

# eSponsorship Application & Training (eSAT)

# User's Guide



**Version 1.0**

April 5, 2010



Providing policy, tools, and resources to further enhance the quality of life of service members and their families.

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## 1.0 Introduction

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### 1.1 Background

The DoD has introduced the eSponsorship Application & Training (eSAT) website to address a number of concerns and issues with the sponsorship process. This website was created based on the issues and challenges reported by commanders, relocation assistance managers, sponsors, and newcomers. This application includes their ideas about operating and managing good sponsorship program. eSAT was developed as a joint effort by the Office of the Secretary of Defense for Military Community and Family Policy and the military services. In addition to meeting the requirement for the Relocation Program to train unit sponsors, eSAT provides sponsors and newcomers with an online, easily accessible and authoritative resource for training, needs assessment, communication, access to trusted relocation information and resources, and feedback for improvement.

### 1.2 eSAT Process Overview

Effective sponsorship should be available to every newcomer, be recognized as an important unit-level duty, and help service and family members settle in to the unit and community quickly. eSAT promotes effective sponsorship with five online processes.

**Step 1 – Sponsor Registration and Training.** eSAT registers every sponsor and presents a standardized training module that each new sponsor must complete before they start their sponsorship duties for the first time. When completed the newly trained sponsor has access to a downloadable Sponsorship Duties Checklist, and an official Training Certificate that they may download for unit records.

**Step 2 – Register and Contact Newcomers.** Once trained (newcomer's assigned to sponsors through the unit) the sponsor is able to register the newcomer in eSAT and send them an initial contact e-mail, "Congratulations on your new assignment." The Congratulations e-mail includes a secure, individualized link for the newcomer that allows them to finish their eSAT registration and then complete an online standardized needs assessment. Once the newcomer completes their needs assessment, the sponsor is automatically notified that the needs assessment is available for their review.

**Step 3 – Sponsor Reviews Newcomer's Needs Assessment and Sends Welcome Letter.** eSAT provides the sponsor with rapid access to the newcomer's needs assessment as well as a workflow manager to help the sponsor know which actions they should be taking next. Once the needs assessment has been reviewed, eSAT allows the sponsor to generate and send the newcomer a standard Welcome Letter that includes links to important installation and service-specific information necessary for a move. The sponsor also has the option to customize the Welcome Letter and include any additional attachments that are particularly important for the newcomer.

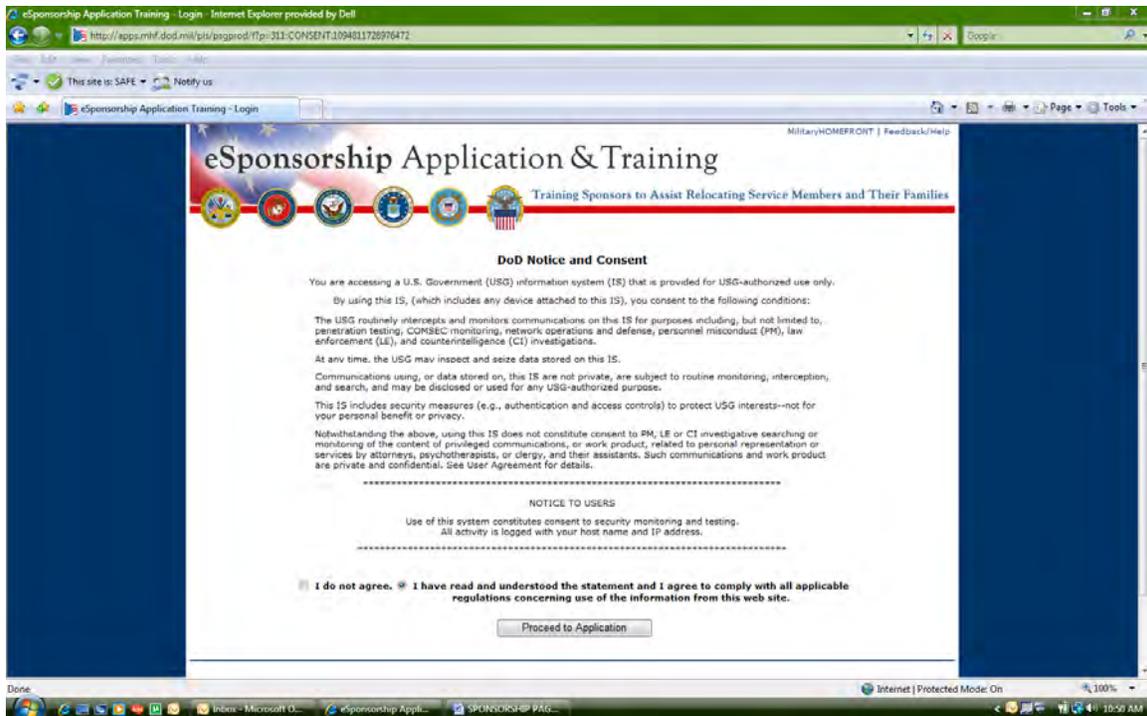
**Step 4 – Follow-through, Communications, and Feedback.** By providing a ready access to the newcomer's needs assessment and trusted relocation information, eSAT helps sponsors follow-through on the newcomer's needs and fosters more accurate communication as the newcomer's arrival day approaches. Once the newcomer is settled into the unit and community, the system sends an e-mail requesting feedback from the sponsor and the newcomer. This feedback will be used to improve the sponsorship process.

**Step 5 – Management and Reporting.** Throughout the eSAT process, sponsorship metrics are gathered and available to Relocation Managers and sponsoring units. These metrics allow the Relocation Managers and units to track sponsor training, the progress of sponsor-newcomer interactions, and finally feedback on the sponsorship program at their installation.

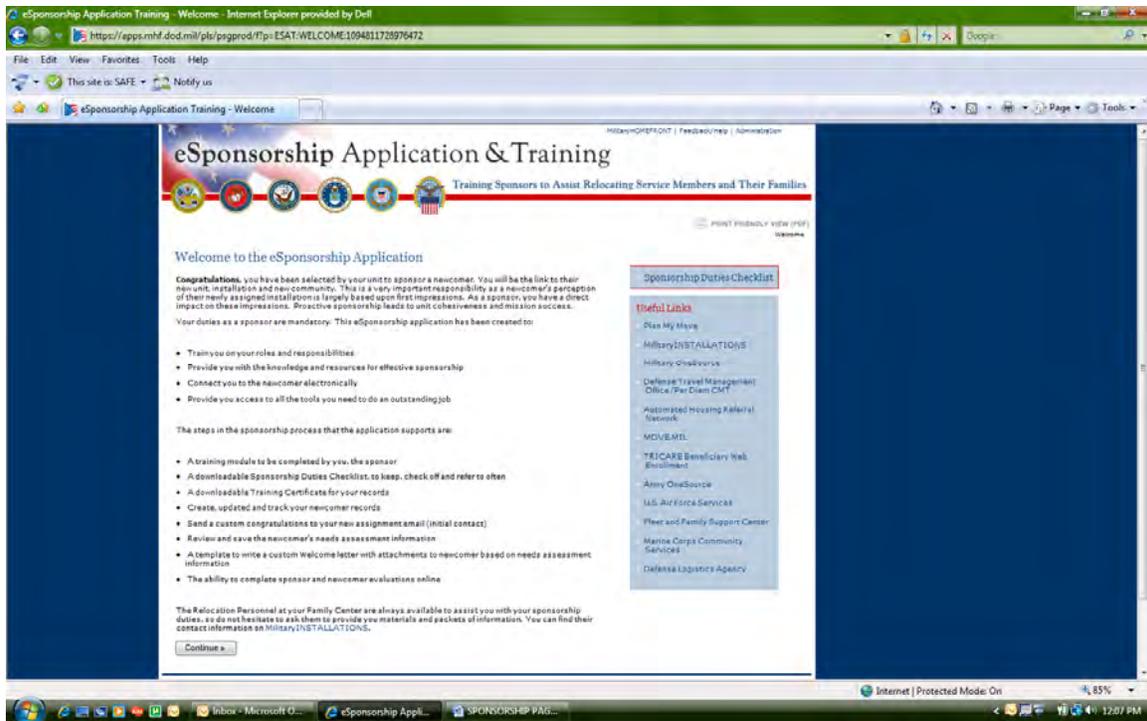
## 2.0 Sponsor Log in and Registration

Once an individual is selected for Sponsorship duty, the first step in the eSAT process is for them to log into the eSAT application and complete registration.

Using a CAC enabled terminal, and with the CAC card inserted in the reader, log into eSAT at <http://apps.mhf.dod.mil/ESAT>.

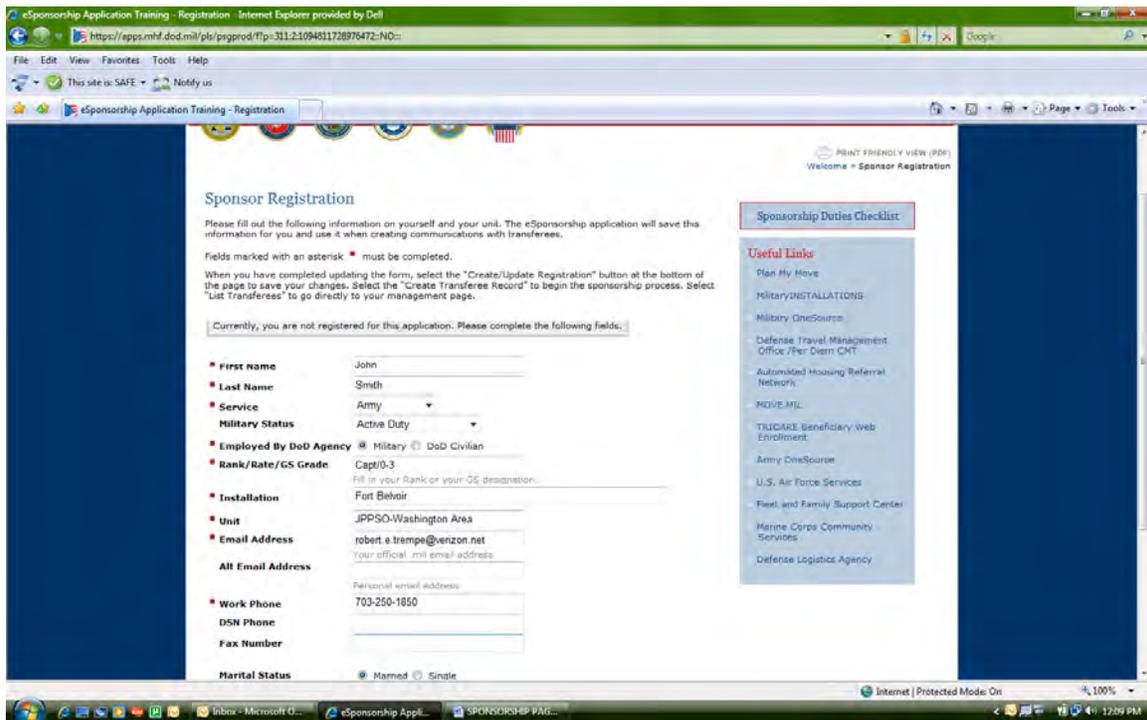


Select the consent statement and **Proceed to Application**. The first page will be the Welcome page.



Without going further the sponsor can access the Sponsorship Duties Checklist. The user also has access to a number of general useful links from this page. Select Continue to use eSAT.

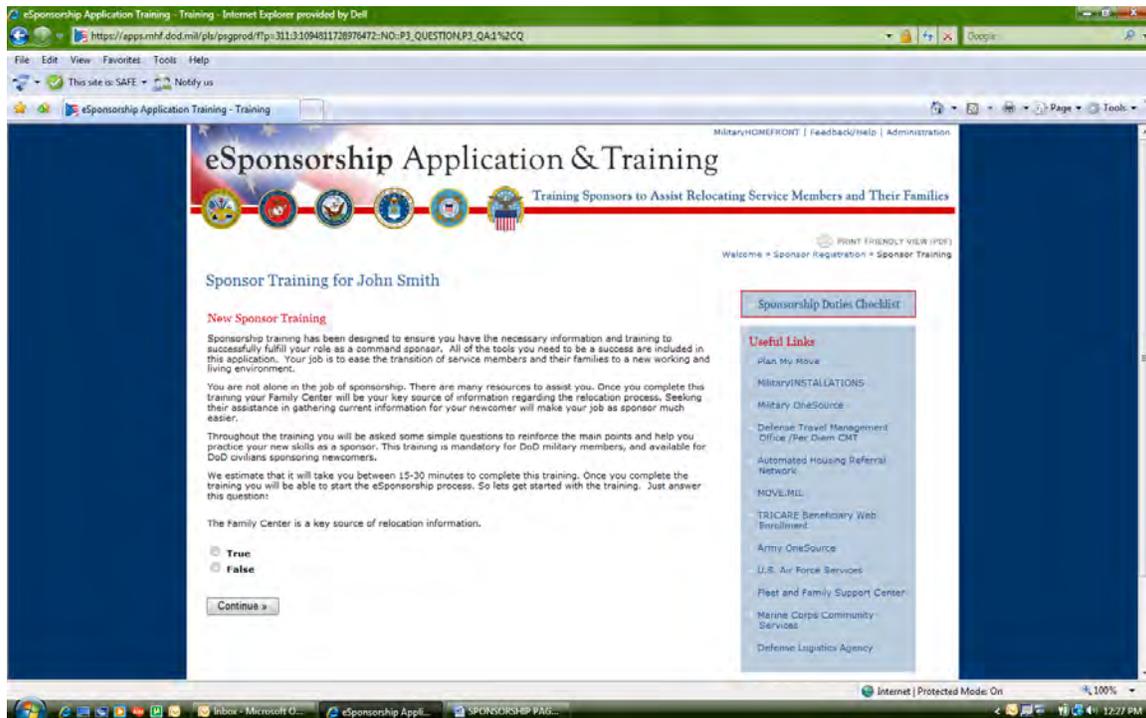
The application automatically detects if the sponsor has or has not previously registered in eSAT. If the user is not registered they will be asked to complete the Sponsor Registration page.



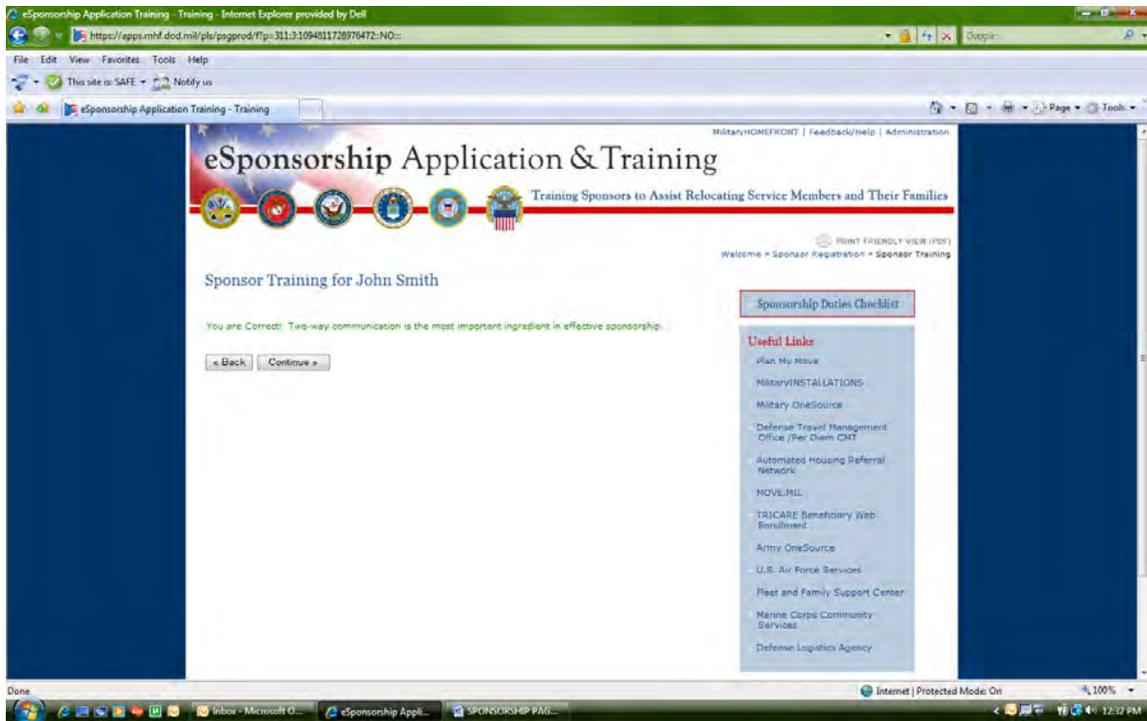


## 3.0 Sponsor Training

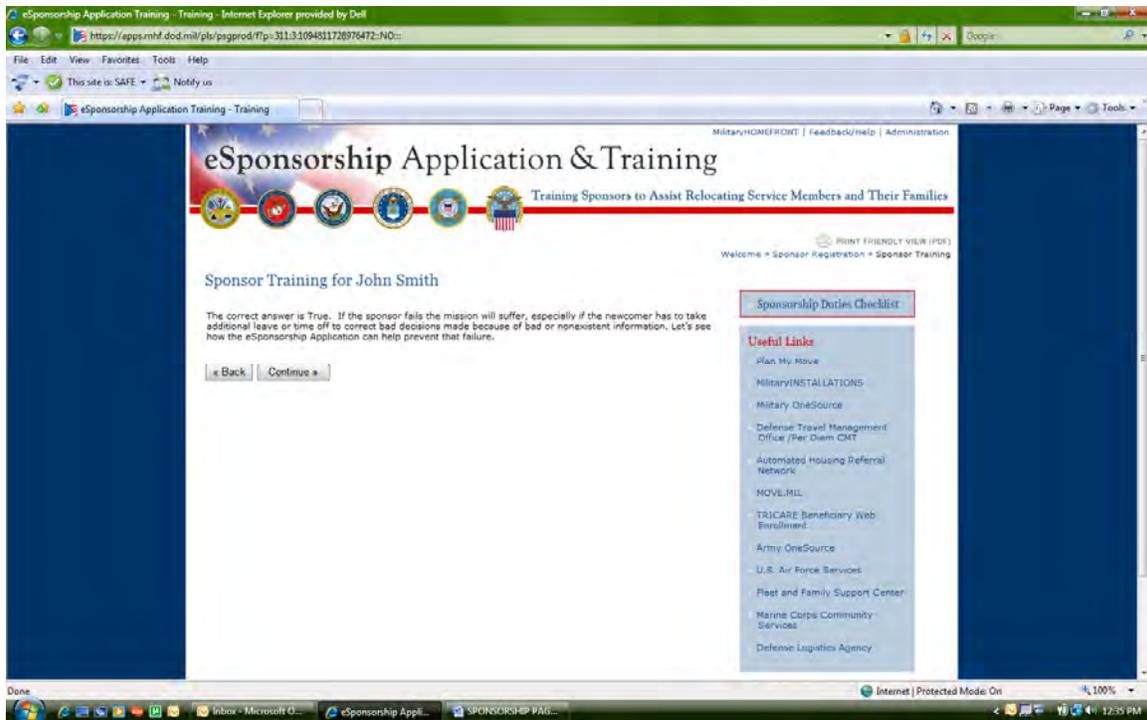
First-time users of eSAT are required to complete the Sponsor Training module before they can proceed with sponsorship of a newcomer. The eSAT training module is a self-paced, self-correcting training function that consists of 15 questions and takes about 20 minutes to complete. On each page, the new sponsor is provided with important information about the sponsorship program. At the bottom of most pages, the user is asked a question about what they just read and are given a set of possible answers.



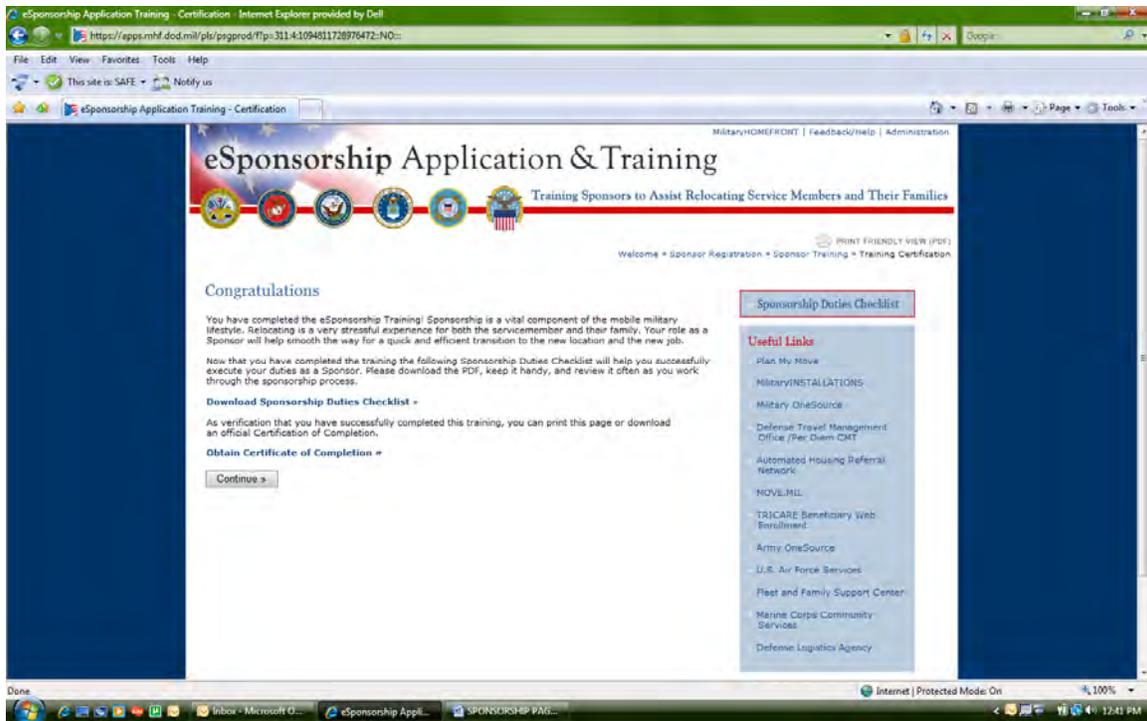
The new user selects an answer and then selects **Continue** to go to the next page. If the user selects the right answer they are told so and **Continue** on to the next question.



If they select an incorrect answer, the correct information is reinforced and then they may go **Back** to the previous question or **Continue** with the training.



When the new sponsor has completed the eSAT training module, they will see the Congratulations page and be able to download a copy of the **Sponsorship Duties Checklist** and obtain their **Certificate of Completion**.



The newly trained sponsor may close eSAT at this point. If they have a newcomer assigned, they may **Continue** to the eSAT Sponsorship Processes.

## 4.0 Sponsorship Processes

Returning, trained sponsors log into the eSAT website, and navigate to the Sponsor Registration page. Trained sponsors will see the date on which they completed their eSAT training.

Information for you and use it when creating communications with transferees.

Fields marked with an asterisk \* must be completed.

When you have completed updating the form, select the "Create/Update Registration" button at the bottom of the page to save your changes. Select the "Create Transferee Record" to begin the sponsorship process. Select "List Transferees" to go directly to your management page.

**Training Completed on** 03/29/2010

\* **First Name** John

\* **Last Name** Smith

\* **Service** Army

**Military Status** Active Duty

\* **Employed by DoD Agency**  Military  DoD Civilian

\* **Rank/Rate/CS Grade** Capt/O-3  
Fill in your Rank or your GS designation.

\* **Installation** Fort Belvoir

\* **Unit** JPPSO-Washington Area

\* **Email Address** robert.e.trempa@verizon.net  
Your official .mil email address

**Alt Email Address**  
Personal email address

\* **Work Phone** 703-250-1850

**DSN Phone**

**Fax Number**

**Marital Status**  Married  Single

**Family Status**  Working Spouse  Military Spouse  
 Single Parent  School-aged Children  
 Special Needs Family Member

**Useful Links**

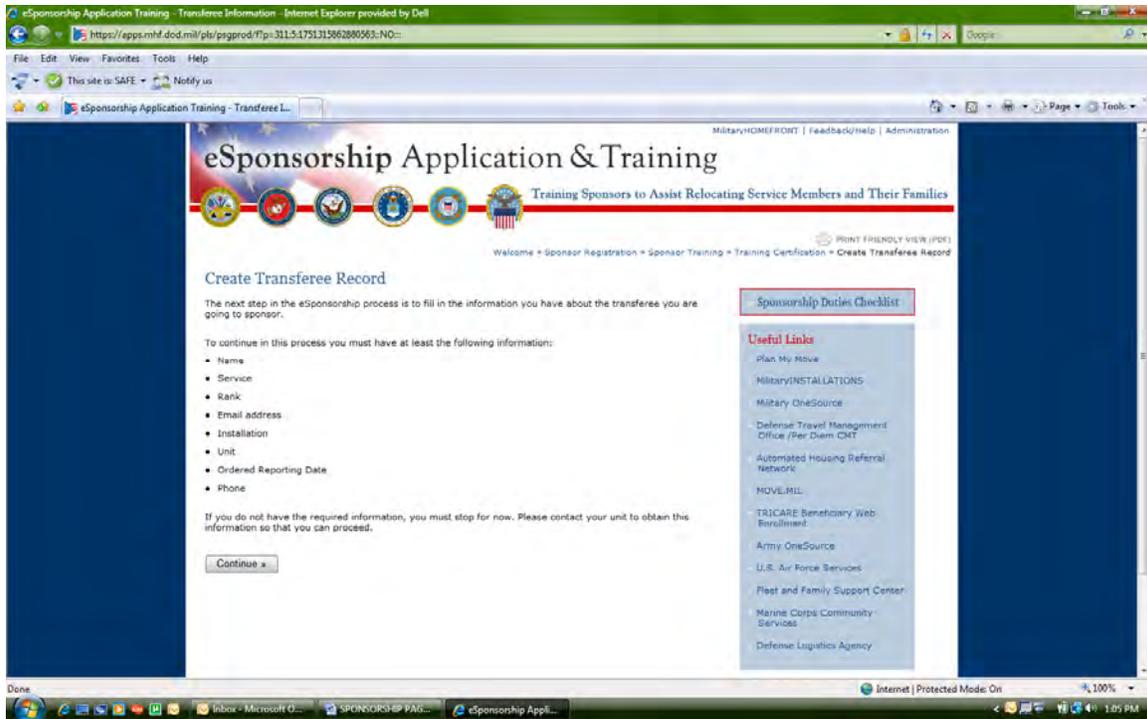
- Plan My Move
- MilitaryINSTALLATIONS
- Military OneSource
- Defense Travel Management Office /Per Diem CMT
- Automated Housing Referral Network
- MOVE.MIL
- TRICARE Beneficiary Web Enrollment
- Army OneSource
- U.S. Air Force Services
- Fleet and Family Support Center
- Marine Corps Community Services
- Defense Logistics Agency

Returning, trained sponsors may update their registration information by selecting **Create/Update Registration** or proceed directly to start the sponsorship process by selecting **Create Transferee Record**.

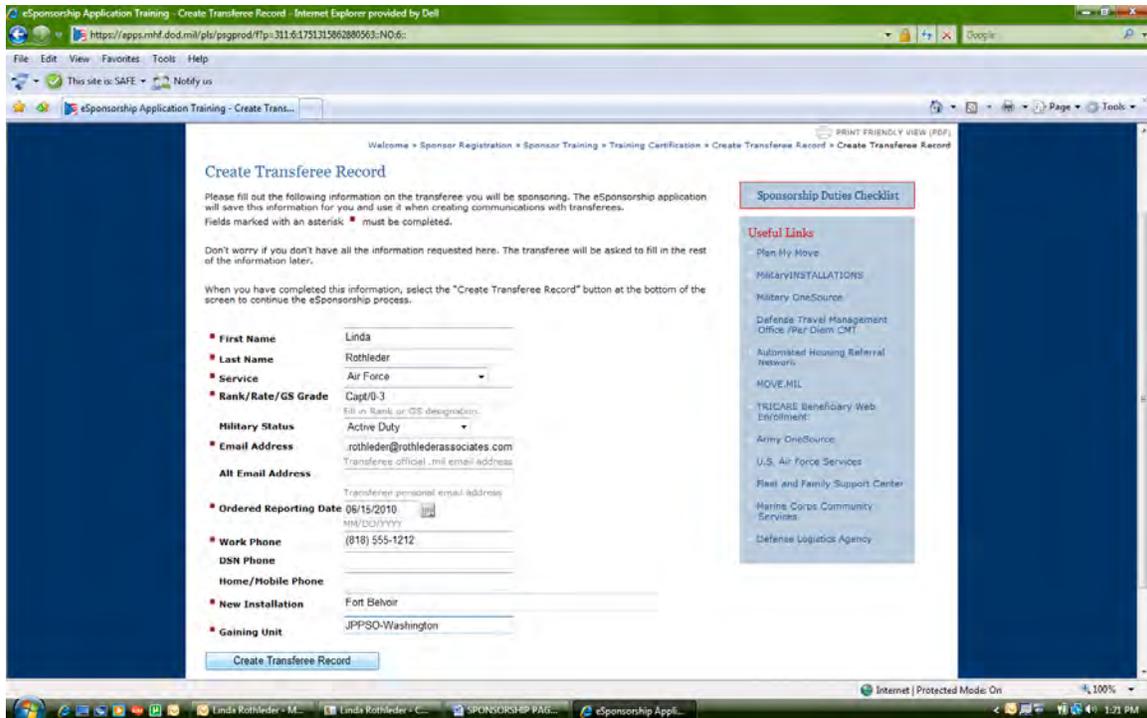
### 4.1 Registering Newcomers in eSAT

#### 4.1.1 Create Transferee Record

The first step in registering a newcomer in eSAT is for the sponsor to create the Transferee Record. The sponsor must be given certain basic information about the newcomer prior to starting this process. At a minimum the sponsor must have a good email address for the newcomer along with the newcomer's name and phone number. Other required information includes the newcomer's service, rank, ordered reporting date, new installation, and gaining unit.



If the sponsor does not have the minimum required information they must stop and get this information from their unit before proceeding. If the sponsor has all the required information they may **Continue**.



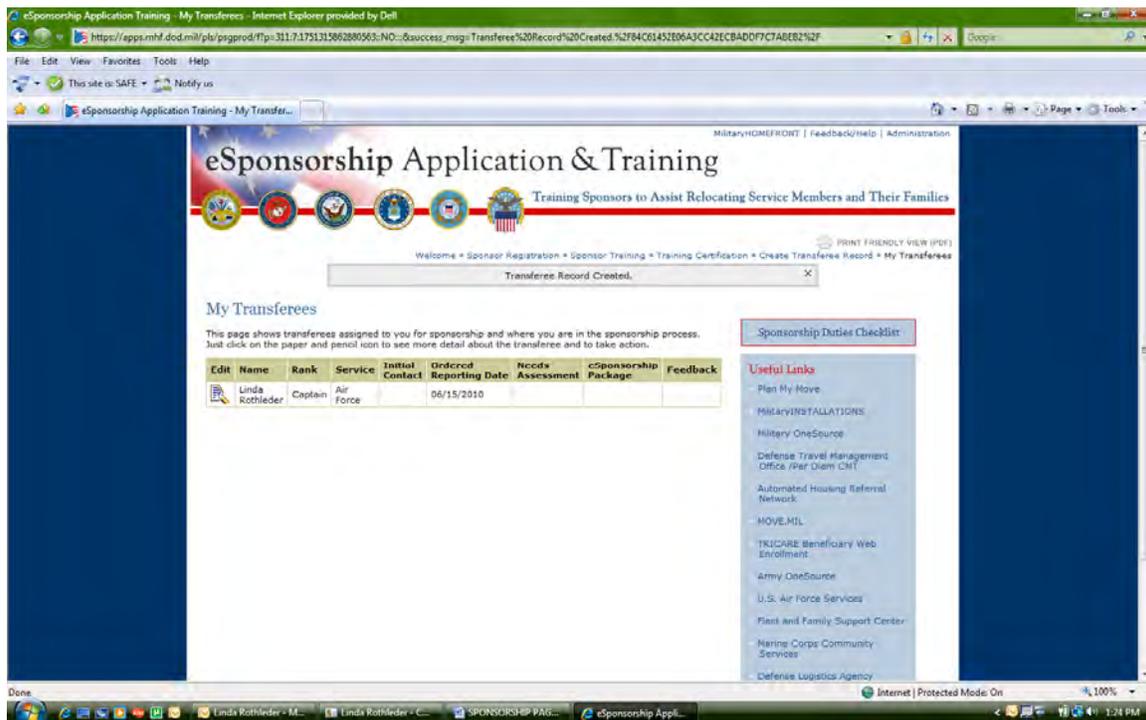
Note: When you start entering the new installation, a drop down will appear with standard installation names. The sponsor should select the installation name from the dropdown if at all possible. If not, you can type into this field the name of an installation which may not be in our database. Gaining Unit is a

“free form” fill-in. Use a common designation for the Gaining Unit that will be understood on your installation.

The sponsor fills in the information on the Create Transferee Record page and then, when complete, selects **Create Transferee Record**.

#### 4.1.2 My Transferees Page

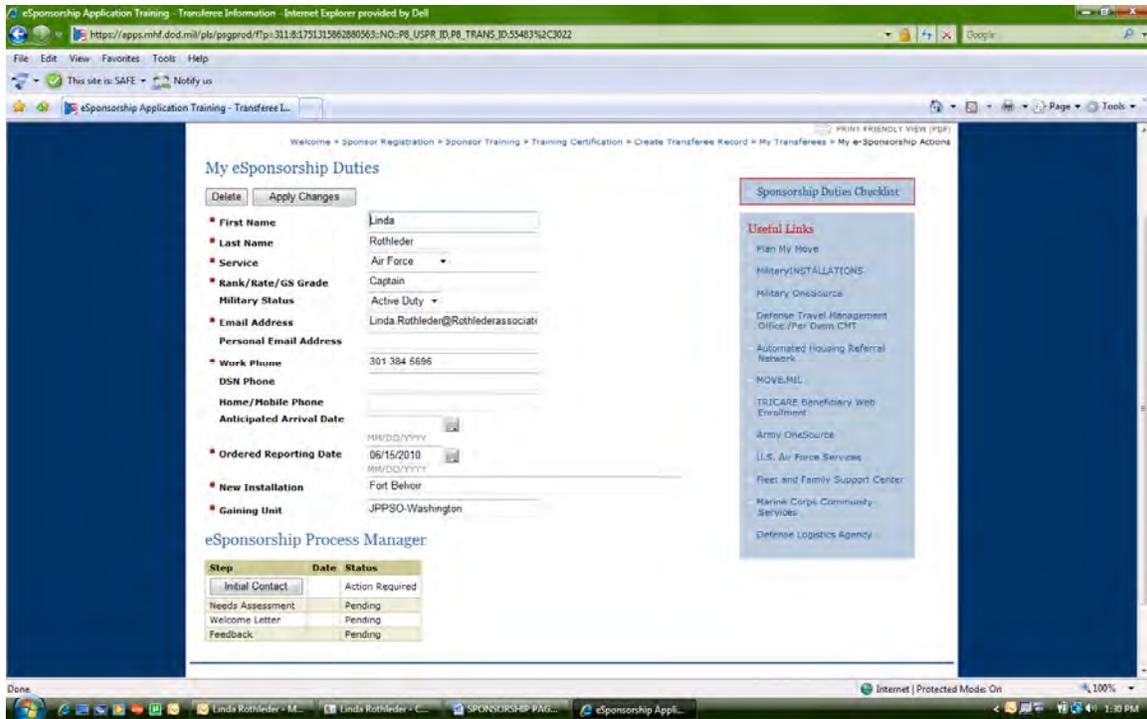
When completed the sponsor will be taken to the My Transferees page and shown a listing of all transferees assigned to them for sponsorship. This page will show where they are in the eSAT sponsorship process. As a step in the sponsorship process is completed, eSAT will enter the date that the action was completed.



To see more detail on an assigned newcomer and work on the next step in their sponsorship process, just select the icon in the **Edit** column.

#### 4.1.3 My eSponsorship Duties Page

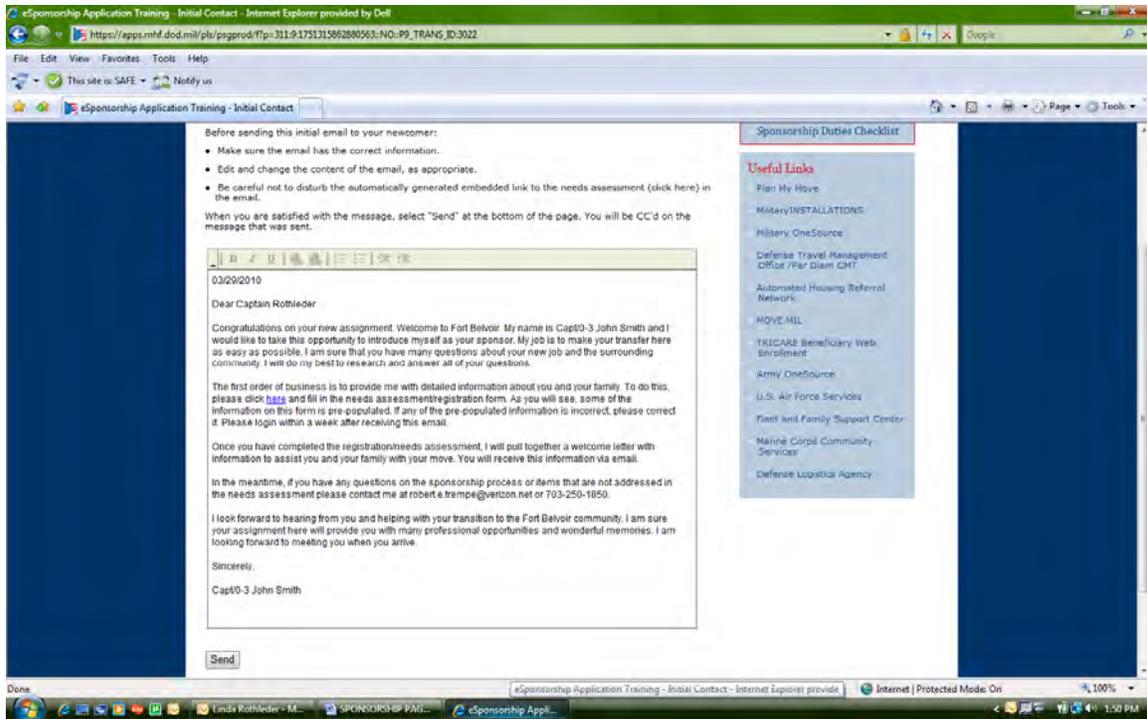
Selecting a transferee record from the My Transferees page will bring the sponsor to the My eSponsorship Page for that transferee. From this page the sponsor may update newcomer contact information if necessary. The My eSponsorship Duties page also includes the eSponsorship Process Manager at the bottom of this page. The eSponsorship Process Manager tells the sponsor exactly where they are in the sponsorship process, what action is needed next, and allows the sponsor to initiate the next required action.



In this view of My eSponsorship Duties page, the eSponsorship Process Manager is telling the sponsor that they are required to make **Initial Contact** with the newcomer.

## 4.2 Initial Contact

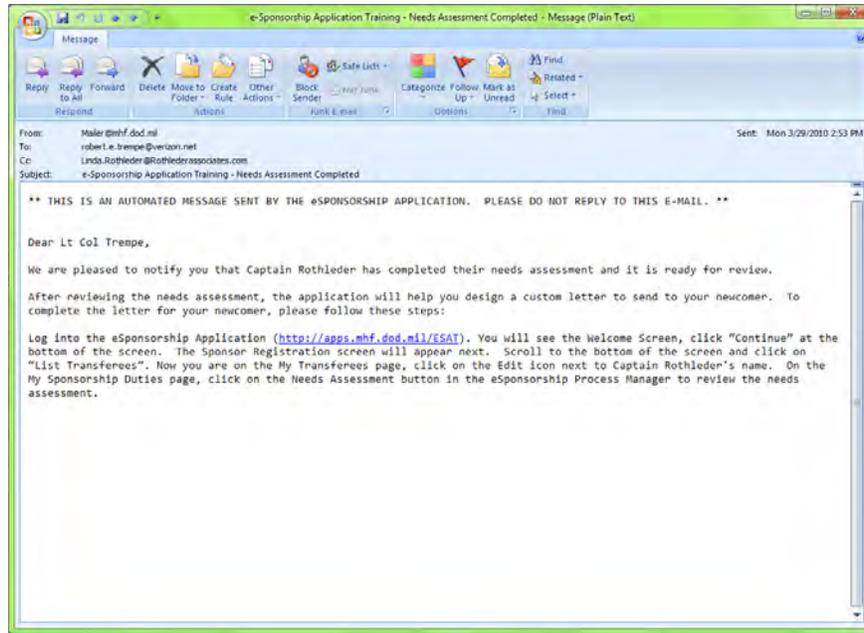
Selecting **Initial Contact** from the eSponsorship Process Manager creates and presents the Initial Contact e-mail for the sponsor's review. The sponsor should read over the e-mail and make sure that all contact information is correct.



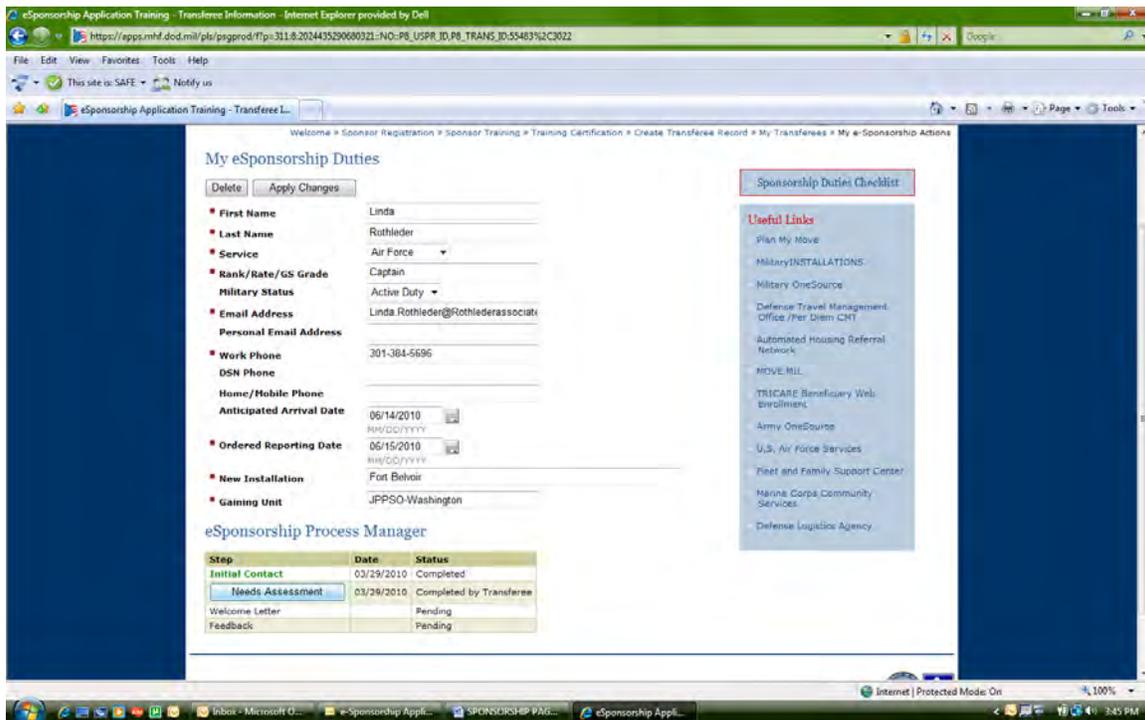
While the format of this e-mail has been approved by DoD and the Services, the sponsor should edit or add important information. But remember that this is only the initial contact and that you will be sending a detailed Welcome Letter/eSponsorship Package as soon as the newcomer completes their “Needs Assessment.”

### 4.3 Reviewing the Newcomers Needs Assessment

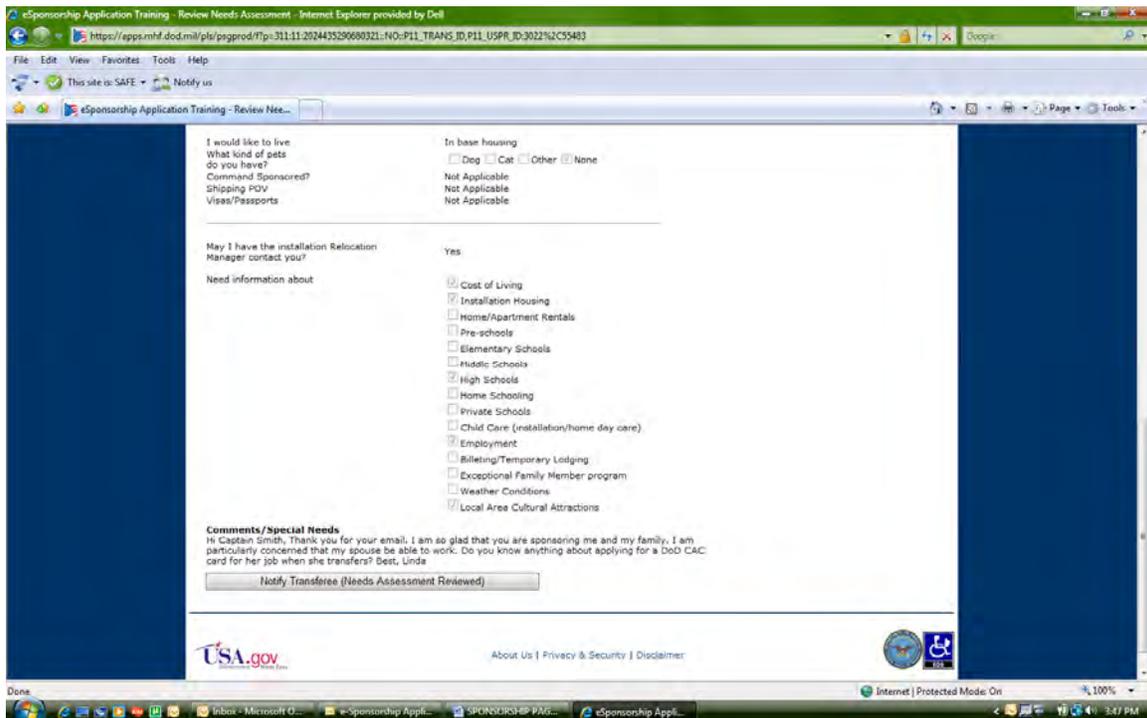
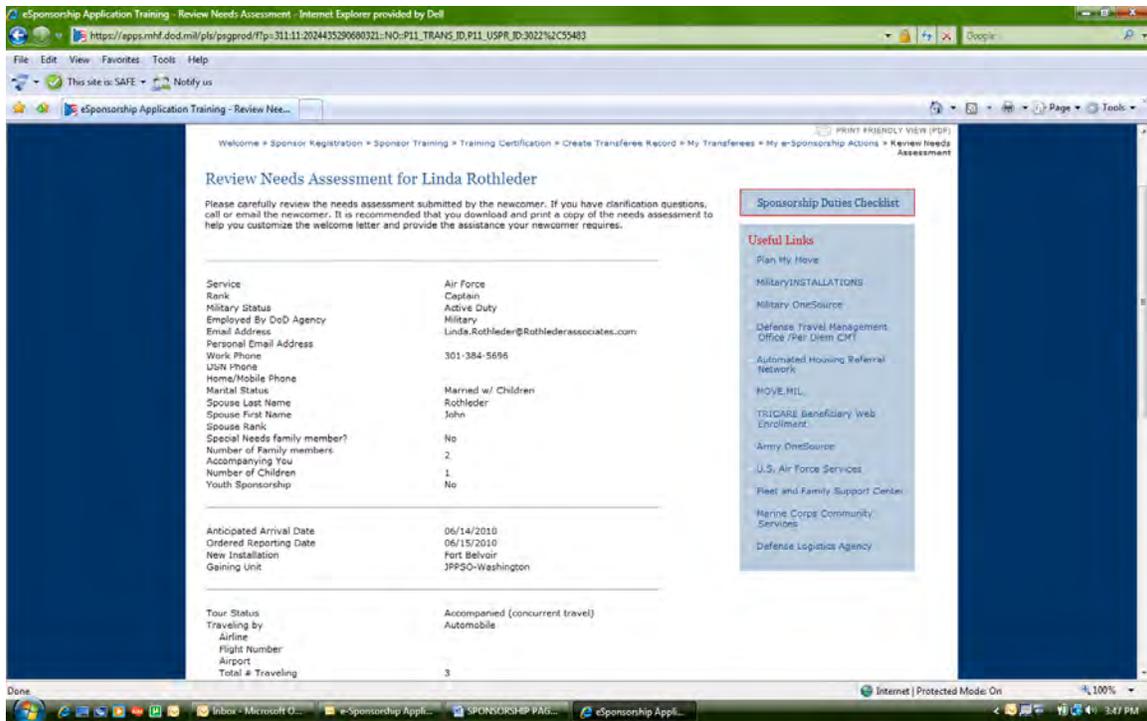
When the newcomer has completed and submitted their needs assessment through eSAT, the eSAT system notifies the sponsor via e-mail that it is ready for review.



The sponsor logs into eSAT, goes to the My Transferees page and selects the record for the newcomer whose needs assessment they want to review.



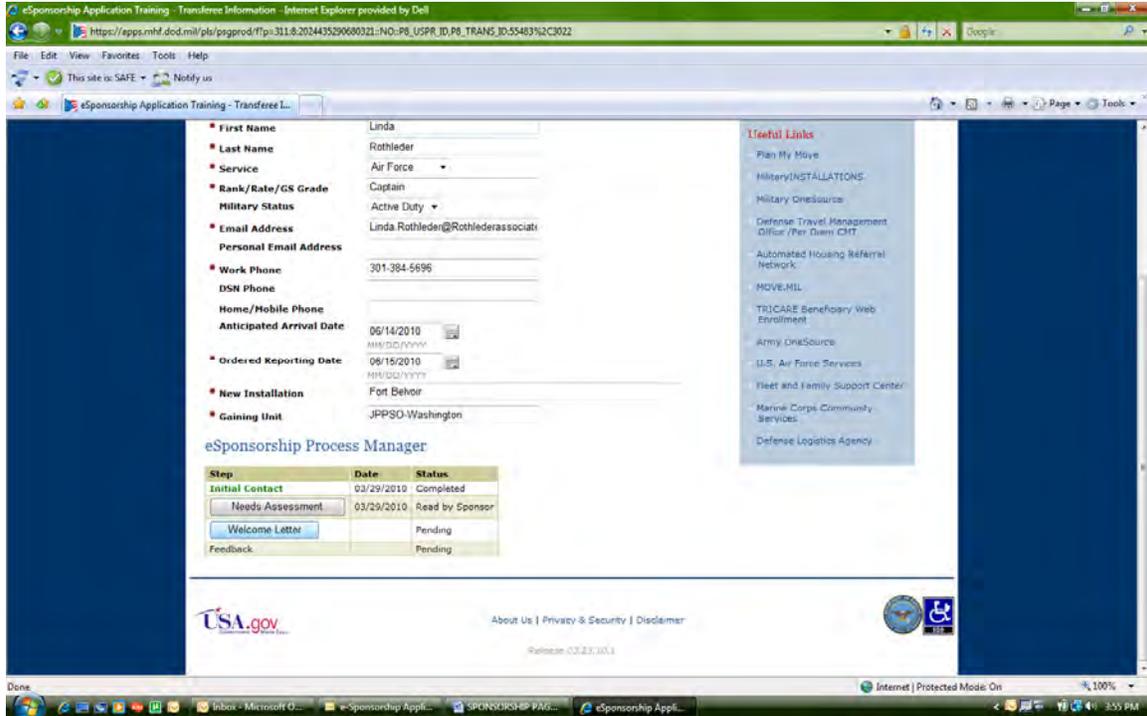
From the updated eSponsorship Process Manager, the sponsor selects **Needs Assessment** to review.



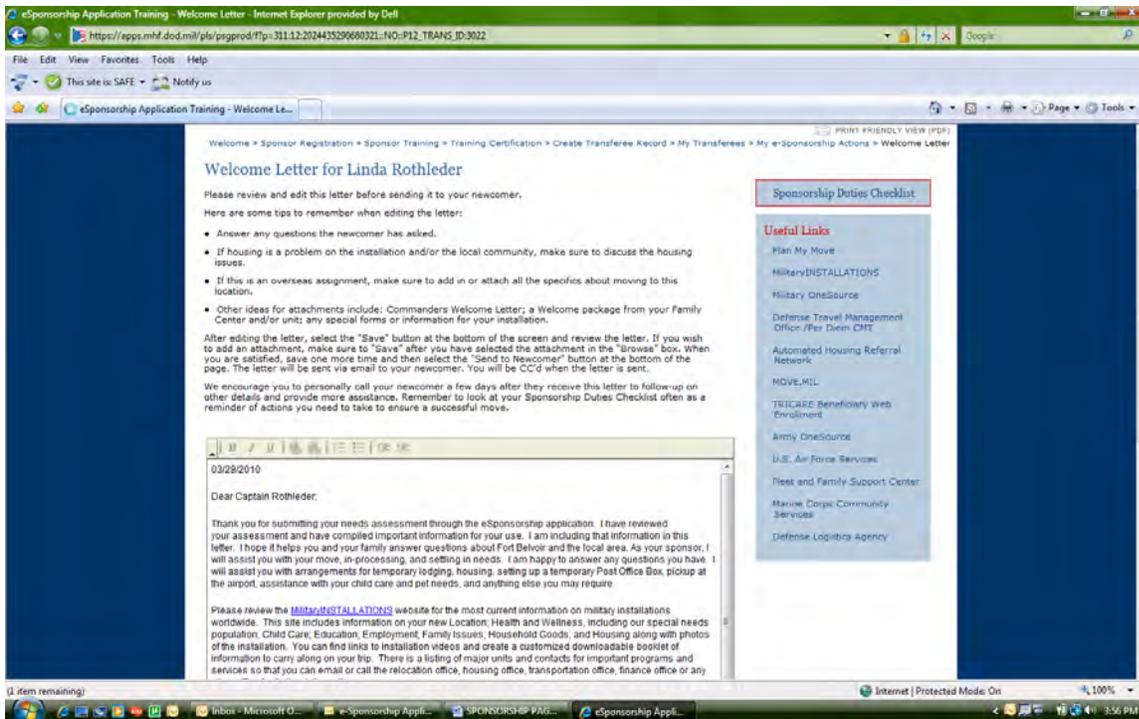
The sponsor reviews the needs assessment submitted by the newcomer in eSAT. Once this review is complete, the sponsor selects **Notify Transferee (Needs Assessment Complete)** to let the newcomer know that their information has been reviewed.

## 4.4 Generating the Welcome Letter/eSponsorship Package

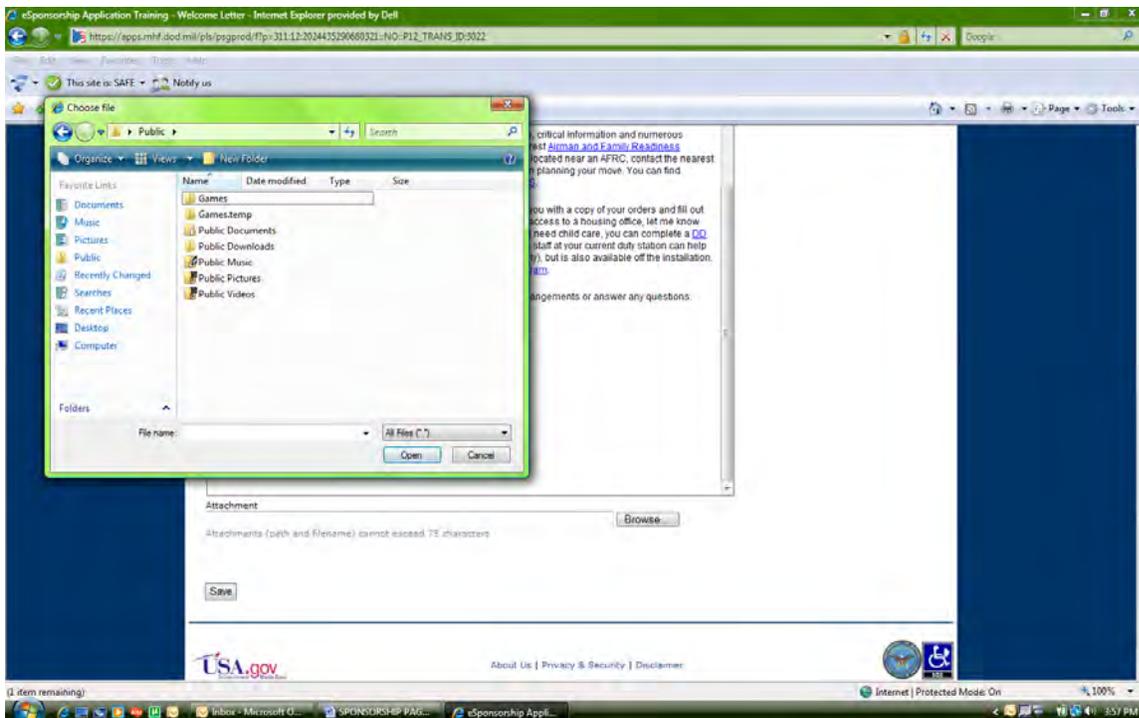
Once the sponsor has reviewed the newcomers Needs Assessment, they can generate the Welcome Letter/eSponsorship Package. To do this, the sponsor selects **Welcome Letter** from the eSponsorship Process Manager.



This generates the standard Welcome Letter which includes links to important information from official DoD and Service resources. The Welcome Letters are specific to the type of family (married, single, children etc.), Branch of Service and destination for the move, domestic or overseas.

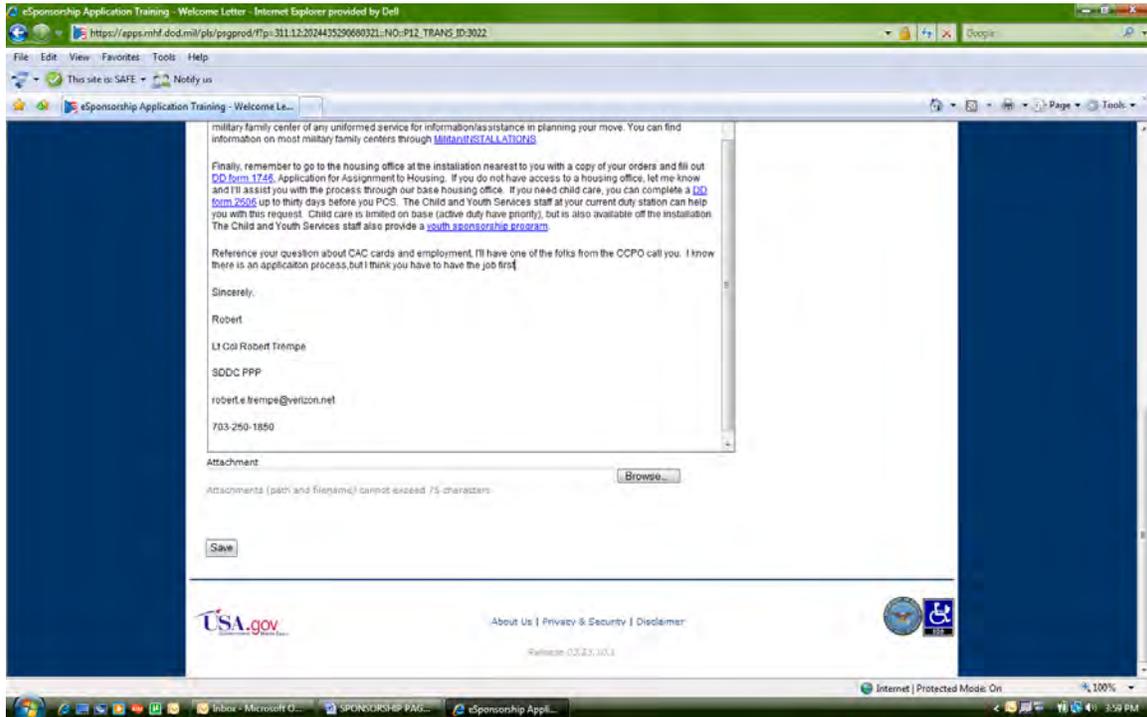


While the standard Welcome Letter covers all the basics, **The Welcome Letter should always be personalized for the newcomer based on the needs assessment.** The sponsor is encouraged to add relevant attachments by using the **Browse** button at the bottom of the letter.



Tip: Attachments can be in any file format, but if you wish to send more than one attachment, it is recommended that you PDF the files or send them as a zip file.

Once the Welcome Letter is completed to the sponsor's satisfaction, they **Save** the letter and then click **Send to Newcomer** to dispatch the completed Welcome Letter.

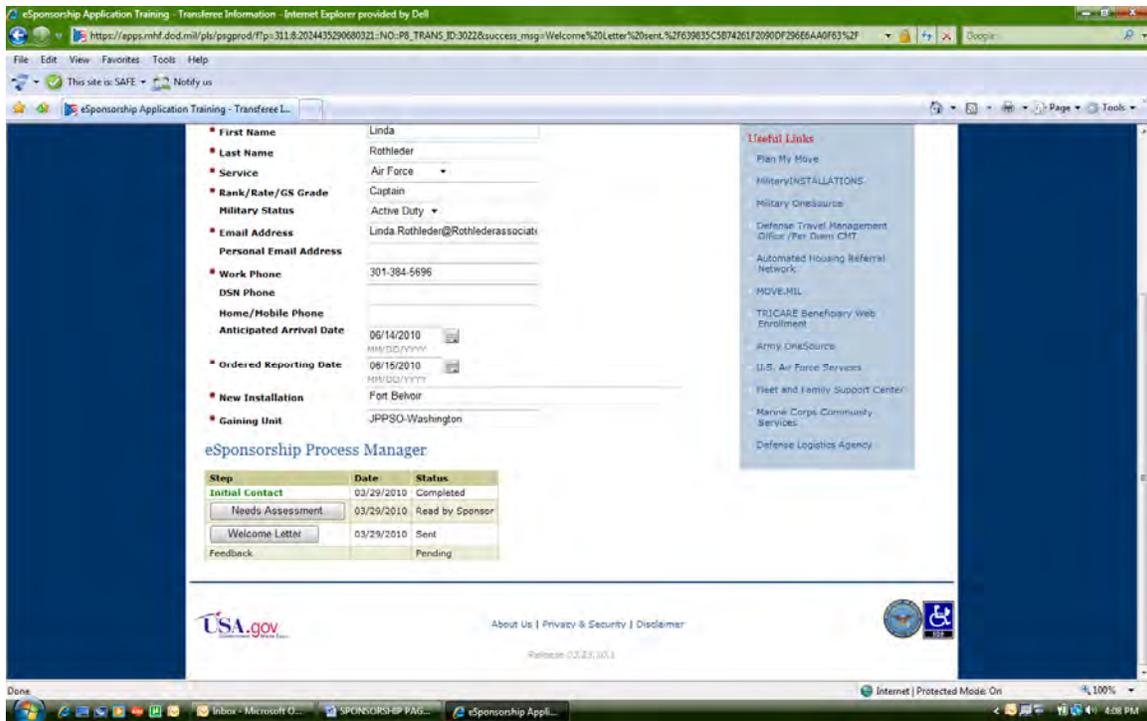


Tip: The sponsor can save the Welcome Letter without sending it, coming back to complete it or add important information requested by the newcomer.

## 4.5 Following Through

Once the Welcome Letter is sent, eSAT continues to provide important support to both the sponsor and newcomer. eSAT provides a single place to store sponsorship information throughout the process. While this will not take the place of direct phone calls and e-mails it can be an aide to the sponsor and newcomer, especially when distance and time zones make direct communications more difficult.

The newcomer can use the link in the Initial Contact e-mail to update the Needs Assessment. This can be of particular value to make a record of port call location and date and updated arrival information during the sponsorship process. The sponsor continues to have access to all of the newcomer's information through the eSponsorship Process Manager. The system automatically notifies the sponsor whenever a change has been made to the records in the application.



## 4.6 Completing the Sponsorship Feedback

Once the Welcome Home is sent, the Feedback link will become active in the eSponsorship Process Manager. The sponsor should open and complete this short questionnaire as soon as possible after the newcomer arrives and settles-in.

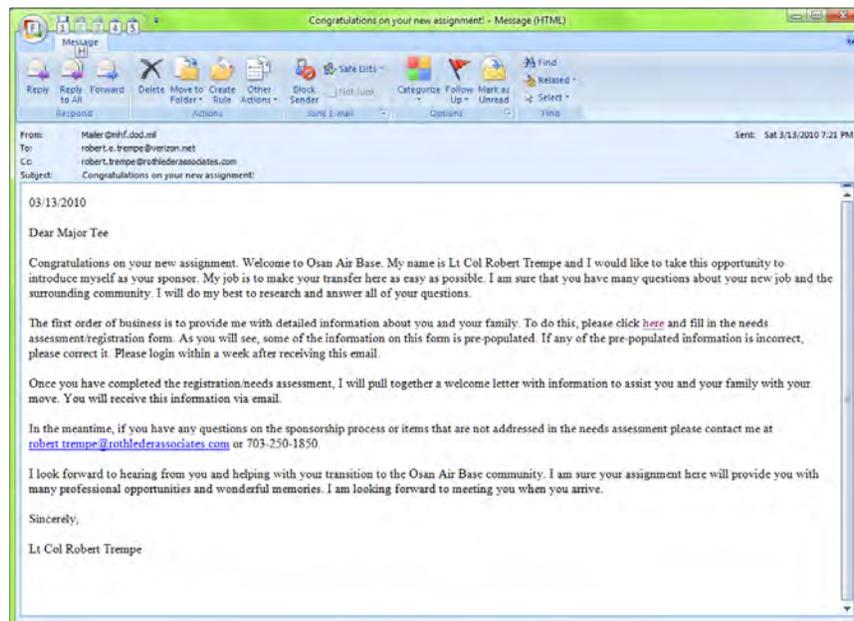
The sponsor will be sent a reminder e-mail 30 days after your newcomer's Anticipated Arrival Date. The sponsor is required to complete this questionnaire in order to complete the eSponsorship Process within the next 5 days.

## 5.0 Newcomer Processes

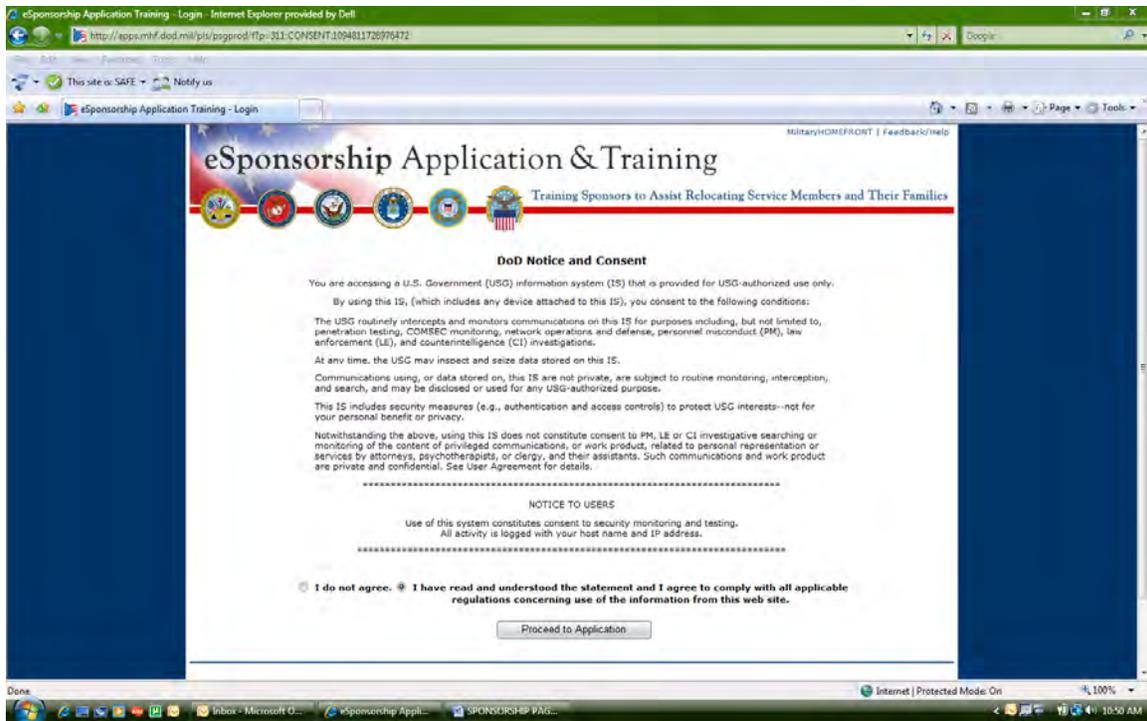
The newcomer's process begins when they receive the initial contact e-mail. Once this e-mail is received, the newcomer will be able to complete their registration and needs assessment, and will soon thereafter receive their Welcome Letter and eSponsorship Package.

### 5.1 Responding to the Initial Contact

The newcomer receives an initial contact e-mail "Congratulations on your New Assignment" from the sponsor. In that e-mail is a secure link that takes the newcomer to the eSAT application notice and consent page.



**Tip:** The newcomer should save and retain this e-mail throughout the sponsorship process as the link remains their way to access and update the Needs Assessment.



Note: The newcomer must access this link from a CAC enabled terminal. The link will take the newcomer to the eSAT Notice and Consent page. The newcomer must indicate their consent and then select Proceed to Application.

## 5.2 Completing the Transferee Registration/Needs Assessment

The newcomer is taken to the Transferee Registration/Needs Assessment page of the eSAT website. The information already filled in by the sponsor shows on this page.

The screenshot displays the 'eSponsorship Application' website in Internet Explorer. The main heading is 'eSponsorship Application' with the tagline 'Connecting Relocating Service Members and Sponsors'. Below this is the 'Transferee Registration/Needs Assessment' section. A 'Save' button is located at the top left of the form. The form fields are as follows:

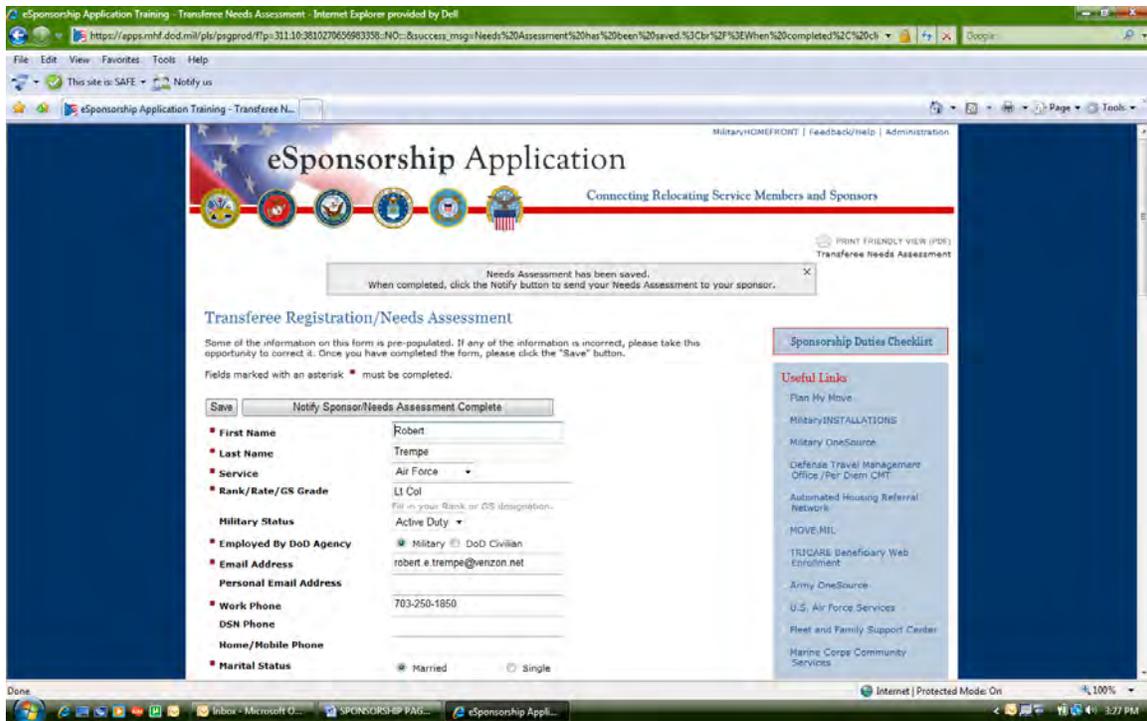
- First Name:** Robert
- Last Name:** Trempe
- Service:** Air Force
- Rank/Rate/GS Grade:** Lt Col
- Military Status:** Active Duty
- Employed By DoD Agency:** Military
- Email Address:** robert.trempe@verizon.net
- Work Phone:** 703-250-1850
- Marital Status:** Married

On the right side of the page, there is a 'Sponsorship Duties Checklist' and a 'Useful Links' section containing links such as 'Plan My Move', 'MilitaryINSTALLATIONS', 'Military OneSource', 'Defense Travel Management Office /Per Diem CMT', 'Automated Housing Referral Network', 'MOVE.MIL', 'TRICARE Beneficiary Web Enrollment', 'Army OneSource', 'U.S. Air Force Services', 'Fleet and Family Support Center', 'Marine Corps Community Services', and 'Defense Logistics Agency'.

The newcomer updates the registration information and then completes the Needs Assessment on the same page. The required information provides the sponsor with information on the newcomer's family, their travel plans, information about their tour and their preparations for it. The newcomer also gets to indicate what specific information they want right away. There is even an area to add a note or comments.

### 5.3 Sending the Completed Needs Assessment

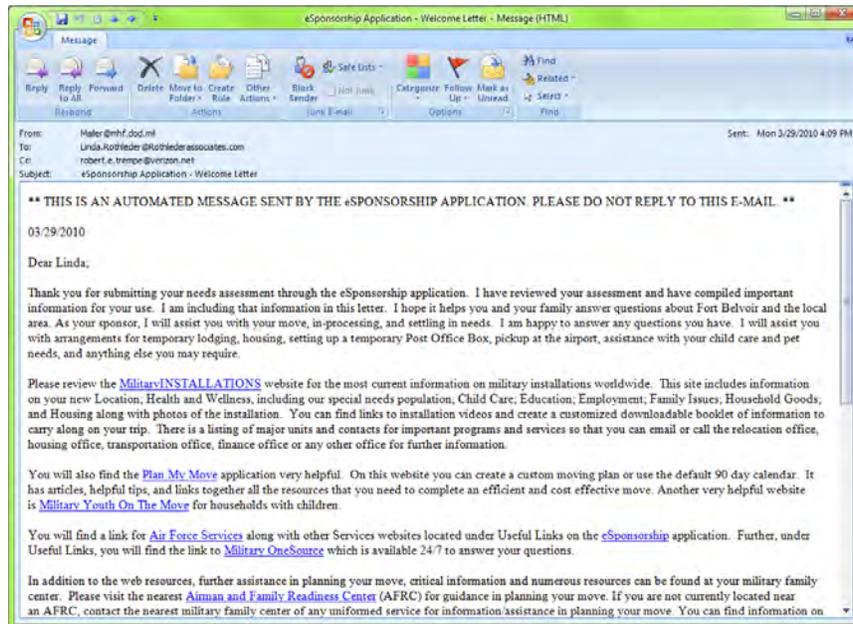
Once the newcomer has completed the needs assessment, they click **Save** at the top of the page. This saves the completed Needs Assessment to the eSAT database. If needed, the newcomer can exit and return to The Transferee Registration/Needs Assessment page (using the link in the original e-mail) at a later date if they need to add or change information. At this point the newcomer must **Notify Sponsor/Needs Assessment Complete**. This will send an automated e-mail to the sponsor that the needs assessment is ready for review.



## 5.4 Responding to the Welcome Letter/eSponsorship Package

Once the sponsor has sent the Welcome Letter, the newcomer will receive the letter via e-mail.

Tip: It will not be a link but a direct email that should be kept in the newcomer's mailbox as they travel to their new location.



The newcomer can use the links in the Welcome Letter to get to the most current and trusted relocation information for their new installation. This information is however, just the beginning of the 2-way communications process that makes for successful sponsorship.

## **5.5 Staying in Touch**

Once the Welcome Letter is sent, eSAT continues to provide important support to both the sponsor and newcomer. eSAT provides a single place to store sponsorship information throughout the process. While this will not take the place of direct phone calls and e-mails it can be an aide to the sponsor and newcomer, especially when distance and time zones make direct communications more difficult.

The newcomer can use the link in the Welcome Letter to update the Needs Assessment. This can be of particular value to make a record of port call and updated arrival information during the sponsorship process. The sponsor continues to have access to all of the newcomer's information through the eSponsorship Process Manager.

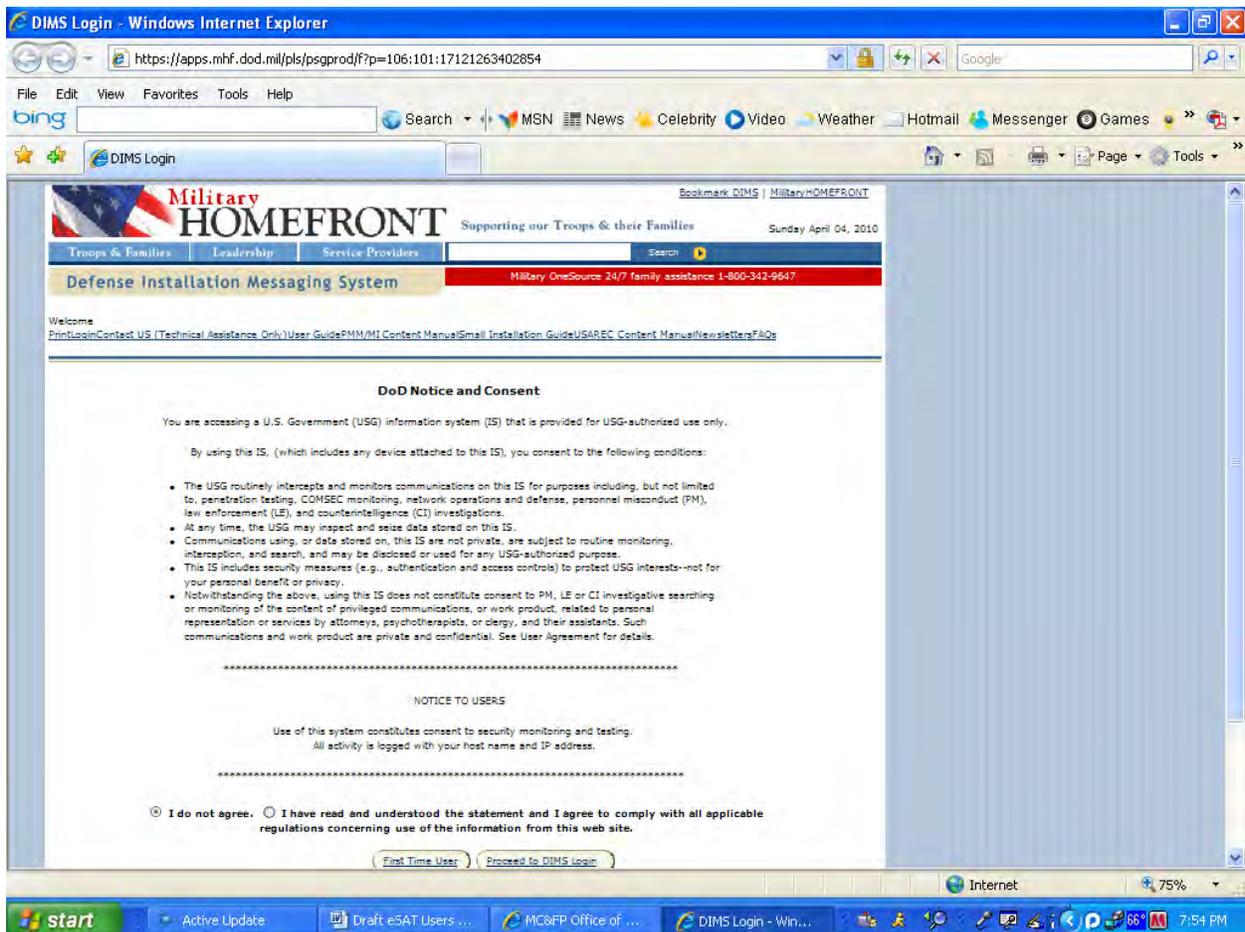
## **5.6 Completing the Sponsorship Feedback**

At 30 days past the newcomer's Anticipated Arrival Date in eSAT, the newcomer is sent an e-mail to both their primary and (if provided) their backup e-mail addresses. This e-mail contains a link to an online feedback questionnaire. The newcomer is required to complete this questionnaire within 5 days in order to complete the eSponsorship Process.

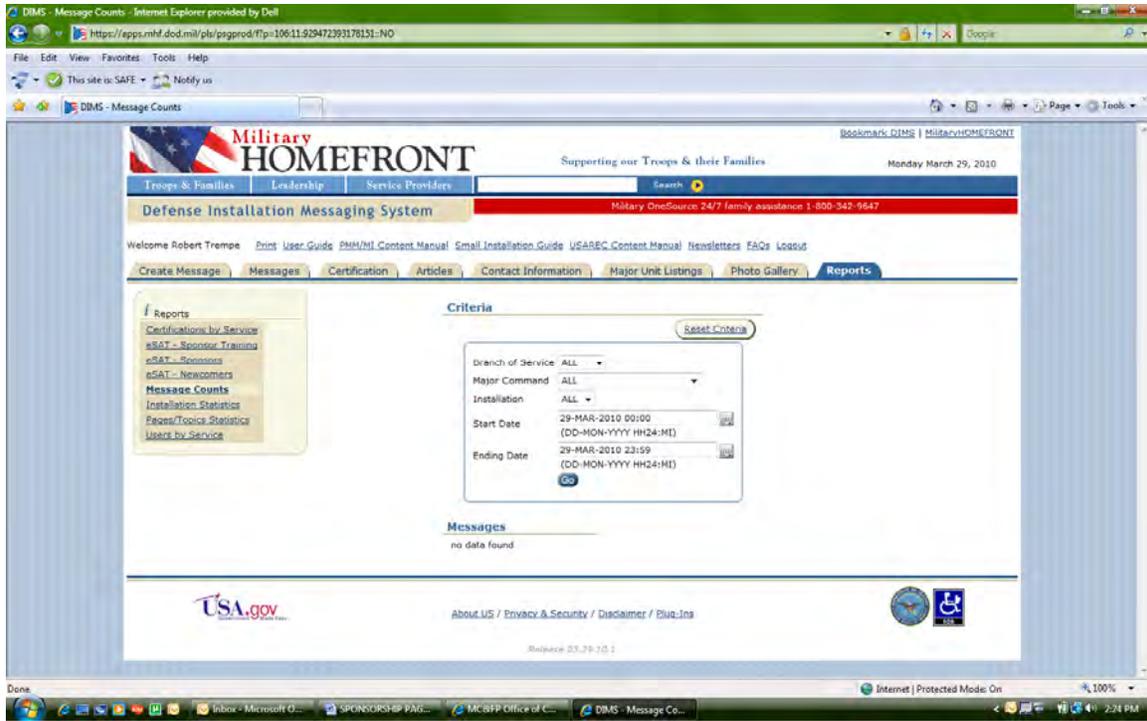
## 6.0 Management and Reporting Processes

### 6.1 Background and Overview

eSAT Management and Reporting processes are supported through a separate application called DIMS—the Defense Installations Messaging System (<http://apps.mhf.dod.mil/dims>). Authorized users access this URL when they want to check the eSAT reports. New users requiring access must apply with their CAC and follow the First Time Users instructions. They must be approved before they can access DIMS and the eSAT reports.



After logging in to DIMS, go to the **Reports tab**. Available eSAT Management Reports are available from the **Reports menu** on the left side of the page.



## 6.2 Available Reports

The following three eSAT reports are currently available through DIMS. Note that these reports include e-mail and phone contact information and must be treated as **For Official Use Only**.

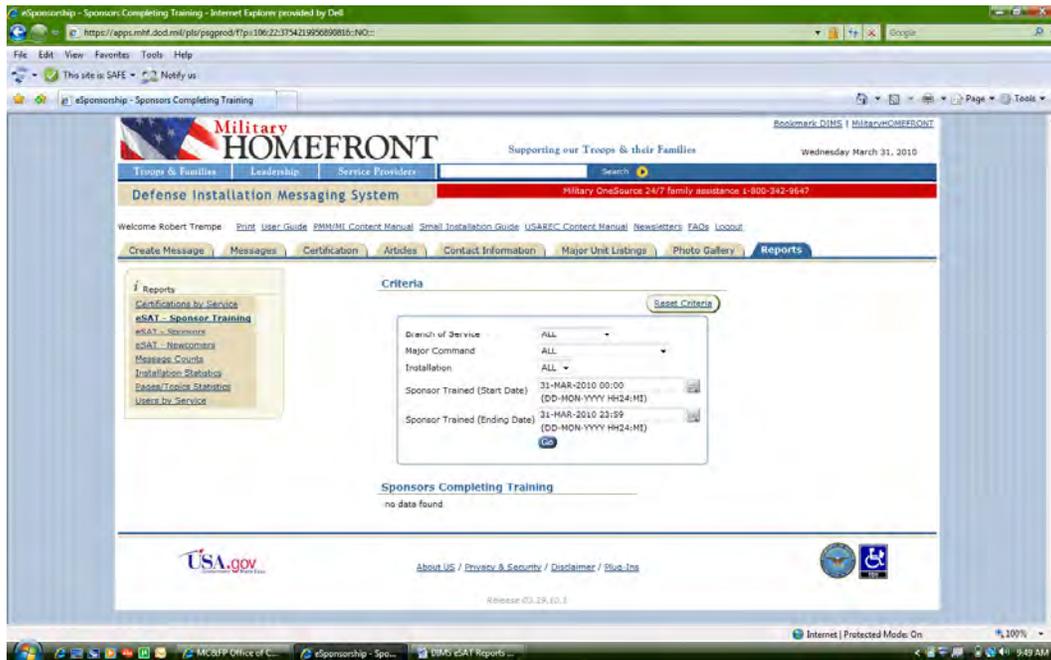
The following table summarizes the available eSAT reports. Each is described in more detail below

Report Name (User Guide Reference)	General Contents	Specific Contents
eSAT Sponsor Training (User Guide 6.2.1)	Sponsors completing training by Branch of Service	Initial report shows all installations and total numbers of trained sponsors by installation. Installation specific links in body of report reset report criteria for that installation. Selecting Go brings up eSAT Sponsors report.
eSAT Sponsors (User Guide 6.2.2)	Report of sponsor information by Branch of Service	Report shows sponsor detail, and may be sorted on <b>Service, Installation Last Name and First Name</b> . A link in the <b># of Newcomers Assigned</b> column resets report criteria for the specific sponsor. Selecting Go brings up the eSAT Newcomers report for that individual sponsor.
eSAT Newcomers (User Guide 6.2.3)	Report of Newcomers assigned. Report can be tailored on e-mail address and Sponsor Name	Report associates all registered newcomers with their sponsors and show progress of each sponsorship action.

## 6.2.1 eSAT Sponsor Training Report

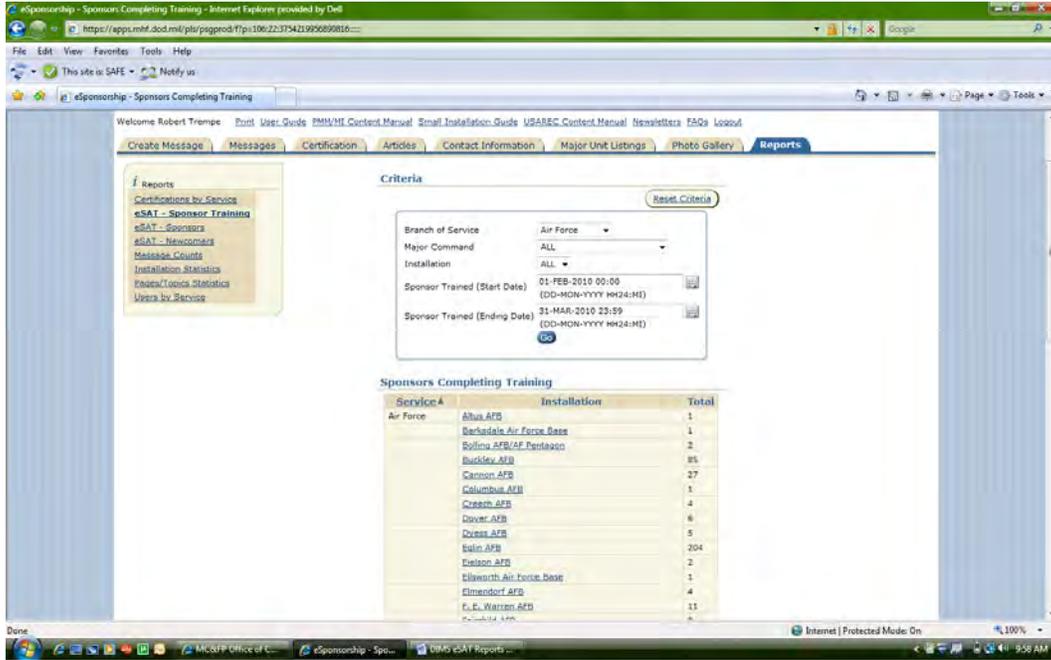
### 6.2.1.1 Generating the eSAT Sponsor Training Report

Select **eSAT – Sponsor Training** from the **Reports** menu. In the **Criteria** you must select a **Branch of Service** and the **Sponsor Trained (Start Date)** and **Sponsor Trained (Ending Date)** range. Select **Go** to generate the report.



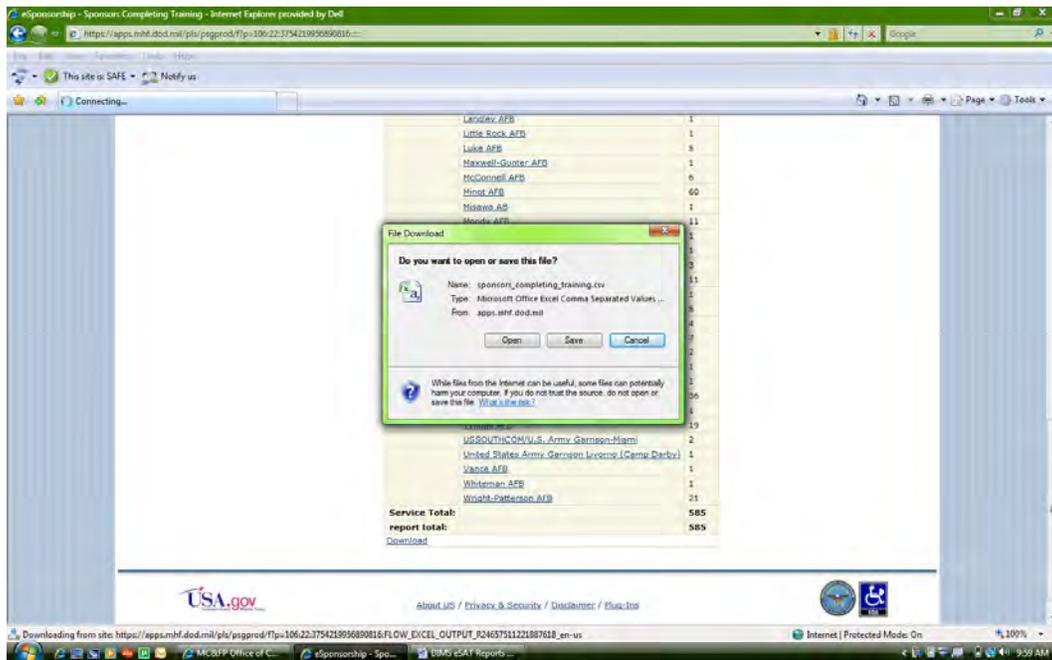
### 6.2.1.2 eSAT Sponsor Training Report Description

Initially, the eSAT Sponsor Training Report provides a listing of each installation associated with the selected Branch of Service and the total number of Sponsors trained at each installation.



A Service Total is provided at the bottom of the report. A **Download** link allows the user to download a comma separated values (\*.csv) version of the report that can be opened in Microsoft Excel.



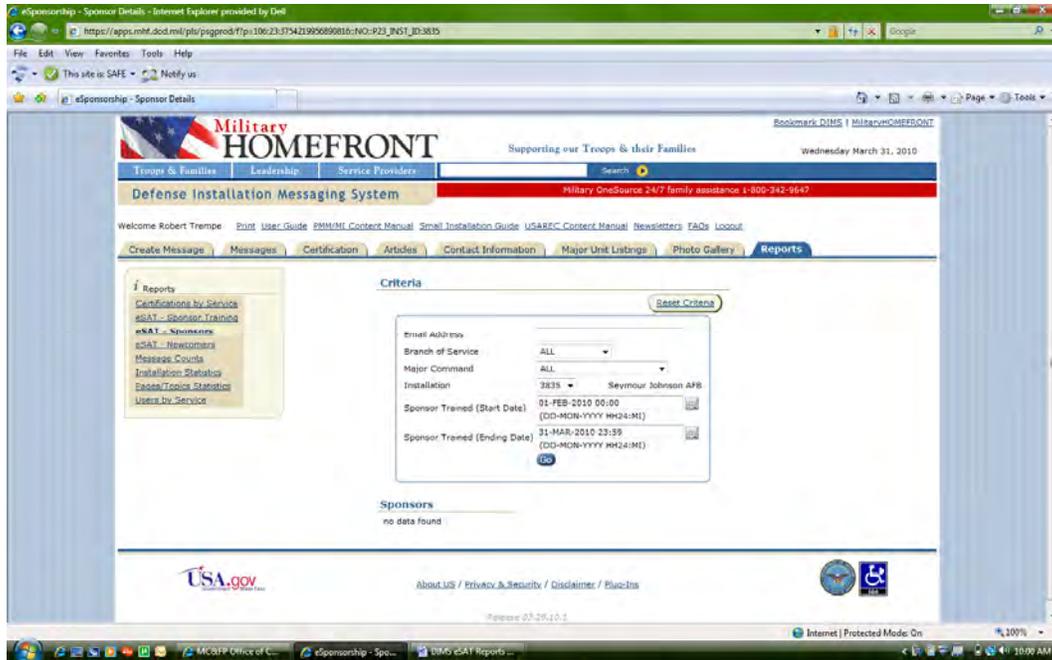


### 6.2.1.3 Drilling Down to Installation-Level Data

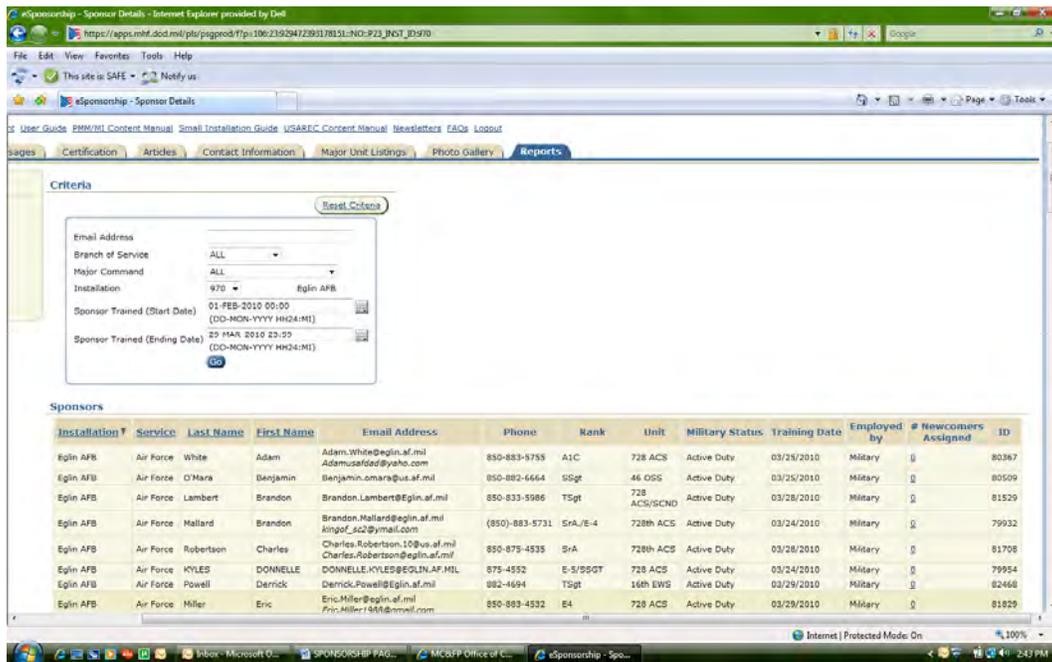
Select a link in the initial eSAT Sponsor Training Report to see installation-level detail



This will bring up the Reports menu for the eSAT **Sponsors** Report with the Criteria pre-set for the requested installation information.



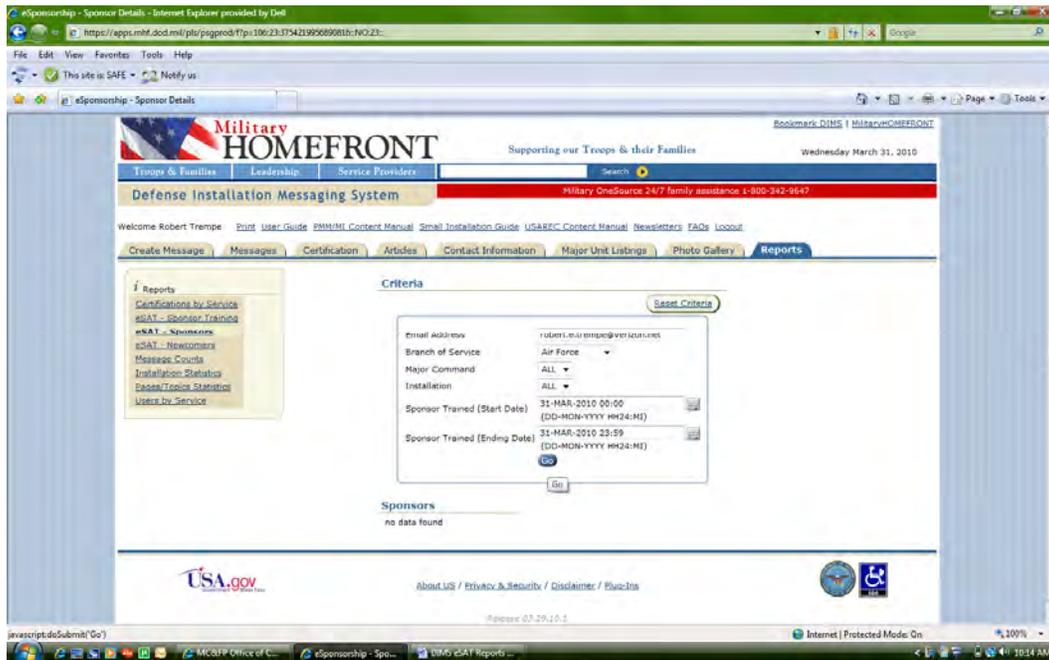
Select **Go** to create a eSAT Sponsors report that shows all sponsors registered at the selected installation. This report is described in more detail below.



## 6.2.2 eSAT Sponsors Report

### 6.2.2.1 Generating the eSAT Sponsors Report

Select **eSAT Sponsors** from the **Reports** menu. In the Criteria enter a sponsor's **E-mail Address** and **Branch of Service** and select **Go**. Note that you must specify a **Sponsor Trained (Start Date)** and **Sponsor Trained (Ending Date)** in order for the report to generate correctly.

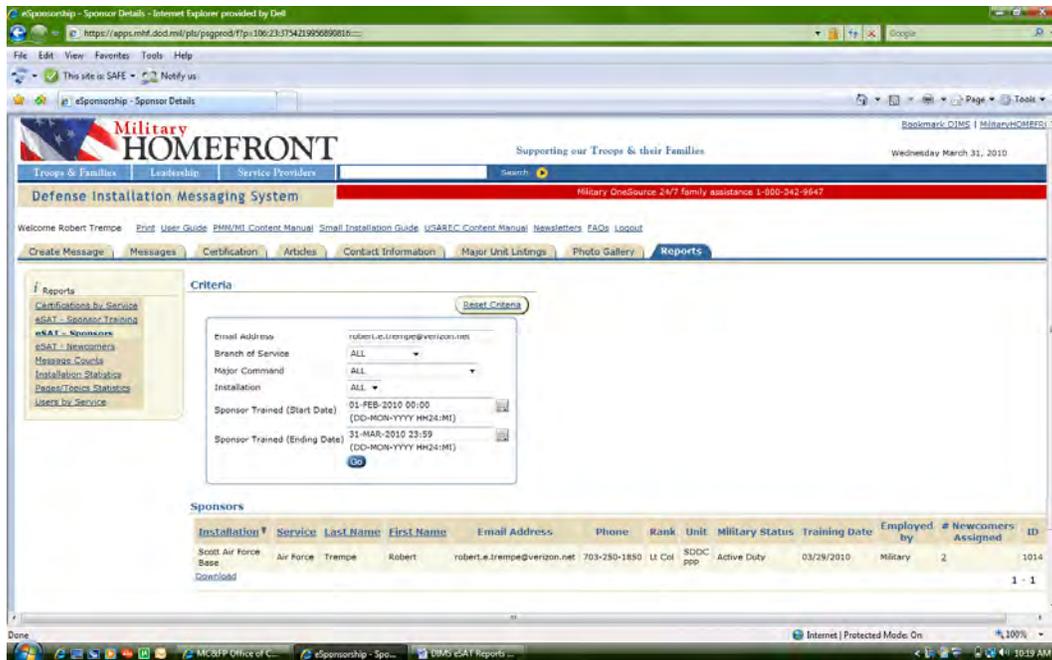


Note: Drilling down into the eSAT Sponsor Training report (see 6.2.1.3) will pre-populate the Criteria so that you get an eSAT Sponsor report for an **entire installation** rather than just a given sponsor.

Note: You may generate the eSAT Sponsors report without identifying a specific sponsor or installation. By leaving **Email Address** blank, selecting a **Branch of Service** and **ALL** for installations, the report that is generated will contain complete data for the selected Service. This report will be very large. Navigation and download controls at the bottom of the report page will make this report more useable

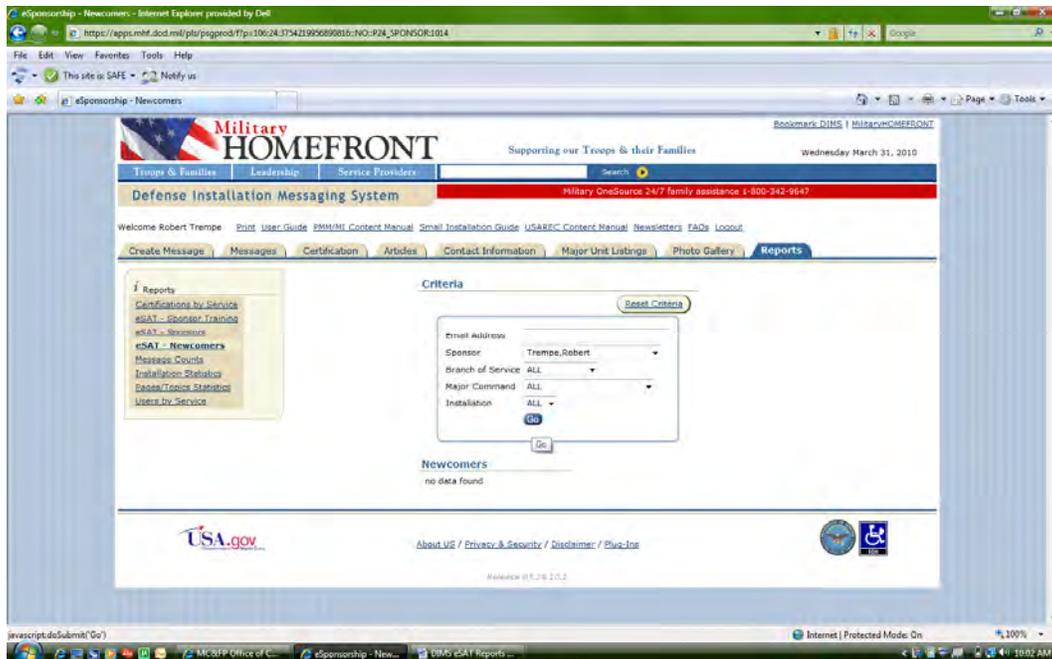
### 6.2.2.2 eSAT Sponsors Report Description

Regardless of how the report is generated, each line of the eSAT Sponsors report provides complete identification and training information on a sponsor, including the number of newcomers currently assigned to that sponsor.

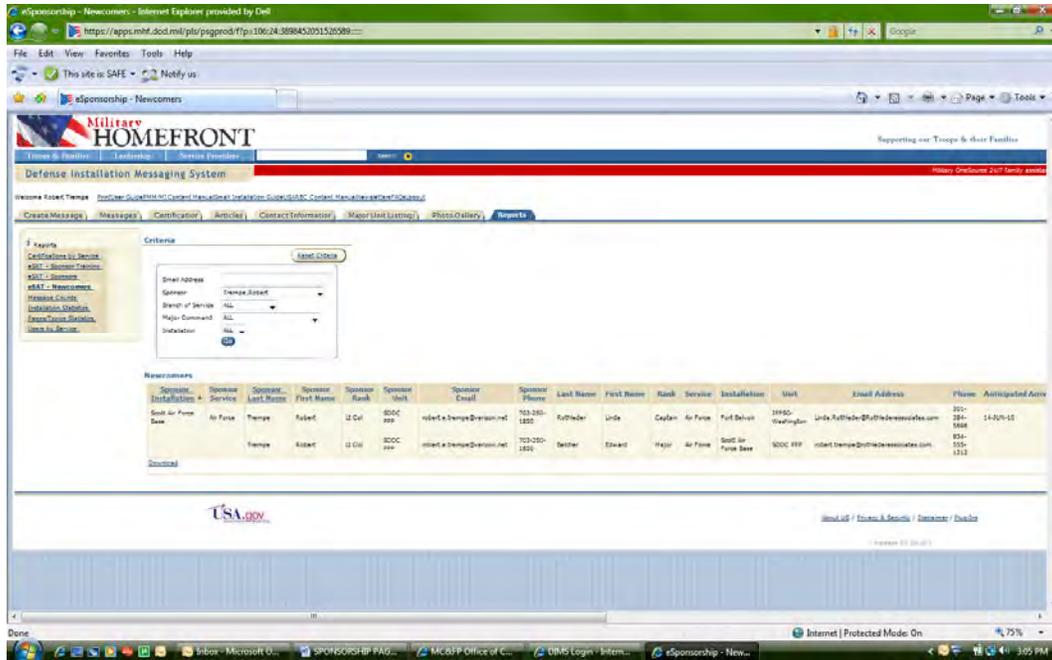


### 6.2.2.3 Drilling Down to Newcomer Data

The eSAT Sponsors report allows you to drill down to information on newcomer's assigned to a given sponsor. Click on the link in the # **Newcomers Assigned** column for a selected sponsor. This will bring up the **Reports** menu for the **eSAT Newcomers** report with the Criteria pre-set for the selected sponsor.



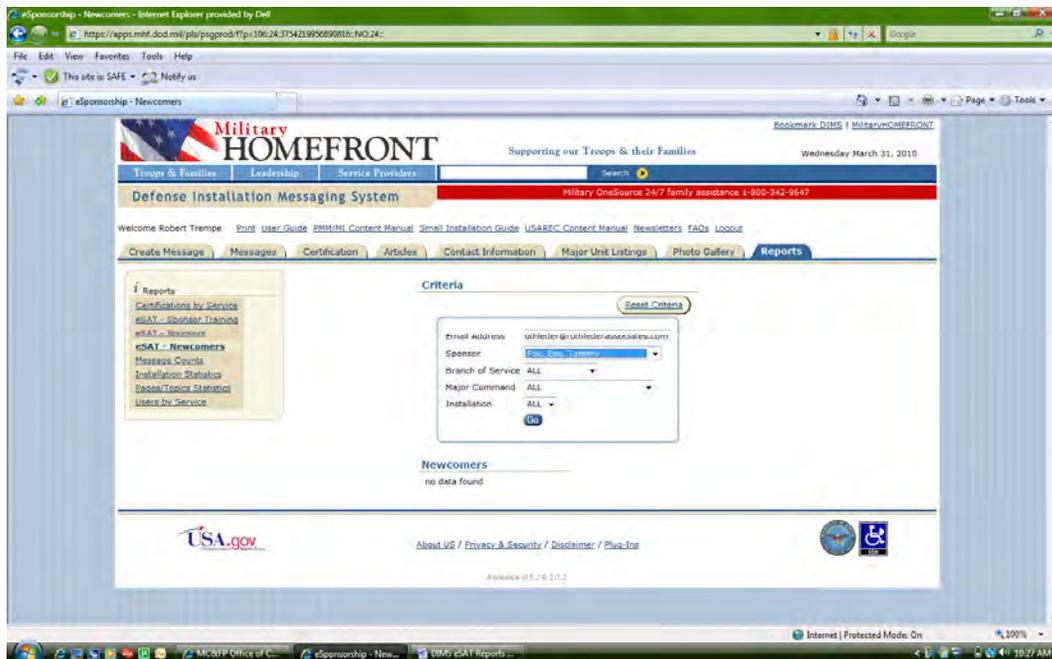
Select **Go** to create a eSAT Newcomers report that shows all newcomers registered for the selected sponsor. This report is described in more detail below.



## 6.2.3 eSAT Newcomers Report

### 6.2.3.1 Generating the eSAT Newcomers Report

Select eSAT Newcomers from the **Reports** menu.



In the Criteria enter:

- A newcomer's **Email Address** to get a sponsorship record(s) for that newcomer; or

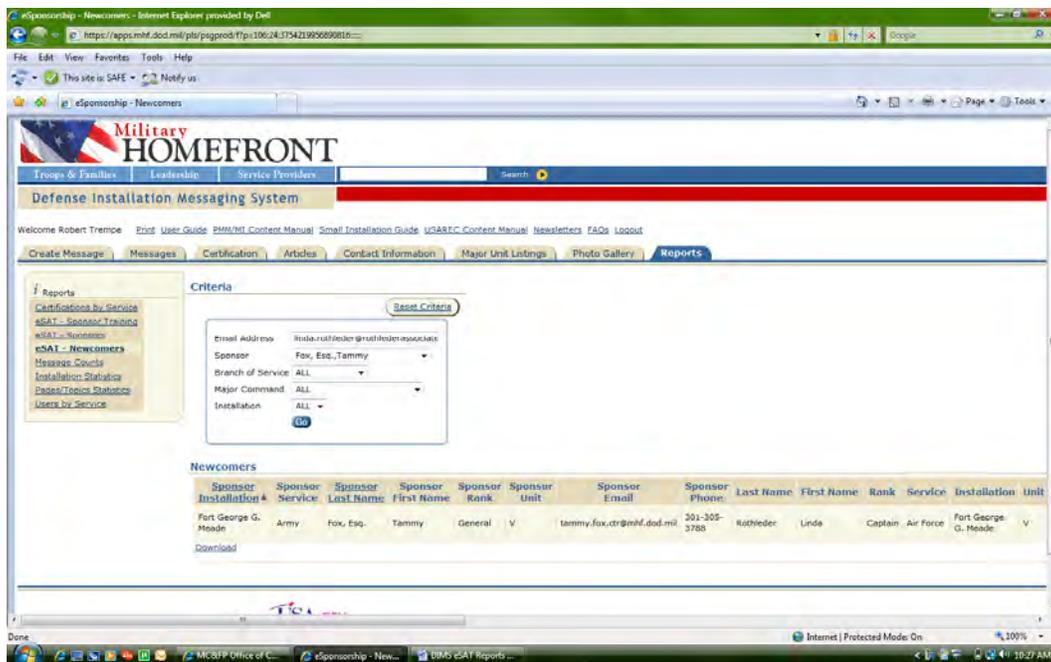
- Select a **Sponsor** from the dropdown to get the sponsorship record(s) for that sponsor.
- Enter a newcomer's **Email Address** and a **Sponsor** to retrieve the specific sponsorship record for this sponsor-newcomer assignment.

Select **Go** to generate the requested eSAT Newcomers Report. Note that you must specify a **Sponsor Trained (Start Date)** and **Sponsor Trained (Ending Date)** in order for the report to generate correctly.

Note: Drilling down into the eSAT Sponsor report (see 6.2.2.3) will pre-populate the Criteria so that you get an eSAT Newcomer report for the selected sponsor.

### 6.2.3.2 eSAT Newcomers Report Description

Each line of the eSAT Newcomers report provides complete identification and process status information on a sponsorship assignment.



This is a very large report. As you move along a line, you will see information on the sponsor, the newcomer, and where the sponsorship process is at.

Installation	Unit	Email Address	Phone	Anticipated Arrival Date	Ordered Reporting Date	Initial Contact Status	Initial Contact Date	Needs Assessment Status	Needs
Fort Belvoir	JPPDC- Washington	Linda.Rothieder@rothiederassociates.com	201- 384- 5695	14-JUN-10	15-JUN-10	Completed	29-MAR-10	Read by Sponsor	29-MAR-
Scott Air Force Base	SDDC PPP	rsbert.e.trempe@verizon.net	703- 250- 1850	21-MAY-10	28-MAY-10	Completed	29-MAR-10	In Work by Transferee	29-MAR-

The right side of the report is the equivalent to the information presented to the sponsor in the eSponsorship Process Manager (see section 4.1.3).

### 6.2.3 eSAT Feedback Reports - RESERVED

## 6.3 Downloading Reports

While the eSAT Reports available through DIMS provide a comprehensive online view of the sponsorship program, leaders and managers responsible for the program may wish to have custom views of the data for their specific purposes. As described above, at the bottom of each online report is a link that allows the user to download the report contents as a comma separated values file (\*.csv) that can be used to create a Microsoft Excel spreadsheet that the user can manipulate to obtain further customization of the standard reports contents.

This will be particularly useful at the installation level to generate reports for specific units. eSAT collects unit identify information, but not as standard data that can be used to create reports. To create unit specific reports, the user should create an installation level report, download the information into Excel and then sort the report by unit.