. Click the License Tab.
3. Update the information as needed.

#### Report

This information is on the Personal Information Sheet.

### (3) Mass Information

#### Report

The License – By Vehicle Report is only accessible from the Reports section of the Main Display Screen.

This is a list of all the vehicles with the soldiers' names listed under each.

## p. MTOE

### (1) Data Limitations

The MTOE report is a derived report based on the information entered during initial setup. As of yet, this information cannot be changed once the initial setup has been completed. The purpose of this report is to validate your initial setup.

### (2) Mass Information

#### Report

The MTOE Report is only accessible from the Reports section of the Main Display Screen.

## 4-2. Training Records

### a. General use of Training Sheets

#### (1) Individual Updates

All training records can be added, updated, and deleted for each individual soldier.

1. Perform a search for the soldier (see 3-4 Searches).
2. Click the tab that corresponds to the topic you want to update.
3. Most of the training information contains calculated information on the Search Display Screen. Because of this, the information cannot be updated directly on the Search Display Screen. To add, edit, or delete a specific record you will need to click the “Add, Edit, Delete” button. This will open a separate screen.
4. Add: In the first line available, type the SSN and the appropriate information for the subject. Refer to each section to determine what the appropriate information is.
5. Edit: Simply change the appropriate information in the line that needs to be changed.
6. Delete: Next to each record there is a button with a small “X” next to it. Simply click that button. You will be prompted to delete the record. Click “Yes” if you are sure.
7. Click the close button.

## Company Information System (CIS)

### (2) Mass Updates

In general all of the training records are updated the same way. You can only ADD new training records using this method. If you need to Update or Delete any training records you must do it individually on the Search Display Screen.

1. Click the button for the appropriate training area.
2. Enter the common information at the top of the page. This is typically the type of qualification and the date the qualification was performed. All fields at the top of the page must be filled. Refer to the paragraph for each subject to determine exactly what information should be entered.
3. In the first line available, enter the soldiers SSN. Their name and all the common information will be automatically entered. Then enter the RAW information for this specific type of qualification.

### b. PT

#### (1) Reference

FM 21-20 (1 Oct 98)

#### (2) Data Limitations

The first thing to consider is the soldier DOB. If it is incorrect, the soldiers PT information may not be displayed correctly or may not be displayed at all. This is because the age of the soldier is calculated using the date of the PT Test and the DOB. If the DOB would have the soldier be less the 17 years old as of the PT Test date, the PT Test will not show up. The minimum age for anyone to join the service is 17.

Event	Minimum	Maximum
PU	0	120
SU	0	120
2M	0.00 or 10.00 min	60.00 min

#### (3) Individual Information

##### Updating

1. Perform a search for the soldier (see 3-4 Searches).
2. The PT Tab is automatically displayed in the lower section. Click the “Add, Edit, Delete” button.
3. Add a Record: In the first available line, enter the soldiers SSN, Date of the PT Test, and the RAW Scores for the PT Test. If the soldier took an alternate event, enter it in the lower section of the screen.
4. Edit PT Test: Simply edit the record that is incorrect.
5. Edit Alternate Event: Click the PT Test in the upper section to show the corresponding Alternate Events, and then edit the information that is incorrect.
6. Delete: Click the Delete button next to the record that you want to delete.
7. Click close. The search Display Screen will automatically update.

##### Report

All of a soldiers PT Records are included on the Personal Information Sheet. A soldiers DA Form 705 (PT Score Card) can be printed from the Search Display Screen. On the PT tab simply click the Print Preview, Email, or Print button.

##### Conditional Formatting

If the PT Date is more than 6 months old, it will be highlighted in yellow. This is because the PT Test is valid for 12 months, however the intent is to have a soldier take a PT Test every 6 months. If the PT Test date is more than 12 months old, it will be highlighted in red. If the soldier scored less than 60 points in any event, that event and the total points will be highlighted in red. This indicates the soldier failed the PT Test. If the soldier took

## Company Information System (CIS)

an alternate event but failed to meet the minimum time requirements, their alternate event time will be highlighted in red. If a soldier took an alternate event and passes, it will not change the conditional formatting of the regular events or the total points.

### (4) Mass Information

#### Updating

1. Click the PT Test button under the Data / Tracking section of the Main Screen.
2. At the top of the page, enter the date that this group was administered the PT test.
3. In the first available line, type the soldiers SSN and then the RAW scores for the PT Test events.

#### Report

The PT Report is accessible from the PT Mass Update Screen and the Reports section of the Main Display Screen.

The report can be broken down into 4 sections. Only the sections that have data will be shown. If your unit doesn't have information relating to one of the sub reports, you will not see the headers for that sub report. The first section shows all current PT test. At the very top are the current averages for this section only. The second section shows all current PT tests with Alternate Events. The alternate events are displayed in a separate report because many people feel that they bring the PT averages of a unit down and should not be included in the averaging process. The third section shows all expired PT test. The fourth section shows a list of names for people who do not have a PT record stored in the database.

#### 4. Conditional Formatting

If the PT Date is more than 6 months old, the date will be highlighted in yellow. This is because the PT Test is valid for 12 months, however the intent is to have a soldier take a PT Test every 6 months. If the soldier scores less than 60 points in any event, that event and the total points will be highlighted in red. This indicates the soldier failed the PT Test. If the soldier took an alternate event but failed to meet the minimum time requirements, their alternate event time will be highlighted in red.

## c. Weapons

### (1) Reference

Weapon	Reference	Type of Qual	Form (DA)	Weapon	Reference	Type of Qual	Form (DA)
AT 4	FM 3-23.25 (Aug01)	Stand	DA 7324	M249	FM 3-27.68 (Jan03)	Stand	DA 85
Hand Grenade	FM 3-23.50 (Sep02)	Stand	DA 3517	M4	FM 23-9 (Jul89)	Alt	DA 5790
M16 A2	FM 23-9 (3Jul89)	Alt	DA 5790			Stand	DA 3595
		Stand	DA 3595	M60	FM 3-22.68 (Jan03)	Stand	DA 86
M2	FM 23-65 (Dec02)	Alt	NA	M9	FM 23-35 (Oct88)	Alt	DA 5704
		Stand	DA 7007			Stand	DA 88
M203	FM 23-31 (Sep94)	Stand	DA 2946				
M240B	FM 3-22.68 (Jan03)	Stand	DA 85				

## Company Information System (CIS)

### (2) Data Limitations

Currently the database is limited to the weapons systems that are included with the initial setup. However it is possible to give credit for a type of qualification (Standard or Alternate) that does not match the type of weapon. If this is done, that particular qualification will not show up on any report or calculated screen. The only place that it will be visible is on the “Add, Edit, Delete” screen from the individual soldier. There are plans to allow the unit to update the weapons qualification tables (see 6-1.a Editable List).

Weapon	Type of Qual	Unqualified	Marksman	Sharp Shooter	Expert
AT4	Standard	0-8	9-10	11-12	13
Hand Grenade	Standard	0-4	5	6	7
M16A2	Alternate	0-25	26-32	33-37	38-40
	Standard	0-22	23-29	30-35	36-40
M2	Alternate	0 (No-Go)	1 (Go)	NA	NA
	Standard	0-152	153-173	174-195	196-218
M203	Standard	0-59	60-69	70-79	80-90
M240B	Standard	0-150	151-179	180-205	206-227
M249	Standard	0-139	140-157	158-181	182-201
M4	Alternate	0-25	26-32	33-37	38-40
	Standard	0-22	23-29	30-35	36-40
M60	Standard	0-150	151-179	180-205	206-227
M9	Alternate	0-79	80-119	120-159	160-200
	Standard	0-159	160-209	210-259	260-300

Note: The M2 Alternate qualification is scored on a Go/No-Go basis. Use “0” for No-Go and “1” for Go.

### (3) Individual Information

#### Updating

1. Perform a search for the soldier (see 3-4 Searches).
2. Click the Weapons Tab
3. Click “Add, Edit, Delete” button
4. Add a record: On the first available line, enter the soldier SSN, Type of Weapons, Type of Qualification, Date of Qualification, and the RAW Score for that weapon.
5. Edit: Simply edit the record that is incorrect.
6. Delete: Click the Delete button next to the record that you want to delete.
7. Click Close. The Search Display Screen will automatically update.

#### Report

All of a soldier’s weapons qualification information is on the Personal Information sheet.

A reconstructed score card can be printed for each weapons qualification that the database initially came with. On the Search Display Screen, click the Weapons type. Next to each weapons qualification are the standard Print Preview, Email, and Print buttons. This will bring up the scorecard for that particular type weapon/type of qualification. This can be helpful if a soldier is PCSing and scorecard cannot be found.

#### Conditional Formatting

If a weapons qualification has expired, the entire line will be highlight in red. If the soldier failed to qualify with the weapon, the score and level of qualification will be highlighted in red.

### (4) Mass Information

#### Updating

1. Click the “Weapons Qual” button under the Data / Tracking section of the Main Display Screen.
2. At the top of the page enter the Date of Qual, Type of Weapon, and Type of Qual.

## Company Information System (CIS)

3. In the first available line, enter the soldiers SSN. Their Name, the Date of Qual, Type of Weapon, and Type of Qual will automatically be updated as you move from each field. Enter the RAW Score for the weapon.
4. Click close.

### Report

The Weapons Report is accessible from the Weapons Mass Update Screen and the Reports section of the Main Display Screen.

The Weapons Report is a simple list of each weapon type with a list of the qualified soldiers under it. The report does not take into consideration whether a soldier is assigned that weapon type or not. It lists all qualified persons for that weapons type.

### Conditional Formatting

## d. Schools

### (1) Data Limitations

All values for schools are limited to the drop down list because the valid time for that school must be determined.

### (2) Individual Information

#### Updating

1. Perform a search for the soldier (see 3-4 Searches).
2. Click the Schools Tab.
3. Click “Add, Edit, Delete” button.
4. Add a record: On the first available line, enter the soldier’s SSN, name of school, and date of school.
5. Edit: Simply edit the record that is incorrect.
6. Delete: Click the Delete button next to the record that you want to delete.
7. Click Close. The Search Display Screen will automatically update.

#### Report

All of a soldier’s school information is on the Personal Information sheet.

#### Conditional Formatting

If a school expires within the next 60 days, it will be highlighted in yellow. If a school has expired it will be highlighted in red.

### (3) Mass Information

#### Report

The Schools Report is only accessible from the Reports section of the Main Display Screen.

#### Conditional Formatting

The schools report is divided into three sections. All three of the sections are grouped by the name of the school, then sorted by the soldiers’ name. The first section lists all schools that are currently valid. The second section lists all schools that have expired. The third section lists all schools that do not expire.

## 4-3. Tracking Sheets

### a. General

#### (1) Individual Update

In general all of the tracking records are updated in the same way.

## Company Information System (CIS)

1. Perform a search for the soldier (see 3-4 Searches).
2. Click the tab that corresponds to the topic you want to update.
3. Since no calculations are performed on tracking sheets, you can add, update, or delete the information directly in the Search Display Screen.
4. Adding: Go to the first available line and simply add the information.
5. Updating: Simply update the information that needs changing.
6. Deleting: Typically these items are not deleted. This allows the item to be referenced as past action on the Search Display Screen for that individual. However, it may be necessary to actually delete a record as if it never happened. Click the record selector to the left of the record. You can then right click and select cut from the drop down list or you can press the delete key on the keyboard.

### (2) Mass Update

In general all of the tracking records are updated in the same way. Only current records are displayed on the tracking update sheets. This keeps the screen clear of items that have been completed and no longer need to be tracked.

1. Click the button for the appropriate tracking sheet.
2. Adding: Enter the soldiers SSN in the first available line. The soldiers name will automatically be entered. Then input the item to be tracked and its current status.
3. Updating: Simply update the information that needs changing.
4. Deleting: If an action is complete, it will no longer show on the tracking update screen after a completed date is entered. This is typically how items are “deleted.” Using this will allow the item to still be referenced as past action on the Search Display Screen for that individual. However, it may be necessary to actually delete a record as if it never happened. Click the record selector to the left of the record. You can then right click and select cut from the drop down list or you can press the delete key on the keyboard.

### (3) Mass Report

The tracking reports display the information shown on the tracking update screens, with one exception. Items that have a completed date within the last seven (7) days will also be included. This is done deliberately so that items will show up as complete at least once during weekly training meetings.

## b. Personnel Actions

### (1) Individual Information

#### Updating

1. Perform a search for the soldier (see 3-4 Searches).
2. Click the Personnel Actions tab.
3. Adding: Go to the first available line on the tab and enter the type of action you want to track for this soldier.
4. Updating: Simply update the action whose current status has changed.
5. Deleting: Typically actions are not deleted so they can be referred to for historical information about a soldier. This historical information may be needed for several months or years. However, it may be necessary to actually delete a record as if it never happened. Click the record selector to the left of the record. You can then right click and select cut from the drop down list or you can press the delete key on the keyboard.

#### Report

This information is included on the Personal Information Sheets

### (2) Mass Information

#### Updating

1. Click the “Personnel Actions” button under the Data / Tracking section of the Main Display Screen.

2. Adding: In the first available line, enter the soldiers SSN. Their name will automatically be entered. Select the appropriate action from the drop down list. If the action is not on the list you can enter an appropriate title for the action. If your unit tracks this action regularly you should add it to the drop down list (see 3-3.a Edit Drop Down List). Then enter the current status of the action.
3. Updating: Simply update the current status of the action.
4. Deleting: If an action is complete, it will no longer show on the tracking update screen after a completed date is entered. This is typically how items are “deleted.” Using this will allow the item to still be referenced as past action on the Search Display Screen for that individual. However, it may be necessary to actually delete a record as if it never happened. Click the record selector to the left of the record. You can then right click and select cut from the drop down list or you can press the delete key on the keyboard.

### Report

The Personnel Actions Report is accessible from the Personnel Actions Tracking Screen and the Reports section of the Main Display Screen. The Personnel Actions Tracking Report contains all active personnel actions and all personnel actions that have been completed in the last seven (7) days. Active personnel actions are all personnel actions that do not have a completion date entered. The report includes all personnel actions that have been completed within the last seven (7) days so that they will show up during the weekly training meetings that most units have.

## c. Awards

### (1) Individual Information

#### Updating

1. Perform a search for the soldier (see 3-4 Searches).
2. Click the Awards tab.
3. Adding: Go to the first available line on the tab and enter the type of award and the reason for the award.
4. Updating: Simply update the award whose current status has changed.
5. Deleting: Typically awards are not deleted so they can be referred to for historical information about a soldier. This historical information may be needed for several months or years. When a soldier is deleted from the database, their corresponding information is deleted. However, it may be necessary to actually delete a record as if it never happened. Click the record selector to the left of the record. You can then right click and select cut from the drop down list or you can press the delete key on the keyboard.
6. Previous Awards: The previous awards section is provided for reference purposes. Care should be taken to insure that an award is not recorded on the tracking section and the previous awards.

#### Report

This information is included on the Personal Information Sheets.

### (2) Mass Information

#### Updating

1. Click the “Awards” button under the Data / Tracking section of the Main Display Screen.
2. Adding: In the first available line, enter the soldiers SSN. Their name will automatically be entered. Select the type of award and the reason for the award from the drop down list. If the award is not on the list you can enter an appropriate title for the award. If your unit tracks the award regularly you should add it to the drop down list (see 3-3.a Edit Drop Down List). Then enter the current status of the award.
3. Updating: Simply update the current status of the award.
4. Deleting: If an award is complete, it will no longer show on the tracking update screen after a completed date is entered. This is typically how items are “deleted.” Using this will allow the item to still be referenced as past action on the Search Display Screen for that individual. However, it may be necessary to actually delete a record as if it never happened. Click the record selector to the left of the

## Company Information System (CIS)

record. You can then right click and select cut from the drop down list or you can press the delete key on the keyboard.

### Report

The Awards Report is accessible from the Awards Tracking Screen and the Reports section of the Main Display Screen. The Awards Tracking Report contains all active awards and all awards that have been completed in the last seven (7) days. Active awards are all awards that do not have a completion date entered. The report includes all awards that have been completed within the last seven (7) days so that they will show up during the weekly training meetings.

## d. Leaves/Passes

### (1) Data Limitations

You cannot enter a leave/pass that is in the past. If a leave/pass has already started, you should use the current date as the start date of the leave/pass. If the leave/pass has already ended, you should not enter it in the database.

### (2) Individual Information

#### Updating

1. Perform a search for the soldier (see 3-4 Searches).
2. Click on the Leaves/Passes tab.
3. Adding: Go to the first available line on the tab and choose the type of leave from the drop down list. Then enter the current status.
4. Updating: Simply update the leave status as required.
5. Deleting: Typically leaves are not deleted so they can be referred to for historical information about a soldier. This historical information may be needed for several months or years. However, it may be necessary to actually delete a record as if it never happened. Click the record selector to the left of the record. You can then right click and select cut from the drop down list of you can press the delete key on the keyboard.

#### Conditional Formatting

If the dates for a leave/pass include the current date (the soldier is on leave/pass) then the start/end dates will be highlighted in yellow. If the leave/pass dates are in the past, they will be highlighted in red.

### (3) Mass Information

#### Updating

1. Click the "Leaves/Passes" button under the Data / Tracking section of the Main Display Screen.
2. The cursor will automatically be moved to the first available line. If you have entered enough records so that there is more than one page, it will appear that no previous leaves have been entered.
3. Adding: Enter the SSN of the soldier. The soldier's name will automatically be entered. Choose the type of leave/pass from the drop down list. Enter the date that the leave was received by ops and the dates of the leave/pass. Most leaves are sent to S1 for processing on the same day they are received. However, passes are handled at the company level. Enter the date taken to S1 as appropriate.
4. Updating: You can only change the dates if they do not violate the data limitation rules. This means that if a soldier gets their leave/pass extended, the end date can be changed (because it is still in the future) but the start date cannot (because it is in the past).
5. Deleting: Typically leaves/passes are not deleted. This will allow the item to still be referenced as past action on the Search Display Screen for that individual. Since the database automatically moves to the first available line, you will not normally see the previously entered leaves/passes. However, it may be necessary to actually delete a record as if it never happened. Scroll up until you find the record you need to delete. Click the record selector to the left of the record. You can then right click and select cut from the drop down list or you can press the delete key on the keyboard.

### Report

## Company Information System (CIS)

The Leaves/Passes Report is accessible from the Leaves/Passes Tracking Screen and the Reports section of the Main Display Screen. The Leave/Passes report is divided into two sections, Currently on Leave and Pending Leaves. These sections are self-explanatory.

### **4-4.** Compare with Battalion Information System (BIS)

#### **a.** Import New Information

Currently the database will only recognize BIS R1. This is because R1 is the only current version. As new versions of the BIS become available, the S1 and the unit should upgrade at the same time. If only new version of CIS become available, they will be backwards compatible with previous releases of BIS.

Insert the most recent backup disk for the Battalion Information system provided by the S1. Then click the "Import New Information" button. The database will determine which version of BIS is being used. You will be prompted several times. You MUST click YES each time you are prompted. If you receive any errors during the import process, please contact the S1 to insure that they performed the Sidpers download correctly. If they did, then please contact the designer of the database for assistance.

#### **b.** Assignments

##### (1) Assigned in BIS, not in CIS

This section simply compares the Social Security Numbers stored in the BIS and the CIS. Special remarks regarding assigned, attached and detached status for *this* comparison.

Assigned: Since the database is comparing the SSN's, all of the soldiers should match.

Attached: The comparison between the databases is only one-way. This comparison is views the information imported from BIS and matches their SSN's. Soldiers that are attached (in your database) will not have a matching SSN in BIS and will not be included in this comparison.

Detached: Soldiers that are detached from your unit are still assigned to your unit and should be included in your database.

Adding these soldiers

Simply click the "Add this soldier" button next to the soldier you want to add. If all of the required information is present, a second screen will then open and you must choose a manning number for this soldier. Only manning numbers that are not currently being used will be displayed. If all of the required information is not present you will be prompted that you need to use the "Arrive a Soldier" button on the Main Screen (see para 4-1.a Adding Soldiers). If names are still being shown on this screen it will automatically be re-opened. If no names are listed on the screen, you will be returned to the "Compare with Battalion Information" Screen.

Reporting errors

There are two basic types of errors that are common.

1. First, a soldier shown on this list is already assigned to your unit and entered in the database. Check the SSN of the soldier in your database. It is not uncommon to have an incorrect SSN.
2. Second, you feel that this soldier is not assigned to your unit. If the soldier recently ETSed, remember that the soldier must be accounted for until their ETS date. If this is not the case contact your S1 to determine if this was a recent change in assignment, the error was made in the BIS, or if there is an error in Sidpers that has not been corrected.

##### (2) Assigned in CIS, not in BIS

This section simply compares the Social Security Numbers stored in the BIS and the CIS. Special remarks regarding assigned, attached and detached status for *this* comparison.

Assigned: Since the database is comparing the SSN's, all of the soldiers should match.

## Company Information System (CIS)

Attached: The comparison between the databases is only one-way. This comparison is views the information in CIS and matches their SSN's in the information imported from BIS (exact opposite of the previous section). Soldiers that are attached (in your database but are not assigned) would normally show up on the section. However soldiers who have a daily status of attached are deliberately excluded from this comparison.

Detached: Soldiers that are detached from your unit are still assigned to your unit and should be included in your database.

### Deleting these soldiers

First you must determine if the soldiers status is being reported incorrectly. If the soldier should be reported as attached, but is not, they will show up in this section. If you need to change the soldiers' status, click the "View this soldier" button to perform a search for the soldier. From there simply change the soldier status to Attached (see para 4-1.g(2) Individual Information).

If it is determined that these soldiers are no longer needed in the database, simply click the "Delete this soldier" button next to the soldier you want to delete. You will be prompted that to insure that you want to delete this record. You may also be prompted about a "cascading delete," click yes. This is because as a soldier is deleted from the main table all of the information in sub tables is also deleted (PT, Weapons, Dependent Information, etc.).

### Reporting Errors

There are two basic types of errors that are common.

1. First, a soldier with an incorrect SSN (either in CIS or in BIS) may be shown. Simple correct the incorrect SSN.
2. Second, you feel that this soldier is assigned to your unit. Contact your S1 to determine if this was a recent change in assignment, the error was made in the BIS, or if there is an error in Sidpers that has not been corrected.

## c. Change in Rank / Date of Rank

### (1) Accept the Rank / DOR stored in BIS

To accept the change for the individual, click the "Accept Change" button next to the soldier. If you want accept all of the changes, you can click the "Accept ALL" button at the top of the screen

### (2) Reporting Errors

There are only two ways to change a soldier's rank, promote them or demote them. In either case, disputes in rank should be taken up with the S1.

## d. Change in ETS

### (1) Accept the ETS stored in BIS

The BIS does not store a soldiers ETS directly. It is part of the Sidpers download. The comparison here is a direct comparison with that information. To accept the change for the individual, click the "Accept Change" button next tot the soldier. If you want to accept all of the changes, you can click the "Accept ALL" button at the top of the screen.

### (2) Reporting Errors

If you feel that there is an error in a soldiers ETS date, you should contact you local re-enlistment NCO.

## e. Change in UMR

### (1) Deployment UIC's

Before starting to compare UMR positions, something must be understood. The UMR Code as shown in the BIS is downloaded from Sidpers. If the unit is currently deployed, Sidpers generates deployment UIC's. The database automatically compensates for this when determining who is assigned, attached, or detached to the unit.

## Company Information System (CIS)

However the deployment UIC's do not have an MTOE assigned to them in Sidpers. The result is that only the 999x UMR codes are available under the deployed UIC. This makes the Change in UMR feature almost useless while the unit is deployed.

### (2) Changes in the UMR Codes

Each year, as the MTOE changes, Sidpers updates the UMR to reflect the new MTOE. Some positions are added, some positions are deleted, and many position numbers change. The entire process changes the UMR dramatically. However the UMR codes stored in Sidpers for the individual do not change. The end result is that even if no changes are needed, according to this comparison, there may be many changes that are needed. The only way to catch when this happens is when the S1 prints their monthly copy of the UMR Report. When this happens, you must update the UMR codes in the database. The ability to change the UMR codes is one of the planned updates in future releases.

### (3) Changing the Manning Number of a soldier

To change the UMR code for a soldier you must change the soldier Manning Number. Click the "Re-Slot Soldier" button next to the soldier. A new screen will open showing all of the manning numbers that are currently available. If you don't see the manning number that you are looking for, someone else is already assigned to that position. Once you locate the manning number you are looking for, click the "Use" button next to it. The manning number for that soldier will be changed.

### (4) Reporting Changes

After you have re-slotted any soldiers that need re-slotting, the rest of the information needs to be updated in Sidpers. Use the Print, Print Preview, or Email buttons at the bottom of the screen to generate a report for S1. S1 should then re-slot those soldiers in Sidpers.

## Chapter 5 Known Issues

### 5-1. Height/Weight

#### a. Incorrect Age Calculation

When calculating a soldier's age as of the date of the Height/Weight, the computer determines how many days old the soldier is on that date. This can be a problem if the following conditions are ALL true:

1. The Height/Weight is administered on the soldiers' birth date.
2. It is a leap year.
3. The soldier's age would affect which age group the soldier would fall in when calculating their score.

Fix: Change the date of the Height/Weight to one day after the actually took it. IE: the soldier had their Height/Weight measured on 23 Sep, change it to 24 Sep.

Probability: 1:500,000 (or so)

### 5-2. PT Report

#### a. Incorrect Age Calculation

When calculating a soldier's age as of the date of the PT test, the computer determines how many days old the soldier is on that date. This can be a problem if the following conditions are ALL true:

1. The PT Test is administered on the soldiers' birth date.
2. It is a leap year.
3. The soldier's age would affect which age group the soldier would fall in when calculating their score.

Fix: Change the date of the PT test to one day after the actually took it. IE: the soldier took the PT test on 23 Sep, change it to 24 Sep.

Probability: 1:500,000 (or so)

### 5-3. Printing

This database was designed for use with a Laser Printer. Laser Printers typically have a larger printable area per sheet. If you use an inkjet printer you may encounter an error saying, "Some data may not be displayed. Insufficient horizontal space." This is normal. For most situations this is not a problem and all the information will be printed. Sometimes one edge of the page may be cut off. This is a limitation of the printer and not this database.

## **Chapter 6** Future Updates

### **6-1.** Items to Add

#### **a.** Editable List

(1) Manning Numbers

Ability to change Manning Numbers as MTOE/UMR changes. Ability to add or delete 999x positions as required.

(2) Automatically offer to add value to select list if they are entered in the database (IE vehicle type in the vehicle license sections)

(3) Weapons Qualification Standards

This will allow the user to add weapons information into the database. This can be an issue for units that use special weapon systems

#### **b.** New Reports

(1) Alert Rosters

This will use information that is already stored in the database (Personal contact information). However it will allow the typical report used by many units as Alert Rosters. It will be automatically be updated based on the Manning Numbers.

#### **c.** New Areas

(1) MAL

This will allow further information to be added. Having the soldiers' assigned weapon included will also allow the database to automatically prepare the statistical information used during Quarterly Training Briefs.

(2) NBC Mask Chart

(3) CTT

This area has not been developed. However the intent is to allow the user to specify which task are part of the CTT Testing for that year and then indicate the individual performance. This will allow statistical information to be developed.

(4) Gains Roster

A simple gains roster that allows easy tracking of projected gains. These soldiers would then be able to be transferred to the database (be arrived). This, in conjunction with the loss roster, will allow statistical projection of the unit strength

(5) Loss Roster

A simple loss roster based on the loss date. This, in conjunction with the gains roster, will allow statistical projection of the unit strength.

(6) Unit Drug and Alcohol Coordinator

This will allow the user to generate a list based on the criteria of the last digit of the SSN or the last letter of the last name.

**d. Automatically Check for Incorrect Data**

This will be a large update that forces the user to input correct information.

**(2) Date of Event**

This will catch the errors as listed in 5-1.a Height/Weight Incorrect Age Calculation and 5-2.a PT Report Incorrect Age Calculation.

**(3) Weapon Type v. Type of Qualification**

Currently a user can specify that the soldier qualified on a weapon but specify a type of qualification that does not match. This will automatically be check and force the user to fix the type of qualification or delete the qualification.

**e. Medical Screening**

Add ability to track medical shots, HIV, Dental, etc. (Similar to Schools.)

**f.**

**6-2. Items to Modify**

**a. Leaves/Passes**

This will have a section to view the current/upcoming leaves in a DA 6 like format.

**b. Compare with BIS**

(1) Attached / Detached status

(2) Loss Date

(3) BASD

**c. Awards Tracker**

(1) Have soldiers who are 120 days from Loss Date show up on awards report.