



Introduction

(0:12-0:27) Welcome to the Office of People Analytics Defense Command Climate Portal, also known as the OPA DCP, Resource Center. This is a training on creating a community roster of units and/or organizations for a CIPP Plan registration.

(0:28-0:38) During this training, I will cover three topic areas; How to Create a Community Roster, How to Upload a Community Roster, And Where to Find Help.

How to Create a Community Roster

(0:44-0:57) If you need assistance with the other steps of the CIPP Plan registration process, review the resources under the “Create Annual CIPP Plan” and “Create Updated CIPP Plan” tabs on the Prevention.mil CIPP Plan System Resource Center.

(0:58-1:10) Since we are focusing on the Community Roster, I will start in the Community Unit/Organization Information section of the CIPP Plan registration. Here, there is the option to import or export a community roster.

Community Information

Community Priorities

Community Unit/Org Info

4 CIPP Plan Upload

5 Review and Submit

Each CIPP Plan will cover a CIPP community. Every unit/organization that is in the CIPP community must be added to this registration. All units/organizations will be summarized in the table below once they are added.

Instructions for adding a unit/organization to this CIPP Community

- To add a Commander or Leader and their Unit/Organization to this CIPP Plan, click the “Add Unit/Organization to CIPP Community” button below.
- After an entry is complete, the entry will populate the summary table below.
- To edit an existing entry, click the “pencil” icon. Additionally, this function can be used to view the entirety of an existing entry.
- To delete an existing entry, click the “trashcan” icon.
- The items entered for each Commander/Leader and their Unit/Organization should match the information provided in this CIPP Plan version.
- To edit the community’s units/organizations in an Excel format, you can use the export and import buttons. This allows you to download the currently existing unit/organization information as an .xlsx file, allowing for additional bulk-edit functionality (e.g., find-and-replace), and subsequent import of this edited file. Please click either the “Export” or “Import” buttons to do so.
- For additional information, see Appendix A of the CIPP Plan Template.

Export/Import Community Unit/Organization Information

Add Unit/Organization to CIPP Community

Export Import

Unit/Organization Title	Action	Commander/Leader Name	Commander/Leader E-mail	CIPP Plan Review Date	Status
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(1:11-1:45) If you have a previous CIPP Plan registration that you want to use as a basis for your current community’s unit or organization information, you can click the Export button to download an Excel file that includes the community unit or organization information. If you have previously registered a CIPP Plan for a community, this can assist you with your next CIPP Plan registration. For example, you can export the unit or organization information from the previous registration, make any necessary changes or updates to the Excel file, and then import the Excel file into the current CIPP Plan registration.

(1:46-2:03) If this is the first time you are registering a CIPP Plan for your community, you can work in the CIPP Plan Community Unit or Organization Roster Template found on the Prevention.mil CIPP Plan System Resource Center to enter all of the relevant unit or organization information for the community.

(2:04-2:30) The community unit or organization roster Excel file includes all of the fields that are included during unit or organization input for CIPP Plan registration. These fields work similarly to the fields that are included during manual entry of the unit or organization information; the same fields that are required in manual entry are required in a roster import, and the same restrictions on what information can go in each field are in place on the roster import.

(2:31-2:56) Each row in the Excel file should contain the information for only one unit or organization. The first section here is Commander/Leader information, which must include the person’s First Name, Last Name, E-mail Address, Phone Number, Service, and Rank. To enter this information, you can manually type into these boxes or copy and paste from a separate file.

	A	B	C	D	E	F	G	H
	Commander_Leader_First_Name	Commander_Leader_Last_Name	Commander_Leader_E-mail	Commander_Leader_Phone_Number	Commander_Leader_Service	Commander_Leader_Rank	Unit_Organization_Title	Unit_Organization_Installation_Base_S
2	William	Cosner	william.p.cosner.ctr@mail.mil	1234567890	Civilian	Mr.	DCP Unit	Pentagon
3	Jen	Smith	jsmith@mail.mil	9876543210	US Navy (USN)	Lieutenant	Ship DCP	Naval Base Guam
4								
5								
6								
7								
8								
9								
10								
11								

(2:58-3:22) For the Service, select the applicable option from the dropdown menu in the cell here. Once the individual’s Service is selected, there is also a dropdown menu to select the commander’s or leader’s rank. With that information entered, the next set of columns here is for the unit or organization information. Here is the unit or organization title which is a field I can type in.

(3:23-3:47) Then we have the Installation/Base/Ship or Location which is another dropdown. If your installation, base, ship, or location is not listed, you can manually add it by typing in the name, or if the unit or organization has no physical location, you can select “Does Not Apply.” Then there is the unit or organization identification code followed by the component type, Service branch, and population.

(3:49-4:08) Depending on which component type you select, different dropdown information will be populated in the Service Branch and Population columns. Additionally, you may not have to enter any information in these columns depending on what you select for your component type. For example, if you select Active Duty and then Army, you do not need to select a population.

G	H	I	J	K
Unit_Organization_Title	Unit_Organization_Installation_Base_Ship_Location	Unit_Organization_Identification_Code	Unit_Organization_Service	Unit_Organization_Type
DCP Unit	Pentagon	72513	DoD	Operations
Ship DCP	Naval Base Guam	85262	US Navy (USN)	Shore
	Does not apply		US Air Force (USAF)	

(4:10-4:25) This information should match the information included on the DEOCS registration for the unit or organization. Next, we have the Unit or Organization Type. Refer to the CIPP Plan System FAQs for a list of unit types broken out by Service component.

(4:26-4:48) Next, the relevant DEOCS IDs can be added here. If you are adding more than one DEOCS ID, be sure to separate them with commas. This will ensure that the individual DEOCS IDs are added to the CIPP Plan registration. If the DEOCS IDs are not separated by commas, they will not be accurately added to the registration when the Excel file is imported. I will add an example here.

L	M	N	O	P
DEOCS_IDs	CIPP_Plan_Review_Date	I_did_not_conduct_a_CIPP_Plan_review	Reason_for_no_CIPP_Plan_Review	Other_Reason
123fd45, 516d3g1	1/4/2025			
974hs36	1/5/2025			
05938f7, 4857gr3		X	Other	

(4:49-5:18) The last section of the Excel file is the CIPP Plan review information. Here I can enter the date that the CIPP Plan review took place with the commander or leader of the unit or organization. The date should be entered in month, day, year order with two digits for the month, two digits for the day, and four digits for the year. The two options to enter the date for the registration system to input the information are to enter it with dashes or forward slashes between the month, day, and year.

(5:19-5:40) If the CIPP Plan review did not take place, I can record that here by selecting the “X” from the dropdown and then provide relevant reasoning in the Reason for No CIPP Plan Review dropdown. If I select “Other” here, I can type my reason into the Other Reason field. Information should only be entered in either the “CIPP Plan Review Date” field or the “I did not conduct a CIPP Plan review” field.

(5:41-5:55) If information is included in both fields for one unit or organization, the information will not be properly added to the registration during the import process. Please carefully review this section of the Excel file before importing.

How to Upload a Community Roster

(6:02-6:21) Once this information is added for each unit or organization included in the CIPP community, I can import this file into the CIPP Plan registration. After clicking the import button, I can either browse my files or drag and drop the Excel file into the file upload section here. Once the file is added, I can click “Start Import.”

(6:23-6:33) Once the file is successfully imported, the units or organizations will populate in the table here. If there are any errors flagged, there will be a red exclamation mark in the status column.

- ✔ Community Information
- ✔ Community Priorities
- ✎ Community Unit/Org Info
- 4 CIPP Plan Upload
- 5 Review and Submit

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- To delete an existing entry, click the "trashcan" icon.
- The items entered for each Commander/Leader and their Unit/Organization should match the information provided in this CIPP Plan version.
- To edit the community's units/organizations in an Excel format, you can use the export and import buttons. This allows you to download the currently existing unit/organization information as an .xlsx file, allowing for additional bulk-edit functionality (e.g., find-and-replace), and subsequent import of this edited file. Please click either the "Export" or "Import" buttons to do so.
- For additional information, see Appendix A of the CIPP Plan Template.

Export/Import Community Unit/Organization Information

Add Unit/Organization to CIPP Community

Export

Import

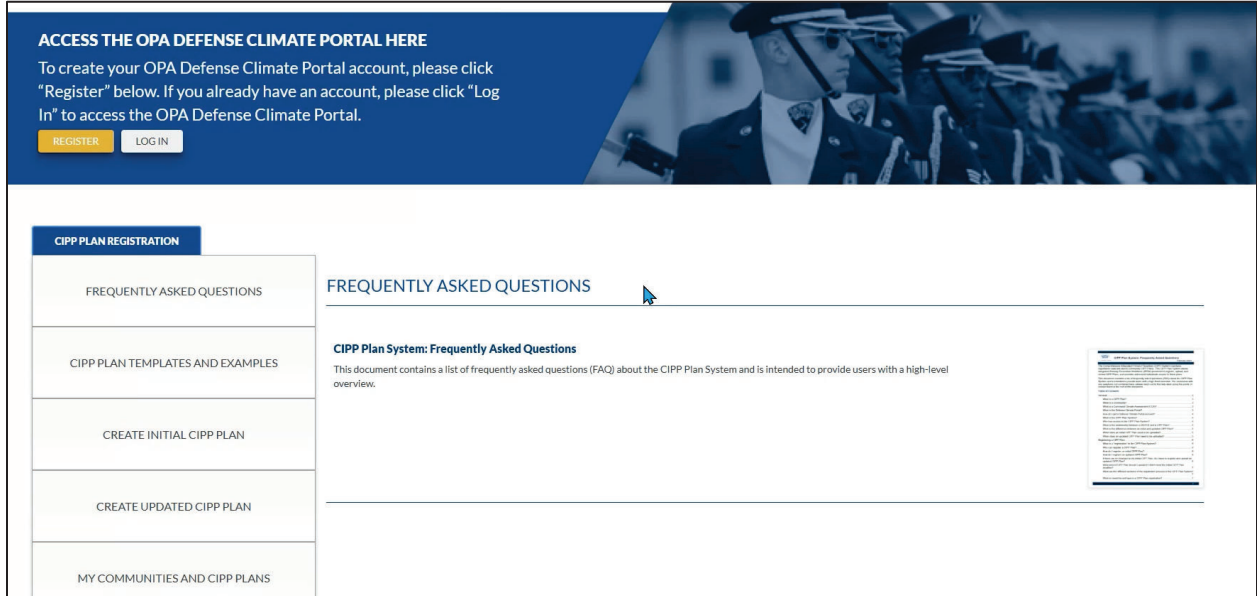
Unit/Organization Title	Action	Commander/Leader Name	Commander/Leader E-mail	CIPP Plan Review Date	Status
DCP Unit	✎ 🗑	William Cosner	william.p.cosner.ctr@mail.mil	01/04/2025	✔
Ship DCP	✎ 🗑	Joe Smith	jsmith@mail.mil	01/05/2025	✔

(6:36-6:56) If changes or updates to the unit or organization information are needed, I can manually edit them using the pencil icon in each corresponding row or I can make edits to the Excel file and re-import the file. Keep in mind that re-importing the file will overwrite or delete any existing information for all units and organizations you have added in the table here.

(6:57-7:09) Once all of the units or organizations have green check marks in the status column and the information entered is accurate, I have completed the Community Unit or Organization Information section of the CIPP Plan registration.

Where to Find Help

(7:16-7:22) For more information on CIPP Plan registration, review the resources on the CIPP Plan System Resource Center.



The screenshot shows the OPA Defense Climate Portal registration page. At the top, there is a blue banner with the text "ACCESS THE OPA DEFENSE CLIMATE PORTAL HERE" and instructions to click "Register" or "Log In". Below this, there is a navigation menu with options: "CIPP PLAN REGISTRATION", "FREQUENTLY ASKED QUESTIONS", "CIPP PLAN TEMPLATES AND EXAMPLES", "CREATE INITIAL CIPP PLAN", "CREATE UPDATED CIPP PLAN", and "MY COMMUNITIES AND CIPP PLANS". The "FREQUENTLY ASKED QUESTIONS" section is active, displaying the title "CIPP Plan System: Frequently Asked Questions" and a brief description: "This document contains a list of frequently asked questions (FAQ) about the CIPP Plan System and is intended to provide users with a high-level overview." A thumbnail image of the FAQ document is visible on the right side of the page.

Conclusion

(7:24-7:32) This concludes the Creating a Community Roster Training Video. Thank you for taking the time to listen in and have a great day!