



# Mandatory iPERMS Web-based Training Instructions

All students will complete the **Scan Operation/Operator** and **Authorized Official** training.

Web-based Training Website: <https://iperms training.carson.army.mil/wbt> Click on “**Certificate Login**”.

CAC login required for training.

## **Annual Requirements for iPERMS access:**

- 1) To Access iPERMS, users must submit a DD Form 2875, System authorization Access Request (SAAR), to one of the following. Certificates of Web-based Training do not have to be sent unless requested by the Point of Contact (POC).
  - a) [usarmy.knox.hrc.mbx.iperms-accounts@mail.mil](mailto:usarmy.knox.hrc.mbx.iperms-accounts@mail.mil) (POC for Active and Reserve Army).
  - b) [ngb\\_perms@ng.army.mil](mailto:ngb_perms@ng.army.mil) (POC for National Guard)
- 2) Required iPERMS Training:
  - a) Information Assurance (IA) Training <https://ia.signal.army.mil> (**Annually**).
  - b) iPERMS Web-based Training:  
<https://iperms training.carson.army.mil/wbt> (**Scan operator and authorized official roles**) (**Annually**).

## **SCAN OPERATOR ROLE**

**Scan Operation:** When an iPERMS user scans Soldier records to create electronic image files, the iPERMS system places the images into batches that are then indexed with data references for future retrieval.

### **Scan operators are responsible for the following:**

- 1) Preparing documents by:
  - a) Removing all staples, binder clips, etc.
  - b) Remove all sticky notes
  - c) Trim jagged edges
  - d) Repair torn pages
  - e) Straighten bent pages
  - f) Photocopy delicate pages
- 2) Inspect documents to make sure of the following:
  - a) The documents are authorized for inclusion into the Soldier’s permanent record (AR 600-8-104 for authorized documents).
  - b) Do not inappropriately contain the personal information of other Soldiers (blacken out the information of the other Soldiers).
- 3) Managing rescans. Rescans are needed when uploaded documents have errors (e.g. documents separated from the original batch). The rescans are identified by a rejection code.

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## Rejection Code Chart

Reject Code	Reject Reason	Explanation	Reject Queue
I	Incomplete Document	The document is missing at least one page.	Rescan
X	Illegible Image	The quality of the document is so poor that it is difficult or impossible to read.	Rescan
Z	Corrupt Image	The image will not display.*	Rescan
A	Check SSN	There is a question about the SSN on the documents.	QC
B	Check Name	There is a question about the name on the documents.	QC
C	Check Doc Type	There is a question about whether a particular doc type should be used.	QC
D	Check Effective Date	There is a question about which date should be used.	QC
E	Check SIDs	There is a question about the SIDs the document is filed under. This requires the QC Operator to review Document Filing and Document Matrix resources.	QC
F	Reindex Document	Not used often as document index data can be changed while in IV, VR and QC stages. May be used if indexer/verifier is unsure of how to index a document and no one is available to ask.	QC
G	SSN/Name Not Available	The soldier SSN/Name has not yet been added to iPERMS.	QC
H	Duplicate Document	Not used often as it is possible to do a dup doc check in Input and delete a document before it gets entered in RMS and causes a duplicate.	QC
J	Unauthorized Document	The document is not processed/handled by a particular Domain. This is more common in Army domains.	QC
K**	Document Needs Splitting	There is a multi-page image file that needs to be transformed into separate images.	Rescan or QC
L**	Document Pages Out of Order	Not used often as Input operators have the capability of rearranging document pages.	Rescan or QC
V**	Duplicate Page	Not used often as it is possible to do a dup doc check in Input and delete a document before it gets entered in RMS and causes a duplicate.	Rescan or QC
W**	Unnecessary Page	Not used often as Input operators have the capability of deleting unnecessary images.	Rescan or QC
Y	See Batch Comment	Operator enters a comment about why the images selected for rejection are being separated from the batch.	Rescan or QC

\* If images will not display and you get a prompt that your browser is not handling Active X controls properly, this does not signify a corrupt image. Please check with your DOIM for information about enabling Active X controls.

\*\*Documents are routed to either QC or Rescan based on the number of images associated with the document. See page 8 of the Indexing tab in the iPERMS Quick Reference Guide for further details.

## AUTHORIZED OFFICIAL

**Authorized Official role** – personnel with this role may only view an iPERMS record. This access is given to iPERMS users who need to view Soldier records in order to accomplish a task (e.g. preparing for a promotion board). They can't upload a document into iPERMS.

## MAINTAINING iPERMS ACCESS

- 1) COMPLETE SSN must be on all documents, not just the last 4.
- 2) iPERMS access is valid for 365 days. An email notification will be sent 30 days prior to access expiring.
- 3) Users must complete a new DD 2875 annually, when there is a change in official duties, or when a user has a permanent change of station.
- 4) Email iPERMS Access request to: [usarmy.knox.hrc.mbx.iperms-accounts@mail.mil](mailto:usarmy.knox.hrc.mbx.iperms-accounts@mail.mil)
- 5) Inactivity in iPERMS for 90 days will result in an automatic revocation of access, other than the Soldier's view of their own record. Users MUST access iPERMS (live) via the iPERMS Home Page at URL: <https://iperms.hrc.army.mil> at least once every 90 days. iPERMS does not recognize accessing OMPF in iPERMS through a remote portal, such as the Soldier Management System (SMS) as logging into iPERMS. Once access is revoked, the user must reapply for access to iPERMS.

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## **Best practices tips:**

- 1) Group documents (i.e. awards or same Soldier's SSN) when scanning to make the process easier for indexers.
- 2) Each batch should be 50 pages or less, unless the equipment says the limit of pages is less.
- 3) Align pages appropriately to prevent jams in the scanner's document feeder tray.
- 4) Place the documents face up or face down according to the directions; otherwise, the scanned images will be blank.

## **System and User Requirements**

The following are system and user requirements:

- 1) Workstation must be running Windows XP or higher and Internet Explorer 6 with Service Pack 2 or higher.
- 2) Must be logged in as an administrator or consult DOIM for help if you do not have administrator privileges.
- 3) Must have AKO account with Scan Operator role assignment in iPERMS.
- 4) Workstation must have intranet/internet access to the IQC server.
- 5) Workstation must have a supported scanner installed using TWAIN drivers.

## **Understand Image Format**

- 1) Image requirements:
  - a) TIFF file is the only image file type in iPERMS for digitized documents. If you try to add other file types you will receive an error message. NOTE: work with the system administrator/DOIM to set up scanner correctly for TIFF files
  - b) File size can't exceed 300 dpi.
- 2) TIFF file conversion (Windows-based operating system):
  - a) Open image in whatever program created it.
  - b) Print to the Microsoft Document Image (MDI) writer.
  - c) Choose a location to save the MDI file.
  - d) Open the MDI file and save as a TIFF file.

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To obtain the Scan Operation/Operator and Authorized Official certificates, users must complete the following steps:

- 1) Open <https://ipermstraining.carson.army.mil/wbt>
- 2) Click on the tab that says “**Input Training**”.
- 3) Click on “**Scanning**” under the Input tab on the left hand side of the screen
- 4) Click on each highlighted area. This review will prepare you for the quiz after the block of instruction.
  - a) Understand the Scan Operator Role
  - b) Configure Web Scanning
  - c) Understand Image Format
  - d) Add Document to the System
  - e) Manage Rescans
  - f) Use the Action Menu
- 5) When you have completed the “**Action Menu**” at the bottom of the second page, there is a link that says, “**Take the Scanning Quiz**”. Click this link.
  - a) Click on the drop down menu and choose (Active Army – Officers; Army Reserve: or the National Guard unit for your state).
  - b) This quiz is for the Scan Operator. There are 10 questions. Choose your answer and click “**submit**” after each question.
  - c) When the quiz is complete, it will say whether you passed or failed and give you the option to generate a certificate. If you didn’t pass then the system will tell you to review and try again.
  - d) Click on “**generate certificate**” and a file download box will appear. Click “**Open**” and a PDF certificate will appear. If you want to save, click the file icon at the top of the page and find Save As. Name the document as directed by your instructor, click “**desktop**” and click “**Save**”.
- 6) Click on the tab that says “**AO Training**”. (Authorized Official)
  - a) Click on each highlighted area. This review will prepare you for the quiz after the block of instruction.
  - b) Understand the Authorized Official Role.
  - c) View Records.
  - d) Report a Problem.
- 7) When you have completed the “**Report a Problem**” section, at the bottom of the second page, there is a link that says, “**Take the Authorized Official Quiz**”. Click this link.
  - a) Click on the drop down menu and choose (Active Army – Officers; Army Reserve: or the National Guard unit for your state).
  - b) This quiz is for the Authorized Official. There are 20 questions. Choose your answer and click “**submit**” after each question.
  - c) When the quiz is complete, it will say whether you passed or failed and give you the option to generate a certificate. If you didn’t pass then the system will tell you to review and try again.
  - d) Click on “**generate certificate**” and a file download box will appear. Click “**Open**” and a PDF certificate will appear. If you want to save, click the file icon at the top of the page and find Save As. Name the document as directed by your instructor, click “**desktop**” and click “**Save**”.