

Transcript (SCIP Training - Finding Cases of Interest Demonstration):

Welcome to this DSU SCIP training demonstration. My name is John O'Connor and I will be the DSCU instructor for this demonstration, which is going to be relatively short, as we're going to focus on one specific task, but a pretty important one. Using the case information case status filters to find cases of interest in the Security Cooperation Information Portal (SCIP).

So when you first log on to the Security Cooperation Information Portal (SCIP) for your account, at the very top, as you see on my screen, you're going to have a navigation bar to navigate between the different SCIP communities for your account, and that's the key point is the communities that are available and visible in your navigation bar once you log on to your account is going to vary depending upon what you requested and what was approved in the creation of your account. So currently on this training account I have the Home community, which is what we're currently looking at, we have Case Execution, Case Information, Partner Info, and Help and Training.

Since we want to find cases of interest in the Case Information community, I'm going to navigate using the navigation bar to the case information community.

When I do that, it is going to change the view from where I was, which was the Home Community on SCIP, to Case Information which identifies right in the title which community that you're in. And specifically within the Case Information community we're looking at, the home portion of the Case Information Community.

When you do navigate to any community on SCIP, it's going to not only give you the original navigation bar to navigate within the communities from one community to another, but also a second navigation bar below to navigate between the different capabilities and report within that community.

So here in the case information community we have Home, we have Case Status, Ad Hoc, My Alerts, Financial, Logistics, Metrics, and Help. Additionally, on the left side, before we go to the Case Status to find cases of interest, which is the focus of this training demonstration, note that there is a refresh status and system data information that's listed on the left. Highly encourage that whenever you go to the Case Information Community, you look at this information because it will tell you when the data was last updated and typically it'll be updated that morning. The day you logon, typically about 5:00 to 6:00 o'clock, East Coast time in the United States, which is exactly what it shows here. Additionally, It shows the data sources, the authoritative data sources for the US Air Force, U.S. Army, and Department of the Navy, including the other DoD systems such as the Defense Integrated Financial System (DIFS), and Defense Security Assistance Management System (DSAMS), etc. So just a very important key point that hopefully you're aware of is the Security Cooperation Information Portal (SCIP) is using authoritative data sources from the military departments and other DoD systems. It's not creating its own data so the data that we're going to be viewing is from these different DoD systems, which was updated per the refresh rate.

Also mentioned the Help, and there's two ways that you can get help for anything that you want to do in the Security Cooperation Information Portal, including in this example the Case information community, you can go within whatever community you're in and 'click' help, or you can click the Help and Training Community itself via the Community navigation bar menu. If, however, you 'click' Help within the community, what it will do is navigate to the SCIP help and training community. But since you did it within a specific community and our example case information, it navigates to the case information portion of the help and training. And you see you have user guides and information training and info. In fact, this is the location that, once this training demonstration is completed and uploaded, it'll be available here in the SCIP help and training case information section, but since we're looking at finding cases of interest using the SCIP case information case status.

We're going to navigate from this Help, to Case Status. Once we do, it's going to bring up a new window with filter choices to find cases of interest. Now in my example that I see here, all my choices are essentially blank. They are clear if you will from all filter choices. You may find when you go to case status on your account, there may be selections already there, because SCIP assumes that you're going to try to find the same cases of interest, so it leaves the last use case status filters. If for example, you came here, and instead of document status being blank, it was Implemented, you could very clearly and cleanly clear all filters by just clicking the Clear Filters button that you see that I'm pointed to. Once you do all your filter choices will be blank with one exception and that is your country or program code.

So at the very top you see in this window we have band area selected with the country code of BN (Bandaria) because that has been selected. BN is automatically listed down here for us now. In your own personal SCIP account, you may have only access to your country data, or your account may have multiple countries and multiple building partnership capacity program codes that you have access to.

To be able to change from one view, in other words, say for example, you did have multiple countries, so if you click the drop down arrow here at the very top it will list all your available choices. So in my training account I have three training countries. I have AK for Akkadia. I have been BN for Bandaria, and I have ZS for Zastavia. I could quickly switch from the BN (Bandaria) data to any of the other country or program data by just clicking the drop down arrow, selecting the choice desired. Once selected as you see, I have now AK (Akkadia), but we still show BN listed because we need to do one final step. Once we select the country or program code that we desire, we now need to click the View Data button. Once we do that, SCIP will show that selection in the data view, hence why it's called the View Data button, to the desired selection. So now that I selected AK (Akkadia) view data, SCIP is now displaying AK (Akkadia) type of data.

Just as a recap, I could go back to the BN (Bandaria) data by going once again to the dropdown arrow for the country or program code, clicking that drop down arrow. Of all the possible choices, pick the desired. In my case my desired is BN (Bandaria), and then one final step. Click the View Data button and then SCIP will change the view to the desired country or program that you selected.

Now there are six filter choices to finding cases of interest that you have options for in these different filter choices, and we're going to walk through each one of them. But just so you're clear, the first one that we did here was the country and program code, so that is done using the drop down arrow and the view data, and until that's changed that's the data that will be displayed on the left side.

Now we have five other choices, so the second and third choice are actually part of what we call the Case ID, and you notice here of our different options that are listed at the top in the title. We have Case ID. We have Customer Service. We have Document Type, Document Status, and we also show a Status Date which is the date that the case status was last changed. Additionally we see Descriptions and we see Total Case Value. Now, just to clarify, you notice in my training data the description for everything that's listed is Vehicles, that's just because this is training data. In your real world SCIP account, your description will be the actual case description itself, as opposed to this generic training data which says vehicles.

But going back to our titles. Every one of these entries that's here are in blue. These are hyperlinks, and that's pretty typical of what you'll find in SCIP. Anything you have that is has the text in blue text is typically going to be a hyperlink. For example, if I'm not sure what a Case ID is, and a case ID is actually made up of three components including the FMS country or program code, the implementing agency code, and the case designator. If I had forgotten that, or I was a little uncertain about how to find the right code for the implementing agency or the case designator or the country or program code, you can click this hyperlink case ID. When you do that, it's going to bring up a help description. Now I'm going to switch the view to show you what happened there, so bear with me as I switch that.

So now I have clicked help descriptions to find what exactly we're talking about. For a case ID, and this is really one of the nice features of SCIP. The help descriptions are in the SCIP help and training community, but SCIP helps us even further.

If you will, by allowing us to just click a hyperlink that will open up the appropriate help guide if you will to help us understand the meaning of these different data fields and also where you can find the codes to identify what should be.

In those different data fields, so case ID we talked about is a combination and you see here our unique 6 digit identifier.

That comprise the country code and building partial capacity program code. If it is a BPC program along with the implementing agency code and the case dedicator, that's great to know that. But since there's a lot of different codes that can go in these six different digit field.

What SCIP also does is provides us with the additional information. So for example in our customer country code it gives us information for FMS country codes. You click this hyperlink and it will open up the appropriate reference. In the SAMM Chapter 4 Table 28 for the FMS country and regional codes and for the building partner capacity. Clicking this hyperlink for the SAMM Chapter 4.5 table 2B will automatically open up that SAMM reference. So not only does

it provide the reference, but it gives you a hyperlink within this help description to navigate directly. Additionally, we have our implementing agency code and our case identifier.

So our for example, if I click our implementing agency code, it will then go directly to that implementing agency code and allow us to see for the different implementing agencies. U.S. Army, U.S. Navy, U.S. Air Force, Defense Contract Management Agency. Defense Information Systems Agency or DISA, Defense Logistics Agency, and then these additional 5 implementing agencies in the right all the way down to the National Security Agency. So you can click the hyperlink. For example, going to the US Air Force and it would tell us the US Air Force Code is a D and then would give you all the different organizations with the addresses for it. Typically for finding case of interest, the biggest thing you need to know is how to find the code, so just to recap, is by clicking our case ID were able to very quickly navigate and find through the help description exactly what we're looking for and so we, we showed the implementing agency code will also be talking about case designators. Well, case designators can be a little complex and so the case designator table within this SAMM reference indicates what letters we should be using.

So I'm going to navigate back to our SCIP and we'll just try to recap that discussion. And the key point that we're bringing up is that use the help information within SCIP either directly through the help and training community, or even easier, just click these hyperlinks for any of these data field descriptions, and that will then give you the specific explanation of that data field along with providing the reference if there are any applicable codes with a hyperlink directly to that reference so you can find the code so with that being said, let's continue on with our printing demonstration focusing on the remaining 5 filters. We talked about the first filter, which is our FM country code or building partnership capacity program code and we showed how using the case ID we could find what code if you especially for the building partial capacity that you may be confused about which one that you're looking. Although SCIP does here very nicely provide in parentheses the name of the country or the name of the BPC program code as we talk about in a case ID it's comprised of not only the country or program code, but the next field. Here is our implementing agency code, so if we click the drop down here all it does is provide us the different implementing agency code letters B, C, D, and so on. As we talked about, you may not recall which one that you're going to do, so once again, the way if you wanted to have a refresher on that or confirm your choice, click the case ID description, then click the hyperlink for your implementing agency Code and find the right letter that matched your code. As a general rule of thumb, though, 95% of our FMS and BPC cases are managed by the U.S. Army, which has a code of Bravo, or the U.S. Air Force which has a code of delta, or Department of the Navy which includes the Navy, Marine Core and Coast Guard, which has a code of Papa.

So if I currently have the dash here, as you see, it's going to show everything, and in fact if I scroll down we start with the letter B because what SCIP does is absent any filter, it will show things in alphabetical order. So if I Scroll down the letter B will eventually change as you see in the second column to delta, and that is because now we're moving down to the U.S. Air Force. If I scroll down even further, eventually we see it goes to Mike for the National Security Agency, and Papa for Department of the Navy and so on. So you could use the scroll bar navigate there. But as you notice on the bottom here, the number of cases and documents is pretty significant.

We got in our example for Bandaria, 3119 cases and documents, and we'll talk later in this demonstration about the difference between cases and documents. But the sheer number of cases and documents that your particular account of interest that you're looking at for your country or program may be significant, so that's the importance of using these filters that we're going to talk about the remaining 5 to be able to very quickly let the computer do the work for you and find your case of interest.

So for example, instead of letting us see all cases and documents, maybe all I want is the U.S. Air Force, so I could use the implementing agency drop down arrow here and one of the other nice things that SCIP does besides giving us the help descriptions with the references hyperlinked directly, if you hover your mouse directly over any of these filter choice boxes, SCIP will give you an automatic popup that will describe what is SCIP is looking for your choice. So if I hover my mouse over this implementing agency, SCIP automatically tells me just by hovering my mouse without even clicking, it says to choose an implementing agency, so I'll do exactly that.

I'll click the drop down arrow just like we did for our country or program code, and instead of the dash, which is everything I'm going to click the letter delta which is the U.S. Air Force. And then as you see my entry here that matches my second choice here is now the letter delta. And you notice the number of cases and documents has gone down pretty significantly. Again, so just a very quick initial example of how by using these filters you can very quickly let's SCIP do the work for you and narrow down the search to help you find cases of interest. OK, I'm going to switch now from the letter delta, to the letter, Papa for just is one more example of that. And then when I do that now I'm looking at just Department of Navy cases with Bandaria because remember, our first choice was her FMS country code for Bandaria. Our second choice now is the letter Papa for implementing agency code, and you notice the number of case in documents has changed. So we had over 3000 for everything and then we had a little over 400 for the Department of Air Force, and now we got 1247 cases and documents for Department of Navy.

So the implementing agency code, if you're looking for specific and once again it kind of depends on your account, you may only have access to a single implementing agency, or you may have access to all implementing agencies. It all depends upon your account and if for whatever reason, if you think your account is set up incorrectly, that's a good reason to check with the SCIP help desk and put in a account modification request for review and approval so that you get the information and data access that you need.

The third choice. Remember first choice here was our FMS country code or BBC program code. Our second choices are implementing agency code. If I hover over this third box here, it shows me my case designator OK and you notice there are three entries there because case designators are three letters. The first letter, in this case alpha, indicates the category of cases. Now, if you once again you click case ID and you're not quite sure what those categories of cases is, I'll switch to that screen momentarily, you once again could navigate to that help description. And in fact, going to our case designator, it identifies the 4th, 5th and 6th position. This is the case designator referred to electronic Security Assistance Management Manual (SAMM) that DSCA

publishes and specifically SAMM Chapter 5 Figure 6. And then not only does it tell you that, but it gives you a nice hyperlink to go to that table.

So in this case, the example that we were showing we had a U.S. Department of Navy case with a first letter of alpha because remember it goes in alphabetical order. So if we scroll down here, once again, this section of the reference table is case identifier and then you have your three primary implementing agencies, Department of the Army for the United States, Department of the Navy for the United States, and Department of the Air Force for United for the United States. And unfortunately, each of these military department do not use many similar letters for the same type of cases. There are some exceptions, a cooperative logistics supply support arrangement, which is also typically referred to as a foreign military sales order case, does start with the letter K for all three Military departments, but with except for that particular category of case, they tend to be unique, so this table that's referenced in the help description on SCIP is very good at finding it. So for example here we showed a letter alpha and you see for the letter Alpha for the United States Navy. That's ammunition, and actually for the U.S. Air Force, similarly alpha does indicate munitions. If we go down to the letter T for the US Air Force, it is a training. The letter T for Department of the Navy is also training. Unfortunately, the letter T for the U.S. Army is not training, it is publications, so just a example that the letters are not consistent between the military departments. So that's the importance of using this Help Descriptions reference when you're trying to find any aspect of the case identifier, including this one for the 1st letter of the case designator, and we'll talk about the importance of that in the filter.

So I'm going to go ahead and switch back to our SCIP display, and we'll proceed on with our demonstration and discussion. So we now understand the importance of the case designator and using the filter. So for example, if I wanted to look for training cases and we just said the letter T is used by the Navy, I could put that and currently you see we're showing everything for Department of Navy which is 1247. But if I've changed and put in the letter T for my first letter, what SCIP is going to do very quickly is navigate and filter and find only the training cases that the Department of Navy is providing in support of Bandaria. So we our number now has dramatically decreased to 55 cases and documents. If by the way you wanted to go to a specific case as opposed to a category of case. So in our example we said we're just want all training cases. That's a category of case. Let's say we really just wanted to see this case TAV, so rather than trying to navigate between these 55 case and documents instead of just putting a single letter, I could put all three letters and SCIP now will find just the case TAV. Now you might wonder if it only went to that case, why is it showing 2 cases and document. Notice that both of these entries do have the letter letters TAV, so they both have the case designators, so why are there 2 entries, and the answer is over here on the document type, so we'll skip past Customer Service for now, and let's talk about document type and explain why there are two entries for this TAV.

Now you notice for document type, here is the letter B. That letter B indicates that specifically the basic version of the case, which is just another way of saying that's the initial version of the case when that letter request was received from Bandaria and the case was initiated into the Defense Security Assistance Management System. Now there may be additional changes on that

case that result in modifications and amendments on that case. In this situation there is not. There's only the original version and what we call the implemented version. So what is the I or implemented version document type? It's essentially an electronic merging within the computer system of all the changes. So if there were Basic, amendment, and modifications on those case. And maybe there were seven amendments and five modifications. The implemented version would combine all those. So for example, if I click under document type and I click the letter I and the choices are a dash for everything and I, B, A and M. The dash is everything. The I is the virtual combination of all the different document modifications. On that case, the B as I mentioned, is the basic or original version the A's amendment and the M is modification. If you don't remember that. As always, I could click the hyperlink for document type and the help description would give me that, but if I wanted to look at what we're currently working on, you just click I. And that does an electric electronic combination of all those different document versions. And now shows you just that. This is a very, very powerful feature because a lot of times you don't want to see 20 years of history. On that case, you just want to know what currently is going on with that case. So document type is a very very powerful filter.

So I'm going to go ahead and clear the filters so we go back to everything in Bandaria. And once again, our number now has grown significantly. We now have 3119 cases and also documents. And remember, we talked about the importance of using the document type, and now let's just recap that a little bit and take our discussion and explanation one step further. What's the difference between case and documents? Well, hopefully, you understand that a little bit more if it was a little unclear before that.

So for example, instead of looking at everything under document type, which is the dash, I'm going to switch that to the "I" so that it will combine as we mention all the different documents within those cases. So you notice all I changed on any of these filter chart choices was document type, so when it was the dash everything I had this 3119 cases and documents OK so how many cases? By clicking the "I", it has now merged all those different documents into their respective cases, which is why despite just changing that single fill. After that number has now reduced from over 3000 to this current number of 1037. So very very powerful.

So let's go back to customer service. So we talked about the implementing agency was the third choice, and remember we've covered so far. Of the country code or BPC code, which is the first choice which you use the drop down arrow. We talked about the implementing agency code. We've talked about the case designator. We've talked about document type. So we're coming back to customer service. The customer services, who in this example Bandaria, is actually receiving the material services and training that the implementing agencies are providing in response to that letter of request. So the implementing Agency that third filter choice is who is the provider by the United States Department of Defense. The customer service is who is receiving it and they can be different. The letters mean the same thing. So for example, if I change the implementing agency from the dash, which is all implementing agencies to the letter Papa, we are now seeing there's 421 cases. Remember they are cases because all the documents are combined, because the document type is I. If I want to see specifically how many of these 421 cases are going to the Bandaria Navy, then I can click customer service and change that to a

P and I see out of those 421, 159 of those cases are going to the Bandaria Navy. Well, who else in Bandaria is getting it? Well, perhaps it's the Bandaria Air Force. And that happens. We can have the U.S. military service in this case, the Department of the Navy providing it to a military service that's different for another country. So if I click the letter D for the Bandaria Air Force, we see actually the Bandaria Air Force is getting quite a few of those cases. They're getting 225 of the cases, so recap we have our country or program code identified by that letter. The letters for the FMS or perhaps a letter number for BPC.

We have our implementing agency code. We have our case designator. We have our customer service with which we said is who's on the receiving end, and then we talked about the document type. Whether you want to look at the basic version, amendments, modifications, or merge all those different documents into the applicable cases by clicking the document type of I.

If we want to start with clean sweep recap, we could just click the query filters. And now we're going to go back to our large number of cases and documents, which is 3119 cases and documents. So now with a clear filter, let's talk about this final very important filter choice, which is document status. So we've selected our country code BN (Bandaria). We're going to go ahead and look for just Department of Navy, so I'm going to click in the implementing agency, use the drop down and collect the letter P. I am going to say let me look for just for major end items for the Department of Navy and so I'm going to click the letter Lima (L). If you do not remember what letter in the case designator category that applies to the category of cases you're looking for, click the hyperlink for case ID, and then click the reference for the case designator, which would list all the letters for that respective implementing agency.

So now I'm showing 90 cases and documents. Remember we talked about the difference. The documents are all those that pertain to individual cases, and we'll use the document type to try to filter that down. So we'll take document type instead of the dash, which is everything we could look for, the basic, which is the original, the amendments, the mods, or we could virtually combine them very quickly by clicking document type of I and now our numbers down to 22 cases because all the all those applicable documents have been combined in their respective cases.

So the last filter choice that we have that we haven't talked about is document status. So once again, if you're not quite sure you forgot what you learn in your process lesson, you could quit document status and it would bring up your pop up window to be able to see exactly what's going on with your document status and you'll see that there are multiple different options. You have your development where your initial letter of request (LOR) was received, you have cases under review, proposed, offered etc. So there are a lot of choices. Just be a little clearer on that. I'll go ahead and share the Help Description pop up screen so you can see that. So as I mentioned, when you click that document status, we now have cradle to grave if you will. So everything from cases that are in development, proposed, offered, accepted, implemented, IA certified, which means they're on the road to closure. We have interim closed, and speaking of closure, we also have final, close, and potentially even cancelled for the status of the case. So knowing what you're looking for allows you to filter, so let's actually walk through a couple of

examples and I'll switch back to our SCIP case information filter screen and we'll demonstrate a few of those choices.

So now we're looking back at our case, information case status filter. We've talked about the purpose of the document status, the value of clicking the hyperlink to be able to see the choices. So, as always, if you want to use one of these filter choices and it truly is your choice, whatever you want to do to find case of interest, you pick out of these six choices, which ones and which combination you want to narrow down to your choice. So for example, if I wanted to click development, I could click D for develop. It's showing 0 cases and documents, and maybe you're puzzled in your real world example and you go well, I know that our country has submitted a letter request or I know we received a lot of requests and we're working on it. So why is it not showing? Well, the key point remember is SCIP applies all your filter choices, so you need to understand what these filter choices are doing and make sure they're set to what you want. So if I don't want to look just for U.S. Navy cases that are Major end items. I could go ahead and clear the filters and now since all the filters are clear, I can go back to document status, filter for development and now we actually see there are 6 results, 6 cases and documents that match my criteria, which is everything in Bandaria that's in development. If I wanted to say OK, just show me the Department of Navy cases that they're developing in support of Bandaria, I can once again apply a second filter here, and it would allow me to see what's going on specifically for the Department of Navy. So I clicked the letter P, and now I'm showing the letter P for implementing agency actually has three cases in development, which highlights a key point. Make sure you set your filter choices so that they are looking per your desired search criteria. Otherwise your results may not be what you're looking for, and if you need to clear the filters, just click the clear filter button to very quickly clear them.

Instead of looking for cases that are in development. Perhaps I want to know those cases that have finished development and actually been offered to Bandaria. To do so, I click offered and now I see my results have changed to five cases and documents that have been offered to Bandaria. Later on in your subsequent training and perhaps You may want to watch some of other SCIP training demonstration videos if you're not within a class per self, you will learn on how You can find them details of any case. So for example, in the offered case, a key criteria to understand is what is the offer expiration date? How much longer does Bandaria have to review that case and make decision? So within the subsequent training videos we teach you and there's multiple ways of doing it, of how to select a any particular case of interest and then view the data to look at things like the offer expiration date. But we'll save that for the future training video and classes that you'll have.

On those subjects and one final example on using the document status, let's say we wanted to go one step further in our process from development, to offered, and then to implemented. To do that, I could click I for implemented and now we're showing 2013 cases and documents. Once again, maybe I don't want to see all the documents that make up a case. Maybe I want to let's SCIP filter those and combine those documents into the applicable cases so we will then go back to Document type. And this gets a little confusing because they both have the letter I, but they mean two different things. Document type here is virtually combining the documents into the

applicable cases, which is why my number has now gone down dramatically to 98 cases as compared to what I was showing. All document types a number that was significantly higher. The higher the number, it's probably it's going to be more difficult for you to find what you're looking for, so use the filters. I'll switch it back to document type of "I", so I'm down in 98. Once again if I want a narrow criteria. Further, I can say I tell you what, just give me Department of Navy cases, so I'll change the Implementing Agency code to P. We're now down to 38. If I said, you know what? I really just want major end items cases, I can click the letter L and I'm now down to 8 cases.

So key point from this training demonstration use the SCIP case information case status training filters to find case of interests. Once you do and you get your results, one of the other very powerful features both in this report and all others is that you can export results. In this case the case status results into an Excel spreadsheet. So in the upper right hand corner you see a Microsoft Excel icon. If you click that Excel icon, it will then download an Excel file. You can open that file as you see there, and I'm going to switch to that file just so you see it. So you notice this just looks like any other Excel file. But now that you exported it, you can share it, you can do offline analysis, etc. So being able to export the results on SCIP is a very very powerful feature.

So, to recap, understanding how to use the case information, case status filters is very, very important. When you first log onto your SCIP account, you'll go to your home community. You can then navigate to case information. Since we want to find case of interest, we'll look at where the data has come from. When was it last refreshed? We will then use the case information navigation bar and click Case Status. It will default to the last known filter choices, because it assumes that's what you want to look for, but if that's not what you want, clear the filters. And then use the six different filter choices, the country code or BPC code, the implementing agency code, your case designator, at the very least, the 1st letter, which is the category or all three letters for the specific case, your customer service is who is receiving it as opposed to the implementing agency who is providing it for the Department of Defense, the document type to be able to look at specific document types, your basic version, your mods, your amendments, or have SCIP combine all those document types into an implemented version in your document status from cradle to grave in the FMS process from development all the way to closure cancelled to be able to very quickly navigate to those. And you can combine any and all of these six filters to bring down your total available case and documents, so you can very quickly find case of interest.

So with that, we're going to conclude this training demonstration, a reminder. Use the help in training. Use the descriptions and the hyperlinks directly within these reports. Reach out to your DSCU instructors either in a class if you're enrolled, or use the Ask an Instructor (AAI) and we'll get back to you very quickly with answers, etc. And other than that, good luck and best wishes in your training and your day to day operations so long for now.