

Check In Check Out (CICO) Users Guide

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Disclaimer

No data shown in illustrations or figures represents any “real” account, project, organization, team, or individual. Any resemblance to actual accounts, projects, organizations, teams, and individuals is purely coincidental.

1 Check In Check Out (CICO) Overview

Check In Check Out (CICO) is an automated workflow tool that will be used by HQ employees and contractors for submitting and processing work requests associated with a person's employment with NASA. Examples of items and services that can be requested through *CICO* include new employee orientation, office space, NASA badge, government passport and various IT resources such as computers or access to applications and folders.

When a request is submitted into *CICO* it is routed electronically for approval, action, and closure by the organizations responsible for fulfilling the request. These organizations include: Human Resources Management Division, Facilities and Administrative Services Division, Information Technology and Communications Division, Office of Security and Program Protection, and Hiring Organization.

The *CICO* application eliminates the NHQ Form 60, Final Checkout Record. All notifications and validations are performed and noted within *CICO*. A Checkout Checklist is provided as Addendum A. This Checklist serves as a tool to help guide the OPOC and departing employee through the checkout process. Although much of the Check Out process takes place within *CICO*, the employee is still required to visit several offices to submit forms and turn in assets such as credit cards, IT equipment and NASA badge.

Within *CICO*, there are 3 primary processes: *Check In*, *Request*, and *Check Out*. These processes track the progress of *CICO* records as they pass through the process. Records move through various stages during the CICO processes. A few examples of those are (Record) "Initiated", "Awaiting Approval", "Awaiting Fulfillment", and "Completed". Records are routed to one or more individual(s) who perform specific roles within a process. These individual(s) are considered to be the "owners" of the current state of a record. For example, the user role called "Level One Approver" is the owner of the state called "Awaiting Level One Approval".

2 Browser Interface

When the User first logs on to CICO all of the processes are displayed in the "Tabs Bar" at the top of the screen. The tab for the process that is defined on the User Profile as being a "Preferred Process" will be highlighted in light blue. The other tabs will appear in a darker blue. The Preferred Process is simply the process that is "Active" when a User first logs on.

To switch to a different process, click on the blue tab showing the process name. That process will become the "Active Process", and be highlighted in light blue. Each process has its own "Home Page Report", which is pre-set for each User.

The area below the Tabs Bar is used for displaying reports and giving a User access to individual records. In this illustration the report titled "Check In Records: All Items" is displayed. This report was set as the User's "Home Page Report" for the Check In process. Any report available to the User can be set as the "Home Page Report".



3 Getting Started

1. To log on to CICO, go to the “**Inside HQ**” website. The link will be located in the blue box under “**HQ Services**”.



2. Click the CICO link.
3. Enter the User name and Password. **Note:** The User name and Password will be the same as the User’s Domain account. If you are logging in from the NASA HQ building and not using SNA or VPN, prefix your username with “hq\”



3.1 Who has access to CICO?

Everyone that has an entry in the NASA HQ X.500 directory has an account to access CICO.

The username and password are the identical to those used to access NASA HQ network domain and your Email account.

CICO does reside behind the firewall and requires access via SNA or VPN if you are accessing remotely

4 The Check In Process

A Check In is a set of individual Request Records, organized under a header (or parent) Check In Record. A parent record has one or many requests linked to the parent record; the parent record cannot be closed until all of the requests linked to the parent record are closed or cancelled. The Check In Record is created as the first step in the process. Then one or more associated request records are automatically generated based on the request item “Yes/ No” selections found in the Check In record. The “Yes / No” selection fields are pre-set for a routine Check In but can be modified by the User who creates the Check In record.

4.1 Starting a Check In (OPOC / COTR)

1. To begin the Check In process, select the “**Check In Records**” tab; click the “**Add a Record**” button.

The screenshot shows the 'Check In Records' tab selected in the application. The 'Add a Record' button is highlighted. Below the navigation bar, there are buttons for 'OK', 'Cancel', and 'Reset Form'. The main content area shows 'Submit into: Base Project : Check In : New Check In Records' and a 'Person Information' section. A 'Note' box contains the instruction: 'Populate the Check In Fields below with information about the person who is Checking In to NASA HQ. The person may be r Press 'OK' when done.' Below the note are input fields for '* First Name:', 'Middle Name:', '* Last Name:', 'UUPIC:', and 'Alternate Identifier:'. The 'Type of Alternate Identifier:' dropdown is set to '(None)'. There are also 'ABP' icons next to the name and UUPIC fields.

2. Enter the full name of the employee, the UUPIC or HQ Identifier if one has been assigned (new employee’s may not have one assigned at the beginning of the Check In process). This will help the system locate any existing records related to the employee. First and last names are required information, all other information is optional. Enter all information that is available before proceeding.

NOTES:

- 1) At the top of most screens there is a *Note*: section with text displayed on a light green background. The “Note” section lists information and instructions relevant to the where the request is within the process, workflow.
- 2) Requests generated by the Check In that require access to IT resources cannot be approved and processed until a valid UUPIC is entered for the employee.

3): This is the only point in the workflow where the “**Cancel**” button can stop the creation of the Check In Record. After a record is created, if the “**Cancel**” button is pressed, the record will be marked as canceled (but not actually deleted from the system) as shown in this illustration. Reports can be generated to view canceled records

3. After entering available information, click "OK"

Request Records | Check In Records | CheckOut Records | Person Records | Request Items

Add a Record | Home Page Report | Reports | Search Records | Search by Record ID: [] >> Settings for Home Page

OK | Cancel | Reset Form | Actions: (select one)

Submit into: Base Project : Check In : New Check In Records

Person Information

Note: Populate the Check In Fields below with information about the person who is Checking In to NASA HQ. The person may be new Press 'OK' when done.

* First Name: Jamie

Middle Name: Christine

* Last Name: Johnson

UUPIC: 442587543

Alternate Identifier: []

Type of Alternate Identifier: (None)

NOTE: Field names displayed in *red italic* and with an asterisk (*) preceding the field name are required. Field names in *green italic* are also required but they have pre-existing values already entered.

4. Below is a display of the Check In screen after clicking "OK" Click the "Continue with Check In" button..

https://nasa.hq.nasa.gov CICO Backup 9.24.07 (Oracle) Microsoft Internet Explorer provided by HITSS

Request Records | Check In Records | CheckOut Records | Person Records | Request Items

Add a Record | Home Page Report | Reports | Search Records | Search by Record ID: [] >> Settings for Home Page

New Check In Records CICO Check In Record 000525: (C) Not Specified : Jamie Christine Johnson : Check In Record Created

Continue with Check In | Update Data Entered | Delete Record | Actions: (select one)

State Change History

Submit | Check In Record Created | New Person Checking In | Check In Record Created

NOTE: This Person is new to the NASA HQ CICO system. Press "Continue with Check In" when ready, or press "Update Data Entered" to modify the person's identifying information.

Request Id: 000525

First Name: Jamie

Middle Name: Christine

Last Name: Johnson

UUPIC: 442587543

Alternate Identifier:

Type of Alternate Identifier:

System Fields

Owner: OPOC1

Submitter: OPOC1

Last Modified: OPOC1

Last State Change: OPOC1

Project: New Check In Records

Secondary Owner: (None)

Submit Date: 10/17/2007 6:09:15 PM

Last Modified Date: 10/17/2007 6:09:15 PM

Last State Change Date: 10/17/2007 6:09:15 PM

State: Check In Record Created

Change History

10/17/2007 6:09:15 PM, "New Person Checking In" by OPOC1

10/17/2007 6:09:15 PM, "Submit" by OPOC1

5. Enter the required User information, including the employee's person type (Civil Servant, Contractor, Detaille, Transferee from Center), citizenship, start date, justification and select the NASA HQ organization that the employee will be joining from the pull down menu.

Title: (None) 
First Name: Jamie
Middle Name: Christine
Last Name: Johnson
UUPIC: 442587543

Alternate Identifier:
Type of Alternate Identifier: (None)

*** Person Type:** Federal Civil Servant 
*** US Citizen:** Yes 
*** Start Date:** 10/17/2007  mm/dd/yyyy
 *** Justification:** New employee will provide administrative support for IT&C

*** Organization Title:** LD070 Information Technology & Communications Division 
Organization POC(s): Bowman, Elaine, OPOC1, Washington, Sharon D
Position: Administrative Support 
Grade Level: GS-07 
Type of Appointment: PERMANENT TEMPORARY

If you are checking in a contractor the person type must be contractor. The “Contract” field is required for contractors. Select the correct contract from the “Contract” pull down menu. Contracts are listed by company name and COTR. Once selected the contract number is displayed.

Contract: InDyne, Inc (NNH06CC93B) (OConnell, Michele)

Contract Name: InDyne, Inc
Contract Number: NNH06CC93B
Contract Company Name: InDyne, Inc
Primary COTR: OConnell, Michele
DOCOTR: (None)

- Use the pull down menus to select or enter location and contact information.

Center:  

Building / Location:  

Room Number: 

Phone Number: 

Fax Number: 

- The Check In form allows the User to select request items for the employee; by either selecting or de-selecting “No” or “Yes” buttons or by selecting or de-selecting the check box for the item. The request items have set defaults and must be de-selected if not needed. Enter all request information. If the employee will reside in the NASA HQ building (Workspace Needs Assigned is Yes) your organization must be with the “IRR ceilings.”

Note: Most request items have a” **Required Date**". If no date is entered, the system will default to the employee’s **"Start Date"**.

Request Fields

Badge Needed: No Yes

Workspace Needs Assigned: No Yes Date Workspace Required:  mm/dd/yyyy

Workspace Notes:

Within IRR Civil Servant Ceiling: No Yes Within IRR "Other" Ceiling: No Yes

Phone Needed: No Yes Date Phone Required:  mm/dd/yyyy

Phone Notes:

Computer Seat Needed: No Yes Date Computer Seat Required:  mm/dd/yyyy

Select Computer Seat:  

Computer Seat Notes:

- The defaults for the Standard Account check boxes are set to order all of the accounts required for a person new to NASA.

Select Standard Accounts: 00034: Standard Account : HQ Domain Account 
 00035: Standard Account : LCS / Sharepoint Account 
 00036: Standard Account : X.500 Entry 
 00166: Standard Account : User HEMI Account 
 00167: Standard Account : Transferred User HEMI Account 
 ::

Dial in Acct w/Token Needed: No Yes **Date Token Required:** mm/dd/yyyy 

IT and C General Comments:

::

Process NF-1722 Form: No Yes

- The defaults for the Security Investigation check boxes are set to the minimum requirement for a person new to NASA.

Select Investigations: 00022: Security Clearance Investigation : NACI - National Agency Check with Inquiries 
 00023: Security Clearance Investigation : NCIC - National Crime Information Center 
 00309: Security Clearance Investigation : LBI - Limited Background Investigation 
 00310: Security Clearance Investigation : BI - Background Investigation 
 00311: Security Clearance Investigation : ANACI - Agency Name Check With Inquiries 
 00312: Security Clearance Investigation : NACLC - National Agency Check With Law and Credit 
 00313: Security Clearance Investigation : MBI - Minimum Background Investigation 
 00314: Security Clearance Investigation : SSBI - Single Scope Background Investigation 
 00315: Security Clearance Investigation : SSBIPR - Single Scope Background Investigation Periodic Reinvestigation 
Security General Comments:

- The “No” and “Yes” buttons for the items below are defaulted to “No.” Select the items as required for the new to NASA employee.

Note: these items are not available for contractor employees.

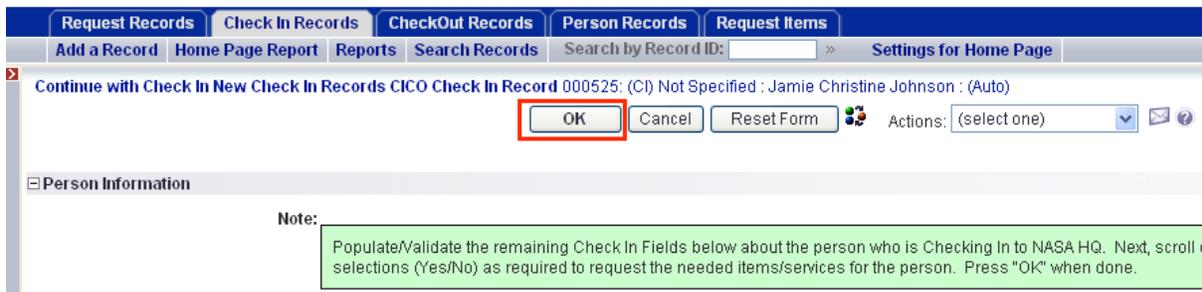
Parking Subsidy Requested: No Yes
Travel Credit Card Requested: No Yes
Passport Requested: No Yes
Fare Subsidy Requested: No Yes
Purchase Credit Card Requested: No Yes
Admin Services Comments:

Finish populating, selecting and de-selecting the items for the remainder of the Check In screen. Verify that all of the information provided is correct, including the NASA

organization the person is reporting to. To make modifications to the request, click the **“Update Check In Record”** button. Not all fields can be updated.



11. Once you have verified that all information has been correctly entered into the Check In Record, Click **“OK”** located at the top of the screen.



4.2 Creating the Check In Request Records

12. To create the Check In Record, click the **“Create Check In Request Records”** button. The system will create a set of request records according to the request items **“Yes/ No”** selection indicators and the items that have a **“check”** in their check box indicator field.

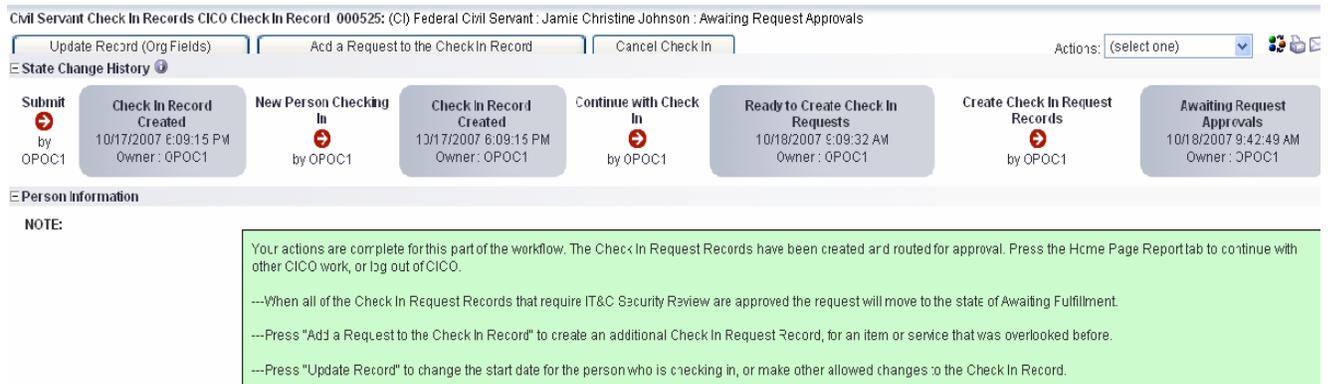


13. Click “OK”.



The text in the “NOTE” section and the state change history are updated to indicate you have completed your actions for this part of the Check In workflow and requests have been generated and routed for approval.

Note: Once created, emails will be sent to the approvers for each Check In related request record. The OPOC or COTR will receive an email notifying them of any action required on their part.



4.3 Searching and Viewing the Request Records associated with the Check In

1. A user can view all requests that are linked to an existing Check In. The first step is to search and locate the check in “parent” record. From the “**Check In Records**” tab, select “Search Records.” The screen below will be displayed. In the “Keywords” field enter the UUPIC or either the first name or last name of the employee. NOTE: Do not enter both first name and last name, the search does not recognize spaces and would not locate the person due to the space between the first and last name. Click the Search button.

The screenshot shows the 'Basic Search' interface. At the top, there are navigation tabs: 'Request Records', 'Check In Records', 'CheckOut Records', 'Person Records', and 'Req'. Below these are sub-tabs: 'Add a Record', 'Home Page Report', 'Reports', 'Search Records', and 'Search by Record ID:'. The 'Check In Records' and 'Search Records' tabs are highlighted with red boxes. The main content area is titled 'Basic Search' and includes a 'Content' section. Under 'Content', there are several search criteria: 'Request Id' (empty), 'Keyword(s)' (containing 'jamie', highlighted with a red box), 'Match All' (selected) and 'Match Any' (unselected) radio buttons, '*Project(s)' (dropdown menu open showing 'Civil Servant Check In Records', 'Contractor Check In Records', and 'New Check In Records'), 'Search in Sub-Projects' (checked checkbox), 'Submitter' (text input with 'Enter value to find here' and a 'Find' button), and 'Active/Inactive' (radio buttons for '(Both)', 'Active', and 'Inactive'). At the bottom left, a 'Search' button is highlighted with a red box.

- You should see the check in “parent” record displayed in the search results. Click on the “Request ID” number to open the check in “parent” record.

Request Records | **Check In Records** | **CheckOut Records** | **Person Records** | **Request Items**

Add a Record | **Home Page Report** | **Reports** | **Search Records** | Search by Record ID: » **Set**

Search Results

[Back to Search](#)

Now showing CICO Check In Records 1 - 1 of 1 Sorted by: Project (Hierarchy)

Base Project > Check In > Civil Servant Check In Records

Request Id	(C) Person Type : First Name Middle Name Last Name : State
<input type="checkbox"/> 000525	(C) Federal Civil Servant : Jamie Christine Johnson : Awaiting Request Approvals

[Check All](#) | [Uncheck All](#) [Requery](#)

(Keywords(All) = jamie)

- Display of the check in “parent” record

Request Records | **Check In Records** | **CheckOut Records** | **Person Records** | **Request Items**

Add a Record | **Home Page Report** | **Reports** | **Search Records** | Search by Record ID: » **Settings for Home Page**

[Back to Results](#)

Civil Servant Check In Records CICO Check In Record 000525: (C) Federal Civil Servant : Jamie Christine Johnson : Awaiting Request Approvals

State Change History

Submit by OPOC1	Check In Record Created 10/17/2007 6:09:15 PM Owner: OPOC1	New Person Checking In by OPOC1	Check In Record Created 10/17/2007 6:09:15 PM Owner: OPOC1	Continue with Check In by OPOC1	Ready to Create Check In Requests 10/18/2007 9:09:32 AM Owner: OPOC1
---------------------------	---	---	---	---	---

Person Information

NOTE:

Your actions are complete for this part of the workflow. The Check In Request Records have been created and routed for other CICO work or log out of CICO.

4. **Scroll to the bottom of the display and locate the “Expand All” link.** When selected it will expand to show all request records that were created as part of the Check In that are linked to the “parent” Check In record.

System Fields

Owner:	OPOC1	Submit Date:	10/17/2007 6
Submitter:	OPOC1	Last Modified Date:	10/18/2007 9
Last Modifier:	OPOC1	Last State Change Date:	10/18/2007 9
Last State Changer:	OPOC1	Project:	Civil Servant Check In Records
Project:	Civil Servant Check In Records	State:	Awaiting Req
Secondary Owner:	Bowman, Elaine OPOC1 Washington, Sharon D	Account Admins:	CICO Check

Subtasks

007900: (PR) Federal Civil Servant : Jamie Christine Johnson : 442587543 (Check In)

Show Subtasks

Expand All

Change History

- 10/18/2007 9:42:49 AM, 'Create Check In Request Records' by OPOC1
- 10/18/2007 9:09:33 AM, Link Principal by OPOC1
- 10/18/2007 9:09:33 AM, Updated by OPOC1
- 10/18/2007 9:09:32 AM, 'Post a Person Record' by OPOC1
- 10/18/2007 9:09:32 AM, 'Continue with Check In' by OPOC1
- 10/17/2007 6:09:15 PM, 'New Person Checking In' by OPOC1
- 10/17/2007 6:09:15 PM, 'Submit' by OPOC1

5. **Scroll to the bottom of the display and locate the “Expand All” link.** When selected it will expand to show all request records linked to the “parent” Check In record as displayed below. Note the “(CI)” displayed to the right of each of the entries, this is an indicator that the requests were created as part of a check in. To view one of the requests, click on the blue link of the request record

Subtasks

007900: (PR) Federal Civil Servant : Jamie Christine Johnson : 442587543 (Check In)

Hide Subtasks

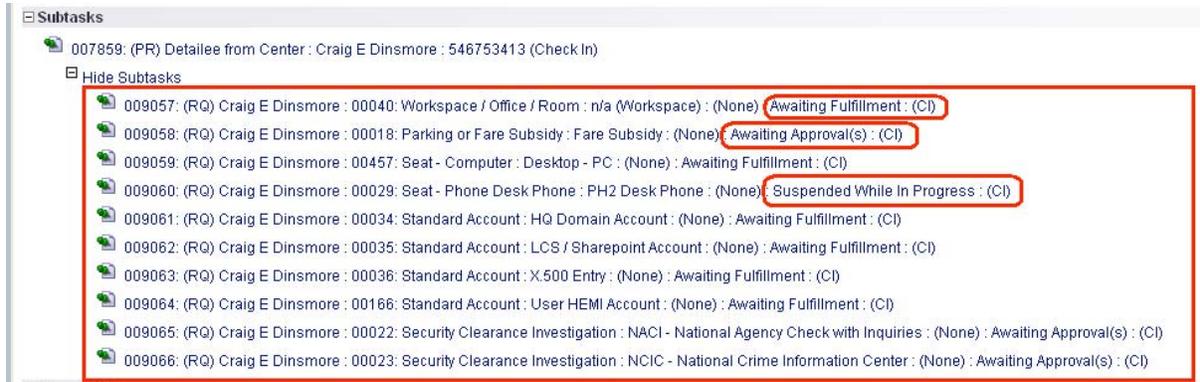
- 009440: (RQ) Jamie Christine Johnson : 00040: Workspace / Office / Room : n/a (Workspace) : Add / Assign : Awaiting Approval(s) : (CI)
- 009441: (RQ) Jamie Christine Johnson : 00458: Seat - Computer : Laptop - PC : Add / Assign : Awaiting Approval(s) : (CI)
- 009442: (RQ) Jamie Christine Johnson : 00029: Seat - Phone Desk Phone : PH2 Desk Phone : Add / Assign : Awaiting Approval(s) : (CI)
- 009443: (RQ) Jamie Christine Johnson : 00037: Token : Dial In Account with Token : Add / Assign : Awaiting Approval(s) : (CI)
- 009444: (RQ) Jamie Christine Johnson : 00034: Standard Account : HQ Domain Account : Add / Assign : Awaiting Approval(s) : (CI)
- 009445: (RQ) Jamie Christine Johnson : 00035: Standard Account : LCS / Sharepoint Account : Add / Assign : Awaiting Approval(s) : (CI)
- 009446: (RQ) Jamie Christine Johnson : 00036: Standard Account : X.500 Entry : Add / Assign : Awaiting Approval(s) : (CI)
- 009447: (RQ) Jamie Christine Johnson : 00168: Standard Account : User HEMI Account : Add / Assign : Awaiting Approval(s) : (CI)
- 009448: (RQ) Jamie Christine Johnson : 00024: IT Orientation : n/a (IT Orientation) : Add / Assign : Awaiting Approval(s) : (CI)
- 009449: (RQ) Jamie Christine Johnson : 00007: Badge : n/a (Badge) : Add / Assign : Awaiting Approval(s) : (CI)
- 009450: (RQ) Jamie Christine Johnson : 00022: Security Clearance Investigation : NACI - National Agency Check with Inquiries : Add / Assign : Awaiting Approval(s) : (CI)
- 009451: (RQ) Jamie Christine Johnson : 00023: Security Clearance Investigation : NCIC - National Crime Information Center : Add / Assign : Awaiting Approval(s) : (CI)

Change History

- 10/18/2007 9:42:49 AM, 'Create Check In Request Records' by OPOC1

4.4 Monitoring the Status of Check In Related Requests

The OPOC or COTR can monitor all of the request records related to a Check In record by either running a report or examining the "Subtask" section of the Check In Record (as seen below). The current state of each request is displayed along with the Request ID, the Request Category and Request Item. The (CI) indicates that the request was generated as part of a Check In.

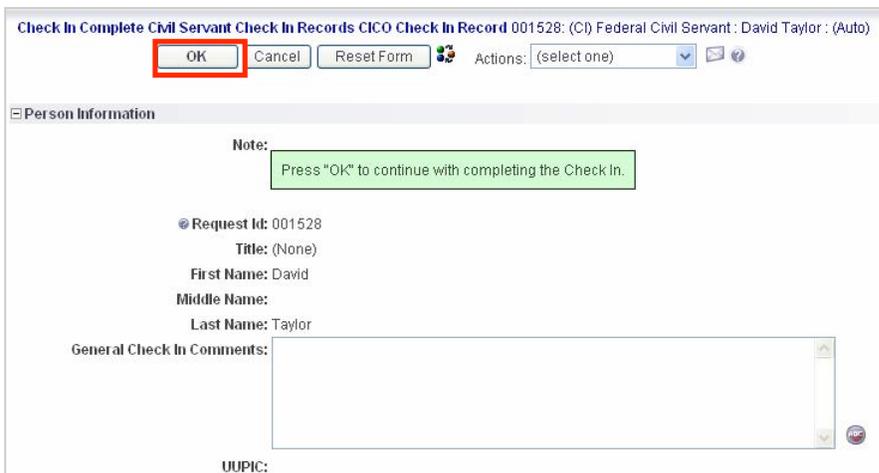


4.5 Completing the Check In

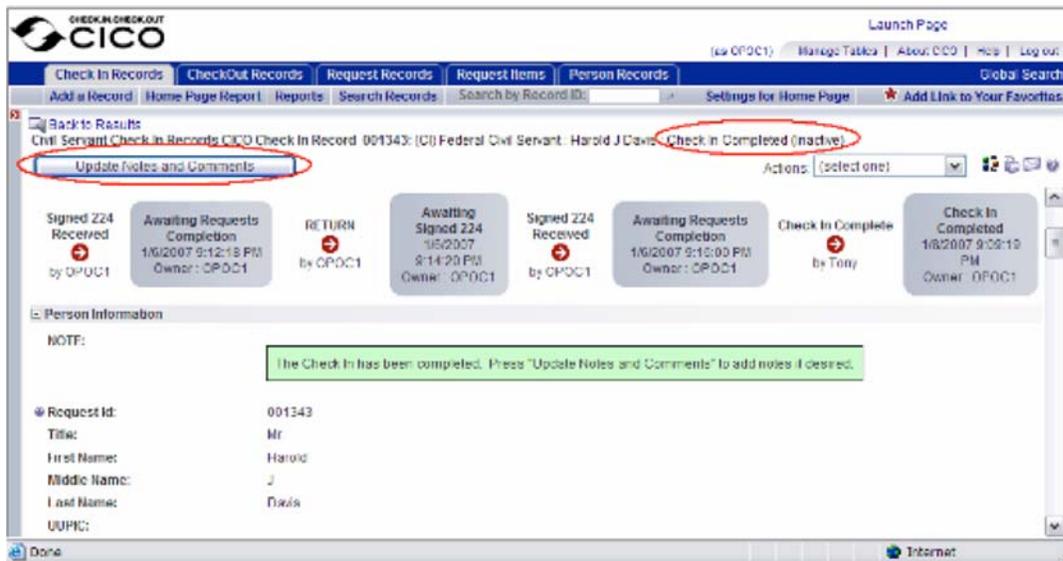
1. Once all of the requests associated with the “parent” check in record have been completed, the "Check In Complete" button will be displayed providing the capability to close the “parent” check in record.



2. Click “OK” to exit.



Note: After the Check In record has been closed, the only action available is to update the notes and comments.

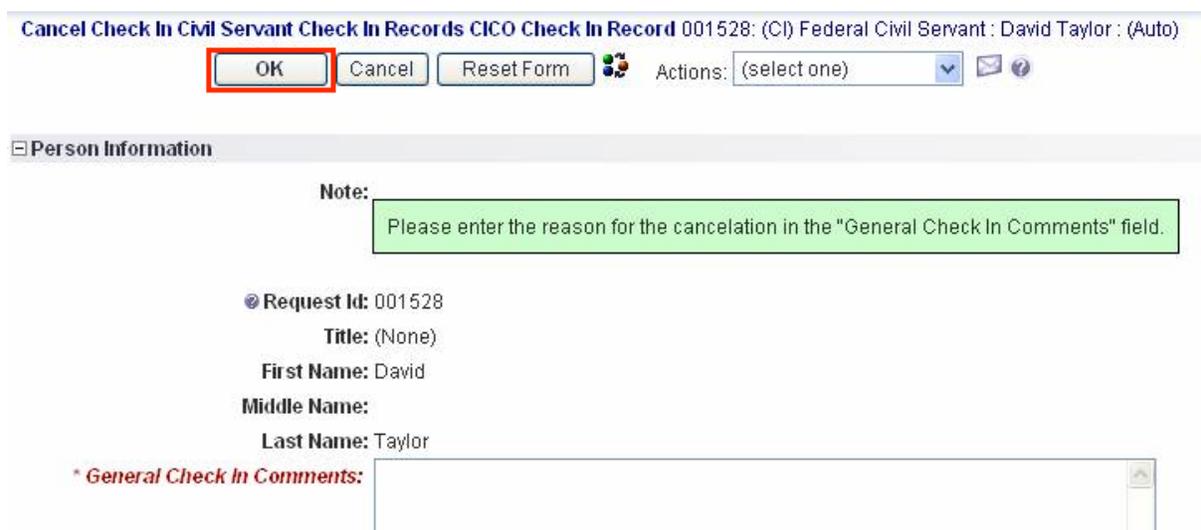


4.6 Canceling a Check In Record

1. To cancel a “parent” check in record all “active” subtasks, associated requests will have to be canceled before the Parent Check In record can be canceled. To cancel a Check In record, click the “**Cancel Check In**” button. Note: The Check In requests cannot be cancelled by anyone other than the persons that have ownership of the request in its current state of the process or a CICO administrator account.



2. Enter the reason for cancelling the check in the “General Check In Comments” field and Click the “**OK**” button.



Note: If there are still open requests related to the Check In record an error message will display. Each of the listed request records must be canceled before the Check In record can be canceled.

Cancel Check In Civil Servant Check In Records CICO Check In Record 001528: (CI) Federal Civil Servant : David Taylor : (Auto)

OK Cancel Reset Form  Actions: (select one)   

**Cannot CLOSE this Check In record because the following are still ACTIVE :
Request record(s) ==> 006923**

5 The Request Process

The Request Records workflow is used to request a single item or access for an individual with an entry in the NASA HQ X.500 directory prior to April 16, 2007 or Checked In via CICO since that time.

5.1 Submitting a Request as a General User

The process to submit a request is identical for all CICO users, although the process tabs displayed at the top of the screen may vary between users based on their roles and privileges. The illustration below display’s the default screen for a General User. General User’s have limited capabilities within CICO. They can submit a request for themselves or others, and may view the progress of any request they submitted. All General User’s have two process tabs, “Request Records” and “Instructions.” The instructions tab is a job aide that displays a screen shot of the initial steps required to submit a request. The text displayed in the “Note” section provides instructions to submit a request. Persons with roles and privileges will have additional process tabs such as “Check In” and “Check Out” that provide the capability to process new hires or persons that are leaving.

The screenshot shows the CICO web application interface. At the top, there is a navigation bar with tabs for 'Request Records' and 'Instructions'. Below this, there are several menu items: 'Add a Record', 'Home Page Report', 'Reports', 'Search Records', and a search field for 'Search by Record ID:'. The main content area is titled 'User Instructions' and shows 'Now showing Instructions 1 - 2 of 2 Sorted by: Project (Hierarchy)'. Underneath, it says 'Base Project > Instructions' and 'Text'. A green box contains the following text: 'You can submit a request by clicking on the "Request Records" tab, and then click on "Add a Record" (as seen ABOVE). When the Request Record Add screen appears, locate the name of the person who the request is for (as seen in the picture below), and then fill out the rest of the form.' Below this is another screenshot of the 'Request Records' form. In this screenshot, the 'Request Records' and 'Add a Record' tabs are circled in red. The 'Persons' search field contains the text 'fred' and is also circled in red, with a 'Find' button next to it. Below the search field, the results show '001407: (PR) Contractor : Fred P Berger (X500 Interface)'. Further down, the 'Organization Title' is 'LD070 INFORM TECHNOLOGY & COMMUNIC DIV', 'Person Type' is 'Contractor', 'First Name' is 'Fred', 'Middle Name' is 'P', and 'Last Name' is 'Berger'. At the bottom left of the page, there is a 'Requery' link.

1. To submit a new Request, select **“Request Records”** and then click **“Add a Record”**.

2. In the **“Persons”** field enter either the first name or last name of the person the request is for. Do not enter both the first name and last name, the search does not recognize spaces and would not locate the person due to the space between the first and last name. Locate and select the name of the person that the requested item is intended for by clicking the down arrow to display the pull down list. Each of the field names displayed in *red italic* and with an asterisk (*) preceding the field name are required.

The person selected will display as shown below. Ensure that the persons “Organization Title” (NASA HQ Organization) is valid. If the organization is not valid, the routing for review and approvals will be incorrect and the request will not be processed in a timely manner. If the “Organization Title” displayed in CICO is incorrect, do the following.

1. Cancel the request in CICO.
2. Send an Email addressed to update@hq.nasa.gov In the message body request update to the X.500 entry, include the persons name and their valid NASA HQ Organization requesting update to the X.500 record. *If sent prior to 3:00 PM the “Organizational Title” should be updated in CICO by the next business day*
3. Once the change is reflected in CICO, resubmit the request.

* **Persons:**

Organization Title:

- The next step is to identify the Request Category, Request Item and Request Type.** The specific assets and services that can be requested through CICO are grouped into "**Request Categories**". Each individual asset or service is called a "**Request Item**". For this example we want Jane Tester to obtain access to the application named HATS. The request category is "**Applications**" and the corresponding request item is, "**HATS: Headquarters Action Tracking System**". A list of valid Request Categories is displayed in the following section of this document.

Request items can either be Assigned, Conducted, Retrieved or Removed from an employee’s access. These request actions are called "Request Types". The set of possible request types is dependant upon the item or service being requested. For this example the request type is “**Add / Assign**”

* **Request Category:**

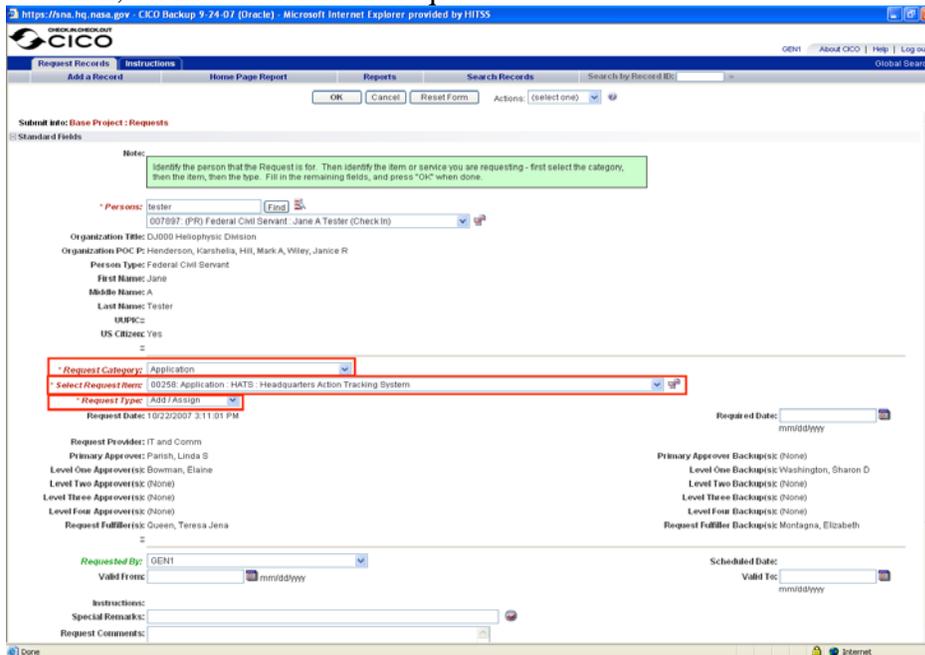
* **Select Request Item:**

* **Request Type:**

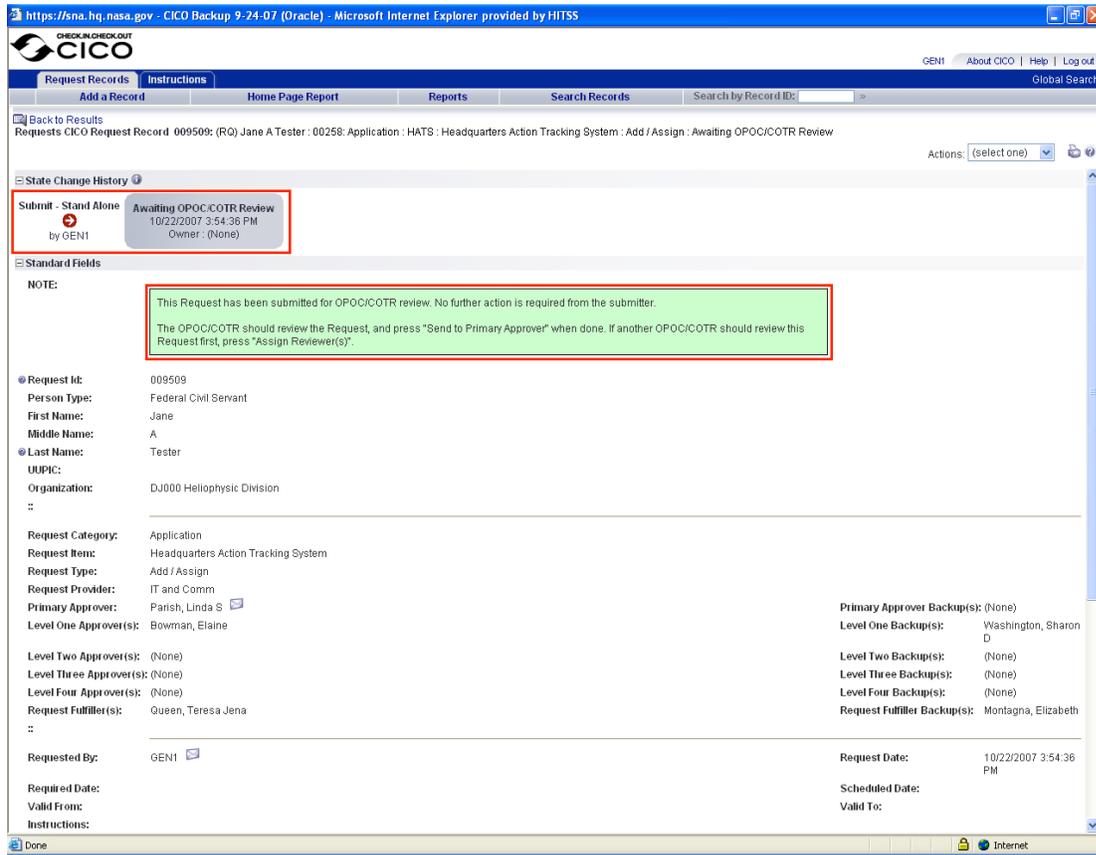
Request Date: 10/22/2007 3:11:01 PM

Required Date:

- Below is a view of a populated request prior to submittal. The “Request Comments” field can be populated with additional information or instructions to assist persons processing the request. Once you have validated that all of the information has been correctly entered, the Organization Title is valid, Click, “**OK**” to submit the request.



- The “State Change History” is displayed and indicates the request was submitted and it is now awaiting OPOC/COTR Review. The “Note” field text is updated, stating the “Request has been submitted.”



Scroll down within the request to view the names of the OPOC’s assigned to review the request and if the request is for a Contractor you will also see the COTR’s name. The OPOCs and COTRs are the owners of the request in the current state of “Awaiting OPOC/COTR Review.”

User Fields

Request Comments:

Organization POC: Henderson, Karshelia
Hill, Mark A
Wiley, Janice R

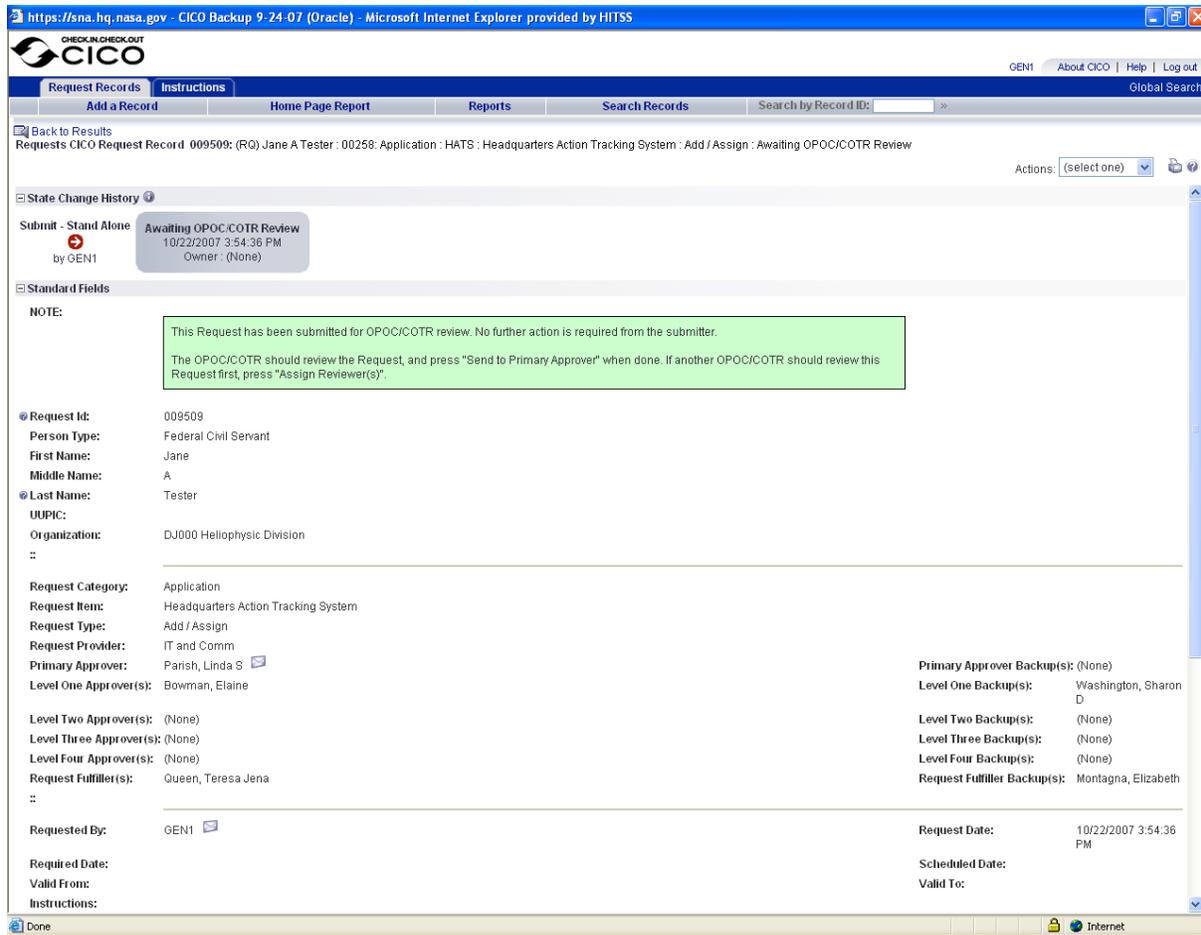
Contract Number: (None)

Contract Name: (None)

Primary COTR: (None)

DOCOTR: (None)

- Note “Owner: (None)” in the “State Change History” of the submitted request below. In this case, “none” indicates there are multiple owners; requests are always assigned to more than one OPOC. The term “(None)” can also be an indicator as in the “Primary Approver Backup” field for this request that there is not a backup approver for the item requested.



5.2 Request Categories, Request Items, and Request Types

The specific assets and services that can be requested through CICO are grouped into "**Request Categories**". Each individual asset or service is called a "**Request Item**". For example, a request category might be "**Applications**" and a corresponding request item would be the, "**Name Check Request System**".

Request items can either be Assigned, Conducted, Retrieved or Removed from an employee’s access. These request actions are called "Request Types". The set of possible request types is dependant upon the item or service being requested. The table below shows the available request categories and the responsible department.

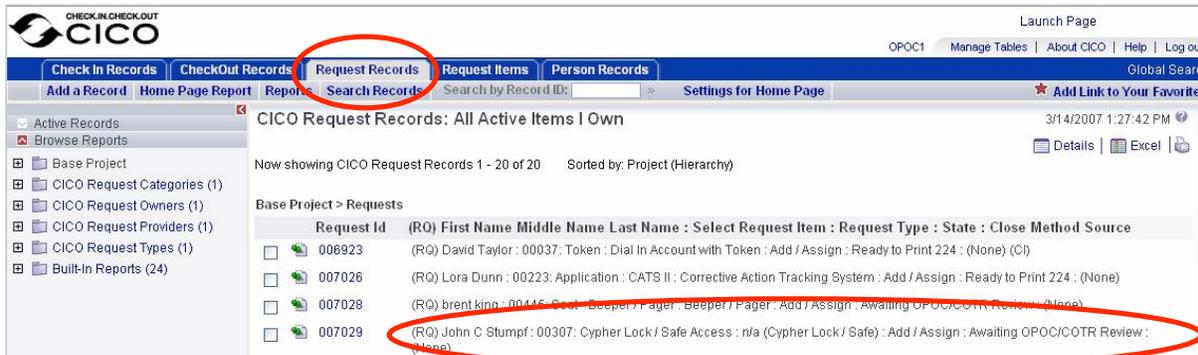
5.2.1 List of Request Categories

Request Category	Provider
Application	IT and Comm
Auxillary Duty	IT and Comm
Badge	Security
Calling Card	IT and Comm
Code / Group Folder	IT and Comm
Contractor Orientation	COTR
Credit Card	Admin
Cypher Lock / Safe Access	Security
Employee Orientation	Hiring Org
Functional Account	IT and Comm
General Admin Request	Admin
General Counsel Debriefing	HR
General Facilities Request	Facilities
General HR Request	HR
General IT and C Request	IT and Comm
General Security Request	Security
Government Passport	Admin
IT Orientation	IT and Comm
Library Items	HR
Loaner Hardware	IT and Comm
Move Equipment	IT and Comm
NF-1722 Position Designation Record (HR)	HR
Office Keys	Security
Parking or Fare Subsidy	Admin
Review Suitability Data	HR
Seat - Beeper / Pager	IT and Comm
Seat - Cell Phone	IT and Comm
Seat - Computer	IT and Comm
Seat - Fax	IT and Comm
Seat - Network Printer	IT and Comm
Seat - Phone Desk Phone	IT and Comm
Seat - Satellite Phone	IT and Comm
Seat - Video Conferencing	IT and Comm
Seat - Wireless Hand-Held Device	IT and Comm
Security Clearance Debriefing	Security
Security Clearance Investigation	Security
Sharepoint Folders	IT and Comm
Special Access	Security
Special Needs Accomodation (COTR)	COTR
Special Needs Accomodation (HR)	HR
Standard Account	IT and Comm

Token	IT and Comm
Transfer Accounts	IT and Comm
Website Access	IT and Comm
Workspace / Office / Room	Facilities

5.3 OPOC / COTR Review of a General User's Request

The OPOC or COTR's default Home Page Report is the "All Items I Own" report. OPOCs and COTRs are responsible for reviewing and processing requests submitted by persons in the organizations or contracts they support. The requests will reside in the "Awaiting OPOC/COTR Review" until acted on by the OPOC or COTR.

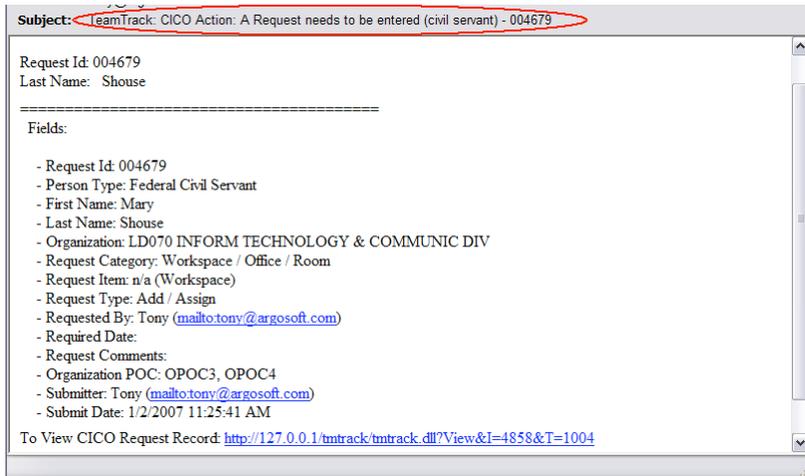


1. To review a request record the OPOC or COTR can either click on the "Request Id" (from within CICO) to open the record (see below) or click on the link at the bottom of a CICO notification Email.



The OPOC or COTR for a General User will receive an email similar to the one shown below each time a request enters "Awaiting OPOC/COTR Review" submitted by a person in their organization or contract.

- Click the Link at the bottom of the email to open the record referenced in the email.



- When the OPOC or COTR selects a request to review a screen will display as shown in this illustration.



5.4 Sending a General User's Request to the Primary Approver

- To send the Request to the “Primary Approver”, click the "Send to Primary Approver" button.



2. Click **“OK”** to submit the request.

Note: Additional comments can be entered in the **“Request Comments”** field.



5.5 Canceling a Request after the OPOC / COTR Review

1. To cancel a Request considered invalid, click the **“Cancel Request”** button.



NOTE: Comments are required when canceling a request.

2. A message will display in the **“Note”** field stating that the request has been canceled.

3. Click **“Back to Results”** to exit.



5.6 Reviewing a Request as an Approver

Note: Each request item must have a “Primary Approver”, “Fulfiller” and backups. Approver Levels One through Four is optional.

Standard Fields			
Item Id:	00175		
Request Item:	Website-Code Ci		
Acronym:			
Request Category:	Website Access		
Provider:	IT and Comm		
Primary Approver:	Thurston, Kathi G	Primary Approver Backup(s):	(None)
Level One Approver(s):	Bowman, Elaine	Level One Approver Backup(s):	(None)
Level Two Approver(s):	(None)	Level Two Approver Backup(s):	(None)
Level Three Approver(s):	(None)	Level Three Approver Backup(s):	(None)
Level Four Approver(s):	(None)	Level Four Approver Backup(s):	(None)
Request Fulfiller(s):	Montagna, Elizabeth	Request Fulfiller Backup(s):	Eatmon, Lanetta
Available for Contractors:	Yes		

Approvers for a Request will receive an email each time a request record is assigned to them for their review and approval.

Subject: TeamTrack: CICO Action: A Request needs review and initial approval by you - 004677

Request Id: 004677
Last Name: Johnson

Fields:

- Request Id: 004677
- Request Category: Token
- Request Item: Dial In Account with Token
- Request Type: Add / Assign
- Request Provider: IT and Comm
- Primary Approver: Tony (<mailto:tony@argosoft.com>)
- Person Type: Federal Civil Servant
- First Name: Kay
- Last Name: Johnson
- UUPIC:
- Organization: BF030 NUCLEAR TECHN & DEMONSTRATION DIV
- Requested By: Tony (<mailto:tony@argosoft.com>)
- Request Date: 12/24/2006 10:24:15 PM
- Required Date: 1/1/2007
- Request Comments:

Select Request Item: 00037: Token - Dial In Account with Token

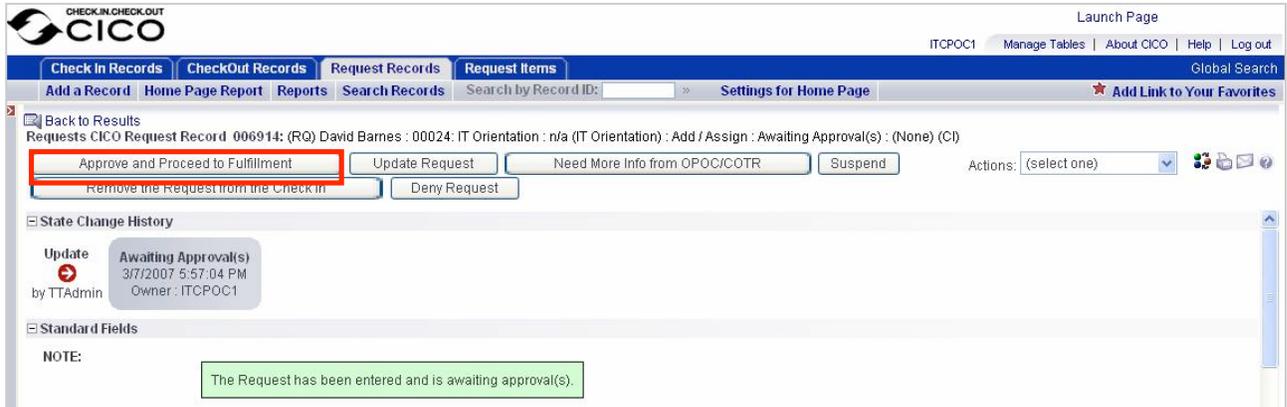
To View CICO Request Record: <http://127.0.0.1/tmtrack/tmtrack.dll?View&I=4856&T=1004>

5.6.1 The Primary Approver

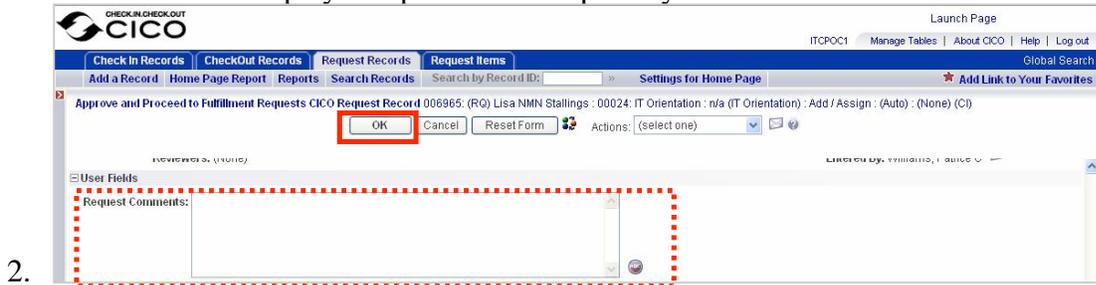
The “Primary Approver” is the first in a chain of approvers for a Request Item, and may approve, deny, update, suspend, or request more information for any submitted request.

5.6.2 Approving a Request

1. To approve a Request, click **“Approve and Proceed to Fulfillment”**. **Note:** If additional approvers are required then the **“Approve”** button will be labeled **“Approve and Send for Level X Approval”** (with X representing the next level of approval required).

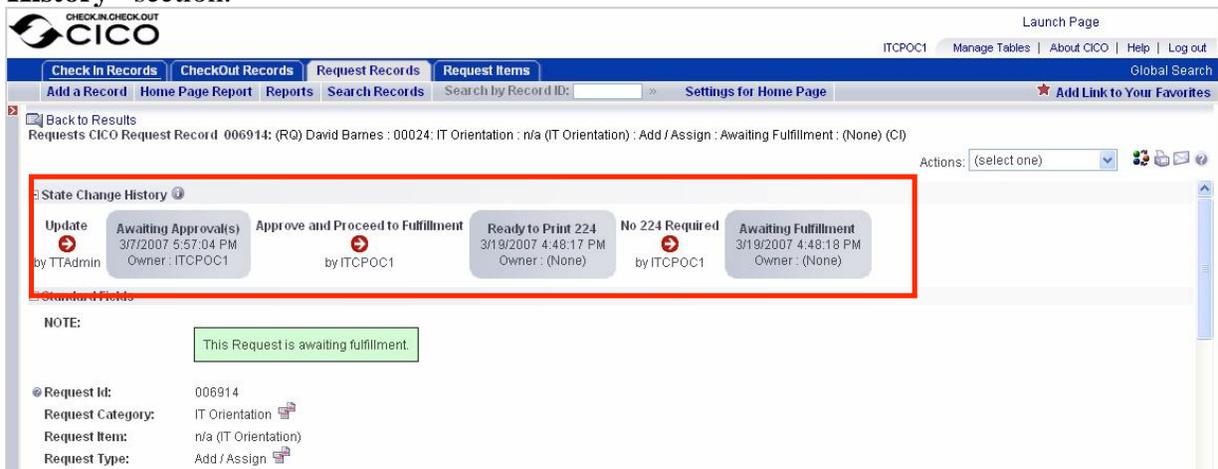


A new screen will display and provide the capability to add additional comments.



- 2.
3. Click "OK" to complete your approval.

Note: The approval will be recorded in the **“State Change History”** and the (Field) **“Change History”** section.



[-] Change History

- 3/19/2007 4:56:50 PM, 'No 224 Required' by ITCPOC1
- 3/19/2007 4:56:49 PM, 'Approve and Proceed to Fulfillment' by ITCPOC1
- 3/12/2007 9:11:39 AM, Updated by (None)
- 3/9/2007 2:12:38 PM, Updated by (None)
- 3/8/2007 3:10:54 PM, Link Principal by Williams, Patrice C
- 3/8/2007 3:10:53 PM, Submitted by Williams, Patrice C

5.6.3 Denying a Request

1. To deny a request, click the "Deny Request" button.

Back to Results
Requests CICO Request Record 007291: (RQ) Brandon W Easton : 00024: IT Orientation : n/a (IT Orientation) : Add / Assign : Awaiting Approval(s) : (None) (CI)

Approve and Proceed to Fulfillment Update Request Need More Info from OPOC/COTR Suspend Actions:

Remove the Request from the Check In **Deny Request**

Launch Page
ITCPOC1 Manage Tables | About CICO | Help | Log out

Check In Records CheckOut Records Request Records Request Items

Deny Request Requests CICO Request Record 007291: (RQ) Brandon W Easton : 00024: IT Orientation : n/a (IT Orientation) : Add / Assign : (Auto) : Denied (CI)

OK Cancel Reset Form Actions: (select one)

Standard Fields

Note: You are Denying this Request. Please enter the reason in the "Reason Request Denied or Unfulfilled" field.

Request Id: 007291

* Reason Request Denied or Unfulfilled: Not needed at this time

Request Category: IT Orientation

2. Click "OK" to deny the request.

Note: If a request is denied a comment for the denial must be entered.

Launch Page
ITCPOC1 Manage Tables | About CICO | Help | Log out

Check In Records CheckOut Records Request Records Request Items

Back to Results
Requests CICO Request Record 007291: (RQ) Brandon W Easton : 00024: IT Orientation : n/a (IT Orientation) : Add / Assign : Request Closed : Denied (CI) (Inactive)

RETURN to Primary Approver Update Request Actions: (select one)

State Change History

Update 3/15/2007 10:22:23 AM by McIntosh, Vanessa Owner: ITCPOC1	Deny Request 3/19/2007 4:56:49 PM by ITCPOC1	Request Closed 3/20/2007 8:35:11 AM Owner: ITCPOC1
---	--	--

Standard Fields

NOTE: This Request has been denied for the reason shown below.

Request Id: 007291
Request Category: IT Orientation
Request Item: n/a (IT Orientation)
Request Type: Add / Assign

Note: The “**Note**” field displays a message stating the request has been denied. The “**Advanced Fields**” section will state the reason for denial.

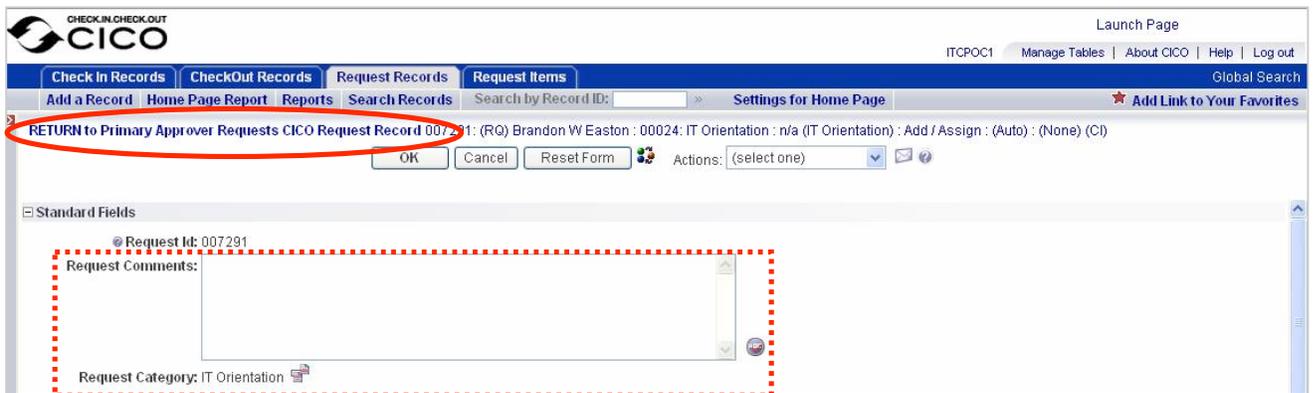


5.6.4 Reinstating a Denied Request

- To reinstate a denied request, click "**RETURN to...**". This will move the record back to the state from which it was denied. For example, if the Primary Approver denied the request, then it would be labeled, "**RETURN to Primary Approver**". If the Level One Approver denied the request it would be labeled, "**RETURN to Level One Approver**".

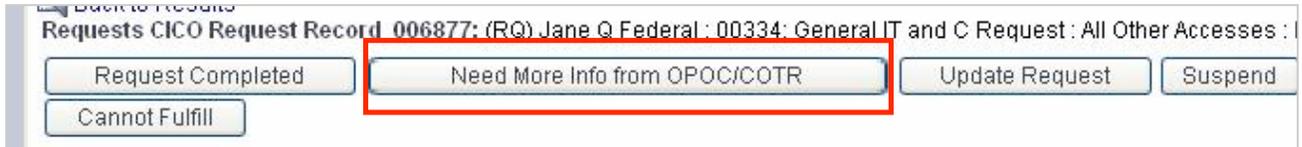


- A screen displays the message that the Request has been returned to the Approver. Comments are optional when reinstating a denied request.



5.6.5 Requesting More Information from the OPOC / COTR Reviewer

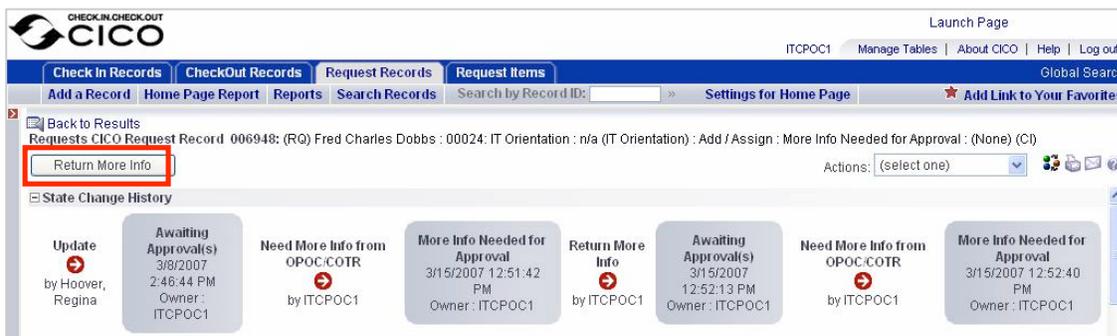
- If more information is needed to approve a request, click "**Need More Info from OPOC/COTR**".



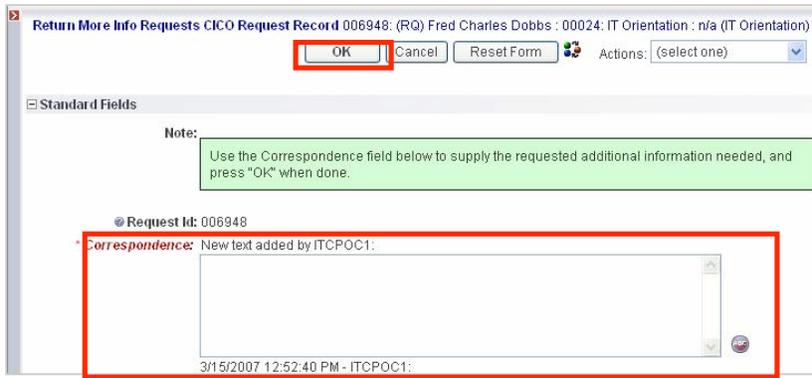
2. Enter the additional information that is needed into the "Correspondence:" field.
3. Click "OK" to submit the Request to the OPOC or COTR. They will be notified by email that additional information is needed.

5.6.6 Supplying information requested by an Approver

1. If an email is received stating that more information is needed review the Request by, clicking the link noted in the email or by viewing all records that you own.
2. Once the Request has been opened, click on "Return More Info".

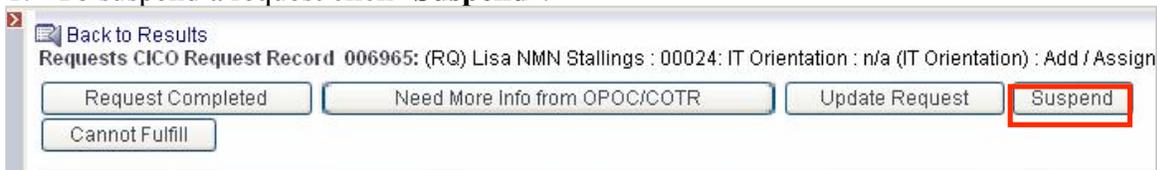


3. Enter the requested information in the "Correspondence:" field
4. Click "OK" to submit the information.

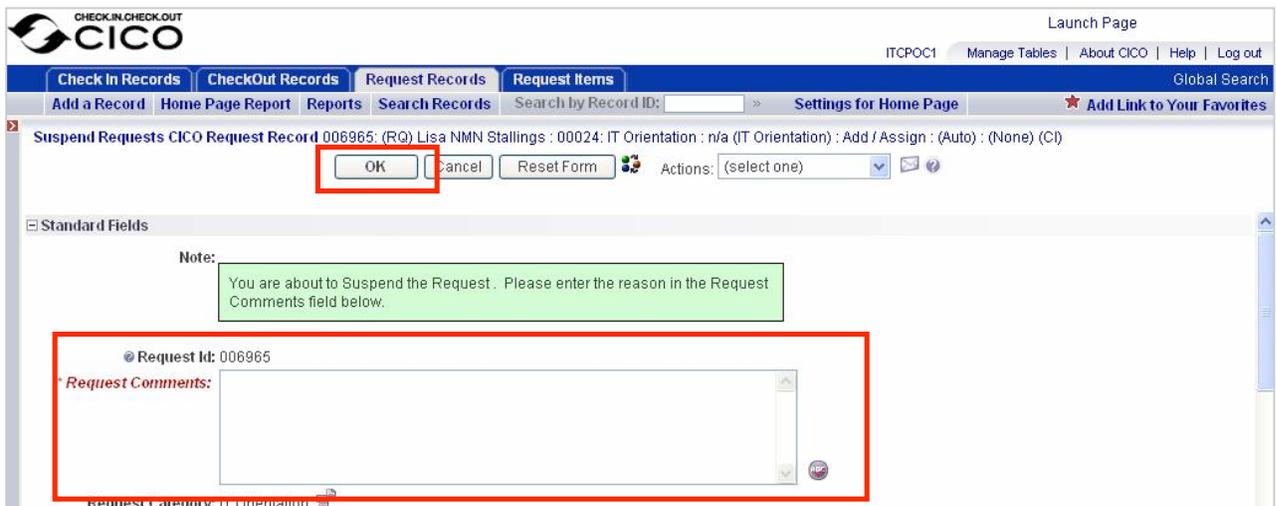


5.6.7 Suspending a Request

1. To suspend a request click **"Suspend"**.

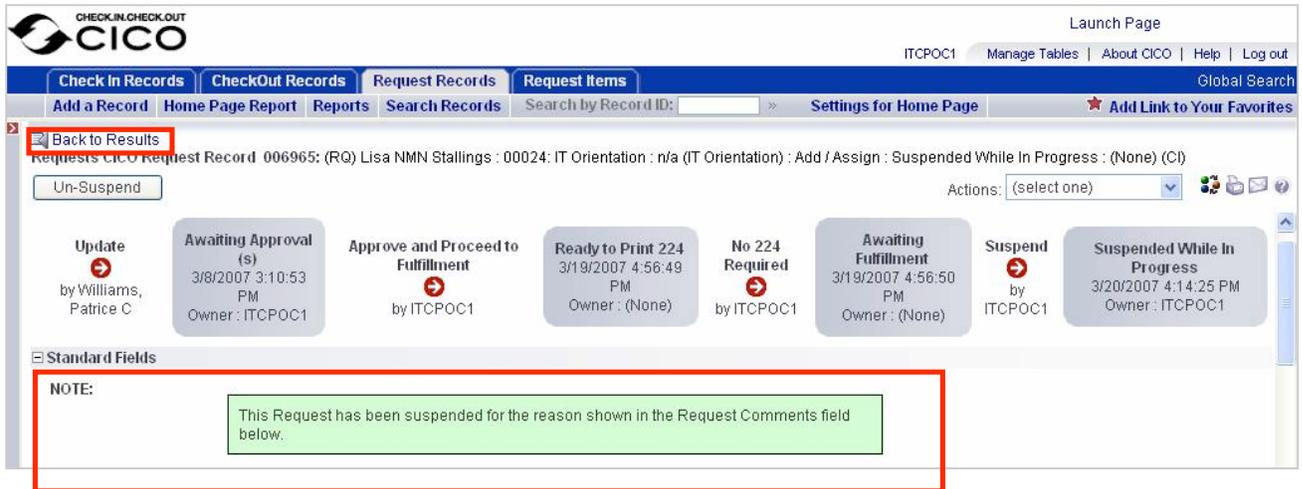


Note: Once a request has been suspended, the request can be reinstated by clicking on the **"Un-Suspend"** button.



Note: A statement of why the Request was suspended must be entered in to the **"Request Comments"** field.

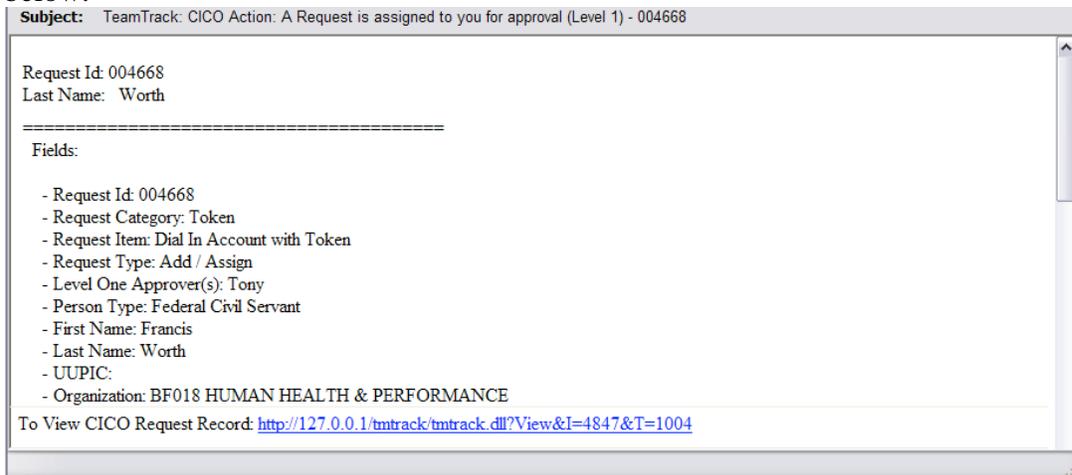
2. Click **"OK"** to submit
3. A message will display in the **"Note"** field, click **"Back to Results"** to exit.



5.7 Request Approval Notifications

5.7.1 Initial Notifications

Approvers will receive an email notification when it's time to approve a request, as shown below.



5.7.2 Escalation and Delinquency Notifications

Each approver has a set time period to take action on a Request. If action is not taken within this time period an escalation reminder notification is sent. If still no action is taken a delinquency notification is sent to the approver and to any backups. The initial action time period and the reminder time period are set by request category and are based on a work day start of 8:00AM and a work day end of 5:00PM without taking a lunch hour into account. All escalation time calculations ignore non-working hours, weekends, and holidays.

All requests categories are set to an initial action period of 8 hours with the reminder time period being set to 4 hours. After the 4 hour reminder time period has passes, a request is considered delinquent. For example, if a request is sent for approval at 3:00PM on a Thursday, then if no action takes place, the reminder notification will be sent at 2:00PM on Friday. If there is still no action taken on the request, then a delinquency notification will be sent at 9:00AM on Monday morning.

The subject line of the reminder notification is shown below, with the Request Id of the record in question appearing at the end of the subject line (as circled in red). Information about the request will appear in the body of the email, along with a link to the record in question.

Subject: TeamTrack: CICO Escalation :A Request has been escalated due to inaction 004677

The subject line of the delinquency notification is shown below:

Subject: TeamTrack: CICO This action is now delinquent. Please handle immediately. - 004677

5.8 A General User Wants to Cancel a Request

After a General User creates a request record they can no longer make modifications to the record or cancel it. If there is a need to cancel the request, then the General User should notify their OPOC or COTR.

5.9 Canceling an Open Request

Only the request record owner can cancel a request. If the record is owned by the OPOC or COTR then they will have the ability to cancel the request.

5.10 Fulfilling and Completing a Request

1. Click "**Request Completed**", to close the request record.

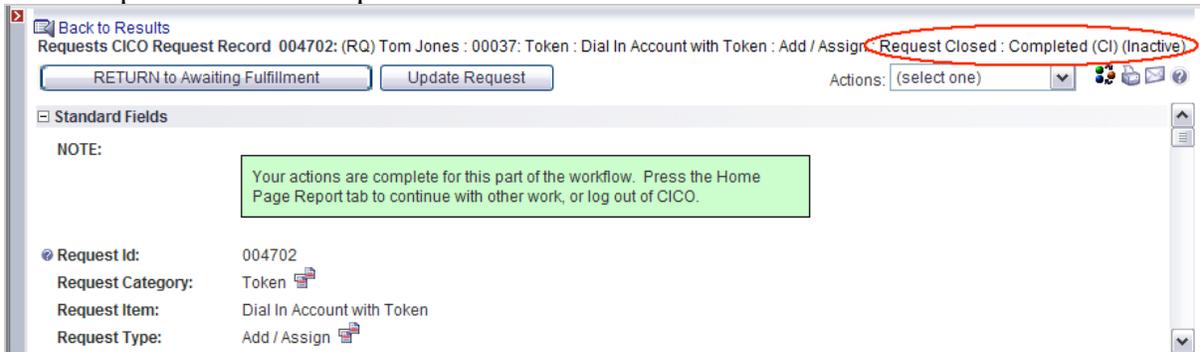


Note: Once a Request has been completed the "**Date Closed:**" field will be set by the system, closing comments are optional.

The screenshot shows a web application window titled "Request Completed Requests CICO Request Record 004702: (RQ) Tom Jones : 00037: Token : Dial In Account with Token : Add / Assign : (Auto) : Completed (CI)". The window contains several elements:

- A toolbar with buttons for "OK", "Cancel", and "Reset Form", along with an "Actions" dropdown menu.
- A "Standard Fields" section containing a "Note" field with the text: "Press 'OK' to confirm that the Request was filled and the record can be closed."
- A "Request Id: 004702" field.
- A "Date Closed: 1/14/2007 5:21:34" field.
- A "Request Comments" text area.
- Metadata fields: "Request Category: Token", "Request Item: Dial In Account with Token", and "Request Type: Add / Assign".

An example of a closed Request.



If there is an error in the record and it needs to be returned to the Fulfiller, click "RETURN to Awaiting Fulfillment".



Note: Once a record is closed comments may still be added by clicking the **"Update Request"** button.

The screenshot shows a web application window titled "Back to Results" for a "Requests CICO Request Record 004702: (RQ) Tom Jones : 00037: Token : Dial In Account with Token : Add / Assign : Request Closed : Completed (CI) (Inactive)". At the top, there are two buttons: "RETURN to Awaiting Fulfillment" and "Update Request", with the latter circled in red. Below the buttons is a "Standard Fields" section containing a "NOTE:" box with the text: "Your actions are complete for this part of the workflow. Press the Home Page Report tab to continue with other work, or log out of CICO." Further down, the request details are listed: Request Id: 004702, Request Category: Token, Request Item: Dial In Account with Token, and Request Type: Add / Assign.

5.11 Indicating that a Request cannot be Fulfilled

If, for some reason, the request cannot be fulfilled, click the **"Cannot Fulfill"** button to record the event. An example for this might be where a passport was applied for but the U.S. Government refused to issue the passport.

The screenshot shows the same web application window, but the status is now "Awaiting Fulfillment : (None) (CI)". The "Update Request" button is still present, but the "Cannot Fulfill" button is circled in red. Other buttons include "Request Completed", "Need More Info from OPOC/COTR", "Suspend", and "Cancel Request". The "Standard Fields" section is empty, and the request details remain the same: Request Id: 004702, Request Category: Token, Request Item: Dial In Account with Token, and Request Type: Add / Assign.

1. A comment must be entered for the denial in the **"Reason Request Denied or Unfulfilled:"** field.

The screenshot shows a dialog box titled "Cannot Fulfill Requests CICO Request Record 004702: (RQ) Tom Jones : 00037: Token : Dial In Account with Token : Add / Assign : (Auto) : Cannot Fulfill (CI)". It has "OK", "Cancel", and "Reset Form" buttons. A "Note:" box contains the text: "You are Closing this Request because you can't fulfill it. Please enter the reason in the 'Reason Request Denied or Unfulfilled' field." Below the note, the field "* Reason Request Denied or Unfulfilled:" is circled in red. At the bottom, the request details are shown: Request Id: 004702, Request Category: Token, Request Item: Dial In Account with Token, and Request Type: Add / Assign.

2. If the Request needs to be returned to the Fulfiller, the OPOC or COTR can click the **"RETURN to Awaiting Fulfillment"** button.



5.12 Requests for "Take-Aways"

If a request type is Removal / Retrieval / Delete / Deactivate the request record will proceed directly to the fulfiller.

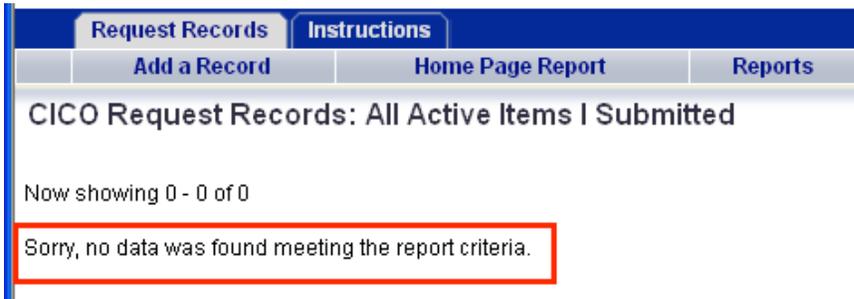


5.13 Viewing Requests

1. The **"Request Records"** tab will display the default Home Page Report "All Active Items I Submitted." Note Home Page Report settings can be altered to display a different report. To view details of any of the requests displayed click on the Request Id Number.



Note: If no requests were submitted from the account or all of the requests are no longer active the report will display “Sorry, no data was found meeting the report criteria” as shown below.



5.14 Monitoring the Status of a Request

Any CICO user can monitor the status of a request that they submitted. OPOCs and COTRs can monitor all of the request records in their organization or contracts supported by their organization. The current state of each request is displayed in the “State Change History” at the top of each request record.



6 The Check Out Process

A Check Out is a set of individual Request Records, organized under a header (or parent) Check Out Record. A parent record has one or many requests linked to the parent record; the parent record cannot be closed until all of the requests linked to the parent record are closed or cancelled. The Check Out record is created as the first step then one or more associated request records are automatically generated based on the (Unconfirmed / Yes / No) selection indicators. The Unconfirmed / Yes / No choices for the selection fields are pre-set for a standard, routine Check Out but they can be modified by the User.

6.1 Starting a Check Out (OPOC / COTR)

The organization OPOC or COTR initiates the Check Out. In addition to using CICO to begin the Check Out process, the OPOC/COTR needs to refer to the Checkout Checklist (Appendix A) to assist the OPOC and departing employee with the process of checking out of NASA HQ. This is important because in addition to CICO, the organization and departing employee will need to take some actions outside of the CICO system. For example, there are several forms that must be completed and hand delivered as part of the check out process. In addition, all physical assets need to be collected and/or returned during the last few days of employment. The OPOC should print out a copy of the Checkout Checklist and provide this to the departing employee.

1. To start a Check Out record, click the “**Check Out Records**” tab. The system will create a list of possible matches and you can see this list by clicking on the down arrow at the right side of the drop down box. Locate the name you're looking for and then click on the name.

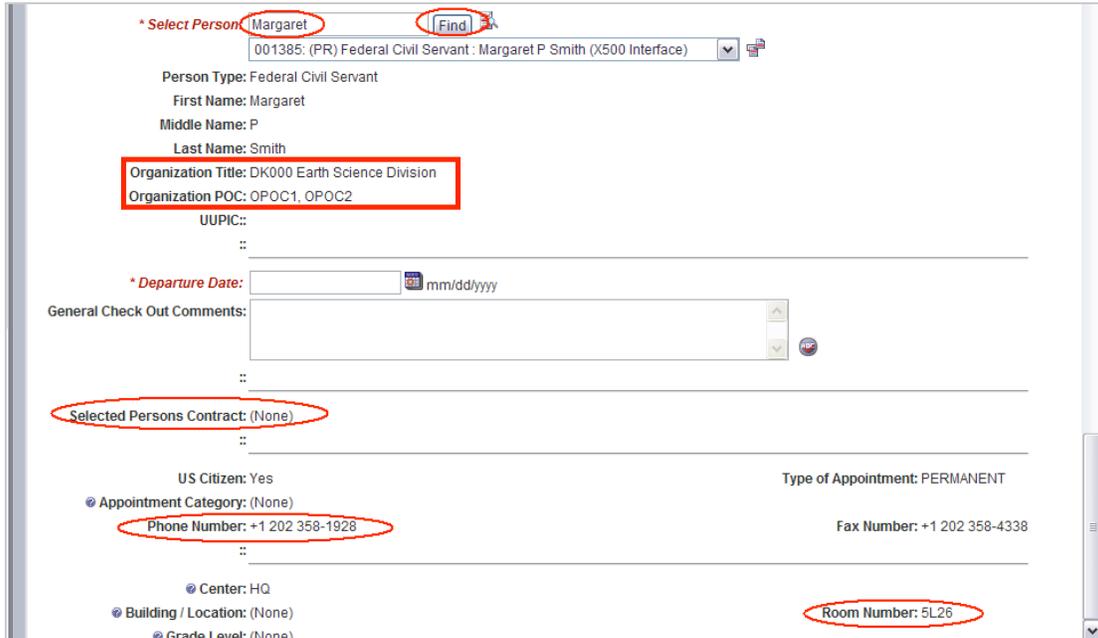
The screenshot shows the CICO web application interface. The 'Check Out Records' tab is highlighted in the navigation menu. The main content area displays 'CICO Check Out Records: All Active Items | Own' with a timestamp of 3/14/2007 4:37:46 PM. Below this, it indicates 'Now showing CICO Check Out Records 1 - 5 of 5' and 'Sorted by: Project (Hierarchy)'. A table titled 'Base Project > Check Out Records' lists three records:

Request Id	(CO) Person Type	First Name	Middle Name	Last Name	State
<input type="checkbox"/> 000185	(CO) Detaillee from Center	Jane Q	Federal	Awaiting Requests Completion	
<input type="checkbox"/> 000217	(CO) Federal Civil Servant	Noah	Nason	Check Out Initiated	
<input type="checkbox"/> 000218	(CO) Federal Civil Servant	William J	Bihner	Check Out Initiated	

- The submit page will open. **Click the “Select Person” field**, enter either the first name or last name of the employee checking out. **NOTE:** Do not enter both first name and last name, the search does not recognize spaces and would not locate the person due to the space between the first and last name. click **“Find”**.



- Verify you've selected the right person by viewing the rest of the information on the page.



4. Enter the date in the “* **Departure Date:**” field.
5. Click "OK".

At this point you may update the record, cancel the record, or choose to generate the verification emails. Updating the record will allow you to change the departure date and add comments that can be read by the various departments who will verify the assets and services assigned to the person.

6.2 Generating the Verification Emails

Since CICO is not the system of record for the assets and services assigned to a person, these assets and services must be verified by the owning departments so that they can be recovered or removed. The OPOC or COTR may add notes to the Check Out record indicating things that they are aware of, such as, "I believe this person has a cell phone, or a credit card, or a token."

Once you click on the "Generate Verification Emails" button, several fields will open up for modification (as seen below). Default selections and information will be on the screen and you can modify these fields according to the situation. There are five organizations involved

in the Check Out and these are the Hiring Organization, the Facilities and Administrative Services Division, the Office of Security and Program Protection , IT and Communications Division, , and Human Resources Management Division. Each organization has a role to play in the Check Out process.

DO NOT CLICK THE “Start Check Out” PROCESS THE CHECK OUT REQUEST PAST THE “Ready to Create Check Out Requests” STATE FOR 48 HOURS after you generate the verification emails. This provides the supporting organizations adequate time to update the Yes / No indicators. The indicators determine if a request should be generated to track the recovery or deactivation of an asset or account and assists in minimizing the effort required of the supporting organization.

All organizations, other than the Hiring Organization are capable of receiving notifications regarding a Check Out. Human Resources will automatically receive a notification and notifications to the other four departments are optional based on the selections for the "Send Notice" Yes / No indicators (as illustrated below). The default setting is for all five departments to receive an email notification.

Any notes that are typed into the various "Notes:" fields will be included in the body of the email notification. The "Put Notes on Request Record(s):" fields are for the case where the OPOC or COTR would want to have these same notes written into the comments field on any request records that get generated from this Check Out record.



Scrolling down the page you will see a section for any Provance and X500 interface information.

Provance and X500 Data			
Provance Information:			
Asset Tag	Asset Make	Asset Model	Seat Id
N010241	APPLE	M7628LL/A	N010241
220003174	BlackBerry	7250	220003174
X500 Unique Identifier: HQ000007			
X500 Last Name: Adamus			
X500 Common Name 1: Joanna M Adamus			
X500 Title / Position: Public Affairs Specialist			
X500 Address: NASA Headquarters \$ 300 E ST SW \$ Washington DC 20546-0001			

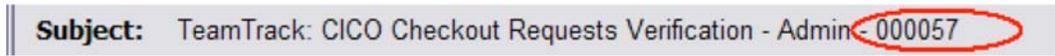
If you continue scrolling down the screen you will see five sub-sections, one for each department that might have information necessary for processing the Check Out. Each of these sub-sections have one or more indicator fields used for creating requests for recovering assets or removing services, or for recording key information (as seen below). There are three values for these indicators, "**Unconfirmed**", "**Yes**", and "**No**".

After the various organizations have been notified about the Check Out, they will be given time to update the Check Out record and change the assets and services indicators to "**Yes**" or "**No**". For example, if Facilities determines that the person checking out has a workspace that needs to be recovered, Facilities will change the "**Workspace:**" indicator to "**Yes**".

The various fields indicating a recovery or a retrieval date will be entered by the owning organization, and if not supplied by the owning organization, then these dates will default to the person's check out date.

6.3 Updating the Admin Fields

The Administrative Services Organization will receive an email with a subject line similar to the one below, listing the Check Out record's Request Id.



Within the body of the email will be a direct link to the record.

To View CICO Check Out: <http://<server>/tmtrack/tmtrack.dll?View&I=267&T=1031>

When the Administrative Services representative views the record, they will see a screen similar to the one below and they will click on the button labeled, "Update Record (Admin Fields)".



Clicking on this button will bring up a screen similar to the one below:

The "*Admin Requests*" indicators should be updated to reflect the particulars for the person checking out. If, for example, the person checking out does not have an active "**Parking Subsidy**", then change the indicator from "**Unconfirmed**" to "**No**". The various fields indicating a required recovery or a retrieval date are optional, however, if not supplied; the date will default to the person's check out date. Any field that does not have a "**No**" marked will cause the generation of a removal or retrieval record.

The fields in the "*Admin Indicators*" sub-section are informational only and will not cause the generation of a removal or retrieval record.

6.4 Updating the Security Fields

The Security department will receive an email with a subject line similar to the one below, listing the Check Out record's Request Id.

Subject: TeamTrack: CICO Checkout Requests Verification - Security **000033**

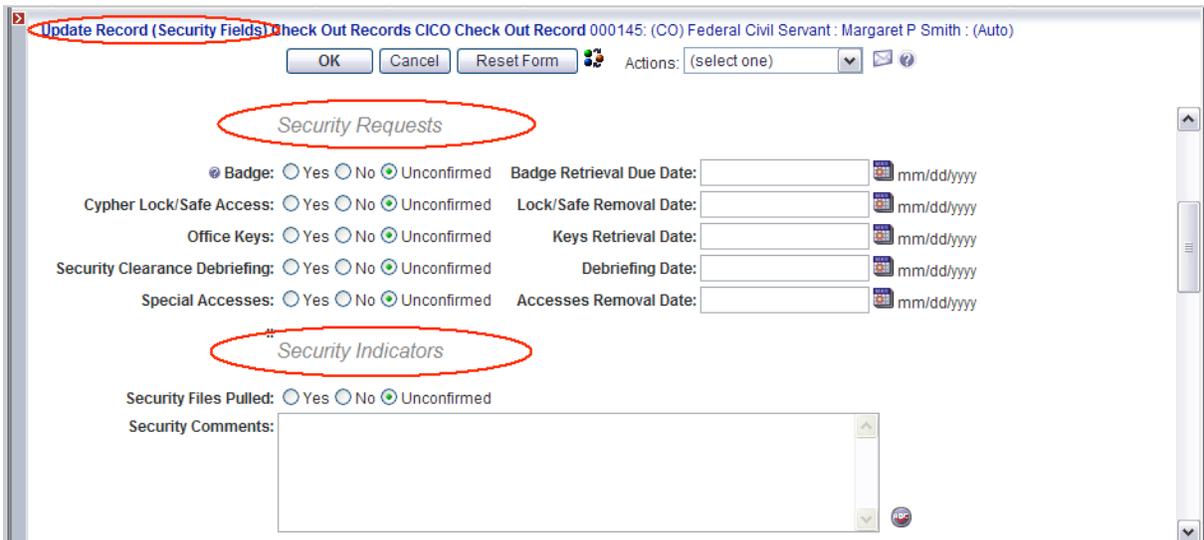
Within the body of the email will be a direct link to the record.

To View CICO Check Out: <http://<server>/tmtrack/tmtrack.dll?View&I=267&T=1031>

When the Security representative views the record, they will see a screen similar to the one below and they will click on the button labeled, "**Update Record (Security Fields)**".



Clicking on this button will bring up a screen similar to the one below:



The "*Security Requests*" indicators should be updated to reflect the particulars for the person checking out. If, for example, the person checking out does not have any "**Office Keys**", then change the indicator from "**Unconfirmed**" to "**No**". The various fields indicating a required recovery or a retrieval date are optional, however, if not supplied; the date will default to the person's check out date. Any field that does not have a "**No**" marked will cause the generation of a removal or retrieval record.

The fields in the "*Security Indicators*" sub-section are informational only and will not cause the generation of a removal or retrieval record.

6.5 Updating the Facilities Fields

The Facilities organization will receive an email with a subject line similar to the one below, listing the Check Out record's Request Id.

Subject: TeamTrack: CICO Checkout Requests Verification - Facilities - 000031

Within the body of the email will be a direct link to the record.

To View CICO Check Out: <http://<server>/tmtrack/tmtrack.dll?View&I=267&T=1031>

When the Facilities representative views the record, they will see a screen similar to the one below and they will click on the button labeled, "**Update Record (Facilities Fields)**".



Clicking on this button will bring up a screen similar to the one below:



The "*Workspace*" indicators should be updated to reflect the particulars for the person checking out. If, for example, the person checking out does not have a "**Workspace**", then change the indicator from "**Unconfirmed**" to "**No**". The field indicating a required recovery date is optional, however, if not supplied, the date will default to the person's check out date. If the field does not have "**No**" marked, then this will cause the generation of a recovery request record.

6.6 Updating the IT&C Fields

The IT and Communications Organization will receive an email with a subject line similar to the one below, listing the Check Out record's Request Id.

Subject: TeamTrack: CICO Checkout Requests Verification - IT and C 000031

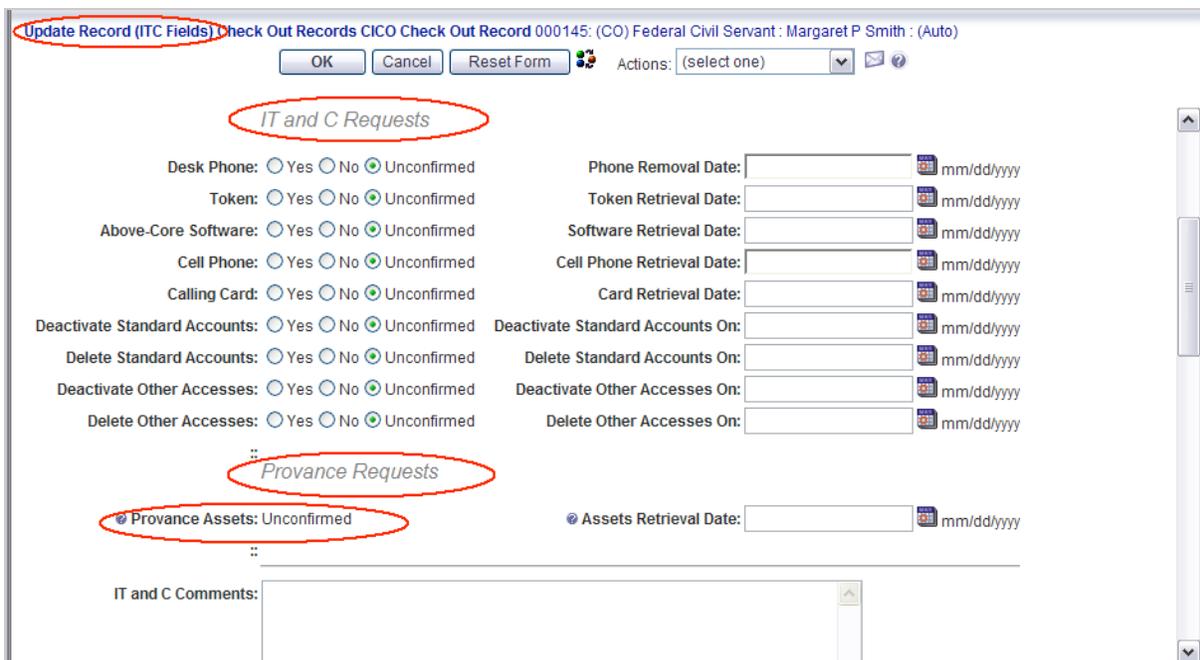
Within the body of the email will be a direct link to the record.

To View CICO Check Out: <http://<server>/tmtrack/tmtrack.dll?View&I=267&T=1031>

When the IT&C representative views the record, they will see a screen similar to the one below and they will click on the button labeled, "Update Record (ITC Fields)".



Clicking on this button will bring up a screen similar to the one below:

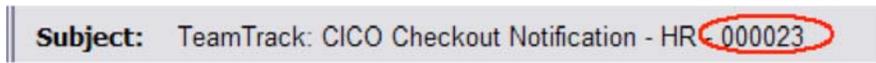


The *"IT and C Requests"* indicators should be updated to reflect the particulars for the person checking out. If, for example, the person checking out does not have a **"Calling Card"**, then change the indicator from **"Unconfirmed"** to **"No"**. The various fields indicating a required recovery or a retrieval date are optional, however, if not supplied; the date will default to the person's check out date. Any field that does not have a **"No"** marked will cause the generation of a removal or retrieval record.

The indicator field in the *"Provance Requests"* sub-section will be automatically filled in by the system since there is an interface between CICO and Provance.

6.7 Updating the HR Fields

The Human Resources organization will receive an email with a subject line similar to the one below, listing the Check Out record's Request Id.



Within the body of the email will be a direct link to the record.

To View CICO Check Out: <http://<server>/tmtrack/tmtrack.dll?View&I=267&T=1031>

When the Human Resources representative views the record, they will see a screen similar to the one below and they will click on the button labeled, **"Update Record (HR Fields)"**.



Clicking on this button will bring up a screen similar to the one below:



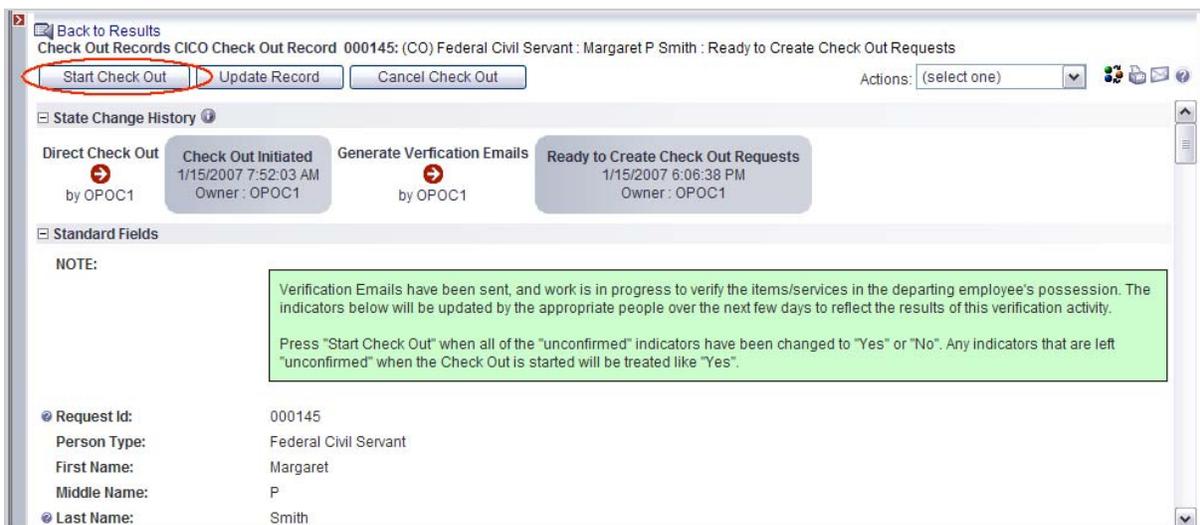
The "*Human Resources Indicators*" should be updated to reflect the particulars for the person checking out. If, for example, the payroll records have been transferred for the person checking, then change the indicator from ""Unconfirmed" to "Yes".

6.8 Updating the Check Out Record (OPOC / COTR)

Updating the record will allow you to change the departure date and add comments that can be read by the various departments who are involved in the recovery of assets and removal of services.

6.9 Starting the Check Out – Generating the Request Records

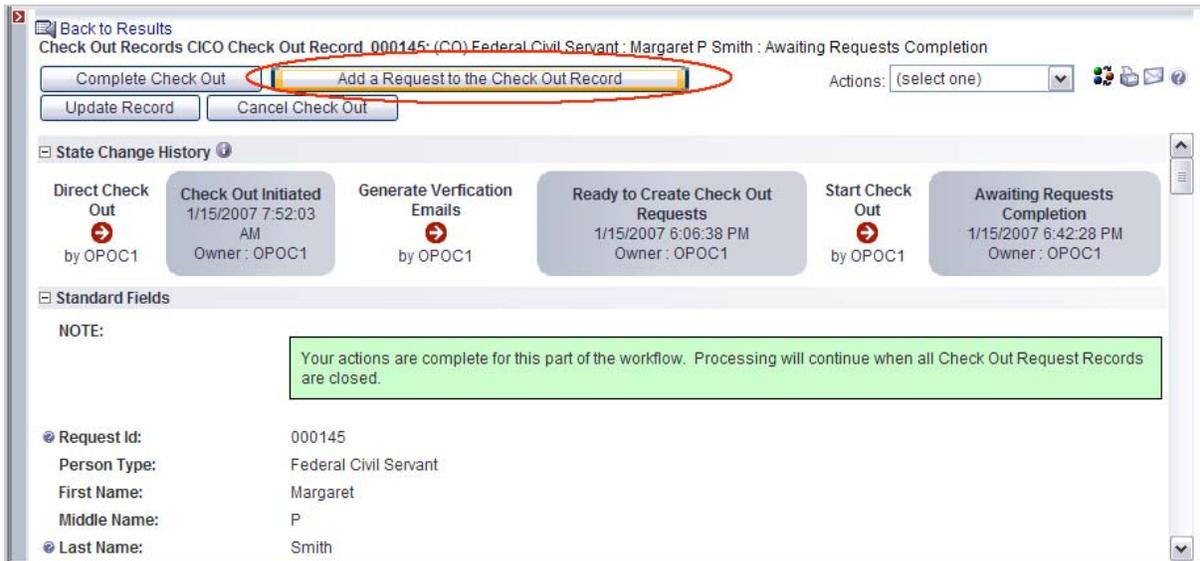
At a point after the verification emails have gone out, and after the various departments have had time to update their indicator fields, the OPOC or COTR will click on the "**Start Check Out**" button (as seen below). DO NOT START THE CHECK OUT, PROCESS THE CHECK OUT PAST THE “Ready to Create Check Out Requests” STATE PRIOR TO 48 HOURS after you generate the verification emails. This provides the supporting organizations adequate time to update the Yes / No indicators. The indicators determine if a request should be generated to track the recovery or deactivation of an asset or account and assists in minimizing the effort required of the supporting organization.



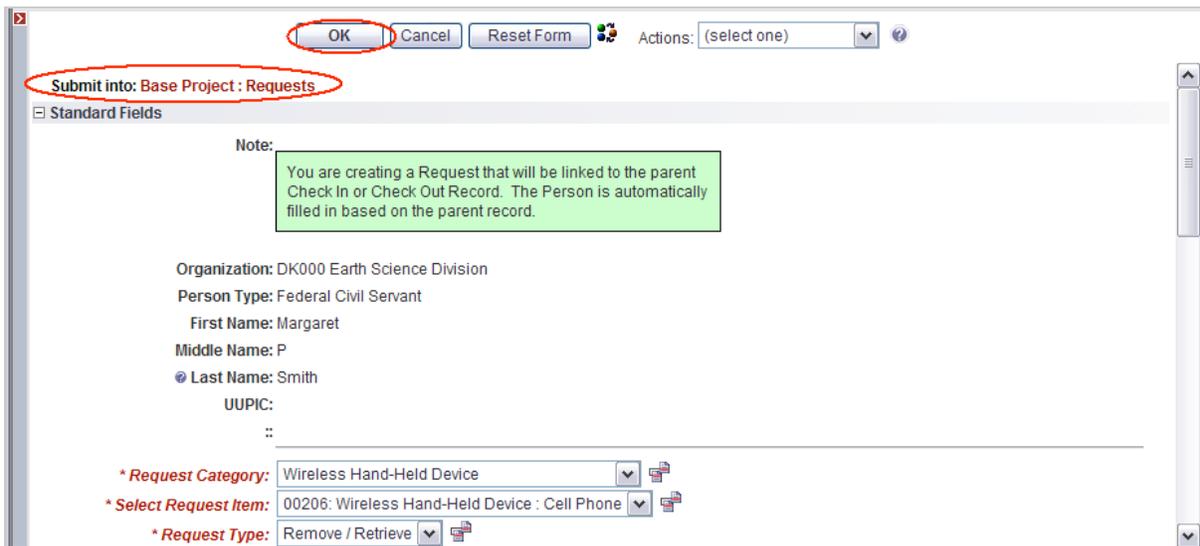
Clicking on the "**Start Check Out**" button will bring up a screen that will allow you to add comments or notes to the Check Out record before the request records are created. Once the "OK" button is pressed, the various Check Out request records will be created and the various fulfillers will be notified.

6.10 Manually Adding a Request to the Check Out Record

After the automatically generated request records have been created, no changes can be made to the request item (Yes/ No/Unconfirmed) selection indicators and any additional Check Out related requests must be added by clicking on the "Add a Request to the Check Out Record" button.



This will bring up the Submit page for the Request process and after clicking on the "OK" button the system will return you to the Check Out record.



6.11 Viewing the Request Records associated with the Check Out

1. A user can view all requests that are linked to an existing Check Out. The first step is to search and locate the Check Out “parent” record. From the “Check Out Records” tab, select “Search Records.” The screen below will be displayed. In the “Keywords” field enter the UUPIC or either the first name or last name of the employee. NOTE: Do not enter both first name and last name, the search does not recognize spaces and would not locate the person due to the space between the first and last name. Click the Search button.

The screenshot shows a web application interface for searching records. At the top, there are four tabs: "Request Records", "Check In Records", "CheckOut Records", and "Person Records". Below these are four buttons: "Add a Record", "Home Page Report", "Reports", and "Search Records". The "Search Records" button is highlighted. Below the navigation is a "Basic Search" section with a "Content" header. It contains several search criteria: "Request Id" (empty field), "Keyword(s)" (field containing "debra", highlighted with a red box), "Match All" (selected) and "Match Any" (unselected) radio buttons, "'Project(s)" (dropdown menu showing "Check Out Records"), "Search in Sub-Projects" (checked checkbox), "Show My Projects" and "Manage My Projects" links, "Submitter" (field with "Enter value to find here" and a "Find" button), and "Active/Inactive" (radio buttons for "(Both)", "Active", and "Inactive"). At the bottom left, a "Search" button is highlighted with a red box.

- You should see the Check Out “parent” record displayed in the search results. Click on the “Request ID” number to open the Check Out “parent” record.



4. Display of the Check Out “parent” record



4. Scroll to the bottom of the display and locate the “Expand All” link. When selected it will expand to show all request records linked to the Check Out record.

System Fields

Owner:	Jenne, Stephen	Submit Date:	9/12/2007 1:31:09 PM
Submitter:	Jenne, Stephen	Last Modified Date:	9/19/2007 12:37:31 PM
Last Modifier:	Benning, Rhonda K	Last State Change Date:	9/12/2007 1:32:54 PM
Last State Changer:	Jenne, Stephen	State:	Awaiting Requests Completion
Project:	Check Out Records		
Secondary Owner:	Jenne, Stephen Masters, Kimberly M OPOC1 Shovely, Michelle		

Subtasks

Show Subtasks
Expand All

Change History

- 9/19/2007 12:37:31 PM, 'Update Record (HR Fields)' by Benning, Rhonda K**
- 9/17/2007 8:42:44 AM, 'Update Record (HR Fields)' by Jackson, Sheila M**
- 9/14/2007 11:50:06 AM, 'Update Record (Security Fields)' by Ford-Miller, Antoinette**
- 9/13/2007 9:11:51 AM, 'Update Record (Admin Fields)' by Butler, Rose T**
- 9/12/2007 1:32:54 PM, 'Start Check Out' by Jenne, Stephen**
- 9/12/2007 1:32:39 PM, 'Generate Verification Emails' by Jenne, Stephen**
- 9/12/2007 1:31:09 PM, 'Direct Check Out' by Jenne, Stephen**

5. Scroll to the bottom of the display and locate the “Expand All” link. When selected it will expand to show all request records linked to the Check Out record as displayed below. Note the “(CI)” displayed to the right of each of the entries, this is an indicator that the requests were created as part of a Check Out. To view one of the requests, click on the blue link of the request record

Subtasks

Hide Subtasks

- [008682: \(RQ\) Debra Watson : 00040: Workspace / Office / Room : n/a \(Workspace\) : Remove / Retrieve : Awaiting Fulfillment : \(CO\)](#)
- [008683: \(RQ\) Debra Watson : 00014: Credit Card : Travel : Remove / Retrieve : Request Closed : \(CO\) \(Inactive\)](#)
- [008684: \(RQ\) Debra Watson : 00013: Credit Card : Purchase : Remove / Retrieve : Awaiting Fulfillment : \(CO\)](#)
- [008685: \(RQ\) Debra Watson : 00021: Government Passport : n/a \(Passport\) : Remove / Retrieve : Request Closed : \(CO\) \(Inactive\)](#)
- [008686: \(RQ\) Debra Watson : 00018: Parking or Fare Subsidy : Fare Subsidy : Remove / Retrieve : Awaiting Fulfillment : \(CO\)](#)
- [008687: \(RQ\) Debra Watson : 00210: Parking or Fare Subsidy : Parking Subsidy : Remove / Retrieve : Request Closed : \(CO\) \(Inactive\)](#)
- [008688: \(RQ\) Debra Watson : 00029: Seat - Phone Desk Phone : PH2 Desk Phone : Remove / Retrieve : Request Closed : \(CO\) \(Inactive\)](#)
- [008689: \(RQ\) Debra Watson : 00037: Token : Dial In Account with Token : Remove / Retrieve : Awaiting Fulfillment : \(CO\)](#)
- [008690: \(RQ\) Debra Watson : 00333: General IT and C Request : All Standard Accounts : Deactivate : Awaiting Fulfillment : \(CO\)](#)
- [008691: \(RQ\) Debra Watson : 00333: General IT and C Request : All Standard Accounts : Delete : Awaiting Fulfillment : \(CO\)](#)
- [008692: \(RQ\) Debra Watson : 00334: General IT and C Request : All Other Accesses : Deactivate : Awaiting Fulfillment : \(CO\)](#)
- [008693: \(RQ\) Debra Watson : 00334: General IT and C Request : All Other Accesses : Delete : Awaiting Fulfillment : \(CO\)](#)
- [008694: \(RQ\) Debra Watson : 00446: Seat - Cell Phone : Cell \(Voice Only\) \(Inactive\) : Remove / Retrieve : Request Closed : \(CO\) \(Inactive\)](#)
- [008695: \(RQ\) Debra Watson : 00008: Calling Card : n/a \(Calling Card\) : Remove / Retrieve : Request Closed : \(CO\) \(Inactive\)](#)
- [008696: \(RQ\) Debra Watson : 00307: Cypher Lock / Safe Access : n/a \(Cypher Lock / Safe\) : Remove / Retrieve : Request Closed : \(CO\) \(Inactive\)](#)
- [008697: \(RQ\) Debra Watson : 00025: Office Keys : n/a \(Office Keys\) : Remove / Retrieve : Request Closed : \(CO\) \(Inactive\)](#)
- [008698: \(RQ\) Debra Watson : 00317: Security Clearance Debriefing : n/a \(Debriefing\) : Conduct : Request Closed : \(CO\) \(Inactive\)](#)
- [008699: \(RQ\) Debra Watson : 00336: General Security Request : All Special Accesses : Remove / Retrieve : Request Closed : \(CO\) \(Inactive\)](#)
- [008700: \(RQ\) Debra Watson : 00007: Badge : n/a \(Badge\) : Remove / Retrieve : Request Closed : \(CO\) \(Inactive\)](#)
- [008701: \(RQ\) Debra Watson : 00448: General IT and C ODIN Request \(Inactive\) : All ODIN Assets for a Seat \(Inactive\) : Remove / Retrieve : Awaiting Fulfillment : \(CO\)](#)
- [008701: \(RQ\) Debra Watson : 00448: General IT and C ODIN Request \(Inactive\) : All ODIN Assets for a Seat \(Inactive\) : Remove / Retrieve : Awaiting Fulfillment : \(CO\)](#)

Change History

- 9/19/2007 12:37:31 PM, 'Update Record (HR Fields)' by Benning, Rhonda K**
- 9/17/2007 8:42:44 AM, 'Update Record (HR Fields)' by Jackson, Sheila M**

6.12 Monitoring the Status of Check Out Related Requests

The OPOC or COTR can monitor all of the request records related to a Check Out record by either running a report or examining the "Subtask" section of the Check Out Record (as seen below). The current state of each request is displayed along with the Request ID, the Request Category and Request Item. The (COI) indicates that the request was generated as part of a Check Out.

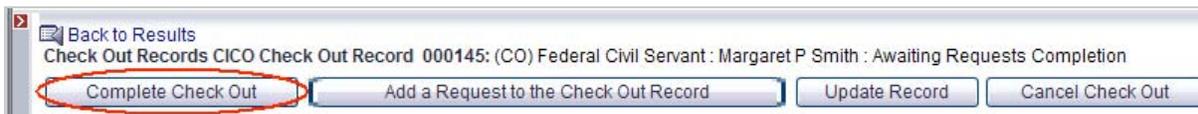


6.13 Updating a Check Out Record While Awaiting Request Approvals

Updating the record at this point will allow you to add comments that can be read by the various departments who are involved in the recovery of assets and removal of services.

6.14 Completing the Check Out

Once all of the Check Out related request records have been completed and the results have been reviewed, for contractors the OPOC or COTR can then click on the "**Complete Check Out**" button to close the Check Out record. For Civil Servants, the close out is only to be performed by persons having the HR role.



Clicking on the "**Complete Check Out**" button will allow you to add closing comments to the Check Out record.

6.15 Canceling the Check Out

If, for example, the person being checked out decides not to leave NASA HQ, then the Check Out record should be canceled. However, all related "open" request records will need to be canceled as well. Also, any completed requests will need to be reversed by submitting add / assign requests.



Appendix

The following appendices are contained in this section:

Appendix A - Roles

Appendix A

Roles

- **Organizational Point of Contact (OPOC) or Contracting Office Technical Representative (COTR)**
 - The OPOC or COTR is responsible for creating Check In records for new employees (ensuring that the new employee is assigned a UUPIC) and reviewing, submitting requests initiated by persons in their NASA HQ organization or that are part of their contract. For Checking Out, the OPOC/COTR is responsible for initiating and submitting the check out request. When a Check Out record is initiated a series of e-mail messages are sent to the service providers to request a check be performed by them to determine if the employee has any assets and services that need to be recovered. The OPOC/COTR is responsible for monitoring the check-out process and in some cases collecting some of the physical assets. For Civil Servants, the final close-out of the check out record is performed by staff within the Human Resources Management Division. For contractors, the final close-out of the check out record is performed by the OPOC or COTR.
- **The Approver / Fulfiller**
 - The Approver/Fulfiller is responsible for approving and/or fulfilling individual requests for items or services that they manage. Upon Check Out they are responsible for validating what items and services an employee has and recovering or disabling access.
- **Information Technology and Communications (IT & C)**
 - The IT&C Division have duties related to approving and / or fulfilling requests for items such as Computer Seats, Hand Held Devices, Above-Core Software, and access to Standard Accounts, Applications, Web Sites, and Folders. On Check Out, the IT&C Role is responsible for verifying whether an employee has items such as a cell phone, a calling card or a token. This information will be recorded on the Check Out record and followed by request records for retrieving and removing verified assets and disabling access to services.
- **IT Security**
 - The IT Security Role is responsible for ensuring that a Universal Uniform Personal Identification Code (UUPIC) has been assigned to the employee being Checked In. When required they validate that items and services requested are appropriate for the person based on their organization, position, security level, and citizenship status. The IT Security Role may also have additional duties related to approving and / or fulfilling individual requests.
- **The Human Resources**

- The Human Resource role is responsible for verifying any special accommodations that may be needed for incoming personnel. For ensuring proper orientation activities are scheduled and performed. On Check Out, the HR Role is responsible for verifying if there is any outstanding debt owed to NASA such as training and development debt and/or debt associated with the Student Loan Repayment Program. The HR role is responsible for ensuring the Standard Form (SF 278); Executive Branch Financial Disclosure Form is submitted to the Office of the General Counsel. In addition, the HR role is responsible for collecting and forwarding address information to the NASA Alumni Association. A major Check Out function is to review and close out the final check out record. This involves reviewing the status of all check out requests to verify that all services and assets were collected and/or an explanation provided for items that may not have been recovered. It should be noted that HR only performs the final close out for Civil Servants only. The HR Role may also have additional duties related to approving and / or fulfilling individual requests.
- **The Security Role (Office of Security and Program Protection)**
 - The Security role is responsible for issuing a UUPIC, a badge, verifying the required security investigations, and approving special building or safe access. They also are responsible for recording information related to any clearances for the employee. On Check Out they are responsible for badge retrieval, security debriefing, clearance status update, and disabling special accesses to items and services. The Security Role may also have additional duties related to approving and / or fulfilling individual requests.
- **The Facilities**
 - The Facilities role is responsible for ensuring that the workspace designated for a new person is appropriate based on the person's position and grade level. Also validates that the request for workspace is within the organization's Institutional Requirements Review (IRR) ceiling. This applies to civil servants and contractors. On Check Out they are responsible for verifying the recovery of workspace and update the corresponding record(s) and building floor plan. The Facilities Role may also have additional duties related to approving and / or fulfilling individual requests.
- **The Administrative Services Role**
 - The Administrative Services role has duties related to approving and / or fulfilling requests for items such as Parking or Fare Subsidies, Government Passports, and Credit Cards. On Check Out they are responsible for verifying whether the employee checking out has any Parking or Fare Subsidies, Government Passports, Library Books, and Credit Cards. They are also responsible for verifying the completion of Form 296, Exit Clearance Process Statement for Records Management. All of this information is recorded on the Check Out record and followed by request records for retrieving and removing assets and services.

- **General Users**
 - This role allows a user to make requests for assets, services and view the progress of any requests that are submitted. Make requests for themselves or for other employee's. Any person having a NASA domain user account is considered a General User.

- **Request Approvers**
 - This role allows the User to approve requests for assets and services that they control. To be a Request Approver you must be specifically designated as the approver for an asset or service.

- **Request Fulfillers**
 - This role allows the User to indicate that a request for an asset or service has been fulfilled. They will only be able to indicate fulfillment for a request when they are assigned as the fulfiller for a request record.

- **Account Administration**
 - This role allows the User to add new user accounts, provide access to WEB based resources, organization and group folders, updating auxiliary tables, checking daily external interface loads, maintaining Request Categories, Request Items, and Request Types, and monitoring the Delinquent Items Report. Account Administration personnel may have additional duties related to approving and / or fulfilling individual requests. The Account