

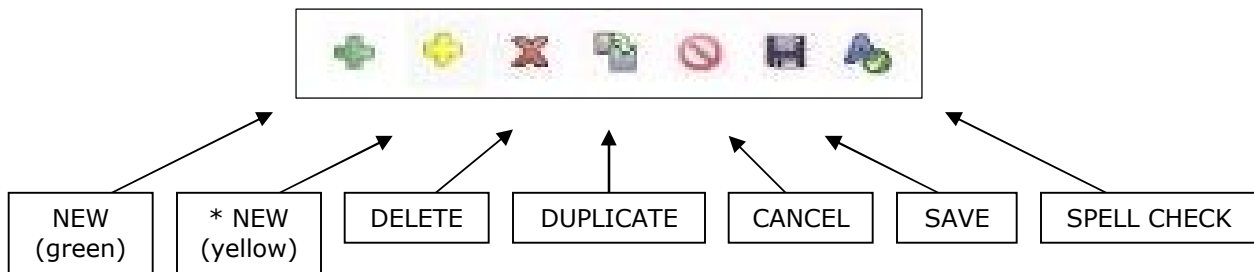
Welcome to LDRPS – Some Helpful Tips

If you are new to LDRPS, or simply new to this version of LDRPS, it may take a while to become familiar with the way it works. Below are some helpful tips to make it easier to navigate through the plan building process.

- 1 – The Toolbar
- 2 – Instructions for Plan Builders (Plan Navigator)
- 3 – Tracking Your Progress
- 4 – Searching for Records
- 5 – Log Out
- 6 – Error When Deleting or Unassigning a Record
- 7 – Other Common LDRPS Functions

1 - The Toolbar

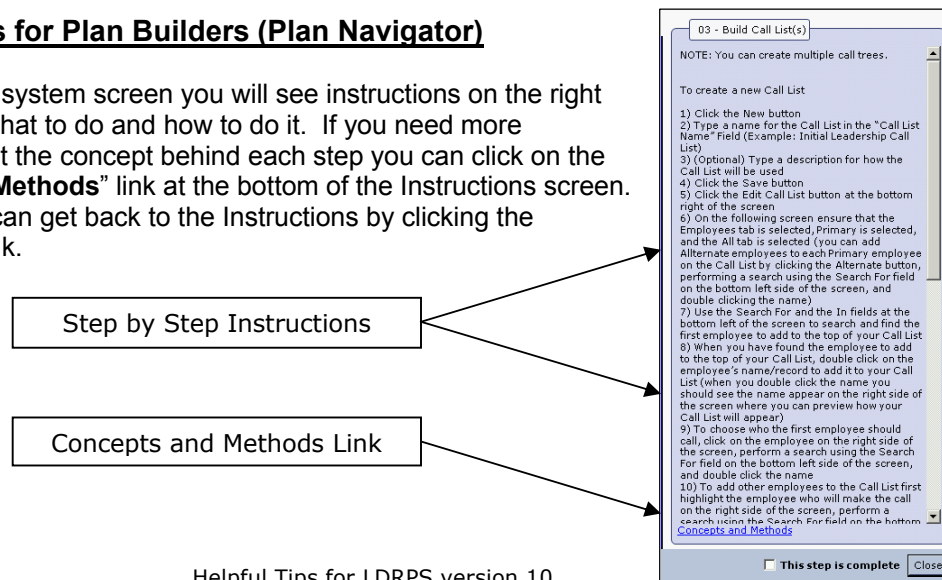
On many screens in LDRPS you will see a combination of the symbols below. These make up the toolbar for any given screen. By clicking these buttons you will be able to perform the most common actions in LDRPS:



- NEW (green) = Create a new record
- * NEW (yellow) = Create a new record, but some security restrictions will apply
- DELETE = Delete a record
- DUPLICATE = Duplicate a record
- CANCEL = Cancel an action
- SAVE = Save a record
- SPELL CHECK = Perform a spell check

2 - Instructions for Plan Builders (Plan Navigator)

On each LDRPS system screen you will see instructions on the right side explaining what to do and how to do it. If you need more explanation about the concept behind each step you can click on the “**Concepts and Methods**” link at the bottom of the Instructions screen. Afterwards, you can get back to the Instructions by clicking the “**Instructions**” link.



3 - Tracking Your Progress

At the bottom of each set of instructions you may see a check box next to the phrase **“This step is complete”** (this does not appear on all screens). After you complete each section of the plan add a checkmark to this box. LDRPS will use this to tell you how much of the plan you have completed.

NOTE: You can ALWAYS go back and make changes, even if you have marked a step as complete.



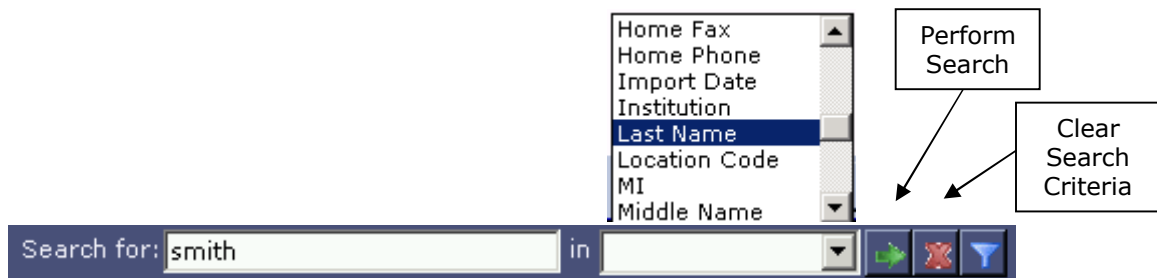
4 - Searching for Records

At the bottom of most LDRPS screens you will find a search tool that will allow you to find specific records. This can be especially helpful when you are searching for one employee or vendor among thousands listed in the system.

To perform a search:

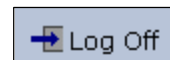
- 1) Enter the name / term / word in the **“Search for”** field (for example, “smith”)
- 2) Click on the drop-down menu and choose the LDRPS field in which you want to search (for example, choose “Last Name” to look for “smith” in the “Last Name” field)
- 3) Click the **“Perform Search”** button (it looks like a green arrow)
- 4) After you have performed your search and you want to see the complete list of records again, click the **“Clear Search Criteria”** button (it looks like a red X)

NOTE: For more search options, click on the **“Open the Advanced Search Window”** button on the far right



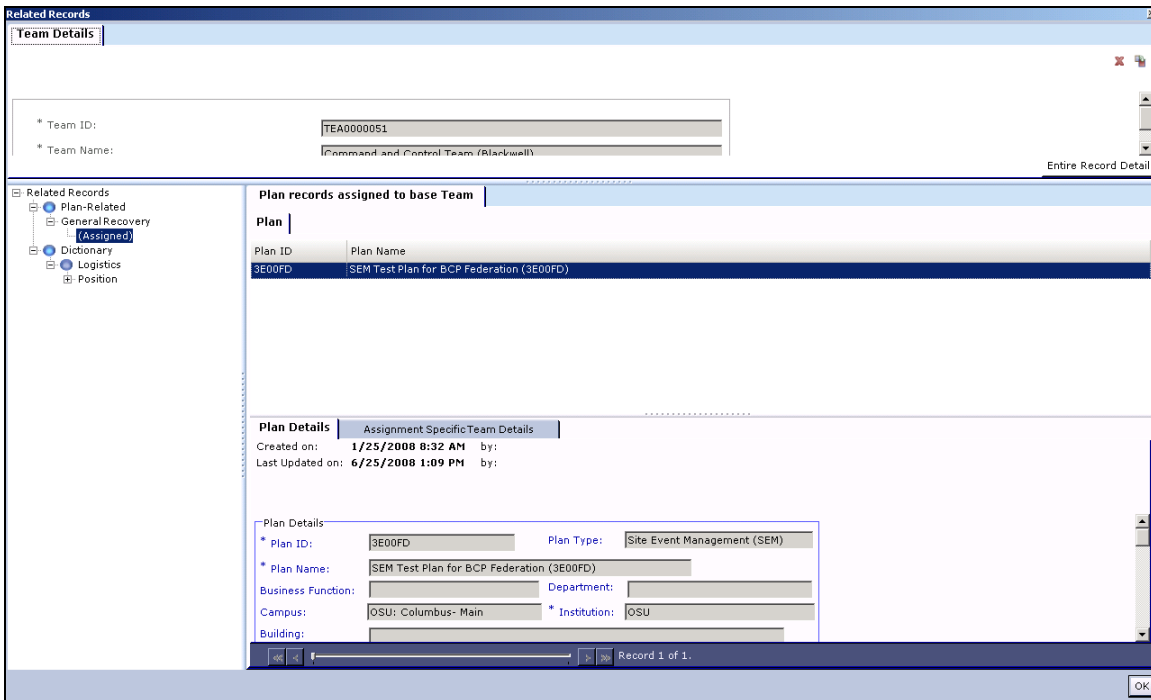
5 - Log Out

When you are finished don't forget to log out of the system by clicking the **Log Off** button at the top right.



6 - Error When Deleting or Unassigning a Record

You may receive one of the following errors (below) when you attempt to delete a record or unassign it from your plan.





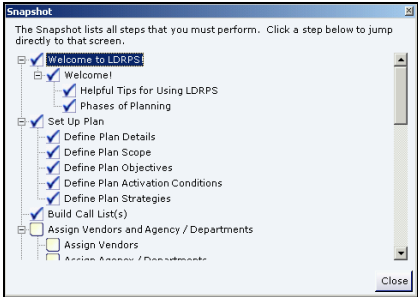
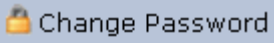


This error occurs when there are sub-records assigned to the record you are trying to delete or unassign. An example of a sub-record would be a vendor representative which is assigned to a vendor.

You can prevent this error by unassigning the sub-record **before** trying to unassign or delete the main record. The following are common main records that may have sub-records assigned to them:

Main Record	Possible sub-records
Vendor	Vendor representatives
Dept / Agencies	Dept / Agencies representatives
Teams	Positions assigned to teams Employees assigned to positions
Positions on Teams	Employees assigned to positions Tasks assigned to positions
Processes	Tasks Equipment Software Vital records Teams Positions Employees

If you have unassigned all sub-records and are still receiving this error please contact your LDRPS system administrator for assistance.

7 – Other Common LDRPS Functions

Icon	Name	Explanation and Instructions
	Change Current Plan	If you have been granted access to more than one plan you can switch between plans by clicking the Change Current Plan button at the top left of the screen.
	NavLink	Clicking the NavLink button gives you a pop up window showing all steps of the Plan Navigator along with your progress. You can click on any step in the NavLink to go directly to that screen. 
	Change Password	Click the Change Password link at the top right of the screen to change your password. 
	Reports	To print your completed plan you should <u>always</u> go to the Publish Plans navigator step and follow the instructions. However, LDRPS also provides you a quick alternative that allows you to publish individual sections of your plan by clicking the Reports link at the top right of the screen. If you want to run a report: <ol style="list-style-type: none"> 1) Search for the report by name 2) Click the report to highlight it 3) Click the View button 4) On the following pop up screen make sure that the Select All Data radio button at the top is selected 5) Click the Next button 6) Double-click the plan you want to run the report against; the plan name should now appear below under the Selected Plans tab 7) Click the Next button 8) Make sure that the Report Format is set to Portable Document Format (.PDF) 9) Click the Run Report button 10) Click the Close button on the Doc/Reports screen