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# **SIMS v7.4**

## **Training Workbook**

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## Section 1: Introduction to the SIMS Training Workbook

Welcome to SIMS! This section covers how to use the SIMS Training Workbook.

### 1.1 Learning Objectives

After completing this section, you will know how to:

- ✓ Use the SIMS Training Workbook and interpret the conventions used (1.2)
- ✓ Find help if you need it while you're using the Workbook (1.3)
- ✓ View the SIMS System Information window (1.3)
- ✓ Set up SIMS for use with the SIMS Training Workbook (1.4)
- ✓ View SIMS video presentations (1.5)

### 1.2 Conventions Used in the SIMS Training Workbook

To make things easier to understand, a few conventions have been used in the SIMS Training Workbook:

- Instructions are numbered as follows:

1. Read this first.
2. Read this next.

- The **names** of items in SIMS and Windows are in **boldface**.
- Notes give you additional information about a subject.

*Note:* Notes will be in purple boxes like these.

- Important notes tell you what you may need to successfully complete the section.

*Important:* Important notes will be in blue boxes like these.

- Tips describe alternate ways of doing things that you might find convenient.

*Tip:* Tips will be in yellow boxes like these.

- Cautions warn you of possible losses to data.

*Caution:* Cautions will be in pink boxes like these.

### 1.3 Notes about the SIMS Training Workbook

The SIMS Training Workbook has been designed to be used with the SIMS Video Presentations and the SIMS Tutorial Database. The SIMS Training Workbook will guide you through tutorial setups, video presentations, and exercises so that you may learn how to use SIMS quickly and easily. Though SIMS does recommend that you go through the SIMS Training Workbook in the order specified, it is not mandatory. You may pick and choose whichever sections you would like to learn. However, *SIMS recommends that you read this section and “Section 2: SIMS Basics” first.* These sections explain the basic terminology, buttons, viewing video presentations, etc. in SIMS and will make it easier for you to understand the information presented in the sections that follow.

#### Should you become lost or uncertain...

...at any point in an exercise, you may want to:



- Return to the SIMS main menu by clicking the **Close** button in the upper right corner on every screen until you reach the SIMS main menu.
- View the video presentation once again; taking note of the areas you had trouble with.
- Generate the tutorial data again to reset the data in the training database.

If you cannot resolve your issue, call SIMS Software’s technical support at (858) 481-9292. Please have your System Information ready.

#### System Information

The **About SIMS** screen displays information such as the version of SIMS you are running and other information specific to your system. Please have this information ready whenever you call SIMS.

#### Accessing System Information

1. In the SIMS main window, click the **Help** menu.
2. Click **About SIMS**. The **About SIMS** window opens.
3. Click **OK** to close the **About SIMS** window.

### 1.4 Generating SIMS Tutorial Data

Please contact your system administrator for instructions on loading the SIMS tutorial data script using Query Analyzer.

*Note:* Some of the images in the SIMS Training Workbook may be slightly different from the ones on your computer. You will still be able to complete the exercises in the SIMS Training Workbook.

## 1.5 Viewing SIMS Video Presentations

The beginning of each section of the SIMS Training Workbook will ask you to view a video presentation. To view a video presentation:

1. In the SIMS main window, click **Utilities**.
2. Click **System Customization**. In the **System Tab**, enter the URL for the video presentations.
3. In the SIMS main window, choose the **HELP** icon. This will display the URL that links to your video presentations.
4. When you are finished viewing the presentation, close the video window.

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## Section 2: SIMS Basics

This section covers basic things a user should know about SIMS.

### 2.1 Learning Objectives

After completing this section, you will know how to:

- ✓ Use SIMS and describe what SIMS does (2.2)
- ✓ Perform basic navigation and recognize the terms used for different screens in SIMS (2.2)
- ✓ Change your password in SIMS (2.2)
- ✓ Use SIMS Output Listing Screens to view, add, copy, and delete records (2.3)
- ✓ Use the Query Editor to find specific data records (2.3)
- ✓ Use the Quick Find to find specific data records (2.3)
- ✓ Add and change data in SIMS Data Entry Screens (2.4)
- ✓ Use Picklists and Pickers to enter data (2.5)

### 2.2 SIMS Basics Overview

#### Introducing SIMS

Let's begin! To start learning SIMS:

- ▶ View the **Overview** presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ View the **Validations** presentation.
- ▶ View the **User Management Utility** presentation.

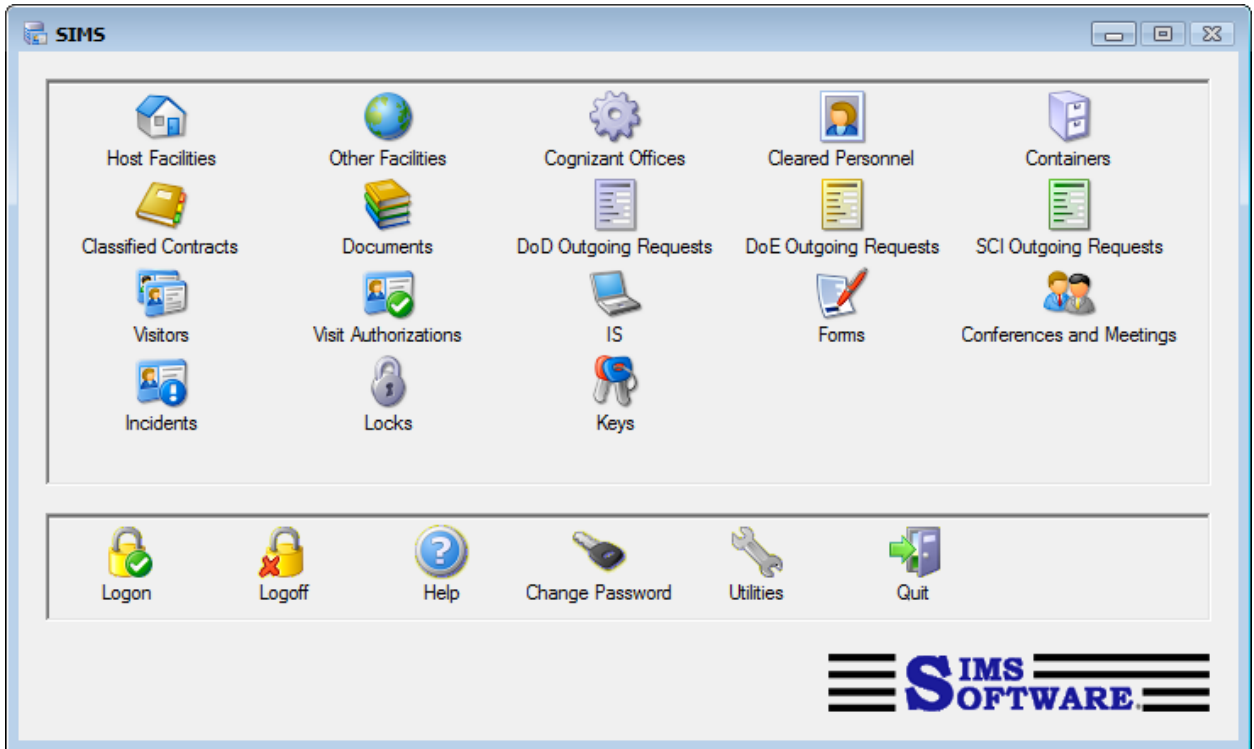


Figure 1: SIMS Main Menu

## 2.3 Output Listing Screens

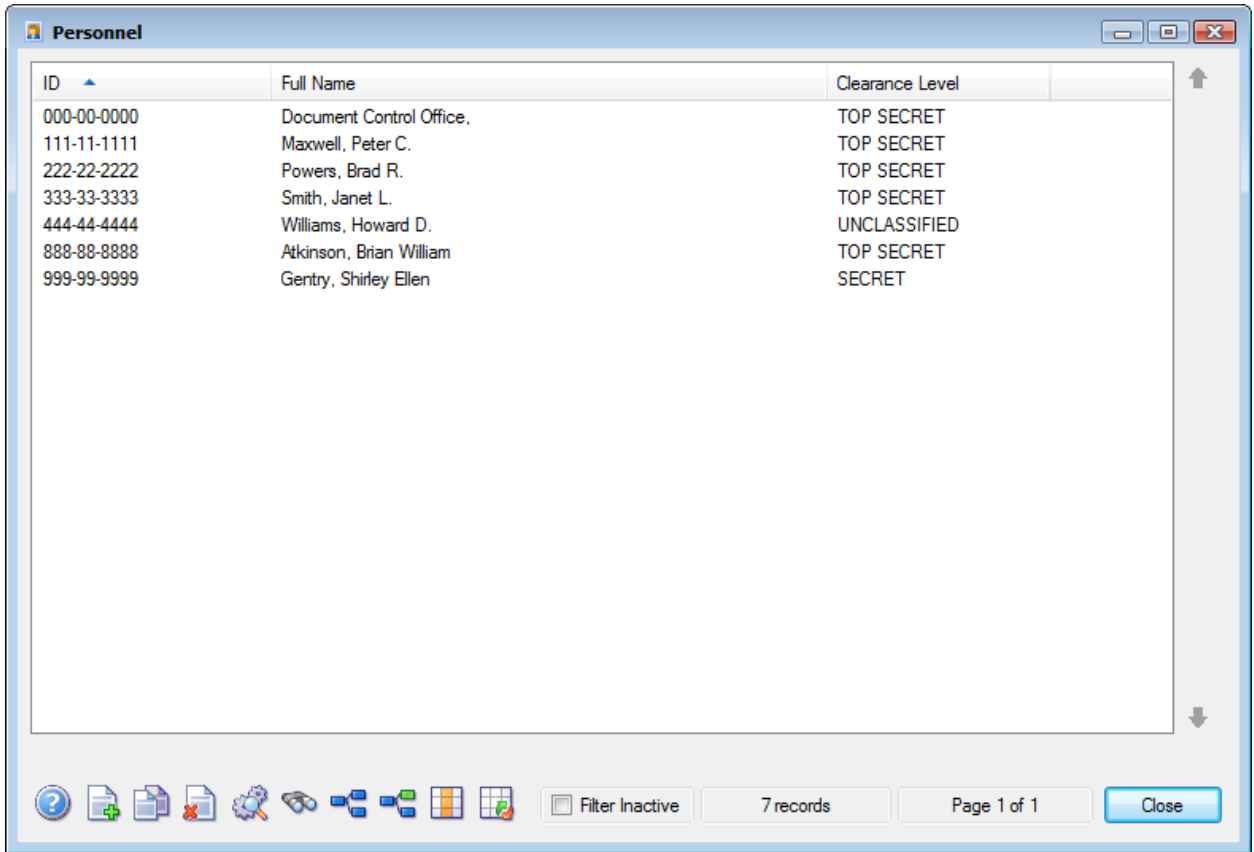
### Introducing SIMS Output Listing Screens

Before beginning the Output Listing Screens exercises:

- ▶ View the **Output Lists** presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

### Exercise: Exploring SIMS Output Listing Screens

1. Open the **Cleared Personnel** module.
2. Explore the output listing screen that opens.



**Figure 2: Cleared Personnel Output Listing**

3. Click on each of the buttons at the bottom of the output listing screen.

*Tip:* You may add a new record, copy a record, delete a record, sort records, perform queries, etc. at this point. You can always re-generate the tutorial data if you want to clear out your entries.

4. Return to the SIMS main menu.

### Exercise: Using the Query Editor

1. Open the **Cleared Personnel** module.
2. Create a new search with the **Query Editor** using the following information.

*Tip:* You can press CTRL-E from any output listing screen to open the **Query Editor**.

Query, Second Line			
<b>Table</b>	Personnel	<b>Field</b>	LastName
<b>Operator</b>	Is less than	<b>Modifier</b>	AND
<b>Value</b>	L		

Query, Second Line			
<b>Table</b>	Personnel	<b>Field</b>	LastName
<b>Operator</b>	Is greater than	<b>Modifier</b>	AND
<b>Value</b>	E		

3. Verify your entries.

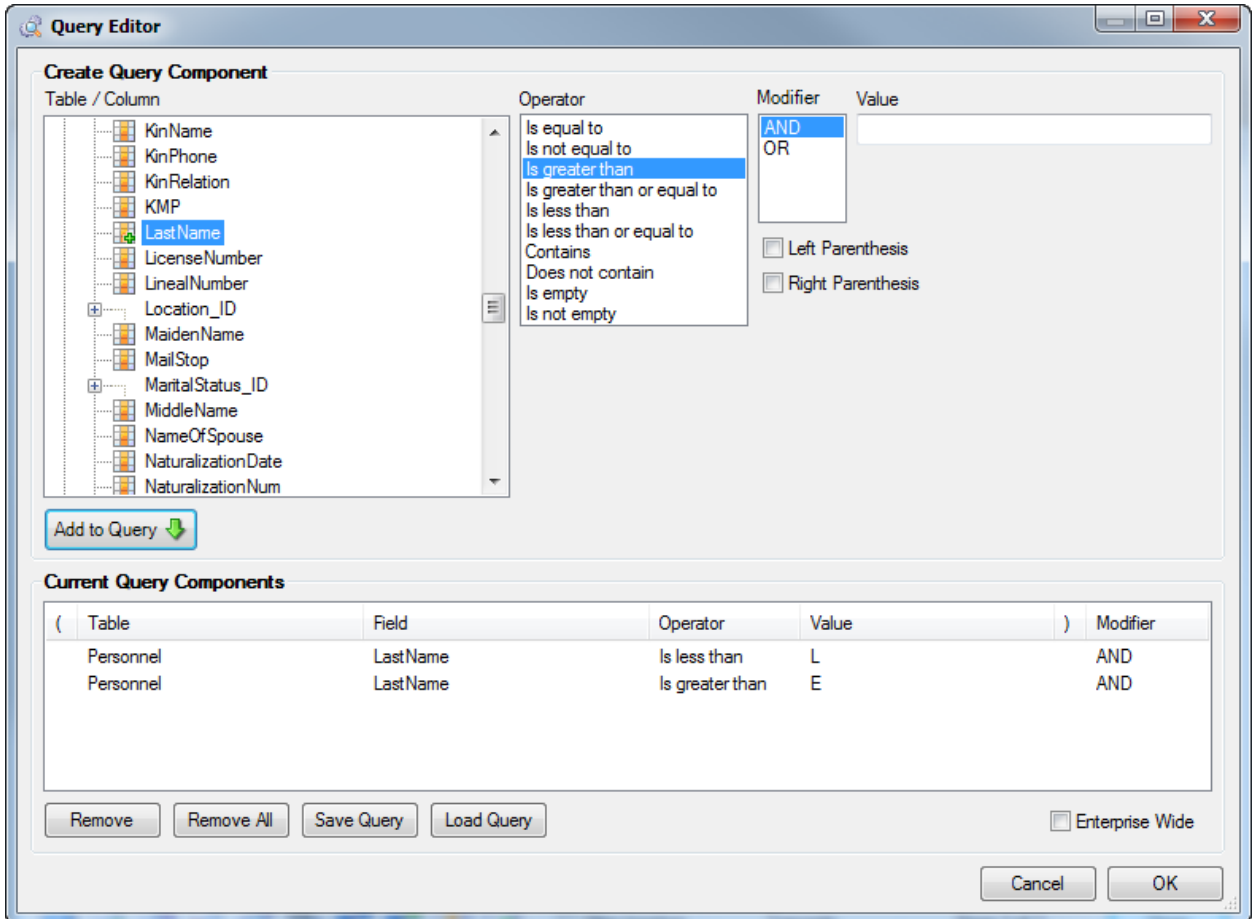


Figure 3: Query Editor

4. Return to the SIMS main menu.

### Exercise: Using Quick Find

1. Open the **Cleared Personnel** module.
2. Use **Quick Find** to search for all personnel with a TOP SECRET security clearance.

*Tip:* You can press CTRL-F from any output listing screen to open **Quick Find**.

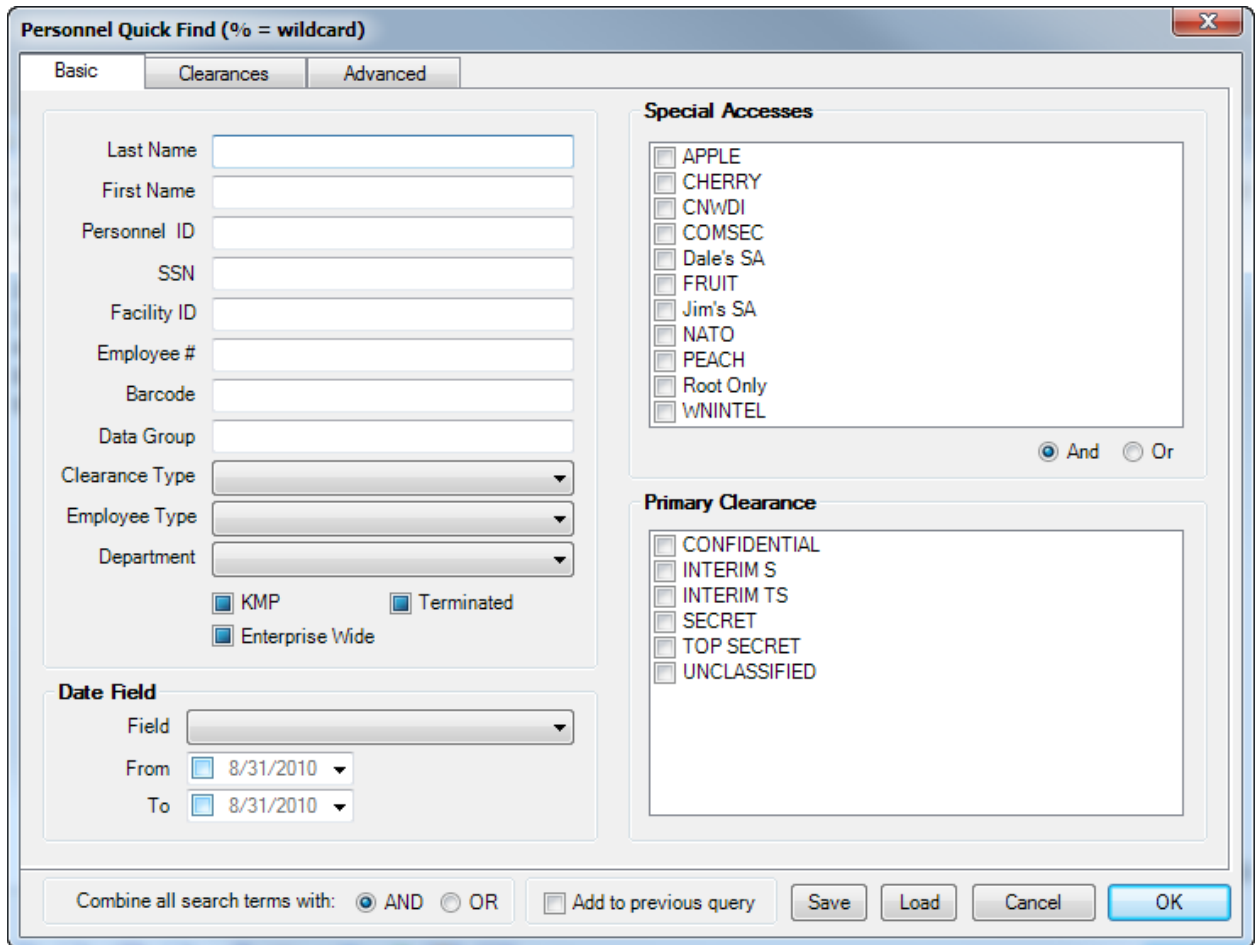


Figure 4: Quick Find

3. On the output listing screen, click **Show All Records** to refresh the list.
4. Return to the SIMS main menu.

## 2.4 Input Screens

### Introducing SIMS Input Screens

Before beginning the Data Entry Screens exercise:

- ▶ View the **Data Entry Screens** presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

### Exercise: Exploring SIMS Input Screens

1. Open the **Documents** module.
2. Explore the output listing screen that opens.

3. Open an existing record.
4. Explore the data fields in each of the various tabs for the record.
5. Return to the SIMS main menu.

## 2.5 Picklists and Pickers

### Introducing SIMS Picklists and Pickers

Before beginning the Picklists and Pickers exercise:

- ▶ View the **Picklists** presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

### Exercise: Exploring SIMS Picklists and Pickers

1. Open the **Host Facilities** module.
2. Open an existing record from the output listing screen.
3. Explore a picker by clicking the **Cognizant Office** button.
4. Explore a picklist by clicking on the **Clearance Level** field.
5. Return to the SIMS main menu.

---

## Section 3: SIMS Reports

This section covers generating **Reports** in SIMS.

### 3.1 Learning Objectives

After completing this section, you will know how to:

- ✓ View and print Pre-Defined reports (3.2)
- ✓ Design, view, and print Custom reports (3.3)

### 3.2 Reports

#### Introducing SIMS Reports

Before beginning any of the Reports exercises:

- ▶ View the **Reports** presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

#### Exercise: Printing a Pre-Defined Report

1. Explore the pre-defined reports available in the different modules of SIMS.
2. Open the **Cleared Personnel** module.
3. View a pre-defined report using the following information.

<b>Reports Menu</b>	
<b>Report</b>	Key Management Personnel

<b>Key Management Personnel Report Options</b>	
<b>Facility ID</b>	A1000

4. You can print the report, or exit without printing.
5. Return to the SIMS main menu.

### 3.3 Quick and Custom Reports

#### Introducing Quick and Custom Reports

Before beginning the Quick and Custom reports exercise:

- ▶ View the **Quick Reports** presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ View the **Custom Reports** presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

#### Exercise: Designing and Printing Quick Reports

1. Explore the custom reports screen from different modules in SIMS.
2. Open the **Documents** module.
3. Design a quick report that includes the following information.
  - Container>>ContainerID
  - DocumentNumber

#### SIMS Quick Report

Container -> ContainerID	DocumentNumber
SAFE B1-L1	Document B1-L1
SAFE 1	SIMS/SB-00001-90
SAFE 1	SIMS/SB-00003-90
SAFE 1	SIMS/SB-00003-90 Copy-001

**Figure 5: Document Quick Report**

4. You can print the report, or exit without printing.
5. Return to the SIMS main menu.

## Section 4: SIMS Cleared Facilities and Cleared Personnel

This section covers the **Host Facilities**, **Other Facilities** and **Cleared Personnel** modules in SIMS.

### 4.1 Learning Objectives

After completing this section, you will know how to:

- ✓ Create new Cleared Host Facility, Government Facility, or Other Facility records (4.2)
- ✓ Create new Cleared Personnel records (4.3)

### 4.2 Cleared Facilities

#### Introducing SIMS Cleared Facilities

Before beginning the Cleared Facilities exercise:

- ▶ View the **Cognizant Offices** presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ View the **Facilities** presentation.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

#### Exercise: Creating New Cleared Facility Records

1. Create a new Host Facility record with the **Host Facilities** module using the following information.

Home Tab			
<b>ID</b>	A2000	<b>Name</b>	General Space & Defense Corporation
<b>Facility Type</b>	Contractor	<b>Cognizant Office</b>	S5310
<b>Clearance Level</b>	TOP SECRET	<b>Storage Level</b>	TOP SECRET
<b>Granted</b>	10/01/1998	<b>SPP Update</b>	02/13/2003
<b>Next Check*</b>	12/12/2008		

*\*Note:* The **Next Check** field automatically populates when data is entered into the **SPP Update** field; you may still change the **Next Check** field.

Other Addresses Tab			
<b>Address Type</b>	Primary	<b>Address Line #1</b>	ATTN: Security Office
<b>FAX #1</b>	(619) 555-7345	<b>Address Line #2</b>	18301 Countrywood Lane
<b>Secure Phone</b>	(619) 555-2534	<b>Address Line #3</b>	Encinitas, CA 92024
<b>Emergency Phone</b>	(619) 555-0202	<b>Address Phone</b>	(619) 555-0939

Other Addresses Tab			
<b>Address Type</b>	POC	<b>Address Line #1</b>	P.O. Box 12345
<b>Contact</b>	Brian Atkinson	<b>Address Line #2</b>	Encinitas, CA 92024
Key Security Personnel Tab			
<b>Facility Security Officer</b>	Peter Maxwell		

2. Create a new Other Facility record with the **Other Facilities** module using the following information.

Home Tab			
<b>ID</b>	67589	<b>Name</b>	Acme Engineering Services
<b>Facility Type</b>	Civilian	<b>Cognizant Office</b>	S4110
<b>Convenience Code</b>	Acme McLean		
<b>Clearance Level</b>	TOP SECRET	<b>Storage Level</b>	TOP SECRET
<b>Granted</b>	09/26/1976	<b>Verified</b>	06/12/2002
Other Addresses Tab			
<b>Address Type</b>	Primary	<b>Address Line #1</b>	7915 Jones Branch Drive
		<b>Address Line #2</b>	McLean, VA 22102-3396
<b>FAX #1</b>	(703) 848-5823	<b>Secure Phone</b>	(703) 848-7823
<b>Emergency Phone</b>	(703) 848-1212	<b>Address Phone</b>	(703) 848-5000
Other Addresses Tab			
<b>Address Type</b>	POC	<b>Address Line #1</b>	P.O. Box 2824
<b>Contact</b>	W.D. Nixon	<b>Address Line #2</b>	McLean, VA 22106-2824
Access Control Tab			
<b>Special Accesses</b>	NATO		

3. Create a new government facility record with the **Other Facilities** module using the following information.

Home Tab			
<b>ID</b>	MICOM	<b>Name</b>	Commander
<b>Facility Type</b>	Government		
<b>Clearance Level</b>	TOP SECRET	<b>Storage Level</b>	TOP SECRET
Other Addresses Tab			
<b>Address Type</b>	Primary	<b>Address Line #1</b>	U.S. Army Missile Command
<b>FAX #1</b>	(205) 481-6714	<b>Address Line #2</b>	ATTN: Visitor Control
<b>Address Phone</b>	(205) 481-7243	<b>Address Line #3</b>	Redstone Arsenal, AL 32904

Key Security Personnel Tab	
<b>Facility Security Officer</b>	SP4 Blaine Cook
Remarks Tab	
<b>Remarks</b>	You can enter comments here about the facility, up to xxxx characters – how many?

4. Verify the information entered.
5. Return to the SIMS main menu.

### 4.3 Cleared Personnel

#### Introducing SIMS Cleared Personnel

Before beginning the Cleared Personnel exercise:

- ▶ View the **Cleared Personnel** presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ View the **Personnel Clearance Tracking** presentation.
- ▶ View the **Personnel Training** presentation.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

#### Exercise: Creating New Cleared Personnel Records

1. Create a new Cleared Personnel record with the **Cleared Personnel** module using the following information.

*Note:* When adding or modifying a Clearance sub-record, a “Clearance Action” dialog will display. Select “Other Action” as the Clearance Action using the example below, and then choose the OK button.

Home Tab			
<b>ID</b>	IN2543	<b>Last Name</b>	Doe
<b>First Name</b>	John	<b>Middle Name</b>	William
<b>Facility ID</b>	A1000	<b>SSN #</b>	188-88-8889
<b>Barcode</b>	P00234	<b>Department</b>	Laboratory
<b>Location</b>	Bldg N-418, NWC	<b>Position</b>	Senior Engineer
Clearances - Clearance Information Tab			
<b>Level</b>	TOP SECRET	<b>Status</b>	Active
<b>Agency</b>	DOD	<b>Type</b>	Final
<b>Granted</b>	12/01/2005	<b>Briefed</b>	12/05/2005

Clearances - Applications/Polygraph Information Tab			
<b>Clearance Waiver?</b>	(Select the checkbox)	<b>Basis</b>	SSBI
<b>Level</b>	TOP SECRET		
<b>Case #</b>	PG188-88-8889	<b>Given By</b>	U. Tuzoia
<b>Type</b>	Electroscopic	<b>Test Date</b>	02/14/2004
<b>Result</b>	Pass		
Citizenship Tab			
<b>US Citizen?</b>	(Select the checkbox)		
Special Accesses - Special Accesses Tab			
<b>Special Access</b>	NATO	<b>Briefed</b>	01/23/2003
<b>Special Access</b>	COMSEC	<b>Briefed</b>	02/14/2003
		<b>Rebrief</b>	02/13/2004
Employment Tab			
<b>Start Date</b>	02/15/1994		
Personal Tab			
<b>Height</b>	5' 11"	<b>Hair</b>	Brown
<b>Weight</b>	132	<b>Eyes</b>	Blue
<b>Birthdate</b>	07/04/1973	<b>Gender</b>	Male
<b>Birthplace</b>	Okinawa	<b>Country</b>	Japan
Badges Tab			
<b>Badge Number</b>	T-1749	<b>Clearance</b>	TOP SECRET
<b>Issued By</b>	A1000		
<b>Issue Date</b>	03/15/1994	<b>Expiration Date</b>	03/15/1995
Training Tab			
<b>Course ID</b>	General-1	<b>Status</b>	Other
<b>Assigned</b>	02/14/2004	<b>Started</b>	03/14/2004
Contacts Tab			
<b>Name</b>	Okabe, Satoru	<b>Relation</b>	Brother
<b>Phone</b>	(415)333-4444		
Contracts / Vehicles Tab			
<b>Date</b>	02/14/2003	<b>License</b>	Crescent
<b>Color</b>	Red	<b>Decal #</b>	Moon-2
<b>Vehicle Make</b>	Pontiac	<b>Vehicle Model</b>	Firebird
Military Tab			
<b>Grade/Rank /Rate</b>	General		
Foreign Travel / Contacts – Foreign Contact Tab			
<b>Name</b>	Olenoides Serratus	<b>Suspicious Marketing</b>	(Select the checkbox)
Remarks Tab			
<b>Remarks</b>	If you can't quite remember what to do, watch the <b>Cleared Personnel</b> video presentation again.		

Links Tab	
<b>Path</b>	<a href="http://www.simssoftware.com">http://www.simssoftware.com</a>
<b>Description</b>	The Makers of SIMS

2. Verify the information entered.
3. Return to the SIMS main menu.

---

## Section 5: SIMS Classified Contracts and Forms

This section covers the **Classified Contracts** module of the SIMS main menu.

### 5.1 Learning Objectives

After completing this section, you will know how to:

- ✓ Create new Classified Contract records (5.2)
- ✓ Create new DD254 forms for contracts (5.3)

### 5.2 Classified Contracts

#### Introducing Classified Contracts

Before beginning the Classified Contracts exercise:

- ▶ View the **Classified Contracts** presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

#### Exercise: Creating a New Classified Contract Record

1. Create a new Classified Contract record with the **Classified Contracts** module using the following information.

Home Tab			
<b>Contract ID</b>	N68472-98-C-2014	<b>Description</b>	HARM III Telemetry Processing
<b>Sponsor</b>	Naval Air Warfare Center	<b>Preceding Contract ID</b>	N68472-93-C-0214
<b>Contact Name</b>	Alfred E. Newman	<b>Phone #</b>	(619) 481-7264
<b>Program Mgr./ACO</b>	Jeremy Collins	<b>Phone #</b>	(310) 275-0926
<b>Facility Level</b>	TOP SECRET	<b>Storage Level</b>	SECRET
<b>Facility ID</b>	A1000	<b>Contract Type</b>	Prime Contract
<b>In Performing This Contract, The Contractor Will:</b>		Receive And Generate Classified Material	
Additional Info Tab			
<b>Scheduled Completion</b>	12/20/2010		
Performing Facilities Tab			
<b>Facility ID</b>	E1000		

2. Verify the information entered.
3. Return to the SIMS main menu.

**Exercise: Creating a New DD254 Form**

1. Create a DD254 form for the contract created in the previous exercise. The **Contract ID** for this record is N68472-98-C-2014. Use the following information for the form.

<b>1-5 Tab</b>			
<b>DD254 level</b>	Top Secret	<b>Subcontract #</b>	456778888
<b>Subcontract Date</b>	8/20/2001	<b>Specification</b>	Original – 8/20/2001
<b>6-8 Tab</b>			
<b>Prime Facility</b>	A1000	<b>Subcontractor</b>	E1000
<b>Facility Address</b>	PRIMARY	<b>Facility Address</b>	OTHER
<b>9-10 Tab</b>			
<b>Communications Security (COMSEC) Info</b>	(Select checkbox)	<b>Intelligence Information:</b>	(Select checkbox)
		<b>Non-SCI</b>	(Select checkbox)
<b>11 Tab</b>			
<b>Require a COMSEC Account</b>	(Select checkbox)		
<b>12-13 Tab</b>			
<b>Proposed public release shall be submitted for approval prior to release:</b>	None		
<b>14-16 Tab</b>			
<b>Additional Security Requirements</b>	Security Guidance forwarded under separate cover.		
<b>Certifying Official</b>	Alfred E. Newman	<b>Title</b>	Director, Corporate Security
<b>Telephone</b>	(310) 481-6352	<b>Address</b>	1000 Century Boulevard, Suite 1200 Los Angeles, CA 90023
<b>17 Tab</b>			
<b>Prime Contractor</b>	(Select checkbox)	<b>Subcontractor</b>	(Select checkbox)
<b>Cognizant Security Officer</b>	(Select checkbox)	<b>Administrative Contracting Officer</b>	(Select checkbox)

2. Verify the information entered.
3. Return to the SIMS main menu.

---

## Section 6: SIMS Containers and Documents

This section covers the **Containers** and **Documents** modules of the SIMS main menu.

### 6.1 Learning Objectives

After completing this section, you will know how to:

- ✓ Create new Container records (6.2)
- ✓ Create new Document records and copy documents (6.3)
- ✓ Process Internal Transfers and use Transaction Reprints to print a receipt (6.4)
- ✓ Process the destruction of documents by creating a Destruction Certificate (6.5)
- ✓ Process the external transfer of documents and verify the transaction by Return to Accountability (6.6)
- ✓ Transfer documents to another Contract (6.7)
- ✓ Retain documents until a specified date (6.8)
- ✓ Process a Tracer Letter using default settings (6.9)
- ✓ Regrade Classifications for documents (6.10)
- ✓ Incorporate one or more documents into another destination document (6.11)
- ✓ Process a Loan Check Out to an individual for documents (6.12)
- ✓ Use ASSETPRO to collect barcode inventory information with the TopGun barcode scanner (6.13)

### 6.2 Containers

#### Introducing Containers

Before beginning the Containers exercise:

- ▶ View the **Containers** presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

### Exercise: Adding New Container Records

1. Create a new Container record with the **Containers** module using the following information.

Home Tab			
<b>ID</b>	SAFE 12-1	<b>Barcode</b>	C00015
<b>Storage Level</b>	SECRET	<b>Location</b>	BLDG 201, ROOM 227
<b>Prime Custodian</b>	Peter C. Maxwell	<b>Type</b>	SAFE
<b>Maker</b>	Mosler	<b>Multiple Drawer?</b>	(Select checkbox>
<b>Drawers</b>	2		
Personnel Access Tab			
<b>Custodian</b>	Brad Powers		

2. Verify the information entered.
3. Return to the SIMS main menu.

## 6.3 Documents

### Introducing Documents

Before beginning the Documents exercises:

- ▶ View the **Documents** presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

### Exercise: Adding New Document Records

1. Create a new Document record with the **Documents** module using the following information.

Home Tab			
<b>Document #</b>	2004-00001	<b>Barcode</b>	D010265A
<b>Pages</b>	23	<b>Generated</b>	(Select checkbox)
<b>Classification</b>	SECRET	<b>Type</b>	Minutes
<b>Title</b>	Project ECHO Monthly Steering Group Meeting Minutes (U)		
<b>Custodian</b>	Document Control Office	<b>Container ID</b>	SAFE 1
<b>Contract ID</b>	SIMS-BDF-00234	<b>Project</b>	ECHO
Origin Tab			
<b>Document Date</b>	06/30/2004	<b>Rec/Gen Date</b>	Today's date
<b>From</b>	A1000	<b>Authors</b>	Janet Smith
Status Tab			
<b>Manual Review?</b>	(Select checkbox)		
Keywords / Special Accesses Tab			
<b>Keywords</b>	FLOT		
<b>Special Accesses</b>	COMSEC	<b>Special Accesses</b>	NOFORN

2. Create another Document record with the **Documents** module using the following information.

Home Tab			
<b>Document #</b>	2004-00002	<b>Barcode</b>	D010266
<b>Pages</b>	33	<b>Generated</b>	(Select checkbox)
<b>Classification</b>	SECRET	<b>Document Type</b>	Document
<b>Title</b>	Logarithm Development Equation for ATF Telemetry Downlink Transmissions (U)		
<b>Custodian</b>	Peter Maxwell	<b>Container ID</b>	SAFE 2
<b>Contract ID</b>	N78341-93-C-0020	<b>Project</b>	ECHO
Origin Tab			
<b>Document Date</b>	03/30/2002	<b>Rec/Gen Date</b>	04/12/2002
<b>From</b>	B1000	<b>Authors</b>	Buzz Bates
Status Tab			
<b>Manual Review?</b>	(Select checkbox)		
Keywords_Special Accesses Tab			
<b>Keywords</b>	FLOT		
<b>Special Accesses</b>	COMSEC	<b>Special Accesses</b>	NOFORN

3. Verify the information entered.
4. Return to the SIMS main menu.

## Document Copying

### Introducing Document Copying

Before beginning the Classified Document Copying exercise:

- ▶ View the **Document Copy Transaction** presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

### Exercise: Copying Document Records

1. Copy the document **SIMS/SB-00003-90** with the **Documents** module using the following information.

Copy Document Screen			
<b># of Copies</b>	5	<b>Assign Sequential Copy Numbers</b>	(select)
<b>Custodian</b>	Brad R. Powers	<b>Container</b>	SAFE 2
<b>All Copies</b>	Generated	<b>Leave New Barcodes Blank</b>	(select)

2. Verify that the copies have been made and review the **Remarks** tab of the original document record and one of the copies for verification.

3. Return to the SIMS main menu.

## 6.4 Document Transactions

### Introducing Document Transactions

Before beginning the Document Transactions exercises:

- ▶ View the **Document Transactions** Overview presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

### Internal Transfer and Transaction Reprints

#### Introducing Internal Transfers and Transaction Reprints

Before beginning the Internal Transfer exercise:

- ▶ View the **Document Internal Transfer** Transaction presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ View the **Document Reprint** presentation.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

#### Exercise: Processing an Internal Transfer and Reprinting a Transaction

1. Process the internal transfer of the document, SIMS/SB-00001-90, to Brad R. Powers with the **Documents** module.
2. Verify the transaction in the **Audit Trail** tab of the document.
3. Use **Transaction Reprints** to view the receipt for the Internal Transfer to Brad Powers. You can print the receipt, or exit without printing.
4. Return to the SIMS main menu.

## 6.5 Destruction Certificates

### Introducing Destruction Certificates

Before beginning the Destruction Certificates exercise:

- ▶ View the **Document Destruction** Transaction presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

### Exercise: Processing a Destruction Certificate

1. Process the destruction of the documents, SIMS/SB-00002-90 and SIMS/SB-00003-90, with the **Documents** module using the following information.

Data for Processing the Destruction Certificate of SIMS/SB-00002-90 and SIMS/SB-00003-90			
<b>Destroyed by</b>	Peter C. Maxwell	<b>Witnessed by</b>	Brad R. Powers
<b>Method of Destruction</b>	Shred	<b>Print Document Titles?</b>	Yes
<b>Remarks</b>	Excess Copies		
<b>Clear Custodian</b>	(Select checkbox)	<b>Clear Container</b>	(Select checkbox)

2. View the certificate. You can print the certificate, or exit without printing.
3. Verify the transaction in the **Audit Trail** tabs of both documents.
4. Return to the SIMS main menu.

## 6.6 External Transfer, External Transfer Receipt Returned, and Return to Accountability

### Introducing External Transfers

Before beginning the External Transfer exercise:

- ▶ View the **Document External Transfer** Transaction presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

### Exercise: Processing an External Transfer

1. Process the external transfer of the documents, SIMS/SB-00004-04 and SIMS/SB-00005-04, with the **Documents** module using the following information.

Data for Processing the External Transfer of SIMS/SB-00004-04 and SIMS/SB-00005-04			
<b>Authorized by</b>	Peter C. Maxwell		
<b>Clear Custodian</b>	(Select checkbox)	<b>Clear Container</b>	(Select checkbox)
<b>Print Document Titles</b>	(Select checkbox)	<b>Print Document Special Accesses</b>	(Select checkbox)
<b>Host Facility</b>	A1000 PRIMARY address	<b>Transfer Facility</b>	XYZ Electronics Corporation PRIMARY address
<b>Tracking Method</b>	Registered Mail	<b>Package #</b>	111
<b>Attn:</b>	John Wilson		
<b>Remarks</b>	At the request of John Wilson		

2. View the transfer. You can print the transfer, or exit without printing.
3. Verify the transaction in the **Status** and **Audit Trail** tabs of both documents.
4. Return to the SIMS main menu.

### Introducing External Transfer Receipt Returned

Before beginning the External Transfer Receipt Received exercise:

- ▶ View the **Document External Transfer Receipt Return** Transaction presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

*Important:* If you have not already processed an External Transfer for documents, SIMS/SB-00004-04 and SIMS/SB-00005-04, do so now.

### Exercise: Processing an External Transfer Receipt Returned

1. Retrieve the receipt number for documents SIMS/SB-00004-04 and SIMS/SB-00005-04 from their **Audit Trail** tabs with the **Documents** module.
2. Use the receipt number to process an External Transfer Receipt Received for these documents.
3. View the transfer. You can print the transfer, or exit without printing.
4. Verify the transaction in the **Status** and **Audit Trail** tabs of both documents.
5. Return to the SIMS main menu.

### Introducing Return to Accountability

Before beginning the Return to Accountability exercise:

- ▶ View the **Document Return to Accountability** Transaction presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

*Important:* If you have not already processed an External Transfer for documents, SIMS/SB-00004-04 and SIMS/SB-00005-04, do so now.

### Exercise: Processing a Return to Accountability

1. Process the **Document Return to Accountability** of the documents, SIMS/SB-00004-04 and SIMS/SB-00005-04, with the **Documents** module using the following information.

Data for Processing a Return to Accountability of SIMS/SB-00004-04 and SIMS/SB-00005-04			
<b>From Facility</b>	XYZ Electronics Corporation PRIMARY address		
<b>New Custodian</b>	Peter C. Maxwell	<b>New Container</b>	SAFE 1
<b>New Contract</b>	F49620-93-C-0100		
<b>Package #</b>	101	<b>Method</b>	Registered Mail

2. View the return. You can print the return, or exit without printing.
3. Verify the transaction in the **Status** and **Audit Trail** tabs of both documents.
4. Return to the SIMS main menu.

## 6.7 Transfer to Another Contract

### Introducing Transfer to Another Contract

Before beginning the Transfer to Another Contract exercise:

- ▶ View the **Document Contract Transfer** Transaction presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

### Exercise: Processing a Transfer to Another Contract

1. Transfer the documents, SIMS/SB-00006-04 and SIMS/SB-00007-04, to **New Contract ID** SIMS-BDF-00234 with the **Documents** module.
2. View the transfer. You can print the transfer, or exit without printing.
3. Verify the transaction in the **Audit Trail** tab of both documents.
4. Return to the SIMS main menu.

## 6.8 Retain Until

### Introducing Retain Until

Before beginning the Retain Until exercise:

- ▶ View the **Document Retention** Transaction presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

### Exercise: Processing Retain Until

1. Retain the documents SIMS/SB-00008-04 and SIMS/SB-00009-04 until 12/31/2010 with the **Documents** module.

2. View the document. You can print the document, or exit without printing.
3. Verify the transaction in the **Audit Trail** tab of both documents.
4. Return to the SIMS main menu.

## 6.9 Tracer Letters

### Introducing Tracer Letters

Before beginning the Tracer Letter exercise:

- ▶ View the **Document Tracer Letter** Transaction presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

### Exercise: Processing Tracer Letters

1. Process a Tracer Letter using default settings. No receipts will be overdue. However, should any External Transfer be found that are overdue, a tracer letter would have been printed for sending to the receiving facility to initiate follow up action.
2. Return to the SIMS main menu.

## 6.10 Regrade Classification

### Introducing Regrade Classification

Before beginning the Regrade Classification exercise:

- ▶ View the **Document Regrade** Transaction presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

### Exercise: Processing Regrade Classifications

1. Regrade Classifications for documents, SIMS/SB-00010-04 and SIMS/SB-00011-04, with the **Documents** module using the following information.

Data for Regrading the Classifications of SIMS/SB-00010-04 and SIMS/SB-00011-04			
<b>New Level</b>	UNCLASSIFIED	<b>Performed by</b>	Peter C. Maxwell
<b>Unaccountable</b>	(Select checkbox)	<b>Authority</b>	OSD C3I
<b>Declassification</b>	(Select checkbox)	<b>Make Document(s) archived?</b>	(unchecked)

2. Print the document. You may exit at the print preview to save paper, if you like.
3. Verify the transaction in the **Status** and **Audit Trail** tabs of both documents.

- Return to the SIMS main menu.

## 6.11 Incorporation

### Introducing Incorporation

Before beginning the Incorporation exercise:

- ▶ View the **Document Incorporation** presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

### Exercise: Processing Incorporations

- Incorporate the documents, SIMS/SB-00012-04 and SIMS/SB-00013-04 into SIMS/SB-00014-04, with the **Documents** module using the following information.

Data for Processing the Incorporation of SIMS/SB-00012-04 and SIMS/SB-00013-04			
Destination Document	SIMS/SB-00014-04	Total or Partial?	Total
Performed by	Peter C. Maxwell		

- Print the document. You may exit at the print preview to save paper, if you like.
- Verify the transaction in the **Status** and **Audit Trail** tabs of the documents.
- Return to the SIMS main menu.

## 6.12 Loan Out and Loan In

### Introducing Loan Check Out

Before beginning the Loan Check Out exercise:

- ▶ View the **Document Loan Out Transaction** presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

### Exercise: Processing a Loan Out

- Process a Loan Check Out to **Shirley Gentry** for the documents, SIMS/SB-00017-04 and SIMS/SB-00018-04 with a **Due Date** of today’s date, using the **Documents** module.
- Print the document. You may exit at the print preview to save paper, if you like.
- Verify the transaction in the Audit Trail tab of both documents.
- Return to the SIMS main menu.

## Introducing Loan In

Before beginning the Loan Check In exercise:

- ▶ View the **Document Loan In** Transaction presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

*Important:* If you have not already processed a Loan Check Out for documents, SIMS/SB-00017-04 and SIMS/SB-00018-04, do so now.

### Exercise: Processing a Loan In

1. Process a Loan Check In for the documents, SIMS/SB-00017-90 and SIMS/SB-00018-90 with the **Documents** module.
2. Print the document. You may exit at the print preview to save paper, if you like.
3. Verify the transaction in the **Audit Trail** tab of both documents.
4. Return to the SIMS main menu.

## 6.13 Barcode Inventory

When using the TopGun barcode scanner, barcode data must first be collected and then downloaded to the PC prior to performing a barcode inventory report of classified documents or IS hardware.

### Scanning in a Barcode Inventory

The TopGun barcode scanner comes pre-programmed with PALPRO, which contains a variety of barcode data collection programs. ASSETPRO is the program within that collection that is compatible with SIMS. To use ASSETPRO to collect barcode inventory information for SIMS:

1. Turn on the TopGun barcode scanner.
2. Enter your password.
3. Press **F2** in the **PALPRO OPTIONS** menu to “**SELECT PROG**”.
4. Press **F1** to select the ASSETPRO program.
5. Press **F4** when prompted to **CHANGE PROMPTS**.

*Note:* To change the application name and prompts refer to the documentation for ASSETPRO. The prompts used in the SIMS Training Workbook are the default ASSETPRO prompts.

6. Press **F2** to begin the barcode data collection operation from the screen titled, **ASSET MGMT**.

7. Scan the barcode for the container when prompted for the **LOCATION ID**. Refer to the documentation for ASSETPRO if you are interested in alternate methods of input.
8. Scan the barcode for the first document or item in the container when prompted for the **ITEM ID**.
9. Repeat step 8 for all the documents or items in this container, then go to step 10.
10. Press **F4** to return to the first prompt, **LOCATION ID**.
11. If you:
  - Need to scan another container full of documents or items, repeat steps 7-9.
  - Are done, press **F4** again to return to the application menu titled, **ASSET MGMT**.

**Exercise: Scanning in a Barcode Inventory**

Create a Barcode Inventory using the following barcodes.



**Figure 6: Barcodes for the "Scanning in a Barcode Inventory" Exercise**

**Performing a SIMS Barcode Inventory Report**

1. Open the **Documents** module.

2. Open the document record for **SIMS/SB-00001-90** and make it an accountable document. Step through the other document records and similarly make them accountable as well. Then go back to the **Documents** output screen. Note that non-accountable documents are exempt from the barcode inventory process.
3. Select **Barcode Inventory** from the **Reports** menu. A **Barcode Options** dialog box opens.
4. Select Read barcode data from scanner... as the Source of Barcode Data.
5. Select **Print Exceptions Only** from **Options**. This means that if an item scanned was found to be located where it was supposed to be (according to SIMS), then it will not be listed on the report; only cases where something is not as it should be will be listed.
6. Select the appropriate COM serial port that is connected to the TopGun download cable.
7. Click **OK**. SIMS will now wait for data from the TopGun barcode scanner once you select the **Receive** button..
8. Press **F3** on the TopGun to select **FILE OPTIONS**.
9. Press **F2** to select **SEND FILE**.
10. Press **F2** to select **SERIAL** and the transfer of the file will commence. When completed, a **\*SEND COMPLETE\*** notice will appear in the TopGun.
11. SIMS will display a Save dialog. Click on the **Save** button and save the downloaded barcode file as **SCANFILE .TXT**.
12. Click the **OK** button in the first **Print** dialog box.
13. Click the **OK** button in the second **Print** dialog box. You may choose **Print Preview** to save paper, if you like. After the report has printed, or you exit from the **Print Preview** screen.

## Understanding a SIMS Barcode Inventory Report

Take a moment to look at a SIMS Barcode Inventory report.

DOCUMENT INVENTORY BY DOWNLOADED BARCODES		
Barcode Inventory		
Barcode	C00025	
Container ID	SAFE 1	
Container Type	2-DRAWER MOSLER, SINGLE COMBINATION	
Clearance Level	SECRET	Facility ID: A1000
Combo Changed	12/30/2003	Facility: General Space & Defense Corporation
Combo Expires	12/24/2004	Location: BLDG 204, COLUMN H-22
ID	BARCODE	STATUS
	D00938	Document not found.
*** Title Not Available ***		
SIMS/SB-00003-90	D00940	Document not scanned
HAVE VISTA Exploitation Report, ANTLQ-34, Vol 1, Technical (U), 12 Jan 87		
Summary for: SAFE 1		
Documents Assigned to Container: 3		Documents Scanned, but NOT ASSIGNED to Container: 1
Documents Found in Scan of Container: 2		Documents NOT FOUND in Scan of Container: 1

**Figure 7: Sample SIMS Barcode Inventory Report**

A SIMS Barcode Inventory report begins with container information. In this case, it's Safe 1. The report then lists the documents with issues. In Figure 24, one of the scanned documents had an unknown barcode, D000938, and another document should have been scanned, D000940, wasn't.

Please note the four lines at the bottom of the listing.

*Document Assigned to the Container ..... 3*

*Documents Found in Scan of Container ..... 2*

*Documents Scanned but NOT ASSIGNED to Container ..... 1*

*Documents NOT FOUND in Scan of Container ..... 1*

## Section 7: SIMS Visitor Control

This section covers Visitor Control in SIMS.

### 7.1 Learning Objectives

After completing this section, you will know how to:

- ✓ Create new Outgoing Visit Request records (7.2)
- ✓ Enter a new Visit Authorization using information from the Visit Request (7.4)
- ✓ Check in and check out visitors (7.4)

### 7.2 Outgoing Requests

#### Introducing Outgoing Requests

Before beginning the Outgoing Request exercise:

- ▶ View the **DoD Outgoing Requests** Module presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

#### Exercise: Creating a New DoD Outgoing Request Record

1. Create a new DoD Outgoing Request record with the **DoD Outgoing Requests** module using the following information.

<b>Home Tab</b>			
<b>Department</b>	Laboratory	<b>From Facility ID</b>	A1000
<b>Valid To</b>	1 Year from now	<b>Valid From</b>	Today's Date
<b>Contract ID</b>	F49620-93-C-0100	<b>Security Officer</b>	Brad R. Powers
<b>Contractual</b>	(select checkbox)	<b>Purpose</b>	Review test procedures for AN/TLQ-34
<b>Anticipated Classification of Topic</b>	SECRET		
<b>Send To Facility Tab</b>			
<b>Facility ID</b>	B1000 PRIMARY address		
<b>Special Accesses/Status Tab</b>			
<b>Requester Name</b>	Terri Landers	<b>Requester Phone</b>	(382) 483-9283
<b>Visitors Tab</b>			
<b>Personnel</b>	Peter Maxwell	<b>Personnel</b>	Shirley Gentry
<b>Personnel</b>	Janet Smith		

2. Print the Visit Request to the screen for review and verification.
3. Return to the SIMS main menu.

## 7.3 Incoming Visitors

### Introducing Incoming Visitors

Before beginning the Incoming Visitors exercises:

- ▶ View the **Visitors** Module presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

### Visit Authorizations

#### Introducing Visit Authorizations

Before beginning the Visit Authorizations exercise:

- ▶ View the **Visit Authorizations** Module presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

## Exercise: Entering Visit Authorization Letters

1. Enter a new Visit Authorization record using information from the Visit Request Letter below.

**Visit Request**

---

**From:** XYZ Electronics Corporation  
1500 Digital Avenue  
Suite 100  
Phoenix, AZ 80000  
Fac. ID: B1000 Phone: (702) 234-5678

**Visit Request# 03R-002**

Contractual?     Non-Contractual?  
Contract ID:

**To:** General Space & Defense Corporation  
1200 W. Century Boulevard  
Suite 800  
Los Angeles, CA 90045  
ATTN: Brad Powers  
Fac. ID: A1000 Phone: (310) 387-2000  
FAX: (310) 387-9228

**Contact:** Shirley Gentry  
Contact Phone: \_\_\_\_\_

Number of Personnel: 3  
Visit Period - from: 10/30/2003 to: 10/28/2004

**Purpose of Visit:**  
To attend the Security Planning Conference and other classified discussions.

Name	SSN	Level	Granted	POB
Position	U.S. Citizen	Type	By	DOB
Adams, John Q.	123-45-6789 YES	TOP SECRET	04/04/80 DISCO	Quincy, MA 11/28/50
Periwinkle, Violet B.	987-65-4321 YES	SECRET FINAL	06/08/98 DISCO	West Wetherford, MA 03/28/69
Suh, Glen D.	555-55-5555 YES	TOP SECRET	00/00/00 DISCO	Los Angeles, CA 11/28/50

----- NOTHING FOLLOWS -----

**Figure 8: Visit Request Letter**

2. Return to the SIMS main menu.

## Incoming Visitor Entry Control

### Introducing Incoming Visitor Entry Control

Before beginning the Visitor Entry Control exercises:

- ▶ View the **Visitors** Module presentation, if you haven't already done so. For information about viewing presentations, see "Viewing SIMS Video Presentations" in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see "Generating SIMS Tutorial Data" in Section 1.

### Exercise: Using Visitor Entry Control

1. Check in Glen D. Suh using the following information.

Glen D. Suh's Information			
<b>Name</b>	Glen D. Suh	<b>Visit Authorization Number</b>	IVAL-4
<b>Badge #</b>	V-01	<b>Type of ID</b>	License
<b>JPAS Verified</b>	Yes		

2. Verify the information entered.
3. Check out Glen D. Suh. He has returned his badge.
4. Undo the last check out. He has not returned his badge after all.
5. Check him out again.
6. Return the badge.
7. Return to the SIMS main menu.

---

## Section 8: SIMS Conferences and Meetings

This section covers the **Conferences and Meetings** module in SIMS.

### 8.1 Learning Objectives

After completing this section, you will know how to:

- ✓ Create new Conferences & Meetings records (8.2)
- ✓ Add attendees to a Conferences & Meetings record (8.2)
- ✓ Generate and print a list of attendees scheduled for a conference (8.2)
- ✓ Mark attendees at a conference as arrived (8.2)
- ✓ Print a list of current attendees who are present at a conference (8.2)

### 8.2 SIMS Conferences and Meetings

#### Introducing SIMS Conferences and Meetings

Before beginning the Conferences and Meeting exercise:

- ▶ View the **Conferences & Meetings** Module presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

*Important:* The exercises in this section should be completed in order. Each exercise creates records for use in the next exercise.

#### Exercise: Creating a New Conference Record

1. Create a new Conference record with the **Conferences and Meetings** module using the following information.

<b>MEMO</b>	
<b>From</b>	Brian Atkinson
<b>To</b>	Security Office
<b>Subject:</b>	“Flight Stability of Fixed Wing Aircraft” Conference
The conference on Flight Stability of Fixed Wing Aircraft will be held beginning 08:00 on November 13 -14, 2004 in room 412 of BLDG 201. The conference is classified Confidential.	
The following employees will attend: Brian Atkinson, Shirley Gentry, Peter C. Maxwell	
Thanks, Brian	

2. Verify the information entered.
3. Return to the SIMS main menu.

### Exercise: Printing a List of Attendees

1. View a list of attendees for the conference in the previous exercise. You can print the list, or exit without printing.
2. Return to the SIMS main menu.

### Exercise: Marking Attendees as Arrived

1. Mark the following attendees as arrived with the **Conferences and Meetings** module using the following information.

Data for Marking Attendees as Arrived			
<b>Conference</b>	Flight Stability of Fixed Wing Aircraft		
<b>Attendee</b>	Brian Atkinson	<b>Attendee</b>	Shirley Gentry

2. Return to the SIMS main menu.

### Exercise: Printing a List of Current Attendees

1. View a list of the attendees who are present at the “Flight Stability of Fixed Wing Aircraft” conference. You can print the list, or exit without printing.
2. Return to the SIMS main menu.

---

## Section 9: SIMS Information Systems

This section covers the **Information Systems (IS)** module of SIMS.

### 9.1 Learning Objectives

After completing this section, you will know how to:

- ✓ Create new IS records (9.2)
- ✓ Add hardware information into an IS record (9.2)
- ✓ Add software information into an IS record (9.2)
- ✓ Add personnel access information into an IS record (9.2)

### 9.2 SIMS Information Systems

#### Introducing SIMS Information Systems

Before beginning the Information Systems exercise:

- ▶ View the **IS** Module presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

#### Exercise: Creating a New IS Record

1. Create a new IS record with the **IS** module using the following information.

Home Tab			
<b>IS ID</b>	TEST LAB 16	<b>IS Mode</b>	Dedicated
<b>Barcode</b>	S00123	<b>Location</b>	BLDG J-3, Test Lab
<b>Facility ID</b>	A1000	<b>Custodian</b>	Peter C. Maxwell
<b>When Processing</b>	SECRET	<b>When Not Processing</b>	SECRET
<b>SPP Date</b>	1/23/2004	<b>Submit Date</b>	1/27/2004
<b>Approve Date</b>	2/06/2004		

Additional Info Tab			
<b>ISSM</b>	Brad Powers	<b>ODAA ID Region</b>	Capital
<b>NISPOM PL</b>	PL1	<b>Accreditation Status – Current 6 month review Completed</b>	8/20/2006
<b>Accreditation Status- Re-Accreditation Due Date</b>	2/8/2008		
Hardware Tab			
<b>Type</b>	Panasonic	<b>Model</b>	200
<b>Serial Number</b>	P8475-049	<b>Barcode</b>	H00286
<b>Classification</b>	SECRET		
<b>Description</b>	PC with one CD-ROM drive, 64 MB volatile RAM, and one non-removable 32GB disk drive		
Software Tab			
<b>Type</b>	Windows XP	<b>Version</b>	2003 SP 1
<b>Classification</b>	UNCLASSIFIED	<b>Resident</b>	(Select checkbox)
Access List Tab			
<b>IS Access List</b>	Janet L. Smith		

2. Verify the information entered.
3. Return to the SIMS main menu.

---

## Section 10: SIMS Incidents

This section covers the **Incidents** module in SIMS.

### 10.1 Learning Objectives

After completing this section, you will know how to:

- ✓ Create a new Incident record (10.2)

### 10.2 SIMS Incidents

#### Introducing SIMS Incidents

Before beginning the Incidents exercise:

- ▶ View the **Incidents** Module presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

#### Exercise: Creating a New Incident Record

1. Create a new Incident record with the **Incidents** module using the following information.

Home Tab			
<b>Incident Type</b>	Material Control	<b>Incident Date and Time</b>	1/09/2006 09:45AM
<b>Classification</b>	SECRET	<b>Department</b>	Management
<b>Location</b>	Building 210, Room 104	<b>Incident Facility</b>	A1000
<b>Subject</b>	Janet L. Smith	<b>Subject Type</b>	Employee
<b>Subject</b>	Peter C. Maxwell	<b>Subject Type</b>	Employee
<b>Cause</b>	Failure to follow document transfer procedures		
<b>Compromise</b>	Unlikely	<b>Status</b>	Reported
<b>Report Date</b>	1/10/2006	<b>Reported By</b>	Document Control Office
Action Tab			
<b>Next Status Date</b>	3/20/2006	<b>Next Status</b>	Supervisory Action
<b>Action Date</b>	3/13/2006	<b>Action</b>	Preliminary Action
<b>Estimated Date for Final Report</b>	3/20/2006		

Description Tab			
<b>Description</b>	Pursuant to a lunch meeting in Maxwell's office, Maxwell allowed Smith to take the document (SIMS/SB-00003-90) back to Smith's office in Building 2304, Suite R. Smith said she wanted to borrow it for several months. The Document Control Office found out about it when they were doing an inspection. Maxwell and Smith didn't go through the security office to transfer custody of the document to Smith.		
<b>Personnel Involved</b>	Peter C. Maxwell	<b>Personnel Involved</b>	Janet L. Smith
<b>Personnel Involved</b>	Document Control Office		
Findings Tab			
<b>Findings</b>	Maxwell and Smith both need a refresher on their security awareness briefings. There is a need to focus on Document Control. This is not the first time this has happened. A written reprimand is recommended.		

2. Verify the information entered.
3. Return to the SIMS main menu.

---

## Section 11: SIMS Locks and Keys

This section covers the **Locks** module and the **Keys** module in SIMS.

### 11.1 Learning Objectives

After completing this section, you will know how to:

- ✓ Create new Key Hook and Key Ring records (11.2)
- ✓ Create new Lock and Key records (11.2)
- ✓ Copy Key records (11.2)
- ✓ Associate Keys with Locks (11.2)
- ✓ Process Locks & Keys transactions and verify the transactions in the key ring's audit trail (11.2)

### 11.2 Introducing SIMS Locks and Keys

Before beginning the Locks and Keys exercise:

- ▶ View the **Locks & Keys** Modules presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

*Important:* The exercises in this section should be completed in order. Each exercise creates records for use in the next exercise.

#### Exercise: Creating a New Key Hook Record

1. Create three new Key Hook records with the **Keys** module using the following information.

Hooks and Rings Tab		
Key Hook ID	Building	Room
Hook #1	Guard Shack	#1
Hook #2	Guard Shack	#1
Hook #3	Guard Shack	#1

2. Verify the information entered.

#### Exercise: Creating a New Key Ring Record

1. Create a new Key Ring record with the **Keys** module using the following information.

Home Tab			
Key Ring ID	Ring #1	Issued	1/03/2006

2. Verify the information entered.

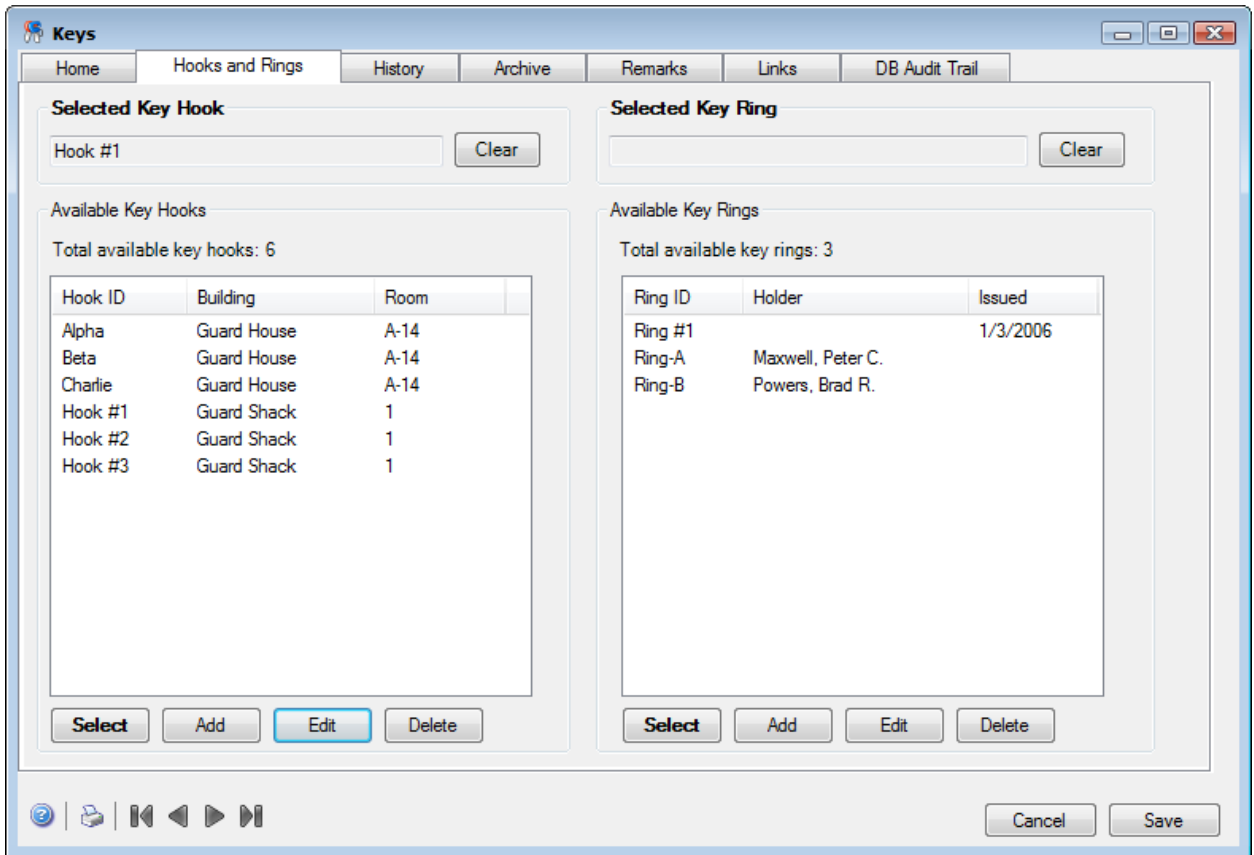


Figure 9: Keys

3. Return to the Keys output listing.

### Exercise: Creating New Lock Records

1. Create a new Lock record with the **Locks** module using the following information.

Home Tab			
<b>Lock ID</b>	A1	<b>Type</b>	Key
<b>Description</b>	Front Door	<b>Issued By</b>	Document Control Office
<b>Classification</b>	SECRET	<b>Maker</b>	Cipher Systems
<b>Issue Date</b>	1/30/2006	<b>Serial #</b>	1234
<b>Base Key ID</b>	A-011	<b>Location</b>	Building 204, Column H-22

2. Create another new Lock record with the **Locks** module using the following information.

Home Tab			
<b>Lock ID</b>	B1	<b>Type</b>	Key
<b>Description</b>	Side Door	<b>Issued By</b>	Document Control Office
<b>Classification</b>	SECRET	<b>Maker</b>	Cipher Systems

<b>Issue Date</b>	1/30/2006	<b>Serial #</b>	5678
<b>Base Key ID</b>	B-001	<b>Location</b>	Building 204, Column H-22

3. Verify the information entered.
4. Return to the Locks output listing.

### Exercise: Creating New Key Records

1. Create a new Key record with the **Keys** module using the following information.

<b>Home Tab</b>			
<b>Base Key ID</b>	A-011	<b>Original ?</b>	(Select checkbox)
<b>Issued</b>	02/09/2004	<b>Hook ID</b>	Hook #1
<b>Copy #</b>	0	<b>Key Ring</b>	Ring #1

2. Create another new Key record with the **Keys** module using the following information.

<b>Home Tab</b>			
<b>Base Key ID</b>	B-001	<b>Original ?</b>	(Select checkbox)
<b>Issued</b>	02/09/2004	<b>Hook ID</b>	Hook #1
<b>Copy #</b>	0	<b>Key Ring</b>	Ring #1

3. Verify the information entered.
4. Return to the Keys output listing.

### Exercise: Copying Key Records

1. Create 5 copies of the Key record, A-001 with the **Keys** module.

*Note:* Use the **Copy Record** button at the bottom of the output listing. Only 1 Key record can be copied at a time.

2. Create 5 copies of the Key record, B-001.
3. Return to the Keys output listing.

### Exercise: Associating Keys with Locks

1. Associate all 6keys with the Base Key ID of A-001 to the lock A1 with the **Locks** module.
2. Associate all 6 keys with the Base Key ID of B-001 to the lock B1 with the **Locks** module.
3. Verify that the keys are associated with their respective locks.
4. Return to the Locks output listing.

### Exercise: Processing Locks & Keys Transactions

1. Assign all the keys on Ring #1 to Peter C. Maxwell with the **Keys** module.

2. Verify the transaction in the Key A-001, Copy 0's audit trail under its **History** tab.
3. Return to the Keys output list.

---

## Section 12: SIMS Utilities

This section covers SIMS Utilities.

### 12.1 Learning Objectives

After completing this section, you will know how to:

- ✓ Describe how to customize SIMS (12.2)
- ✓ Define new Clearance Levels (12.3)
- ✓ Define new Special Accesses (12.4)
- ✓ Describe how SIMS Manager can be used for List Management (12.5)
- ✓ Describe Data Field Defaults (12.6)
- ✓ Create Keywords and Authors (12.7)
- ✓ Create a new Document Numbering Stream (12.8)
- ✓ Create a New User Account with Password Management (12.9)
- ✓ Print Database Audit Reports (12.10)

#### Introducing SIMS Utilities

Before beginning the SIMS Utilities exercises:

- ▶ View the **System Customization** Utility presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

### 12.2 System Customization

#### Introducing System Customization

Before beginning the System Customization exercise:

- ▶ View the **System Customization** presentation, if you have not already done so. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

#### Exercise: Exploring System Customization

1. Open the **System Customization** sub-module of **Utilities**.
2. Explore the **System Customization** screen that opens.

3. Explore the data fields in each of the tabs.

*Tip:* You may change the preferences as you wish at this point. You can always reset the tutorial database by running a tutorial setup again.

4. Return to the SIMS main menu.

## 12.3 Clearance Level Definitions

### Introducing Clearance Level Definitions

Before beginning the Clearance Level Definitions exercise:

- ▶ View the **Clearance Level Definitions** presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

### Exercise: Creating a Clearance Level

1. Create a new Clearance Level called “Eyes Only” with a rank of 5 with the **Clearance Levels** sub-module of **Utilities**.
2. Verify the information entered.
3. Return to the SIMS main menu.

## 12.4 Special Accesses

### Introducing Special Accesses

Before beginning the Special Accesses exercise:

- ▶ View the **Special Accesses** presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

### Exercise: Creating Special Accesses

1. Create a new Special Access with the **Special Access Definitions** sub-module of **Utilities** using the following information.

Special Accesses Window		
Name	QUEEN	
<b>Select the following checkboxes:</b>		
Container Type	Facility Type	Document Type
Personnel Type	U.S. Citizenship Required	Briefing Required
Contract Type	Visitor Type	IS Type

2. Create another new Special Access with the **Special Access Definitions** sub-module of **Utilities** using the following information.

Special Accesses Window		
Name	KING	
Select the following checkboxes:		
Container Type	Facility Type	Document Type
Personnel Type	Briefing Required	Contract Type
Visitor Type		

3. Create a new Umbrella Access with the **Special Access Definitions** sub-module of **Utilities** using the following information.

Special Accesses Window			
Name	ROYALS		
Included Accesses	KING	Included Accesses	QUEEN

4. Verify the information entered.
5. Return to the SIMS main menu.

## 12.5 List Management

### Introducing List Management

Before beginning the List Management exercise:

- ▶ View the **List Management** presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

### Exercise: Exploring List Management

1. Open the **List Management** sub-module of **Utilities**.
2. Explore the **List Management** screen that opens.
3. Choose a Module and an Available List, and explore the data fields for the list.
4. Return to the SIMS main menu.

## 12.6 Data Field Defaults

### Introducing Data Field Defaults

Before beginning the Data Field Defaults exercise:

- ▶ View the **Data Field Defaults** Utility presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.

- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

**Exercise: Exploring Data Field Defaults**

1. Open the **Data Field Defaults** sub-module of **Utilities**.
2. Explore the **Data Field Defaults** screen that opens.
3. Explore the different fields for each type of table.
4. Return to the SIMS main menu.

## 12.7 Document Numbering Streams

### Introducing Document Numbering Streams

Before beginning the Document Numbering Streams exercise:

- ▶ View the **Document Streams** presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

**Exercise: Creating a Document Numbering Stream**

1. Create a new Document Numbering Stream with the **Document Streams** sub-module of **Utilities** using the following information.

Document Number Stream Input Screen			
<b>Stream Name</b>	Waptia		
<b>Root # Prefix</b>	2004W-	<b>Root # Counter</b>	1
<b>Root # Min. Width</b>	5	<b>Pad Char.</b>	X
<b>Start Copy # at 0</b>	(select option)	<b>Use Copy Format for Originals</b>	(Select checkbox)

2. Verify the Document Stream by opening a new document in the **Documents** module, and choosing Waptia as the **Stream**.
3. Return to the SIMS main menu.

## 12.8 User Management

### Introducing User Management

Before beginning the User Management exercise:

- ▶ View the **User Management** Utility presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

### Exercise: Creating a New User Account in SIMS

1. Create a new User Account with the **User Management** sub-module of **Utilities** using the following information.

<b>User Tab</b>			
<b>Login ID</b>	Jottoia	<b>User Name</b>	John Ottoia
<b>Password</b>	John	<b>Confirm password</b>	John
<b>Select Read for the following options:</b>			
Host Facilities		Other Facilities	
Cognizant Offices		Cleared Personnel	
Containers		Classified Contracts	
Documents		DoD Outgoing Requests	
DoE Outgoing Requests		SCI Outgoing Requests	
Visitors		Visit Authorizations	
IS		Conferences and Meetings	
Incidents		Locks	
Keys			

2. Verify the information entered.

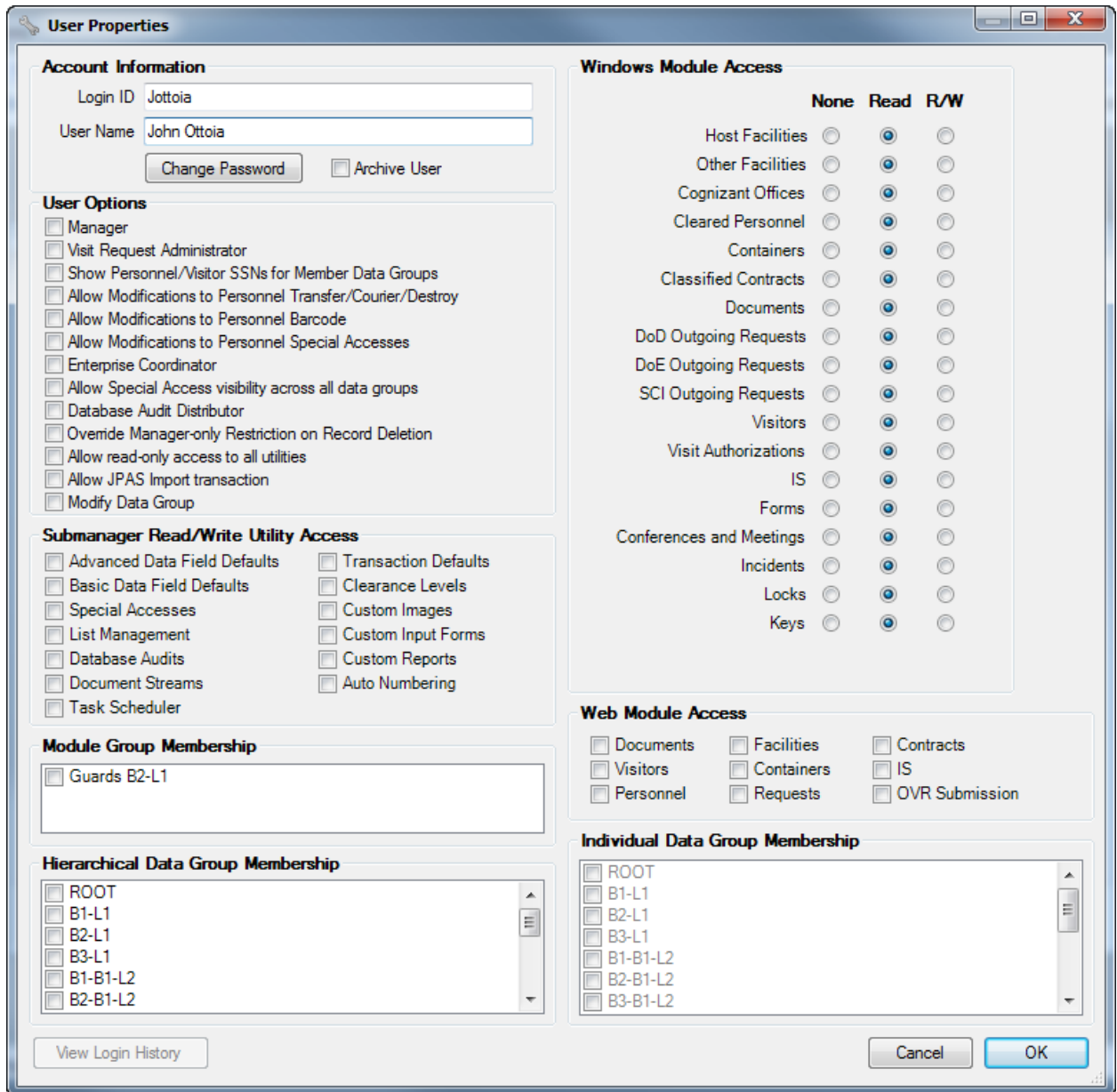


Figure 10: User Properties

3. Return to the SIMS main menu.

## 12.9 Database Audits

### Introducing Database Audits

Before beginning the Database Audits exercise:

- ▶ View the **Audits** Utility presentation. For information about viewing presentations, see “Viewing SIMS Video Presentations” in Section 1.
- ▶ If you have not already generated the tutorial data, do so now. For details, see “Generating SIMS Tutorial Data” in Section 1.

### Exercise: Printing a Database Audit Report

1. Print a Security Action Items Report with the **Database Audits** sub-module of **Utilities** using the following information.

<b>Database Audits</b>	
<b>Select the following checkboxes:</b>	
Enable Facility Audits	Enable Personnel Audits
Enable DoD Visit Request Audits	

2. Print the report. You may exit at the print preview to save paper, if you like.
3. Return to the SIMS main menu.