

OFFICE OF THE GENERAL COUNSEL
Division of Operations-Management

MEMORANDUM OM 16-12(NxGen)

March 17, 2016

To: All Regional Directors, Officers-in-Charge,
and Resident Officers

From: Anne Purcell, Associate General Counsel

Subject: NxGen March Release (10.2)

NxGen 10.2 will be deployed during the weekend of March 18th. Enhancements to NxGen, many of which are in response to suggestions provided by the field users, in this release will include:

- Documents with 'Sensitive' flag checked automatically will be set to 'CaseHQ' visibility
 - Allows a wider range of people, including CCLSB and Finance, to view financial records while maintaining security
- Automation of initial visibility and status for Tally of Ballots
 - Issued
 - NLRB
- Potential 10(j) check box can be accessed by everyone in the Region for greater data entry flexibility at different stages of the case
 - In the Inquiry Charge Action -- Before the Case is Created
 - Will automatically update More Info GC Tab when checked prior to creating the case

Actions

Menu ▾ | New | Query | Submit To JCMS | Participant List | New Subsequent Action

Inquiry ID: 1-1451539592 | Dispute City: Cleveland | No. of 8(a)(3) Discriminatees: | Status: Active ▾

Action Name: Charge ▾ | Dispute State: OH ▾ | No. of 8(b)(2) Discriminatees: | Action Disposition: ▾

Action Type: CA ▾ | No. of Ees on Charge: 255 | CE - Charge Against Employer: | Action Disposition Date:

Action Team: 08CLEASGN | Allegations: Coercive Actions (Sur) | CE - Charge Against Labor Org: | IA Category: 2 ▾

Office Assigned: Region 08, Cleveland, Oh | Barg. Status: ▾ | **Potential 10(j):**

Cases | Approvals | **Tasks** | Due Dates | EOTs | Suspensions | Associated Actions | Hearing | Action Team | Documents | Sub-Actions | Action Notes | Inquiry | Special Project | More In

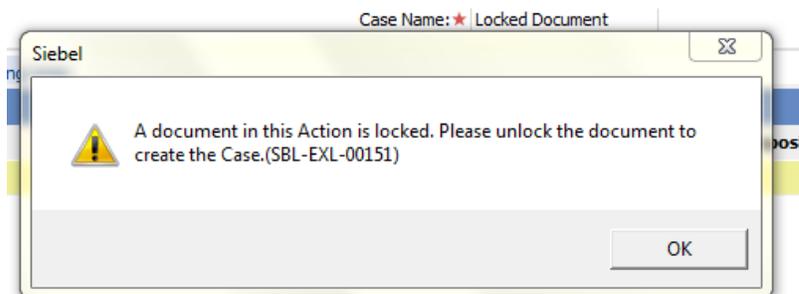
Menu ▾ | New | Delete | Query | Request Approval | **Doc Unit** | Mailing List | All Tasks ▾

View Info	Task Type	Description	Next Approver	Document Type	Document Subtype	Determinat
View Info	Document	DFV-1-1451539592.testinn.doc		DFV	Documentary Evidence	

- More Info GC Tab – After the Case is Created
 - If the Region determines that the case is a potential 10(j) during the investigation, it can check the box in the More Info GC Tab

The screenshot shows the 'More Info GC' tab in a Siebel application. The navigation bar includes 'Target Dates', 'Allegations', 'Bargaining Units', 'Remedies', 'Election Tally', 'Related Cases', 'Election Schedule', and 'More Info GC'. Below the navigation bar, the form is titled 'C-Case' and contains several input fields: 'No. of 8(a)(3) Discriminatees:', 'No. of 8(b)(2) Discriminatees:', 'Potential 10(j):' (with an unchecked checkbox), 'RD Decides No 10(j):' (with an unchecked checkbox), 'Date RD Decides Merit and No 10(j):', 'No. of 8(a)(3) Discharges Alleged:', and 'No. of 8(a)(3) Meritorious Discharges:'. The 'Potential 10(j):' checkbox is highlighted with a red rectangular box.

- New Post HQ Target Date for Compliance Determinations
 - Created after Appeal period expires (15 days)
 - The Target Date will automatically complete when one of the following documents are finalized
 - Compliance Specification
 - Compliance Agreement
 - Recommendation for enforcement/contempt
 - Closing letter/memo
- Prevention of Locked Documents during Case Creation
 - Users will receive a warning message if a document is locked in the Inquiry when the Create Case Button is clicked. This will assure that the Investigation Action and Target Dates are properly created.
 - To unlock documents, click on the OK button in the warning message, navigate back to the document tasks and click on "Document".



- In the Document task view, remove the name in the “Document Locked By” field. If there is no name in the “Document Locked By” field, click on “Info” and click on “Cancel Check Out”(NOTE: THIS STEP WILL CAUSE ALL CHANGES MADE BY THIS PERSON TO BE LOST)

View Info Task Type
View Info Document

Document

Menu | New Query Reviewed

Case Name: Locked Document

Case Number: 1-1451539592

Action Name: Charge

Action Type: CA

Task Type: ★ Document

Office Assigned:

Employees: JSTEWART

Document Locked By: JSTEWART

OR

View Info Task Type View Info Task Type
View Info Document View Info Document

+ Check In × Cancel Checkout

- NxGen Case File Updates
 - Updated dates from document tasks will now be reflected correctly
 - Issued
 - Finalized
 - Received
 - Document Name column will display entire Document Name even if there is an apostrophe
 - Filtering by Action Name has been corrected

Be sure to also watch for the NxGen News and Template Tips and Updates e-mails for more updates.

/s/

A. P.

cc: NLRBU
Attachments

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