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# Retention Management System Extension User Guide

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**Version 10.28.0**

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# 1 Whats New

Version 10.28.0-Released 2023/12/28

## Enhancements

- (Extension) The “Extension Eligibility” screen displays “Body Composition” eligibility rules and provides the user the ability to update and override the eligibility if eligibility rules are met.
- (Extension) A stored procedure that checks if a case has met the Height/Weight requirements was added to the “Eligibility Rules” on page 2 of an Extension case under the first line.
  - The rule reads: Body Composition Test. Soldier failed to take or pass current height/weight requirements in the previous 6 months. See AR 600-9, AD 2023-08, and AD 2023-11 for further guidance and waiver qualifications.
  - The information scroll over in the “Rule Description” column reads: Eligibility fails when ATMS Body Composition date reflects post 6 mo. from the date of verification, and/or a Fail is reflected in the HT/WT results AND the Body Fat Results.
- (Extension) The ACFT Eligibility Rule on page 2 of an Extension case was updated to read:
  - ACFT. AGR- Soldier failed to take or pass an ACFT in the previous 8 months. TPU – Soldier failed to pass their last physical assessment. See PPOM 22-023 for further guidance and waiver qualification.
- (Extension) Page 2 in Panel 4 of an Extension case was updated. When a case with a red X is updated, the X becomes a yellow checkmark to note that the field has been updated. This will differentiate cases that were originally eligible and those that had to be updated. When user hovers over the yellow checkmark, tooltip will display "This field has been updated."
- (Extension) Height and Weight assessment values were added to the Panel 3 “Personnel” tab.
- (Extension) On page 6 of an Extension case, when a user clicks “PRINT DA4836”, the form populates with signature fields that can be signed with a CAC card with one click (Only in Adobe PDF Readers).
- IET Site names in the “LNO Assignments” admin tool were updated in the “Administration” blade.
  - Fort Rucker to Fort Novosel
  - Fort Lee to Fort Gregg Adams
  - Fort Benning to Fort Moore
  - Fort Gordon to Fort Eisenhower
- The “Eligible by ETS Date” report was renamed to “15 months to ETS.” Fields in the base report display the State, UIC, Name, ETS Date, Days to ETS, Eligibility, and Intent and Comments.
- The search results when performing a Soldier search were updated to only display one instance of

each Soldier.

- The table in the “Uniform Distribution” module in the “Administration” blade was updated so that rows can be selected for edit/delete using the keyboard.
- The “LNO Assignments” module in the “Administration” blade was updated so that rows can be selected for edit/delete using the keyboard.

## Version 10.27.0-Released 2023/11/30

### Enhancements

- “State” was removed as a transfer option when “Alert Chain of Command” is selected in Panel 4 Page 1.
- The “Alert Chain of Command” logic was updated:
  - Cases can be sent to the Battalion and Brigade levels. When the user clicks “SAVE,” the case is moved to the selected work bucket and an email is sent using the following logic:
    - If the case is sent to Battalion, an email will be sent to any Battalion Level User with the parent UIC, as well as Access Approved in RMS.
    - If the case is sent to Brigade, an email will be sent to any Brigade Level User with the parent UIC, as well as Access Approved in RMS.
- Within IPPS-A, State, Brigade, and Battalion Work Buckets, users are able to return cases to the unit level user via the "Return to Unit" button on Page 6 of the case. This button will send an email notification with notes to the user that originally processed the case and move the case to the proper work bucket.
- The following Resources within in the "References" blade were updated:
  - FY24 ARNG SRIP FINAL
  - FY24 ARNG SRIP Update 1
  - FY24 VolEd Policy
  - Total Army Sponsorship
  - Army Regulation 135-91
  - The "UMT Roles and Associated Permissions" document was moved to the "Document Center" blade
- "Eligible by ETS Date" report will allow users to track extensions for their state. This report will be limited to State Level Users and above for the time being.
- In the “My Account” ribbon menu drop-down, “My Profile” was named to “Upgrade/Revalidate.”
- The “Switch Profile” option was removed from the “My Account” ribbon menu drop-down.
- All users now have access to the “My Reports” blade in the Command Center.



- 508 Compliance Remediation conducted:
  - In the “Category Manager” module in the “Administration” blade, users can select table rows to edit/delete using their keyboards.
  - In the “Create Extensions Counseling” module in the “Administration” blade, users can select table rows to edit/delete using their keyboards.

### Resolved Issues

- An error where users were unable to complete extensions when they returned to Page 5 of an extension case after moving to Page 6 has been resolved. The error would add unnecessary character fields after the number to the “Number of Extensions Previously Granted to Current DD Form” field causing an error.
- On the Production site, an issue was resolved where soldiers appeared twice in Extension Work Buckets.
- An error causing the “Eligible by ETS Date” report to not load was resolved.

### Resolved Issues

- On the Production site, an error causing duplicate Soldier cases to appear in Extension work buckets was resolved.

## Version 10.25.0-Released 2023/10/05

### Enhancements

- The “Years” field in page 5 of an Extension case is required for the case to advance. The number in the “Years” field can’t be 0. If conditions are satisfied, the case should move forward. If they are not satisfied, then a message appears stating "Extension Years or Extension Months or Extension Days should be greater than 0."
- The following fields in page 5 of an Extension case are now required fields before a user can record extension information:
  - “Date Extension will be Executed”, “Length of Extension”, “Name, Grade, and Branch of Commissioned Officer”, and “Number of Extensions Previously Granted to Current DD Form.”
- A new work bucket called “Override Requested” was added under the “Soldiers beyond their ETS date” work bucket. The “Override Requested” state was also created, as well as a new action called “Request Override” which will move cases to the “Override Requested” state. A new action called “Return to Unit” was also created to return all items in “Override Requested” back to their appropriate state.
- On page 2 of an Extension case, if a case field is marked with a red ‘x’, the button should display “Request Override.” If that button is clicked, the case is moved to the “Override Requested” work bucket and a notification is sent to the Admin who can approve the override.

## 1 Whats New

- The “Return to Unit” button was added to page 6 in Panel 4 of an Extension case. This button sends an email to the appropriate unit level user (whoever prepared the case), alerting them that the case has been returned to them.
- In the “Reports” blade, all reports currently under the “DPRO IET Reports” bullet have been hidden.
- The “New Folder” button in the Panel 3 and Panel 4 “Documents” tab was hidden. This button should only be visible in the “Document Center” blade.

### Resolved Issues

- On the Production site, an error causing duplicate Soldier cases was resolved.
- An error causing the “Eligible by ETS Date” report to not load was resolved.

## Version 10.24.0-Released 2023/08/30

### ENHANCEMENTS

- A check was implemented preventing extensions beyond 7 years.
- The “Eligibility Override” button was updated so extensions are allowed for eligible cases if ACFT and PHA assessments meet current standards.
- A new message pointing users to contact a supervisor to further extension cases was created. User roles who can see the message include: State Level, Unit Level, Sponsor, Battalion Level, and Brigade Level.
- The ability to create folders was restored to the “Document Center” tab so that users can create folders and sort uploaded documents.

### RESOLVED ISSUES

- The “Reasons for ETS” report was not pulling in all cases that should be populating in the report. This error has been resolved.

## Version 10.23.0-Released 2023/07/26

### ENHANCEMENTS

- When a user inputs 12 months in the “Length of Extension” field in button 5 of an Extension case, it is converted to 1 year for the DA4836 form.
- The “Transition Services” case type was unhidden.
- The “Transition Services” work bucket is now visible to users with the “NGB Admin” role.
- Only NGB Level Admins can see/action the controls in the “Ship Date Management” module in the “Administration” blade.
- In the “LNO Assignments” module in the “Administration” blade, “Enterprise/AKOID” was changed

to “Name” in the grid when the module first opens and in the “LNO User” pop-up window.

- The “RSP Portal” blade was added to the Command Center
- RSP tables and data were transferred to the RMS application.

## Version 10.22.0-Released 2023/06/28

### ENHANCEMENTS

- Users can now upload multiple documents that overwrite current documents when named the same file name.
- The “Ship Date Management” module was created in the “Administration” blade under the “Vulcan RSP” folder. Users can input email addresses for other users that will receive notifications from the “Routine Monitoring- Ship Date Management” section in a Vulcan case.
- The 4856 Counseling Form was updated in the UI in the following locations:
  - Extension Counseling work bucket – Panel 4 Button 1 - Prepare New 4856 Counseling Button
  - Extension Counseling work bucket - Panel 4 “Counseling” tab - Prepare New 4856 Counseling Button
  - Career Development Counseling work bucket - Panel 4 Button 1 - Prepare New 4856 Counseling Button
  - Career Development Counseling work bucket – Panel 4 “Counseling tab” - Prepare New 4856 Counseling Button
  - AWOL Recovery work bucket - Prepare 4856 work item - Panel 4 Prepare New 4856 Counseling Button

### RESOLVED ISSUES

## Version 10.21.0-Released 2023/05/31

### ENHANCEMENTS

- The “IPPS-A” work bucket can now be viewed by State Level Admin users.
- The “DPRO” option was removed from the “Projects” drop-down in the ribbon menu.
- The “CREATE EXTENSIONS FORM” button in the “Create Extensions Counseling” screen was renamed “CREATE COUNSELING FORM”. The “Create Extensions Counseling” screen can be accessed from the “Administration” blade.
- A notification was generated for all users listed in the “Ship Date Management” module. The notification displays:

- Fields from Routine Monitoring:
  - Current Ship Date
  - What is the earliest Ship Date?
  - Comment
- The “My Reports” blade was updated to only be accessible by NGB Level Admin and State Level Super Admin users.
- The “Height/Weight Assessment” screen in the “Administration” blade was updated so users can move to the next case directly after inputting data.
- The “Drill Date” column in the “RSP Site Setup” screen found in the “Administration” blade was updated to be display as YYYYMMDD.

## RESOLVED ISSUES

- The following extension rules under button 3 in Panel 4 of an Extension case were displaying the wrong length of extension options available. They were updated so that once a rule is selected, button 5 reflects the appropriate length options.
- On the QA site, an error with the “Years Extended” report was resolved.
- On the QA site, an error with the “Completed Extensions by State (YTD)” report was resolved.
- On the Exercise and Production sites, the training video links in the “Resource Center” blade open an error page.
  - This error has been resolved.

## Version 10.20.0-Released 2023/05/3

## ENHANCEMENTS

- The requirements for the ACFT soldier eligibility rule were updated. A green checkmark is displayed when:
  - Army Fitness date administered has a date within 8 months (AGR Soldiers) or has a date (All other Soldiers)
  - Test Result field displays P or W. Supporting Documentation is not required if the first 2 are true.
  - If Fitness Test Administered date is beyond 8 months (AGR Soldiers only), or the Fitness Test Result = F, Supporting Documentation will be required in order to switch Red X to Green checkmark.
- The LRP bonus incentive option was hidden in Panel 4.
- Extensions issued out of the “Career Development Counseling” work buckets will now appear as “Extension” case types in Panel 3.

- The DisplayName for the UMT “Admin” role was updated to instead display “Developer Admin”.
- The URL that displays when an LNO notification email is sent out was updated to display v4 instead of v3.

## RESOLVED ISSUES

- An error causing cases to be automatically closed after their extensions are executed in IPPS-A was resolved.
- An error when attempting to fill out the Witnessing Official’s information was resolved.
- Errors when uploading files with completed “File Name” and “Description” fields were resolved.
- The “Reports Usage” report returned no data found.
  - This error has been resolved.

## Version 10.19.0-Released 2023/04/5

## ENHANCEMENTS

- The ACFT eligibility rules in the button 2 screen of Panel 4 were updated to say: "ACFT. AGR - Soldier otherwise eligible but failed to take or pass an ACFT in the previous 8 months. TPU - Soldier otherwise eligible but failed to pass their last Physical Fitness Assessment”.
- The “Return to IPPS-A” button in Panel 4 is not available to a case unless it meets the following requirements:
  - Must have a case
  - Intent = Extend
  - Has a DA4836
  - YearsExtend >0 or MonthsExtend >0 or DaysExtend >0
  - Current ETS >= Date Extension Executed (and this date is not null)
- The “Date Extension Will Be Executed” calendar picker in Panel 4 Button 5 was updated. Users are only able to select dates on or after the current date.
- Section 8 in Form 4836 was updated. The “XXXX’s” blocking the text were replaced with a strikethrough.
- Any links reflecting RMS v3 were updated to v4.
- A script was created to close or terminate old cases that cannot be closed/terminated in the UI.
- All reports from before January 31, 2023 were deleted from the “My Reports” blade.
- The Transition Services case type was hidden from view in the application.

## RESOLVED ISSUES

## 1 Whats New

- An error when generating a SRIP(RE25) contract was resolved.
- The “Extension/Counseling” and “Career Development Counseling” work buckets were not filtering work bucket results by State hierarchy when assuming command.
  - This error has been resolved.
- “ARNG/AGR” in Section 5 of Form 4836 was not populating correctly.
  - This error has been resolved.
- Spaces in the “LNO Edit Ticket Email Distro List” under the “Administration” blade that caused errors when creating or moving LNO tickets between work buckets were corrected.
- Dates were not displaying in a consistent format when using a date picker.
  - This error has been resolved.
- An error with the “Projected Losses” report displaying no data was resolved.
- An error with the “Contact Information For Open Cases” report displaying no data was resolved.
- An error in the “Counseling By Date Range” report was resolved.
- An error with the “Extension Status by Unit State” report not returning any data was resolved.

### Version 10.18.2-Released 2023/03/23

#### ENHANCEMENTS

- The “Sent to IPPSA Dt” column was added to the Panel 2 results of the “IPPS-A” work bucket.

#### RESOLVED ISSUES

- An error when generating a SRIP contract was resolved.

### Version 10.18.1-Released 2023/03/16

#### ENHANCEMENTS

- ETS DT calculation is now locked in when a case is sent to IPPS-A. Users will no longer be able to move cases directly to the “IPPS-A” work bucket from the “State” or “Unit” buckets without specific criteria being met.
- The option to transfer a case to the “IPPS-A” work bucket is now hidden from the “Transfer” drop-down for every work bucket except for the “State” and “Brigade” work buckets.
- The “Date Sent to IPPS-A” column was added to the Panel 2 results in the “IPPS-A” work bucket.

### Version 10.18.0-Released 2023/02/22

#### ENHANCEMENTS

- The “Extensions Eligibility Rule” description in Panel 4 were updated to “ACFT. Soldier otherwise eligible but failed to take or pass the latest Physical Assessment”.
- The “ETS Date” column was added to the Soldier Extension Table to update when an Extension is completed.

### RESOLVED ISSUES

- The “Missed Counseling” report did not load on the Exercise or Production sites.
  - This error has been resolved.
- No data was found in the “AWOL Status by Unit State” report.
  - This error has been resolved.
- The “Extensions in Progress” report was not returning any data.
  - This error has been resolved.
- The “Report Usage” report was not returning any data.
  - This error has been resolved.
- Users at the NGB level could only use the “Assume Command” function for their parent State and not any others.
  - This error has been resolved.
- An error when attempting to load the “Eligible by ETS Date” report was resolved.

## Version 10.17.01-Released 2023/01/31

### ENHANCEMENTS

- When the “Return to IPPS-A” button is clicked in Panel 4 of a case in the IPPS-A work bucket, the “UpdatedDate” column in the Extension table is updated but the case remains in the IPPS-A work bucket until the ETS date is confirmed. Then it moves to the Completed work bucket. Previously, when clicking the button, the case would immediately move to the Completed folder

## Version 10.17.0-Released 2023/01/18

### ENHANCEMENTS

- A new column called “SentToIPPSA\_DT” was created in the Soldier Extension table. The stored procedure was updated to add the date sent to IPPSA field in the Soldier Extension table.
- The logic in the IPPS-A work bucket was updated to automatically move cases to the Completed folder once the ETS Date is updated.
- The “Entered into IPPS-A” button was renamed “Return To IPPS-A” and updated to manually add a case back to the IPPS-A feed update queue. The pop-up messaging has also been updated to reflect

this new logic.

- The Loan Repayment Program (LRP) incentive was made available in Panel 4, button 4.
- The logic for the “Completed” work bucket was updated so that it refreshes each calendar month.
- Any instances of “APFT” were updated to read “ACFT” instead.

#### **RESOLVED ISSUES**

- A spelling error in the Panel 4 “Eligibility Rules” section was corrected.

#### **KNOWN ISSUES**

- The “Assume Command” blade in the Command Center is not fully operational.
- Continued impact from IPPS-A R3 data issues.

### **Version 10.16.0-Released 2022/12/07**

#### **ENHANCEMENTS**

- The work bucket order was changed to match the flow of a Soldier working through RMS- Vulcan then Retention. The Vulcan RSP Case Work Parent folder and its same workflow appears above the RMS Case Work Parent work bucket.
- The following documents were deleted from the References section in the Resource Center blade: ARNG SRIP Policy FY22, ARNG SRIP Policy FY22 Memo, RRG SRIP Q1 Top 3 State MOS.
  - The following documents were added to the reference section: FY23 VolEd Policy, FY23 SRIP Implementation-final, FY23 ARNG SRIP FINAL, FY23 ARNG SRIP 1QTR Top MOS List.
- SAAR documents are now required for access to SMMS applications and will need to be uploaded into UMT before access can be approved for Users. The form is available on the SMMS home page.
- The Physical Assessment module in the Administration blade allows for batch inputs for available test fields for the ACFT and OPAT options.

#### **RESOLVED ISSUES**

- Typing in the calendar field of an ACFT Physical Assessment case in the Administration blade created an error but selecting from the calendar picker does not.
  - This error has been resolved.

### **Version 10.15.0-Released 2022/11/01**

#### **ENHANCEMENTS**

- The ‘OVERRIDE ELIGIBILITY’ button in Panel 4, button 2 of an Extension case only appears for users with NGB Admin and State-level Super Admin roles. For all other users, the button reads



‘CONTINUE’ instead.

- In Panel 4 of a case in the IPPS-A work bucket, clicking ‘Entered into IPPS-A’ sends that information to IPPS-A for updating and closes the Extension case.
- The STRM Course Completion module was hung in the Administration blade.
  - Selecting a course from the phase drop-down brings up a list of cases.
  - Cases that populate from the phase drop-down can be marked as complete if the Soldier has taken the course test.
  - Once saved, the ‘Date Completed’ column populates with the test date.
- The OPAT option was added to the ACFT Assessments module in the Administration blade. Users can select the test date which passes to any cases where Physical Assessment data is input and saved.

## **RESOLVED ISSUES**

- Starting in the Exercise environment, the ETS Date was not populating when Rule A – 1 Year is selected from the Length of Extension drop-down in button 5 of an Extension case.
  - This error has been resolved.
- An error involving the ‘Date Extension Will Be Executed’ field not correctly passing to form DA4836 was resolved.
- Users would receive an error when clicking Print PDF in the Prepare New 4856 Counseling window in Panel 4.
  - This error has been resolved.
- The Last/First Name fields for Counseling Form 4856 were cut off if the inputted information was too long.
  - This error has been resolved.
- The Not Counseled report was not returning any data.
  - This error has been resolved.
- On the Exercise and Production sites, the Create Case tab in Panel 3 was not populating the controls or cases tied to the Soldier.
  - This error has been resolved.
- Data was not being saved when attempting to add request form information to approve change requests.
  - This error has been resolved.
- The check preventing users from using SMMS applications in Internet Explorer was not functioning in any environments.
  - This error has been resolved.

## Version 10.14.0-Released 2022/09/22

### ENHANCEMENTS

- The term ‘SIDPERS’ was replaced with IPPS-A in the custom controls within panel 4 of the IPPS-A work bucket.

### RESOLVED ISSUES

- (Extension)- The ‘ENTERED INTO IPPS-A’ and ‘RETURN TO UNIT’ DEI buttons under button 6 in Panel 4 of an Extension case did not perform actions when clicked.
  - This error has been resolved.
- (Extension)- Button 4 in Panel 4 of an Extension case created an error when required fields are left N/A instead of selecting Yes/No.
  - This error has been resolved and the N/A field options were hidden. The application defaults to ‘No’ before the user makes their selection.
- (Extension)- The Extensions in Progress report did not return any data.
  - This error has been resolved.
- (Extension)- The First Counseled report did not return any data.
  - This error has been resolved.
- (Extension)- The Eligible by ETS Date report did not return any data.
  - This error has been resolved.
- (Extension)- The Counseling by Date Range report did not return any data.
  - This error has been resolved.
- Under the Document Center blade in the Command Center, the link to the Vulcan RSP user guide did not correctly populate on the Production site.
  - This error has been resolved.

## Version 10.13.1-Released 2022/08/31

### RESOLVED ISSUES

- The Extension code was updated so that when selected, only Rule B in button 3 of Panel 4 takes the user to the Incentive Request screen (button 4). All other Rules under Button 3 now skip button 4 and take the user directly to the Extension Information screen (button 5) where they can input information to pass to DA4836.
  - Previously, users received an error that would not let them complete the extension process.

## Version 10.13.0-Released 2022/08/25

### ENHANCEMENTS

- Updates were made to the Army Combat Fitness Test Scorecard to populate when a user wants to export the results of the ACFT. The Soldiers name, gender, unit information, should pass to the form.
- Users now can add/edit/delete a future date for drills scheduled through the RSP Admin blade module

### RESOLVED ISSUES

- Uploading multiple documents at the same time sometimes failed.
  - This error was resolved by updating the upload mechanism to upload documents sequentially.
- An error causing items in the Document Center blade to display blank panels when clicked on was resolved.
- An error preventing remarks from being made in Panel 3 of a Warrior case was resolved.

## Version 10.12.0-Released 2022/08/03

### ENHANCEMENTS

- (Extension) Depending on their user role, users now have the capability to make actions on cases in the Battalion, Brigade, State, and IPPS-A work buckets.
- (Extension) Users can input a Service Representative/Witness Official's information and pass them over to the Print Addendum/Agreement Form under button 6 of Panel 4.
  - Users will fill out witness information under the button 5 screen.
- Section 5 of Form DA4836 was edited so that "ARNG/AGR" populates ahead of the address line for eligible cases.
- The ability to Add, Edit, and Delete information in the RCT Roster in the Administration blade was added.
- The LNO Edit Ticket Email Distro List was created in the Administration blade. Users can use it to save email addresses to selected states so that those addresses receive email notifications when an LNO ticket is created for, or returned to, that state.

## Version 10.11.0-Released 2022/07/06

### ENHANCEMENTS

- A link to the Uniform Distribution inventory was added under the Vulcan RSP section of the Administration blade in the Command Center.

- The inventory displays the current uniform inventory, by size, for each state.
- It allows the user to select one of the states and then view the history of PT Uniform transactions.
- It allows the user to select one of the states and adjust the PT Uniform inventory count, by size, for that state.
- Calendar year 2022 was added to the UMT User Activity report. It drills down into Calendar Year month, then Run Date, with a base report of Application, Calendar Year, Calendar Year Month, Date Accessed, Full Name, email address.

### Version 10.10.0-Released 2022/06/09

#### ENHANCEMENTS

- A Print Addendum/Agreement button was added for each Incentive issued to an extension case. Because bonuses can be stacked, a button is needed for each program (LRP, SRIP, MGIB Kicker).
- The Oath of Extension form (D4836) was modified.
  - Capital X's were added above "United States Army Reserve".
- Under button 2 of the Case tab in Panel 4, the user should be able to click Update, select any date, select either P or W (Pass/Withdraw), click Submit, and the eligible column should reflect a green check mark. Changing the test result drop-down to F (fail) should change the check mark to a red x.
- The My Reports blade was created in the Command Center. It contains the My Reports, Private Reports, and Shared Reports folders.

#### RESOLVED ISSUES

- Uploading a document under button 6 (Issue Documents screen) in Panel 4 created a generic error message. Users can upload PDF files to trigger the transfer case drop-down action.

#### KNOWN ISSUES

- The RMS Metric Brief report does not open and instead creates an error message.

### Version 10.9.0-Released 2022/05/12

#### ENHANCEMENTS

- The Print Addendum/Agreement button was added to button 6 in the panel 4 Case tab of an Extension/Counseling case next to the Print DA4836 and Upload Document buttons.
- The Enterprise/AKO ID section was changed to a drop-down and the email address now auto-populates.
  - The Enterprise/AKO ID drop-down is found in the LNO User window which opens when adding a new user to the LNO Assignments chart in the Administration blade.
- A section for Training Videos was created in the Resource Center blade of the Command Center.

## 1 Whats New

- The Category Manager, LNO Assignments, and Resolutions links under the Administration blade in panel 1 were role restricted, only to be seen/actioned on by the NGB Admin role and hidden for all other roles.
- The ability to upload multiple files to the Documents tab was added.
  - This applies to panel 4 of the AWOL Recovery, Sponsorship, Career Development Counseling, Extension, and Interstate Transfer cases, as well as panels 3 and 4 of a Vulcan RSP case.

### RESOLVED ISSUES

- The grid in the Counseling tab in panel 4 of any Extension work bucket previously did not save information. This has been resolved.
- In panel 4 of a case in the Extension/Counseling folder, an error generated when a user clicks the Alert Chain of Command or Transfer buttons was resolved.
  - The error would not allow the user to proceed through the extension process.
- The “Unable to Counsel Reason” section in the Counseling tab of panel 4 was not displaying any information from button 1 of the Case tab, even when the “Unable to Counsel” checkbox was selected and a reason was chosen from the drop-down. This error has been resolved.
- The field under Days Until Shop\_Color Code was being duplicated and has now been resolved. Only applicable fields show options for the user.
  - Users would see duplicate fields, that while the same, were different tables.
- The POC Last Name field in the Warrior Roster Builder report had an extra space that was deleted.
  - It used to read POC L ast Name.
- An error surrounding the “Failed Transaction Flag” field in the ATRRS Training Roster was resolved.
  - The “Failed Transaction Flag” would throw an error when inserted into the report. It was removed as an option from the left side.

## Version 10.8.0-Released 2022/04/4

### ENHANCEMENTS

- Updates were made to form DA 4836 Oath of Extension found under button 6 in panel 4 of the Extension/Counseling work buckets.
- The latest form version of DA 4836 Oath of Extension is now available.

## Version 10.7.0-Released 2022/03/14

### ENHANCEMENTS

## 1 Whats New

- The Period of Extension questions under button 3 in Panel 4 of an Extension work bucket were updated.
- Several updates to form DA4836 under button 6 in Panel 4 of an Extension work bucket were made.
- The Enlisted Affiliation Incentives Request Form and Enlisted Incentives Request Form were added to the Resource Center blade.
- The ARNG SRIP Policy FY22, ARNG SRIP Policy FY22 Memo, and ARNG SRIP Q1 Top 3 State MOS documents were added to the Resource Center blade.
- The Case History tab is grayed out and inaccessible unless there is data present. If data is present the tab is accessible and show a history grid with a Contact button that opens a pop-up window when clicked.
- The Strength Maintenance Program and Summary of Change documents were extensively updated, and the Assignment of Enlisted Personnel document was added to the Resource Center blade.

### RESOLVED ISSUES

- An error creating an Extension case using the Soldier Search function was resolved.
- An error with users having blank UIC/Grades in UMT user profiles which was not allowing them to fall into the appropriate user hierarchies was resolved.

## Version 10.6.0-Released 2022/02/8

### ENHANCEMENTS

- PFA/APFT Assessments successfully opens in panel 3 from the Administration blade.
- Controls were created in the Assume Command blade to assume different commands and roles.
- An updated DA 4836 form has replaced the outdated form in RMS

### RESOLVED ISSUES

- An error involving the 4856 Counseling form was resolved.
- An error involving the calendar defaulting to January 1900 was resolved.
- An error involving the Document Center not listing properties was resolved.
- An error causing .docx file types to be unsupported in the Document center was resolved.

## Version 10.5.0-Released 2022/01/10

### ENHANCEMENTS

- Users under the RSP Shipper Management work bucket will have access to a checklist form that is exportable.

## 1 Whats New

- A link to the User Management Tool was added to the Administration blade.

### **KNOWN ISSUES**

- The subscribe button for Reenlistment Success reports generates an error message.

## **Version 10.3.0-Released 2021/10/16**

### **ENHANCEMENTS**

- The list of RMS User Roles that can issue incentive Contracts was updated.
- Updated ability to capture Family Contact information.
  - Adding primary and alternate contact information for soldiers.

# 2 SMMS Overview

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The Strength Maintenance Management System (SMMS) is a CAC-authenticated management and reporting tool for the Army National Guard (ARNG) force's readiness and strength at the unclassified level. SMMS is a web-based system with multiple modules and tools that support the Recruiting and Retention Community utilizing a familiar desktop-style user interface. SMMS also currently hosts the G1 Gateway and the Guard Incentive Management Subsystem (GIMS).

## 2.1 Accessing Retention Management System Extension

Access to the SMMS and RMS Extension is Common Access Card (CAC) authenticated through EAMS-A.



**Tip** - For account assistance, please contact the Army Enterprise Service Desk (AESD) at 866-335-ARMY. For application support, please contact the G1 Help Desk at 877-339-5570.

**Warning: The SMMS is a DOD website. The security accreditation level of this site is classified as FOUO and below. Do not process, store, or transmit information classified above the accreditation level of this system. DOD web sites may be monitored for all lawful purposes, including ensuring their use is authorized, managing the system, facilitating protection against unauthorized access, and verifying security procedures, survivability, and operational security. Monitoring includes, but is not limited to, active attacks by authorized DOD entities to test or verify the security of this system. During monitoring, information may be examined, recorded, copied and used for authorized purposes. All information, including personal information, placed on or sent over this system may be monitored. Use of this DOD web site, authorized or unauthorized, constitutes consent to monitoring. Unauthorized use of this DOD web site may subject you to criminal prosecution. Evidence of unauthorized use collected during monitoring may be used for administrative, criminal or other adverse action. Use of this system constitutes consent to monitoring for all lawful purposes.**

## 2.2 Logging on to SMMS

1. In order to access the SMMS, and all of the available products, navigate to <https://smms.ngb.army.mil/v4/RMS/>.
2. Insert CAC into the reader attached to the computer.
3. Select the authentication certificate and enter a valid CAC PIN.
  - ▶ The SMMS opens.



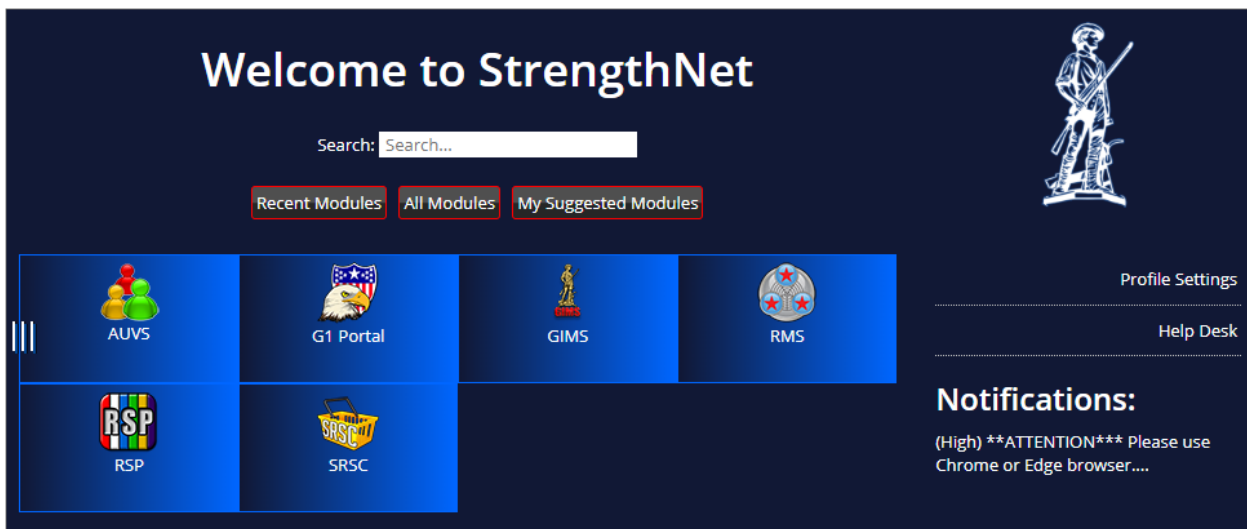


**Note** - Upon first logging into the SMMS, users must read and accept the Acceptable Use Policy.


4. Log on. If there are any active system notices, they appear in a pop-up window.
5. Click **Dismiss** after reviewing the message or click **Remind Me Later** to view the message again upon next logging into the SMMS.

## 2.3 The StrengthNet Landing Page

Upon logging into SMMS, the StrengthNet Landing Page opens. This page displays links to the most popular products in the SMMS portal.

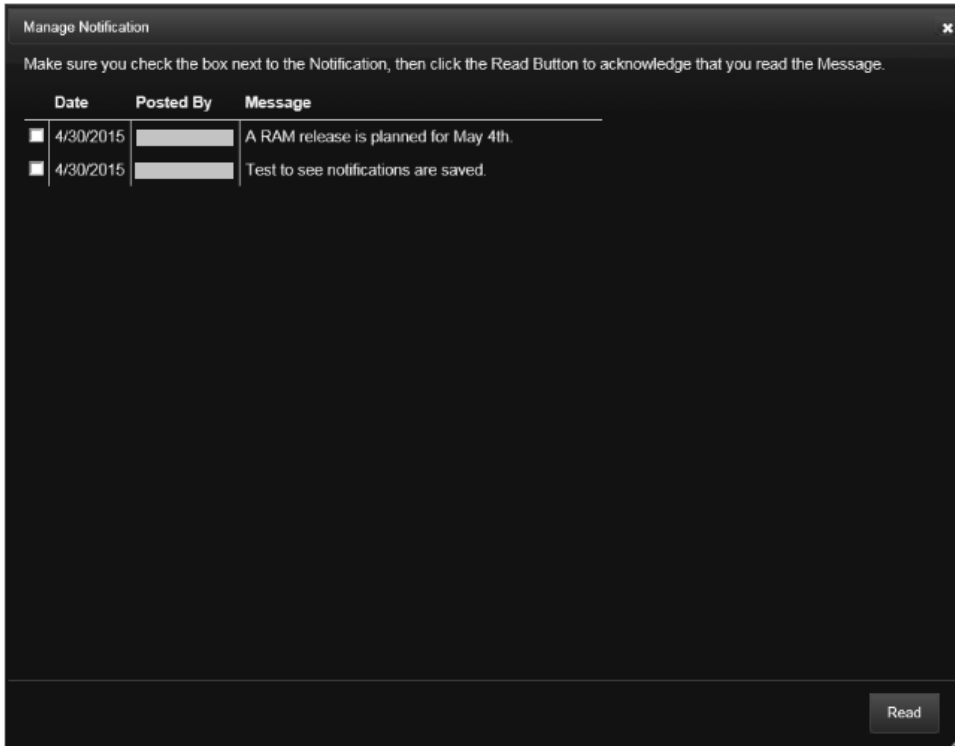


There are three ways to access links on the StrengthNet Landing Page:

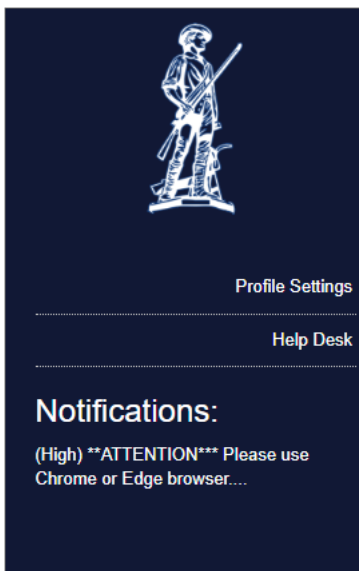
- **Product Boxes:** Clicking the modules in the boxes either opens the module via the webtop, or with some modules, opens the module in the browser window. The *G1 Gateway* product box opens the G1 Gateway website in a separate tab in the browser.
  - Recent Modules: limits the modules displayed to the last ten users have accessed
  - All Modules: default view
  - My Suggested Modules: displays modules matching tags selected in user profile settings
- **Search:** Type the name of a module in the *Search* field. The modules displayed are filtered as users type.
- **Shortcut menu:** Hover the cursor over the icon  on the left side of the screen to view a pop-up menu with shortcuts to all the module tiles and options available from the Landing Page.

## 2.3.1 Message Notification

If any messages require attention, the *Message Notification* window appears when opening the site. Select the check box for each message and click **Read** to acknowledge the message so it won't appear upon next login.

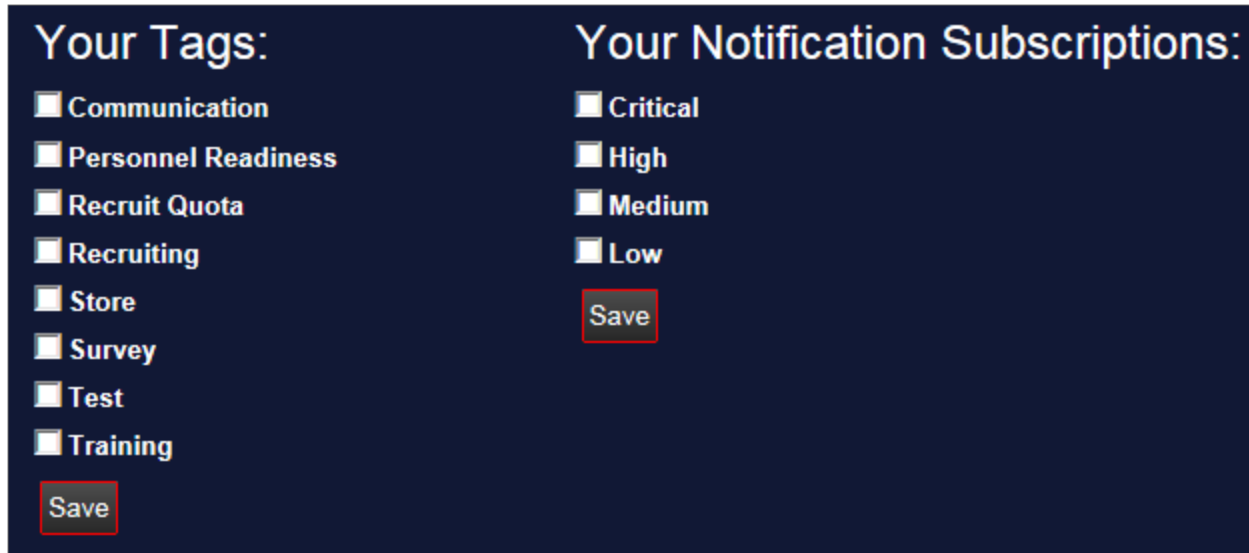


The recent messages from the *Message Notification* window also appear on the right side of the screen for future reference.



### 2.3.1.1 Profile Settings

The *Profile Settings* page displays tags that can be selected to filter the modules displayed from the *My Suggested Modules* screen or to limit notification subscriptions.



The screenshot shows a dark blue interface with two columns of settings. The left column, titled 'Your Tags:', contains a list of tags with checkboxes: Communication, Personnel Readiness, Recruit Quota, Recruiting, Store, Survey, Test, and Training. A 'Save' button is at the bottom of this column. The right column, titled 'Your Notification Subscriptions:', contains a list of subscription levels with checkboxes: Critical, High, Medium, and Low. A 'Save' button is at the bottom of this column. Both 'Save' buttons are highlighted with a red border.

Selecting tags may help users decide which modules are of interest to the user and to their mission. Modules matching selected tags are displayed when the *My Suggested Modules* filter is selected. Tags are maintained by administrators.

### 2.3.1.2 Help Desk

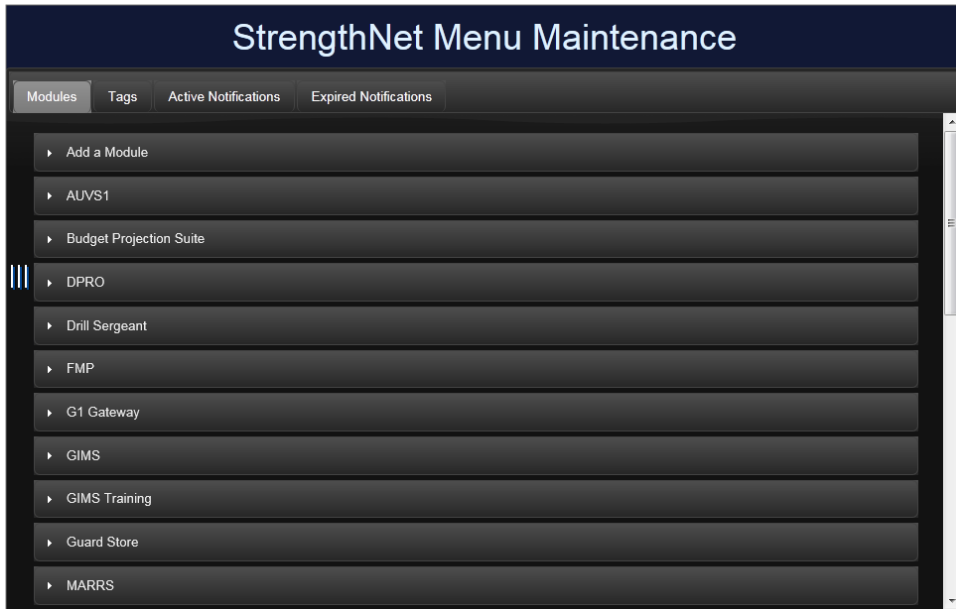
The Help Desk contact information is available from this screen.



The screenshot shows a dark blue box with white text. At the top, it says: 'Thank you for contacting StrengthNet support. If you are experiencing difficulties with a module, want to make a feature request, or suggest a new module you can contact your support team via the methods described below:'. Below this, it lists 'Telephone 1(877)339-5570 (M-F 0700-2000 EST)'. At the bottom, there is a green circular icon with a white envelope and a telephone handset, followed by the email address 'Email: ng.ncr.ngb-arg.mbx.rcms-g@army.mil'.

### 2.3.1.3 Manage Menu

The *Manage Menu* button opens the *StrengthNet Menu Maintenance* page to the *Modules* tab. Only admin users have access to the Manage Menu.

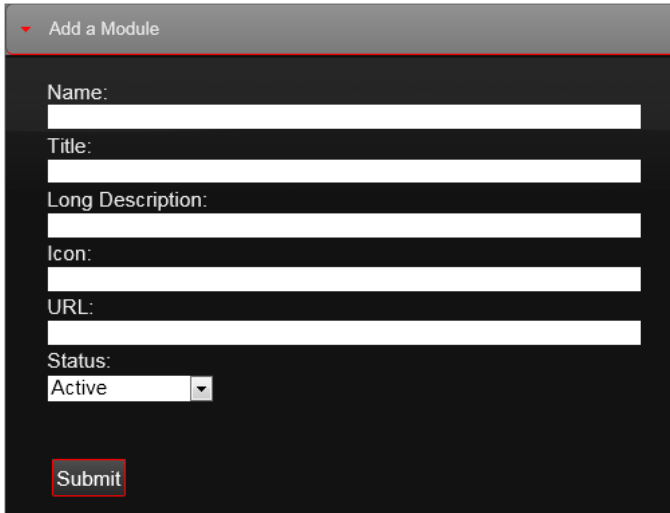


Manage Menu options include:

- *Modules* tab
- *Tags* tab
- *Active Notifications* tab
- *Expired Notifications* tab
- *User Management* tab

## Modules Tab

Click **Add a Module** at the top of the list to create a new module.



▼ Add a Module

Name:  
[Input Field]

Title:  
[Input Field]

Long Description:  
[Input Field]

Icon:  
[Input Field]

URL:  
[Input Field]

Status:  
Active ▼

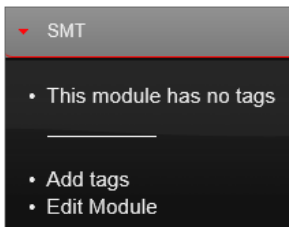
Submit



**Note** - The contents of the *Long Description* fields are displayed as a tooltip once the module has been added, as seen in the screenshot below.



To edit an existing module, select that module from the list. The example below illustrates the options to add tags to or edit the SMT module.



▼ SMT

- This module has no tags

---

- Add tags
- Edit Module

Click **Add tags** to view a list of existing tags. Select the checkbox for any tag(s) required to apply to the module.

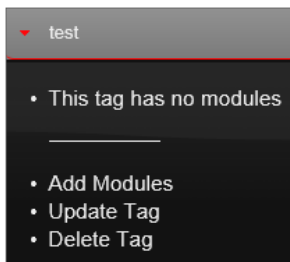
## Tags tab

Click **Add a Tag** to create a new tag.



A screenshot of a web form titled "Add a Tag". The form has a dark background. At the top, there is a header "Add a Tag" with a small downward arrow. Below the header, there is a label "Tag Text:" followed by a white text input field. At the bottom of the form, there is a red "Submit" button.

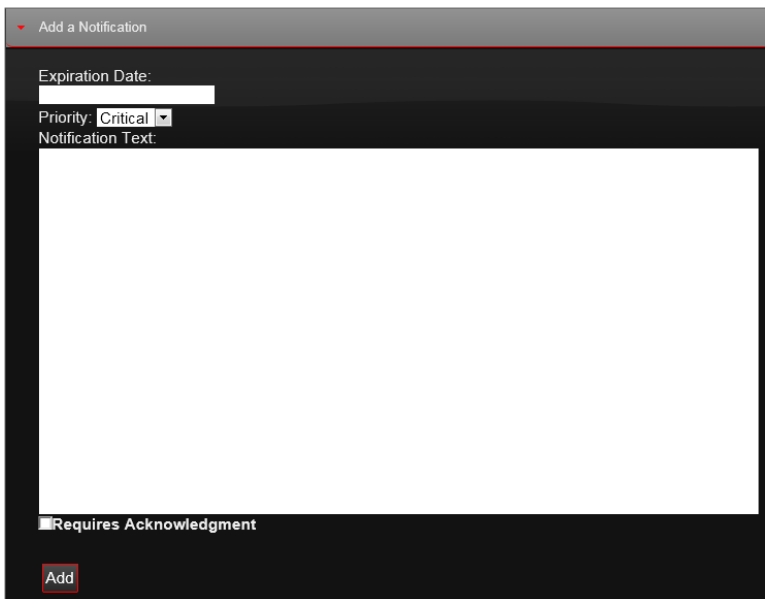
To edit an existing tag, select that tag from the list. The example below illustrates the options to edit a tag labeled "test."



A screenshot of a dropdown menu for a tag labeled "test". The menu has a dark background. At the top, there is a header "test" with a small downward arrow. Below the header, there is a list of options: "This tag has no modules", "Add Modules", "Update Tag", and "Delete Tag".

## Active Notifications tab

To add a notification:



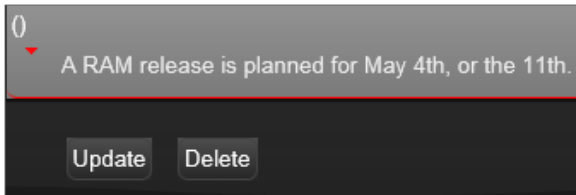
A screenshot of a web form titled "Add a Notification". The form has a dark background. At the top, there is a header "Add a Notification" with a small downward arrow. Below the header, there are several fields: "Expiration Date:" followed by a white text input field, "Priority: Critical" with a dropdown arrow, and "Notification Text:" followed by a large white text area. At the bottom of the form, there is a checkbox labeled "Requires Acknowledgment" and a red "Add" button.

1. Set the expiration date.
2. Set the priority to Critical, High, Medium, or Low.
3. Enter notification text.

4. Optionally, select the *Requires Notification* check box to flag the message as high priority. This requires the user to select the message and click *Read* in the *Message Notification* window that appears after logging in.
5. Click **Add**.

### Expired Notifications tab

In this section users can select an expired notification to update or delete.

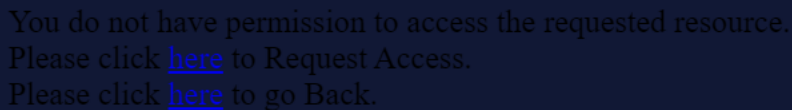


### User Management tab

To navigate back to the *Manage Menu* screen click **Home**.

## 2.4 Requesting Access on StrengthNet

1. On the StrengthNet Landing Page, click the application you wish to request access to.
  - ▶ A page displaying hyperlinks to request access to the application appears.



You do not have permission to access the requested resource.  
Please click [here](#) to Request Access.  
Please click [here](#) to go Back.

2. Your profile appears in the *Request Access* screen

## 2 SMMS Overview

### Request Access

**Access Details**



Documents


My Admins


**Profile**


Last Name	First Name	Rank	Email
Rulona	Nathan	MOS	nathan.y.rulona.ctr@army.mil
Member Name	UIC	Grade	
nathan.y.rulona.ctr			

**Command**

Command Value \*   

Hierarchy Type (Auto-Pop)  

Command Level (Auto-Pop)  

Unit State  

**Roles and Permissions**

Approved

Role \*

**Submit**

Current Status: Access Request Initiated

Description: Access request initiated. User must submit request before an administrator can review.

Provide Remarks

**REQUEST ACCESS**

**History of Actions**


Search:

Date	User ID	Comment	Previous Status	Action	Status
09/01/2022 12:52 PM	nathan.y.rulona.ctr	New Case Created			Access Request Initiated

Showing 1 to 1 of 1 entries

3. First, click the magnifying glass next to the *Command Value* field.

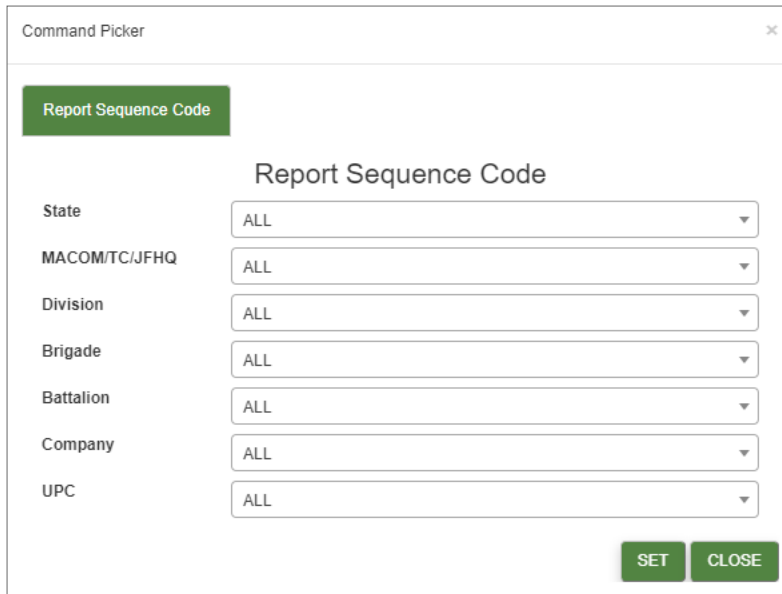
**Command**

Command Value \*  



## 2 SMMS Overview

- ▶ The *Command Picker* window opens. Select the appropriate options from the drop-down menus. Click **SET**.



4. The *Hierarchy Type* and *Command Level* fields will automatically populate.

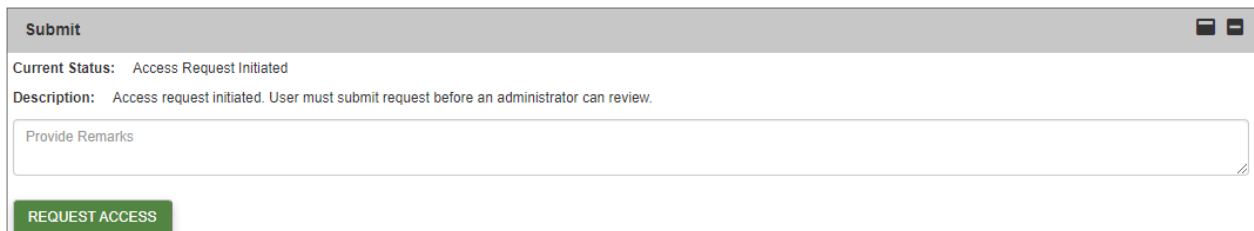
- ▶ Click **SAVE**.

5. In the *Roles and Permissions* section, select the appropriate role from the *Role* drop-down menu.



- ▶ Click **SAVE**.

6. Once all required information has been filled in, click **REQUEST ACCESS** in the *Submit* section.



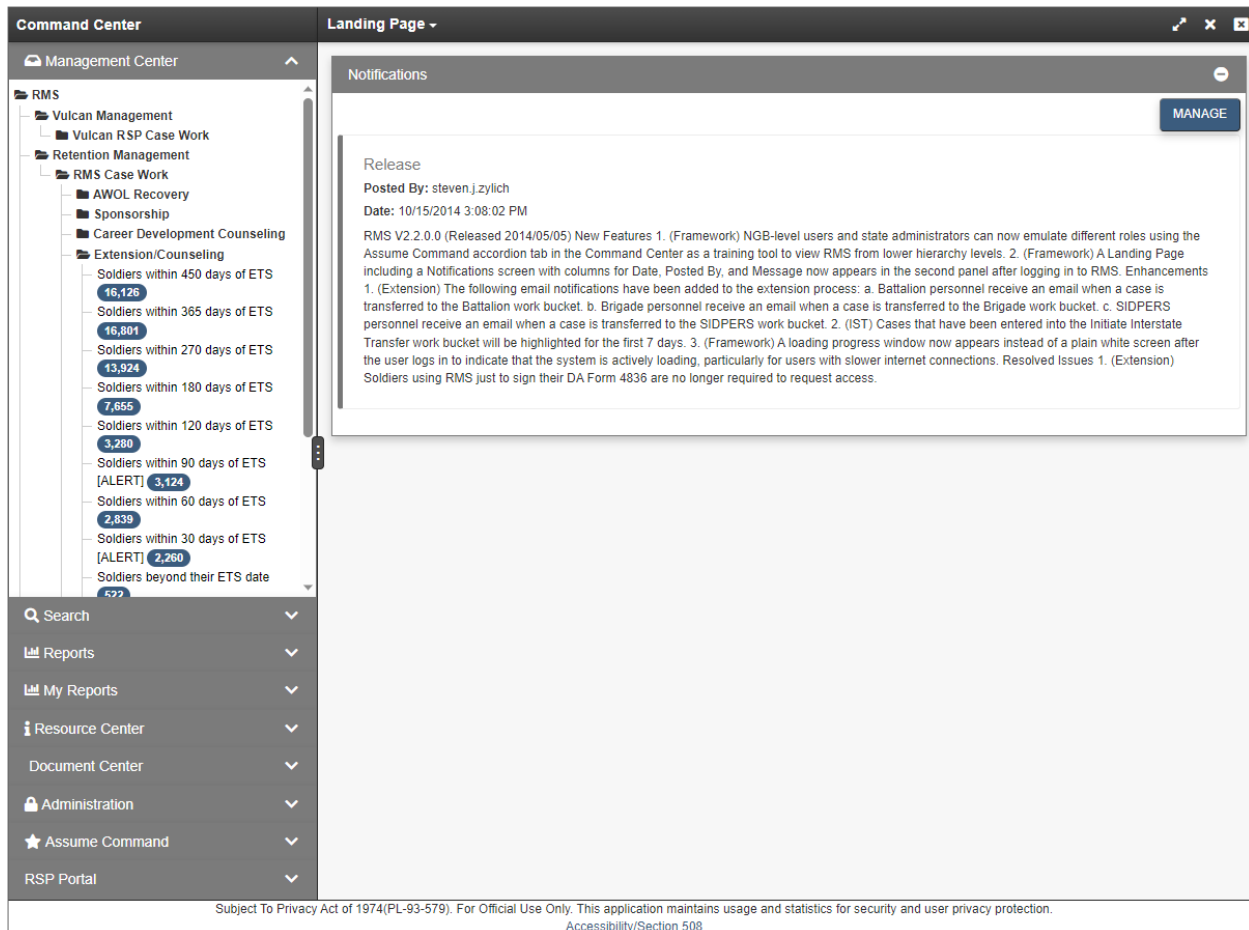
- ▶ Click **YES** in the confirmation window.

7. Your request is submitted for Administrator approval.

# 3 Retention Management Software Overview

## 3.1 Opening Extension

From the RMS Landing Page, you can open the *Extension* module from the *Management Center* menu in the Command Center.



## 3.2 Introduction to the RMS Extension Interface

The RMS Extension user interface allows you to accomplish your work from four panels, each of which performs a different function.

### 3 Retention Management Software Overview



**Note** - Each panel can be collapsed or expanded at any time by clicking the black bar at the top of each panel.

The screenshot displays the Retention Management Software interface. On the left is the 'Command Center' sidebar with a tree view of navigation options: Management Center, RMS, Vulcan Management, Vulcan RSP Case Work, Retention Management, RMS Case Work, AWOL Recovery, Sponsorship, Career Development Counseling, Extension/Counseling, and various filters for soldiers within specific days of ETS (e.g., 450, 365, 270, 180, 120, 90, 60, 30 days, and beyond their ETS date). Below the tree are search, reports, and resource center options.

The main panel, titled 'Extension/Counseling - Soldiers within 365 days of ETS (16,801)', shows a table of 16,801 entries. The table columns are: Unit State, Soldier Name, RCC, Unit Name, 4856, Intent, Eligibility, ETS Dt, Days to ETS, Years of Service at ETS, Now ETS DT, and Sent To IPPSA DT. The table lists soldiers from various units such as 858TH HORIZ CO, 223, TRP A, 1-98TH CAVALRY REGIMENT, HHC 66TH THTR AVN CMD (TAC), CO A (DISTRO) 257TH BDE SPT BN, 656TH SIGNAL COMPANY, CO C 1-102D INF RGT (IBCT), 617TH MP CO (-) CBT SPT, CO E 429TH SUPPORT BN, CO B 2ND BN 121ST IN, 153 MP CO CBT SPT REAR, 957TH ENGINEER CO (MRBC), and CO A 1 BN 279 INF.

At the bottom of the table, it indicates 'Showing 1 to 100 of 16,801 entries' and includes a pagination control with 'Previous', '1', '2', '3', '4', '5', '169', and 'Next' buttons.

Subject To Privacy Act of 1974(PL-93-579). For Official Use Only. This application maintains usage and statistics for security and user privacy protection.  
Accessibility/Section 508

From left to right, panels 1 and 2 contain:

1. **Command Center:** see [Command Center](#) on page 37.
2. **Soldier Roster:** see [Soldier Roster](#) on page 39.

### 3 Retention Management Software Overview

The screenshot displays two main panels in a web application interface. The left panel, titled 'Soldier Summary', shows details for AALA SHAMEL, including Grade (E5), Rank (SGT), Date of Commission, ETS Date (20121118), Reserve Component Category (TPU), and Unit Processing Code (P5GC0). Below this is a 'Create Case' section with a table listing three cases: AWOL, Extension (883172), and Extension (1252776). The right panel, titled 'Case Summary', shows details for Case ID 1252776, Name (271 - 365 days), Authority (Extension), and Start Date (20131223). Below this is a 'Case' section with a 'Soldier Intent' dropdown set to 'Extend' (Reason: APFT Failure) and a 'Counseling Comments' table with no data.

**Soldier Summary**

Soldier Name	Grade
AALA SHAMEL	E5
Date of Commission	Rank
ETS Date	SGT
20121118	Unit Processing Code
Reserve Component Category	P5GC0
TPU	UPC Attached

**Create Case**

Case Type	Case Number	Status	Previous Status	Date Created	Created By
AWOL	2689938	Terminated	Validate Contact Information	01/26/2015	steven.j.zylic
Extension	883172	Closed	Case Started	12/19/2013	
Extension	1252776	271 - 365 days	271 - 365 days	12/23/2013	

Showing 1 to 3 of 3 entries

**Case Summary**

Case ID	Name
1252776	271 - 365 days
Authority	Start Date
Extension	20131223

**Case**

Soldier Intent

Extend

Reason: APFT Failure

ETS

Retirement

Undecided

Counseling Comments

Excel Show 10 entries

Date	User	Comment
No data available in table		

Showing 0 to 0 of 0 entries

Unable to Counsel

Add Counseling Comment Prepare New 4856 Counseling Alert Chain of Command

Record Intent

1 2 3 4 5 6

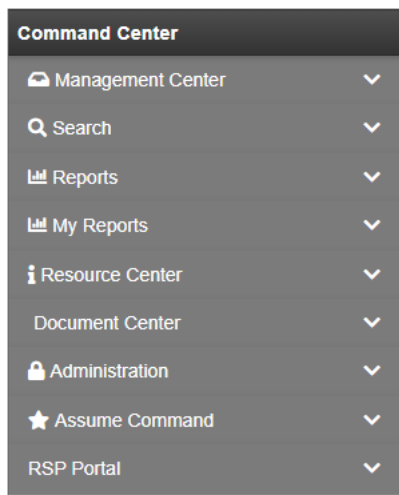
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Panels 3 and 4 contain:

3. **Soldier Details:** see [Soldier Details](#) on page 40.
4. **Case Details:** see [Case Details](#) on page 42.

## 3.2.1 Command Center

The Command Center is where you access your job duties within RMS Extension.



The Command Center is composed of several different blades:

- **Management Center:** See [Management Center](#) below.
- **Search:** See [Search](#) on page 65.
- **My Reports:** Contains private and shared reports. See [My Reports](#) on page 89
- **Resource Center:** Contains documents, user guides, and training videos. See [Resource Center](#) on page 94
- **Document Center:** Contains any policy guidance or other documents uploaded by module administrators for users of the module to view.
- **Administration:** See [Administration](#) on page 95.
- **Assume Command:** See [Assume Command](#) on page 98.
- **RSP Portal:** Search for RSP training resources. See [RSP Portal](#) on page 102.

### 3.2.1.1 Management Center

The *Management Center*, located in the first panel on the far left of the screen, organizes cases in permission-based work buckets, or groups of similar cases. Work buckets display a list of Soldiers needing a particular action that you may need to perform. You can only view work buckets, and the cases within, if you have the appropriate role and permission. The number in parentheses beside each work bucket is the

number of cases that you can either view or edit.



**Note** - Depending on your role, you may be able to view work buckets and cases that you are unable to edit.

### RMS Extension Work Buckets

The work buckets within the Extension module include:

Work Bucket	Case
<b>Soldiers within 450 days of ETS</b>	The Soldier has no more than 450 days until the scheduled ETS Date.
<b>Soldiers within 365 days of ETS</b>	The Soldier has no more than 365 days until the scheduled ETS Date.
<b>Soldiers within 270 days of ETS</b>	The Soldier has no more than 270 days until the scheduled ETS Date.
<b>Soldiers within 180 days of ETS</b>	The Soldier has no more than 180 days until the scheduled ETS Date.
<b>Soldiers within 120 days of ETS</b>	The Soldier has no more than 120 days until the scheduled ETS Date.
<b>Soldiers within 90 days of ETS</b>	The Soldier has no more than 90 days until the scheduled ETS Date.
<b>Soldiers within 60 days of ETS</b>	The Soldier has no more than 60 days until the scheduled ETS Date.
<b>Soldiers within 30 days of ETS</b>	The Soldier has no more than 30 days until the scheduled ETS Date.
<b>Soldiers beyond their ETS date</b>	The Soldier has passed their scheduled ETS Date.
<b>Battalion</b>	This work bucket is populated when a reviewer transfers the Soldier's record to the Battalion level, so that they may review and add/confirm any DA4836 or Bonus Addendum information as well as transfer the case to a higher level.
<b>Brigade</b>	This work bucket is populated when a reviewer transfers the Soldier's record to the Bri-

### 3 Retention Management Software Overview

Work Bucket	Case
	grade level, so that they may review and add/confirm any DA4836 or Bonus Addendum information as well as transfer the case to a higher level.
<b>State</b>	This work bucket is populated when a reviewer transfers the Soldier's record to the State level, so that they may review and add/confirm any DA4836 or Bonus Addendum information as well as transfer the case to the IPPS-A level.
<b>IPPS-A</b>	This work bucket is populated when a reviewer transfers the Soldier's record to the IPPS-A level. Soldiers in this bucket are waiting to be entered into IPPS-A.
<b>Completed</b>	This work bucket contains all the cases that require no more action. The cases in this work bucket are viewable.

### 3.2.2 Soldier Roster

The Soldier Roster is the second panel from the left, which lists a selected work bucket's contents.

The list includes Soldiers who have a case in that work bucket and general information about those Soldiers, such as Soldier name, UPC, ETS date, etc.

You can select any Soldier from this list to view detailed information about that Soldier. After clicking a Soldier, the third and fourth panels populate, and the first and second panels automatically collapse.

Extension/Counseling - Soldiers within 365 days of ETS (16,801) -

Soldiers within 365 days of ETS

Show 100 entries

Soldier Name	RCC	UPC	Unit Name	4856	Intent	Eligibility	ETS Dt	Days to ETS	Years of Service at ETS
AALA SHAMEL	TPU	P5GC0	CO C 1-102D INF RGT (IBCT)	N	Extend	APFT, PHA	20121118	277	7
AALA SHAMEL	TPU	X1UAA	858TH HORIZ CO, 223	N	Extend	APFT, PHA	20121204	293	7
AALA SHAMEL	TPU	PXDAA	617TH MP CO (-) CBT SPT	N	Extend	APFT, PHA	20121219	308	6
AALA SHAMEL	TPU	XFGA0	TRP A, 1-98TH CAVALRY REGIMENT	Y	Extend	SFPA (K,A),SFPA (J,A), APFT, PHA	20130121	341	14
AALA SHAMEL	TPU	ZGEE0	CO E 429TH SUPPORT BN	N	Extend	APFT, PHA	20121228	317	10
AALA SHAMEL	TPU	PN0D0	CO D 1-148TH IN RGT	Y	Extend	APFT, PHA	20130127	347	9
AALA SHAMEL	TPU	X9GA0	CO A (DISTRO) 257TH BDE SPT BN	N		SFPA (J,A),SFPA (K,A), APFT, PHA	20121207	296	12
AALA SHAMEL	TPU	P1WAA	656TH SIGNAL COMPANY	N	Extend	APFT, PHA	20130117	337	6
AALA SHAMEL	TPU	YHUAA	HHC 66TH THTR AVN CMD (TAC)	N	Extend	APFT, PHA	20121213	302	2
ABDALLAH CORINA	TPU	V96E0	CO E 1ST BN 130TH AVN	N		SFPA (K,A), APFT, PHA	20121118	277	13
ABDALLAH CORINA	TPU	ZGWH0	153 MP CO CBT SPT REAR	N		SFPA (J,A),SFPA (K,A), APFT, PHA	20130118	338	14
ABDALLAH CORINA	TPU	Y2FAA	133RD EN CO SU	N		APFT, PHA	20121119	278	9
ABDALLAH CORINA	TPU	PT0A0	FSC 107 ENGR BN	Y	Extend	APFT, PHA	20121216	305	6
ABDALLAH CORINA	TPU	PTBA0	CO A 1 BN 279 INF	N	Extend	APFT, PHA	20121123	282	6
ABDALLAH CORINA	MIL	PEUA2	DET 2, 1041ST EN (MRBC)	N		APFT, PHA	20130123	343	13
ABDALLAH CORINA	TPU	X1RAA	288TH SAPPER CO, 223	N	Extend	APFT, PHA	20130117	337	6
ABDALLAH CORINA	TPU	PGEB0	INTELLIGENCE SUSTAINMENT CO	N		APFT, PHA	20130129	349	20
ABDALLAH CORINA	TPU	P8AAA	957TH ENGINEER CO (MRBC)	N	Extend	APFT, PHA	20121221	310	6
ARI F CI ARISSA	MIL	YB3C0	TROOP C 2-116TH CAV	N		APFT PHA	20121217	306	8

Showing 1 to 100 of 16,801 entries

Previous 1 2 3 4 5 ... 169 Next

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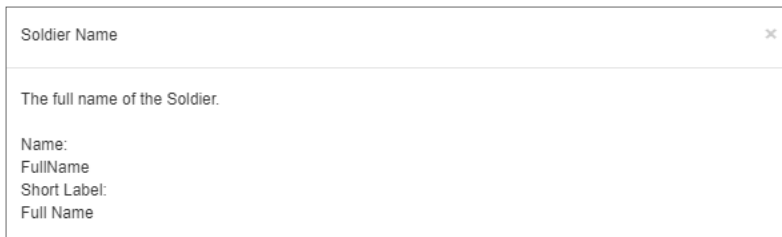
### 3.2.2.1 Soldier Roster Tools

There are several ways to customize the Soldier Roster (second) panel.

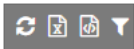
- Filter the results by clicking on the **Show/Hide Filters**  icon at the top of the panel. Enter text above a column in the *Search* field. The results are filtered as you type.




- View tool-tips by clicking the information  icon in any column heading.



- Options to refresh the screen, show/hide filters, clear filters, export to CSV, or export to Excel are available in the tool panel above the roster.



 **Tip** - See the [Glossary of Icons](#) on page 64 for specific descriptions.

### 3.2.3 Soldier Details

Soldier Details, located in the third panel, includes information about the specific Soldier you selected, including contact history, personnel data, and other data available within RMS.

The Soldier Details panel contains the following tabs:

Tab	Function
<b>Create Case</b>	Add different case types to a Soldier's file.
<b>Documents</b>	Includes all uploaded documents associated with the Soldier. (See <a href="#">Documents</a> on page 59 for more information.)
<b>Personnel</b>	Displays basic personnel information for the Soldier, such as AFQT Score, Date of Commission, Duty Position Qualified, etc.
<b>Demographics</b>	Displays demographic information on the Soldier, such as Age, Gender, and Marital Status.
<b>Current Assignment</b>	Displays information on the Soldier's current assignment such as Line, Paragraph, and Position Title.
<b>Active Duty Tours</b>	Displays a summary of the Soldier's ARNG Active Duty Tours.
<b>ATRRS History</b>	Displays information about the Soldier's Army Training Requirements and Resources



### 3 Retention Management Software Overview

Tab	Function
	System (ATRRS) Reservation History (Class Number, Course Number, Completion Status, and Start and End Dates).
<b>Medical Status</b>	Displays information on the medical status of the Soldier, including deployment limitations and other attributes of medical readiness.
<b>SFPA</b>	Displays the most recent status of each Suspension of Favorable Personnel Actions (SFPA) flag associated with a Soldier and tracked by his or her current state.
<b>Line Scores</b>	Displays the line scores for the Soldier which are derived from individual ASVAB subtest scores.
<b>Reenlist/Ext Activity</b>	Displays information on any recent reenlistment or extension activities, if applicable.
<b>Drill Attendance (U)</b>	Displays information on any Drill Attendance codes of "U" (Unsatisfactory Attendance).
<b>SIB Transactions</b>	Displays information on any IPPS-A transactions submitted for the Soldier, if applicable.
<b>Additional Contact Info</b>	Allows you to view existing contact information and edit or add information.
<b>Contact History</b>	Tracks all contact made with the Soldier. (See <a href="#">Viewing and Adding Contact History</a> below for more information.)

#### 3.2.3.1 Viewing and Adding Contact History

The third panel *Contact History* tab displays a record of all of the instances of contact with the Soldier.

1. Click **Contact History**.

▶ The *Contact History* tab opens.

The screenshot shows the 'Contact History' interface. At the top, there is a search bar and several utility icons. Below is a table with columns: Contact Date, Module, Contact Type, Comment, and Response. The table contains five entries. Below the table, it says 'Showing 1 to 5 of 5 entries'. Underneath is a form titled 'Add Contact History' with fields for Contact Date, Contact Type, Module, Response, and Comment, each with a red asterisk indicating it is required. There are also '+ ADD' and 'CANCEL' buttons at the bottom right of the form.

Contact Date	Module	Contact Type	Comment	Response
20220704	AWOL Recovery	Email	TEST Comment	TEST Response
20220608	AWOL Recovery	Email	test	
20220704	AWOL Recovery	Phone	TEST Comment	TEST Response
20220801	AWOL Recovery	Social Media	TEST 200 Comment	Test500 Response
20220802	AWOL Recovery	Certified Mail	TEST 88	TEST 88

2. To add a new contact record, fill in the fields and drop-down lists.

3. Click **+ADD**.

- ▶ The contact is added to the *Contact History* tab.

### 3.2.4 Case Details

The fourth panel, *Case Details*, contains all information pertaining to a Soldier's selected Case.

The *Case Details* panel contains the following tabs:

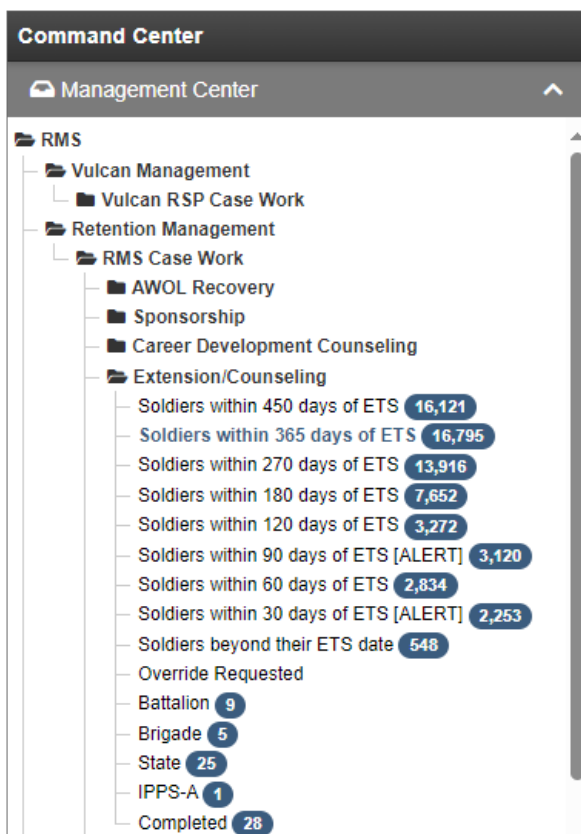
Tab	Function
<b>Case</b>	Displays detailed information on the case and allows permission based actions to be taken.
<b>Contracts</b>	
<b>Counseling</b>	Displays a list of all Soldier counseling (DA4856) that has been done and allows a new counseling form to be created. See <a href="#">Counseling</a> on page 58.
<b>Documents</b>	Displays information on the documents already uploaded for the case and allows users to upload additional documents relating to the case. See <a href="#">Documents</a> on page 59.
<b>Incentive Contracts</b>	Displays information for all incentive and benefit Contracts by Control Number. See <a href="#">Incentive Contracts</a> on page 61.
<b>Case History</b>	Displays information on the history of actions taken on the case. See <a href="#">Case History</a> on page 61.
<b>Intent History</b>	Displays all changes in intent for the case. See <a href="#">Intent History</a> on page 62.

# 4 Extension

RMS Extension is designed to document counseling of Soldiers and assist in extending Soldiers who are within 365 days of their ETS date. A DA Form 4836 can be generated through RMS. RMS Extension ties into the Guard Incentive Management Subsystem (GIMS) in order to allow a Bonus Addendum to be generated for applicable Soldiers.

## 4.1 Processing an Extension

1. Within the Command Center, open the *Management Center* tab and expand the *Extension/Counseling* menu.



2. Click one of the available work buckets to display its Soldier Roster in the second panel.

## 4 Extension

The screenshot displays the Command Center interface. On the left is a sidebar menu with the following items: Management Center, RMS (with sub-items: Vulcan Management, Vulcan RSP Case Work, Retention Management, RMS Case Work, AWOL Recovery, Sponsorship, Career Development Counseling, Extension/Counseling), Search, Reports, My Reports, Resource Center, Document Center, Administration, Assume Command, and RSP Portal. The main content area is titled 'Landing Page' and contains a 'Notifications' section. The notification is titled 'Release' and is posted by 'steven.j.zylich' on '10/15/2014 3:08:02 PM'. The message text reads: 'RMS V2.2.0.0 (Released 2014/05/05) New Features 1. (Framework) NGB-level users and state administrators can now emulate different roles using the Assume Command accordion tab in the Command Center as a training tool to view RMS from lower hierarchy levels. 2. (Framework) A Landing Page including a Notifications screen with columns for Date, Posted By, and Message now appears in the second panel after logging in to RMS. Enhancements 1. (Extension) The following email notifications have been added to the extension process: a. Battalion personnel receive an email when a case is transferred to the Battalion work bucket. b. Brigade personnel receive an email when a case is transferred to the Brigade work bucket. c. SIDPERS personnel receive an email when a case is transferred to the SIDPERS work bucket. 2. (IST) Cases that have been entered into the Initiate Interstate Transfer work bucket will be highlighted for the first 7 days. 3. (Framework) A loading progress window now appears instead of a plain white screen after the user logs in to indicate that the system is actively loading, particularly for users with slower internet connections. Resolved Issues 1. (Extension) Soldiers using RMS just to sign their DA Form 4836 are no longer required to request access.'

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3. Select a Soldier from the Soldier Roster.

## 4 Extension

- ▶ Soldier Details open in the third panel. Case Details open in the fourth panel. Minimize the third panel.

The screenshot displays a web application interface with two main panels. The left panel, titled 'AALA SHAMEL', contains a 'Soldier Summary' section with the following details:

Soldier Name	AALA SHAMEL	Grade	E5
Date of Commission	20121118	Rank	SGT
ETS Date	20121118	Unit Processing Code	P5GC0
Reserve Component Category	TPU	UPC Attached	

Below the summary is a 'Create Case' section with a table of case entries:

Case Type	Case Number	Status	Previous Status	Date Created	Created By
AWOL	2689938	Terminated	Validate Contact Information	01/26/2015	steven.j.zylch
Extension	883172	Closed	Case Started	12/19/2013	
Extension	1252776	271 - 365 days	271 - 365 days	12/23/2013	

The right panel, titled 'AALA SHAMEL (1252776)', contains a 'Case Summary' section with the following details:

Case ID	1252776	Name	271 - 365 days
Authority	Extension	Start Date	20131223

Below the summary is a 'Case' section with a 'Soldier Intent' dropdown menu set to 'Extend' and a 'Reason' dropdown menu set to 'APFT Failure'. There are also radio buttons for 'ETS', 'Retirement', and 'Undecided'. Below this is a 'Counseling Comments' section with an 'Excel' button and a 'Show 10 entries' dropdown. At the bottom of the case section are buttons for 'Add Counseling Comment', 'Prepare New 4856 Counseling', 'Alert Chain of Command', and 'Record Intent'. A pagination bar at the bottom shows '1 2 3 4 5 6'.

4. In the fourth panel, select the Soldier's intent with regards to the upcoming ETS date from the *Soldier Intent* window. The available choices include *Extend*, *ETS*, *Retirement*, or *Undecided*.

## 4 Extension

**Case** Refresh Help Print Close

Displays detailed information on the case and allows permission based actions to be taken.

Soldier Intent

Extend

Reason:

ETS

Retirement

Undecided

Counseling Comments

Show  entries

Date	User	Comment
No data available in table		

Showing 0 to 0 of 0 entries Previous Next

Unable to Counsel

5. If the Soldier intends to *Extend* or *ETS*, select the **Reason**.

**Case**

Displays detailed information on the case and allows permission based actions to be taken.

Soldier Intent

Extend

Reason:

ETS

Retirement

Undecided

Counseling Comments

Flags

Fully Qualified

Height/Weight Noncompliance

Medical Holds



**Note** - When selecting *ETS*, you must choose a reason category first, and then choose a reason.

Displays detailed information on the case and allows permission based actions to be taken.

Soldier Intent

Extend

**ETS**

Reason Category:

Reason:   
Admin error  
Change of drill schedule  
Did not receive newsletter  
Short mobilization notice

Counseling Comments

Date	User	Comment

6. Click **Prepare New 4856 Counseling** at the bottom of the screen to officially record a counseling session with the Soldier using DA Form 4856.

Unable to Counsel



**Tip** - The *Prepare New 4856 Counseling* button is also at the bottom of the *Counseling* tab.

7. The *Counseling* window appears.

## 4 Extension

Counseling ×

Prepare 4856

Name (Last, First, Middle): AALA SHAMEL

Social Security Number: 127331311

Counseling Type: General Form

Date of Counseling: 12/18/2023

Organization:

Counselor Last Name:

Counselor First Name:

Counselor Middle Name:

Counselor Title:

Purpose of Counseling:

Point of Discussion:

Plan of Action:

Session Closing:

Leader Responsibilities:

Assessment:

8. Fill out the appropriate information.
9. Scroll down and click **SAVE**.
10. If the Soldier was unable to be counseled, select the **Unable to Counsel** check box, and select a reason from the drop-down menu that appears.

Retirement

Undecided

Counseling Comments

Date
------


Showing 0 to 0 of 0 entries

Unable to Counsel

School  
Missing Drills  
Split Drill  
Deployed  
AWOL  
Attached to another Unit  
Other

1 2 3 4 5 6



 **Note** - You can click *Add Counseling Comment* to the left of the *Prepare New 4856 Counseling* button to add comments or unofficial counseling notes to the *Counseling Comments* box, along with your username and the date each time a new comment is entered.

11. Optionally, click **Alert Chain of Command** at the bottom of the screen if the Soldier makes a request that is beyond the control of the unit, such as changing a Soldier's MOS.

▶ The *Alert Chain of Command for Case* pop-up window appears.



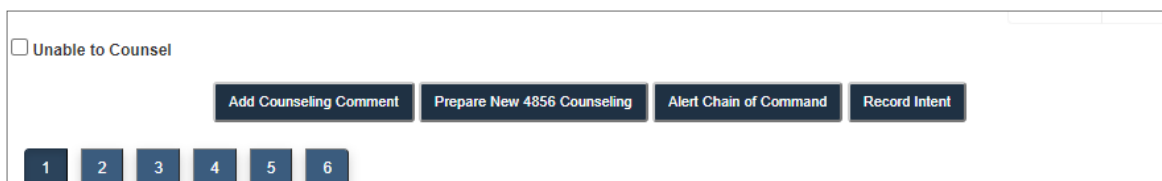
- a. Select **Send to Battalion** or **Send to Brigade** from the *Transfer Case to* drop-down menu.



- b. Enter notes in the *Case Note* field.
- c. Click **SAVE**.

















▶ The case is transferred to the selected level for review and moved to the Battalion or Brigade work bucket in the Command Center. The case is returned to the unit after the requested action is performed or rejected.

12. Click **Record Intent** at the bottom right of the screen.



13. The *Extension Eligibility* screen appears. The Extension module immediately determines which eligibility rules have been met, which are not applicable, and which have not been met by the Soldier.




## 4 Extension

Case			
Displays detailed information on the case and allows permission based actions to be taken.			
Eligibility Rules	Rule Desc	Eligible	Update
ACFT. Soldier otherwise eligible but failed to take or pass the latest Physical Assessment.			<input type="button" value="UPDATE"/>
If Soldier is beyond 60 years of age, they will qualify for retirement by age 64			
Security Clearance is expired			
Soldier is a U.S. Citizen or Legal Resident Alien			
Soldier must have a current periodic health assessment and must meet medical retention standards per AR40-501 P8-20 Delta(4)			<input type="button" value="UPDATE"/>
Soldier must not be beyond 60 years of age (Mandatory Retirement Age)			
Soldier must not have any Active SFPA (Suspension of Favorable Personnel Action) Flags			
Soldier must not have BAR to reenlist			

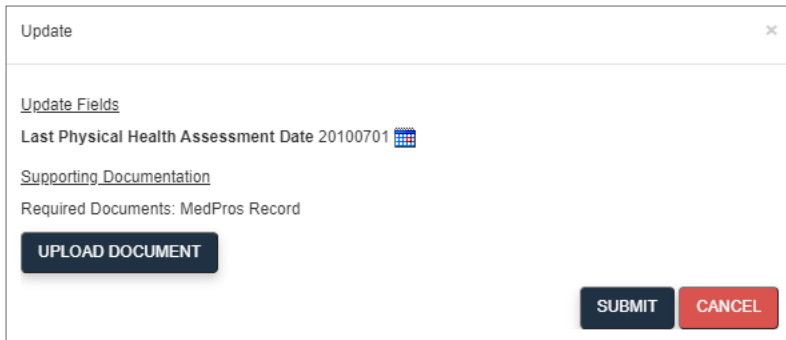
1 2 3 4 5 6



**Note** - NGB Admin and state-level Super Admin users see an *Override Eligibility* button instead of the *Continue* button under the *Eligibility Rules* table. Clicking the *Override Eligibility* button bypasses the *Eligibility Rules* table and sends the case to the *Period of Extension Questions* on the next page. Any user with extension permissions can process the case at this point. The override remains in effect until the case transitions into a new work bucket.

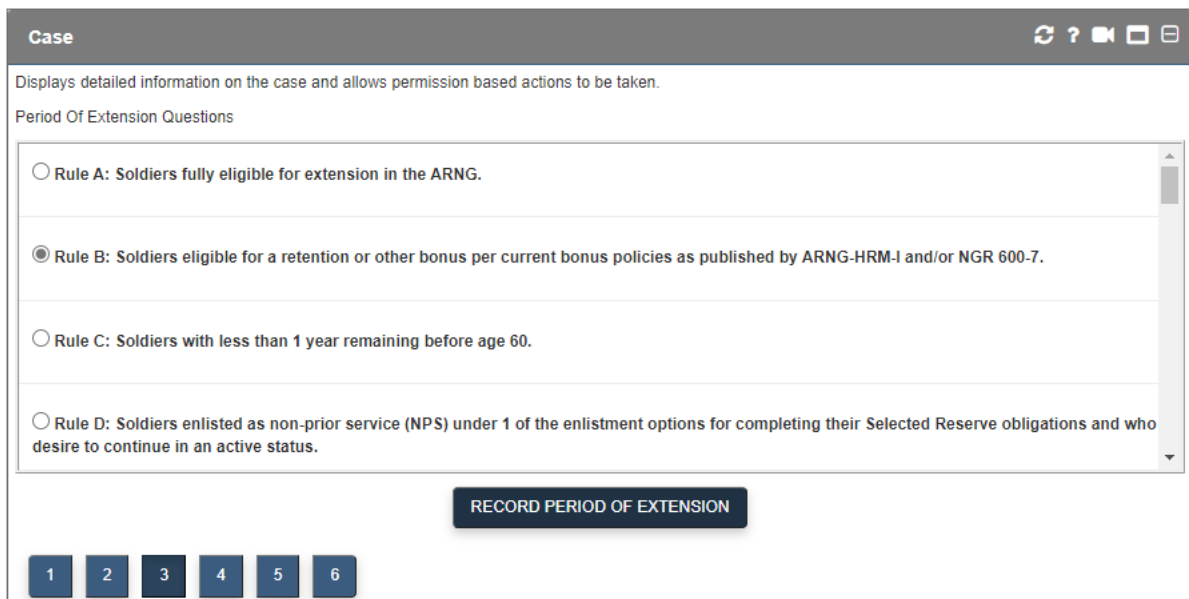
- a. The *Rule Met* icon  indicates the Soldier satisfactorily meets the requirements for the evaluated rule. Clicking on the *Rule Met* icon displays the eligibility rule that was evaluated and the Soldier's information as to why he/she meets eligibility criteria.
  - b. The *Rule Not Met* icon  indicates the Soldier fails to meet the requirements for the evaluated rule. Clicking on the *Rule Not Met* icon displays the eligibility rule that was evaluated and the Soldier's information as to why he/she does not meet eligibility criteria.
  - c. The *Rule Description* icon  displays the Law, DoDI, SRIP Policy, EIOM, and/or Regulations that support a given rule. Hover on this icon to view information applicable to the case.
14. If there are any *Rule Not Met* icons in the Eligible column, an *Update* button appears in the *Update* column for that row.
- Click **UPDATE** to update fields that may change the Soldier's eligibility, such as Last Physical Exam Date and Soldier Weight, and supporting documentation for the new information, then

Click **SUBMIT**.




15. Click **CONTINUE**.

▶ The *Period of Extension Questions* screen appears.



 **Note** - Alternatively, click **OVERRIDE ELIGIBILITY** to continue without meeting the *Eligibility Rules*.

16. Choose the rule that best describes the Soldier's current scenario.

 **Note** - You must select a rule for the Soldier to be eligible to extend. You may only select one rule.

17. Click **RECORD PERIOD OF EXTENSION**. The *Select Program* and *Select Incentive* drop-downs appear.

## 4 Extension

- ▶ The *Incentive Request* window also appears. Select the appropriate options and click **CHECK ELIGIBILITY** to view the eligibility rules.

The screenshot shows a web application interface with two main sections: **Case** and **Incentive Request**.

**Case Section:**

- Header: "Case" with refresh, help, and window control icons.
- Description: "Displays detailed information on the case and allows permission based actions to be taken."
- Fields: "Select Program" (dropdown with "Selected Reserve Incentive Program (SRIP)"), "Select Incentive" (dropdown with "Re-enlist/Extend").

**Incentive Request Section:**

- Header: "Incentive Request" with refresh, print, and window control icons.
- Fields: "Soldiers Grade" (dropdown with "E5"), "Bonus AOC/MOS" (dropdown with "19D - Cavalry Scout"), "Contract Signature Date" (text input with "20230502"), "Contract Length" (dropdown with "Select ..."), "Duty Position Status" (dropdown with "Select ..."), "Is the Soldier currently assigned to a Medical Management Activity (MMA) unit?" (radio buttons for "Yes" and "No", "No" is selected), "RMS Case ID" (text input with "1262264").

**Buttons:**

- "CHECK ELIGIBILITY" button.
- Page navigation buttons: 1, 2, 3, 4, 5, 6.



**Note** - You can select different programs from the *Select Program* drop-down in the *Case* section. Choose from the *Selected Reserve Incentive Program (SRIP)*, or the *MGIB Kicker* programs. The fields in the *Incentive Request* section change depending on the selected program.

The screenshot shows a dropdown menu for "Select Program".

- Header: "Select Program"
- Selected item: "Loan Repayment Program (LRP)"
- Search bar: A search input field with a magnifying glass icon.
- Options list:
  - Loan Repayment Program (LRP)
  - Selected Reserve Incentive Program (SRIP)
  - MGIB Kicker

18. Click the button for page 5. The *Extension Information* screen appears.

## 4 Extension

**Case** ↻ ? 🗨 📄

Displays detailed information on the case and allows permission based actions to be taken.

Extension Information

Date Extension will be Executed: 10/27/2022 📅

Length of Extension:

Days:

Months:

Years:

Name, Grade, and Branch of Commissioned Officer:

Number of Extensions Previously Granted to Current DD Form:

**RECORD EXTENSION INFORMATION**

1 2 3 4 5 6



**Note** - Some fields may already be filled depending on your previous selections.

19. Type or select from the date picker 📅 the date the extension is executed.

Date Extension will be Executed: 07/21/2022

Length of Extension:

Name, Grade, and Branch of Commissioned C

Number of Extensions Previously Granted to

Jul 2022

Su	Mo	Tu	We	Th	Fr	Sa
						1 2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

20. Choose a length of extension for the Soldier from the drop-down menu.

1 year  
1 year  
2 years  
3 years  
4 years  
5 years  
6 years

21. Enter the Name, Grade, and Branch of the Commissioned Officer responsible for signing off on the Soldier's extension.

Name, Grade, and Branch of Commissioned Officer:

22. Enter the number of extensions previously granted to the current DD Form.

Number of Extensions Previously Granted to Current DD Form:

23. Enter the Service Representative's information in the fields at the bottom of the section.

Service Representative/Witnessing Official:

Last name

First name

Middle Initial

Suffix

Rank

**RECORD EXTENSION INFORMATION**

1 2 3 4 5 6



**Note** - This information is required to proceed.

24. Click **RECORD EXTENSION INFORMATION**.

- ▶ The *Issue Documents* screen appears.

Case

Displays detailed information on the case and allows permission based actions to be taken.

Issue Documents

[DA4836](#)

**PRINT DA4836** **UPLOAD DOCUMENT**

**PRINT ADDENDUM / AGREEMENT**

Transfer Case(\* DA4836 must be uploaded)

**TRANSFER**

1 2 3 4 5 6

25. Click **PRINT DA4836** to open a PDF of the contract form in a new window.



**Note** - After completing step 4 of the Extension process (Incentive Request), you can click **PRINT ADDENDUM/AGREEMENT**.

26. After DA Form 4836 has been signed by the Soldier and the commissioned officer and uploaded to your computer, click **Upload Document**.

- ▶ The *Upload File* to pop-up window appears.

27. Click **Choose File** to select the document from your files.
28. Optionally, enter a description.
29. Click **SAVE**.

- ▶ You can click the link to the right of the **UPLOAD DOCUMENT** button to view the uploaded form.

## 4.2 Transferring a Case

### To complete a Soldier's extension:

After the DA Form 4836 has been signed by the Soldier and uploaded, transfer the case to the appropriate command level to submit the extension.

1. From the *Issue Documents* screen, page 6 of the *Case* tab, click the drop-down menu under *Transfer Case* and select to send to Battalion, Brigade, or State.



**Note** - The *Send to IPPS-A* option is hidden for all work buckets except for the *State* and *Brigade* work buckets.

2. Click **TRANSFER**.
  - ▶ Personnel at the selected command level receive an email notification that a case has been transitioned to their work bucket for review.



**Note** - Each command level has its own work bucket where users at that level can transfer to a higher level, from the unit to Battalion, Brigade, State and IPPS-A.



**Tip** - Contact your incentives manager for questions about incentives.

## To transfer a case from the *Battalion, Brigade or State* work buckets:

After a case has been transferred to Battalion, Brigade, or State, users at those respective command levels can view the case and its supporting documents in the respective work bucket.

1. From the *Soldier Roster* panel, the case opens to the *Issue Documents* screen, page 6 of Case Details.

- ▶ Open the **Documents** tab to review the DA Form 4836, and any other supporting documentation.

2. If you approve the case, return to the *Issue Documents* screen and click the drop-down menu under Transfer Case to select an available option.



**Note** - The example above shows the options available for a case in the *Brigade* work bucket.


3. Click **TRANSFER**.

- ▶ The person who submitted the case for review receives an email notification that the case has been returned, including your comments.

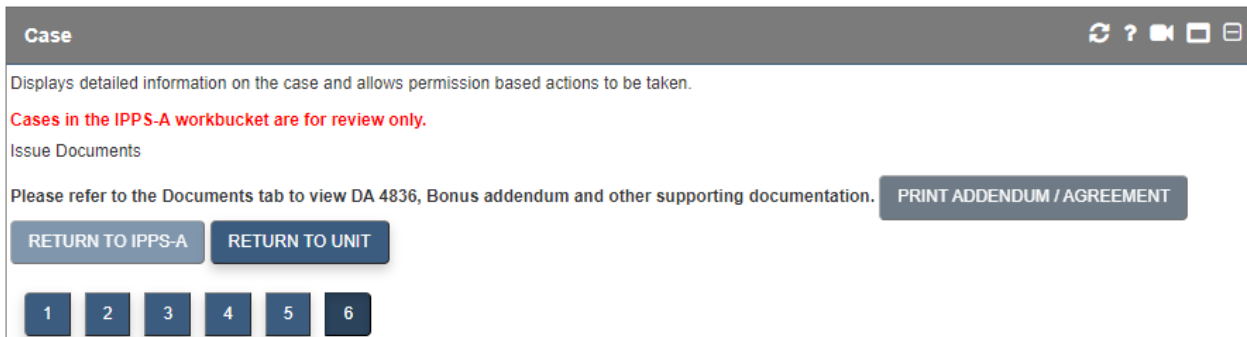


## To transfer a case from the *IPPS-A* work bucket:

Cases that have been transferred to the *IPPS-A* work bucket are either entered into the IPPS-A database or returned to the unit.

 **Note** - Cases in this work bucket are for review only.

From the Soldier Roster panel, the case opens to the *Issue Documents* screen, page 6 of Case Details.



Case

Displays detailed information on the case and allows permission based actions to be taken.

**Cases in the IPPS-A workbucket are for review only.**


Issue Documents

Please refer to the Documents tab to view DA 4836, Bonus addendum and other supporting documentation. PRINT ADDENDUM / AGREEMENT

RETURN TO IPPS-A RETURN TO UNIT

1 2 3 4 5 6

- Click **RETURN TO UNIT** to send the case back to the unit.
- Click **RETURN TO IPPS-A** to send the case information to IPPS-A and close the case.

 **Note** - When you click **Return to IPPS-A** the case remains in the *IPPS-A* work bucket until the ETS date is confirmed. Then it moves to the *Completed* work bucket.

# 5 Additional Actions

By default, the fourth panel opens with the *Case* tab selected. The *Contracts*, *Counseling*, *Documents*, *Incentive Contracts*, *Case History*, and *Intent History* tabs can also be viewed within this panel.

## 5.1 Contracts

The *Contracts* tab...

Case	Contracts	Counseling	Documents	Incentive Contracts	Case History	Intent History
Contracts						

## 5.2 Counseling

1. Click the **Counseling** tab in the *Case Details* (fourth) panel.
  - ▶ The tab opens, showing information about previous counseling sessions completed with the Soldier.

Case	Contracts	Counseling	Documents	Incentive Contracts	Case History	Intent History
Counseling						
Last Updated	Counseling Date	Counselor Last Name	Counselor First Name	Counselor Title	Unable To Counsel Reason	State at Counseling
4/27/2022 2:32:18 PM	20220427	counselor1-ln	counselor1-fn	Battalion Commander	Attached to another Unit	365 days until ETS date
PREPARE NEW 4856 COUNSELING						

2. Click a row to view more information about the counseling entry.

- The *Counseling* pop-up window opens.

3. If you created the original counseling record for the entry, you can edit the information in the *Counseling* pop-up window.
4. Click **SAVE**. Or to exit without saving, click **CANCEL**.
5. Click **PREPARE NEW 4856 COUNSELING** at the bottom of the *Counseling* tab window to enter a new counseling session. The *Prepare New 4856 Counseling* button is also located on the first page of the *Case* tab of the *Soldier Intent* screen.

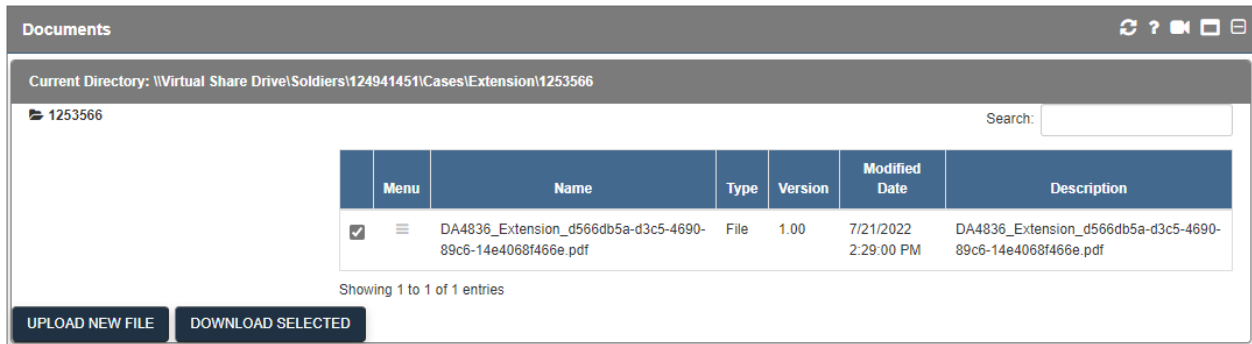
## 5.3 Documents

The *Documents* tab allows you to filter, download, and upload files pertaining to the selected Soldier.

Menu	Name	Type	Version	Modified Date	Description
<input type="checkbox"/>	DA4836_Extension_d566db5a-d3c5-4690-89c6-14e4068f466e.pdf	File	1.00	7/21/2022 2:29:00 PM	DA4836_Extension_d566db5a-d3c5-4690-89c6-14e4068f466e.pdf

### 5.3.1 Download a File

1. From the *Documents* tab, check the check box(es) of the file(s) that you want to download.



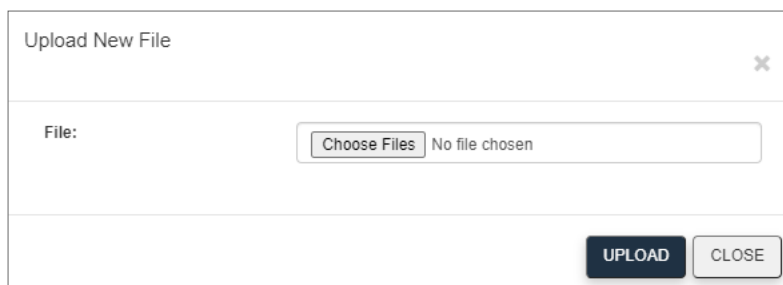
**Note** - If more than one file is selected, the files are downloaded as a zip file.

2. Click **DOWNLOAD SELECTED** at the bottom of the screen. The file(s) are downloaded.

### 5.3.2 Upload a File

1. Click **UPLOAD NEW FILE**.

▶ The *Upload New File* dialog box opens.



2. Click **Choose Files**.
  3. Navigate to the file, and click **Open**.
- ▶ The *File* field is populated with the name of the file.



**Note** - You can upload multiple files at a time by simply selecting more than one file before clicking **Open**.

4. Click **UPLOAD**.

▶ The file is uploaded.



**Note** - Any documents uploaded in the 4th panel will be available in the *Documents* tab in Panel 3 where all documents uploaded to the Soldier's case are consolidated.

## 5.4 Incentive Contracts

The *Incentive Contracts* tab displays all incentive contracts associated with the Soldier. Any prior incentive contracts and ones that are currently in effect or being applied for are included in the *Incentive Contracts* tab.

Contract ID	Control Number	Contract Type	Rate Code	Contract Amount	Current Status	Contract Issue Date
730325	A21060001GANGB	EAB	MSEA	\$0.00	Waiting for Uploading Manual Contract Documents	20210625
730563	S21110001GANGB	RE	MLRE2	\$50,000.00	Contract Initiated	20211104
730567	S21110001GANGB	RE	MLRE2	\$50,000.00	Contract Initiated	20211104
730568	S21110001GANGB	RE	MLRE2	\$50,000.00	Contract Initiated	20211104
730569	S21110001GANGB	RE	MLRE2	\$50,000.00	Contract Initiated	20211104

## 5.5 Case History

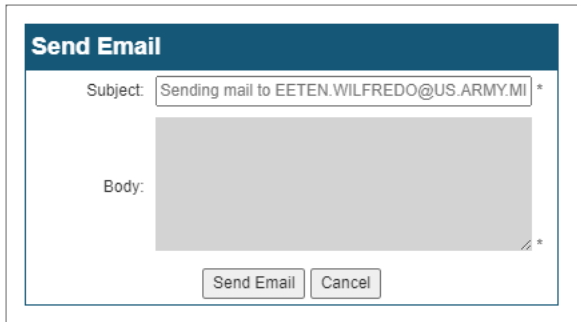
- In the *Case Details* (fourth) panel, click the **Case History** tab.
  - The *Case History* tab opens, displaying information about previous actions completed for the Soldier.

	Case Code	Date	Comments	User	Status
<b>CONTACT</b>	Extension	05-20-2022	Intent recorded.	alec.horn	365 days until ETS date
<b>CONTACT</b>	Extension	05-20-2022		alec.horn	365 days until ETS date
<b>CONTACT</b>	Extension	04-22-2022	Intent recorded.	alec.horn	365 days until ETS date
<b>CONTACT</b>	Extension	04-22-2022		alec.horn	365 days until ETS date
<b>CONTACT</b>	Extension	05-20-2022		alec.horn	365 days until ETS date
<b>CONTACT</b>	Extension	05-04-2022	Intent recorded.	alec.horn	365 days until ETS date
<b>CONTACT</b>	Extension	05-04-2022		alec.horn	365 days until ETS date
<b>CONTACT</b>	Extension	07-01-2022	Intent recorded.	alec.horn	365 days until ETS date
<b>CONTACT</b>	Extension	05-20-2022	Intent recorded.	alec.horn	365 days until ETS date
<b>CONTACT</b>	Extension	05-20-2022		alec.horn	365 days until ETS date

Showing 1 to 10 of 24 entries

PREVIOUS 1 2 3 Next

- To contact the Soldier, click **CONTACT** to open the *Send Email* window.



**Send Email**

Subject: Sending mail to EETEN.WILFREDO@US.ARMY.MI \*

Body: [Empty text area] \*

Send Email Cancel

3. Compose the email and click **Send Email**.

▶ A copy of the sent email will be sent to you (the user) as well.

## 5.6 Intent History

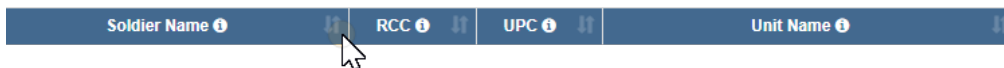
Click the **Intent History** tab in the *Case Details* (fourth) panel.

The tab opens, showing a list of every change to a case's intent that was previously recorded in the *Case* tab.

Case	Contracts	Counseling	Documents	Incentive Contracts	Case History	Intent History
<b>Intent History</b>						
Submitted By ALEC.HORN			Prior Rsn Cat Extension Extend			
Date 03-15-2022			Prior Rsn Fully Qualified			
Prior Intent Extend			Current Intent			
			Current Reason Category			
			Current Reason			

### 5.6.1 Filtering

You can filter by clicking on the arrow icons in each column title. Doing so sorts the information by ascending or descending order.



# 6 Contacting the Help Desk

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You can contact the Help Desk in one of two ways:

1. Call 1-855-249-9311.
2. Email <mailto:ng.ncr.arnng.mbx.rcms-g@mail.mil>

When contacting the Help Desk, please include the name of the module and a brief description of what you were doing before receiving an error message within the module.

# 7 Glossary of Icons

These are all of the icons encountered throughout the RMS Extension product.

Case Management Icons	Function
	Refresh
	Show/hide the filter fields above the columns
	Print
	Export to CSV
	Export to Excel
	Closes the current panel
	Closes all tabs currently open for just the selected panel
	Toggle section
	Toggle full screen
	Maximize section
	Displays the look up values for a particular field
	Show DEI
	Help
	Video



# 8 Additional Tools

Additional Tools explains additional functionality included within RMS, including the *Search* and *Reports* sections.

## 8.1 Search

You can search for Soldiers within the module by selecting the *Search* tab from the *Command Center*, and then choosing the appropriate *Search Type*. (See [Soldier Roster Tools](#) on page 40 for more information about options in the search results panel.)

### 8.1.1 Soldier Search

The screenshot displays the 'Search' interface for finding soldiers. It features a search bar at the top with a magnifying glass icon and an upward arrow. Below the search bar are several sections:

- Searches:** A dropdown menu currently set to 'Soldier Search'.
- Saved Searches:** A dropdown menu with 'Select...' as the current selection.
- Recent Searches:** A dropdown menu with 'Select...' as the current selection.
- SSN:** A text input field.
- SSN Last 4:** A text input field.
- Last Name:** A text input field.
- First Name:** A text input field.
- UPC Code:** A text input field.

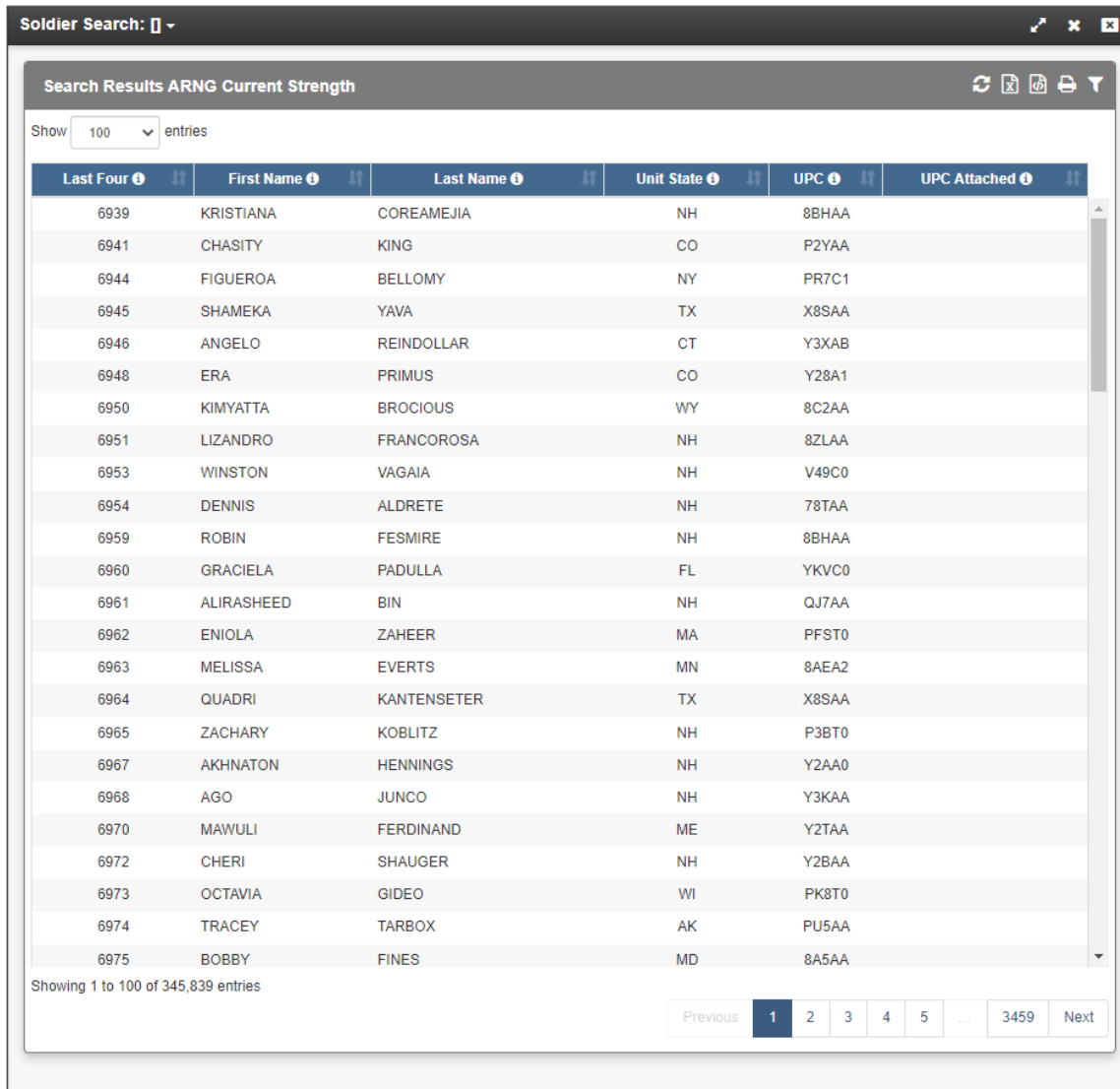
At the bottom of the form are five buttons: 'SEARCH', 'RESET', 'OPEN FIRST', 'SAVE', and 'DELETE'.

1. Enter information into any of the available fields—*SSN*, *SSN Last 4*, *Last Name*, *First Name*, or *UPC Code*.

## 8 Additional Tools

2. Click **SEARCH**.

► The second panel displays a list of Soldiers matching your search criteria.



The screenshot shows a web application window titled "Soldier Search: [ ]". The main content area is titled "Search Results ARNG Current Strength". It features a table with columns for "Last Four", "First Name", "Last Name", "Unit State", "UPC", and "UPC Attached". The table displays 26 rows of data, with the first row being 6939 KRISTIANA COREAMEJIA NH 8BHAA. The interface includes a "Show 100 entries" dropdown, a "Showing 1 to 100 of 345,839 entries" status bar, and a pagination control with "Previous", "1", "2", "3", "4", "5", "...", "3459", and "Next" buttons.

Last Four	First Name	Last Name	Unit State	UPC	UPC Attached
6939	KRISTIANA	COREAMEJIA	NH	8BHAA	
6941	CHASITY	KING	CO	P2YAA	
6944	FIGUEROA	BELLOMY	NY	PR7C1	
6945	SHAMEKA	YAVA	TX	X8SAA	
6946	ANGELO	REINDOLLAR	CT	Y3XAB	
6948	ERA	PRIMUS	CO	Y28A1	
6950	KIMYATTA	BROCIOUS	WY	8C2AA	
6951	LIZANDRO	FRANCOROSA	NH	8ZLAA	
6953	WINSTON	VAGAIA	NH	V49C0	
6954	DENNIS	ALDRETE	NH	78TAA	
6959	ROBIN	FESMIRE	NH	8BHAA	
6960	GRACIELA	PADULLA	FL	YKVC0	
6961	ALIRASHEED	BIN	NH	QJ7AA	
6962	ENIOLA	ZAHEER	MA	PFST0	
6963	MELISSA	EVERTS	MN	8AEA2	
6964	QUADRI	KANTENSETER	TX	X8SAA	
6965	ZACHARY	KOBLITZ	NH	P3BT0	
6967	AKHNATON	HENNINGS	NH	Y2AA0	
6968	AGO	JUNCO	NH	Y3KAA	
6970	MAWULI	FERDINAND	ME	Y2TAA	
6972	CHERI	SHAUGER	NH	Y2BAA	
6973	OCTAVIA	GIDEO	WI	PK8T0	
6974	TRACEY	TARBOX	AK	PU5AA	
6975	BOBBY	FINES	MD	8A5AA	

3. Click a Soldier's name to view more information about the Soldier.

## 8 Additional Tools

- The third panel opens.

**Soldier Summary**

<b>Soldier Name</b> COREAMEJIA KRISTIANA	<b>Grade</b> O5
<b>Date of Commission</b> 19891014	<b>Rank</b> LTC
<b>ETS Date</b>	<b>Unit Processing Code</b> 8BHAA
<b>Reserve Component Category</b> MIL	<b>UPC Attached</b>

**Create Case**

ALL

ADD CASE

Search:

Case Type	Case Number	Status	Previous Status	Date Created	Created By
Extension	2805900	In Progress	Case Started	02/25/2022	Alec.horn
Extension	2805913	In Progress	Case Started	03/08/2022	alec.horn
IST	2805844	Initiate Interstate Transfer	Case Started	12/22/2021	alec.horn
IST	2805848	Initiate Interstate Transfer	Case Started	01/04/2022	alec.horn
Sponsorship	2805915	Manage Sponsor Contact	Initiate Sponsorship	03/08/2022	alec.horn
Transition Service	2650983	Terminated	Financial Counseling	09/11/2014	
Transition Service	2805886	Initial Phase	Case Started	01/12/2022	alec.horn
Transition Service	2805916	Initial Phase	Case Started	03/08/2022	alec.horn

Showing 1 to 8 of 8 entries

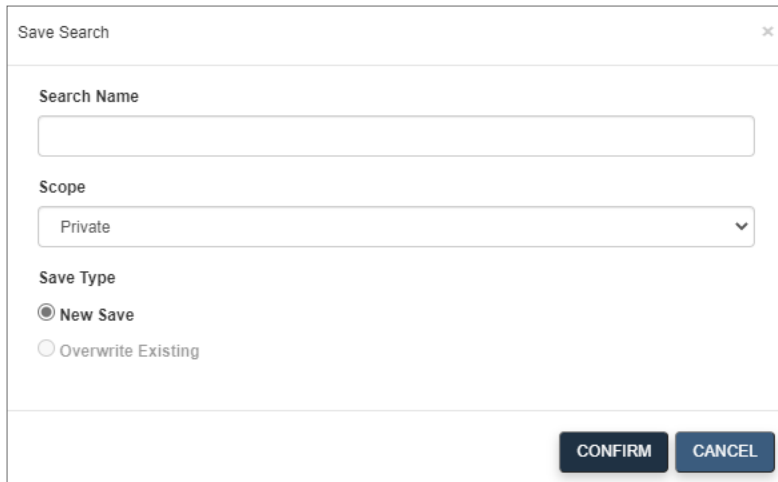
Subject To Privacy Act of 1974(PL-93-579). For Official Use Only. This application maintains usage and statistics for security and user privacy protection.  
Accessibility/Section 508



**Note** - Some tabs may be hidden when the panel opens. Click the arrow icon to view them.

## 8.1.2 Save a Search

1. Click **SAVE** after entering search parameters to save a search for later use.

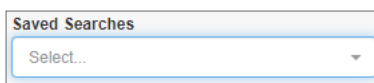


The image shows a 'Save Search' dialog box with a close button (X) in the top right corner. It contains three sections: 'Search Name' with a text input field; 'Scope' with a dropdown menu currently set to 'Private'; and 'Save Type' with two radio button options: 'New Save' (which is selected) and 'Overwrite Existing'. At the bottom right, there are two buttons: 'CONFIRM' and 'CANCEL'.

2. Enter a name for the search.
  3. Choose the *Scope* for the search, either Private or Public.
  4. Choose to overwrite an existing save, or save the search as something entirely new.
  5. Click **CONFIRM**.
- ▶ The search is saved and can be used again by clicking the *Saved Searches* drop-down menu.

## 8.1.3 View Saved Searches

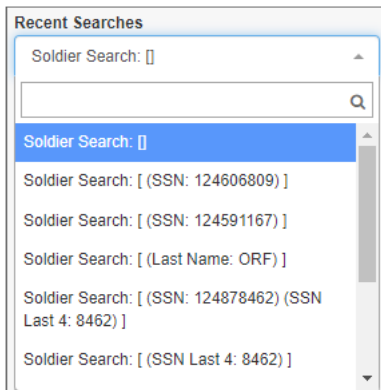
From the *Saved Searches* drop-down menu, you can choose to view the criteria for any previously saved search.



The image shows a 'Saved Searches' dropdown menu with a blue border and a downward-pointing arrow on the right side. The text 'Select...' is visible inside the dropdown.

## 8.1.4 Recent Searches

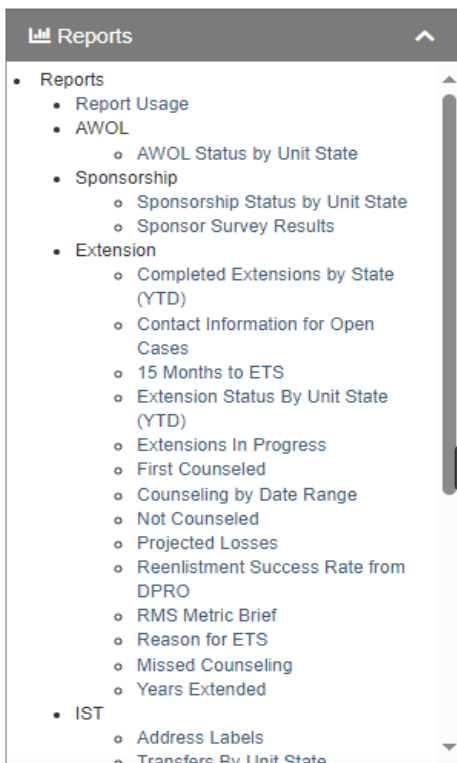
From the *Recent Searches* drop-down menu, you can view the search criteria from your recent searches.



## 8.2 Reports

Reports are a central tool in RMS Extension. They display data in a tabular format and provide many options for customization. In general, reports allow you to view information tailored to your needs at the scope that makes sense for your subject of interest. They provide a user-friendly way to access detailed information on nearly any data used in RMS Extension.

You can view reports within the module by selecting the *Reports* tab from the Command Center, and then choosing the appropriate folder.

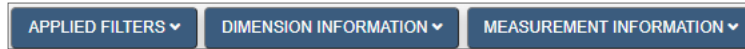


## 8 Additional Tools

This section of the user guide explains how to navigate and work within a report. The functions described here are available for all reports, regardless of how they were generated.

## 8.2.1 The Reports Screen

At the top of every report screen you can find the **APPLIED FILTERS**, **DIMENSION INFORMATION**, and **MEASUREMENT INFORMATION** buttons. These give information about the report and options for modifying it. The report itself occupies the remainder of the screen.



## 8.2.2 Data Marts

Reports can run directly against a data mart or can link directly to a data mart. All reports either represent a portion or portions of data mart data. A data mart is a central source for data pertaining to a certain focus. Each data mart defines the dimensions and measurements available to you as well as the roll-up definitions (table joins) that derive the information. Data marts pull their data from select source tables, which define how a user or report queries against them.

## 8.2.3 Report Information

The section at the top-left side of Panel 2 contains the title of the report and a short description of the information contained therein. The *MEASUREMENT INFORMATION* section describes the numeric values being presented (e.g., Assigned Strength), usually as columns in the report. The *DIMENSION INFORMATION* section identifies the other field elements being displayed in the report, often grouped as row values (e.g., Unit State) and/or filters (e.g., Run Date).



**Tip** - See [Measurements](#) below or [Dimensions](#) below for more information.

### 8.2.3.1 Measurements

Measurements are fields that represent a numeric count (e.g., a sum total) or mathematical function (e.g., an average value or the percentage of a population) of something being analyzed. They are typically derived from information stored as binary (yes/no) values in the Data Store at the individual record level-of-detail.

Examples of data stored as measurements include total assigned strength, total gains over a given period of time, MOS-qualified personnel, average age, and an organization's loss rate.

### 8.2.3.2 Dimensions


Dimensions are fields with values that are typically grouped to form a basis of comparison (e.g., male vs. female), or are used to filter or parse data (e.g., unit state = Virginia). Since they are not typically represented with binary "Yes/No" values, dimensions cannot be directly summed; rather, they are used in combination with various measurements (e.g., total missions, etc.) to produce your result matrix. For example, consider "gains" (measurement) by "unit state," or "assigned strength" (measurement) by "gender" (dimension). Dimension values are typically represented as rows in a given report, although they can also appear as columns in a cross-tab report.

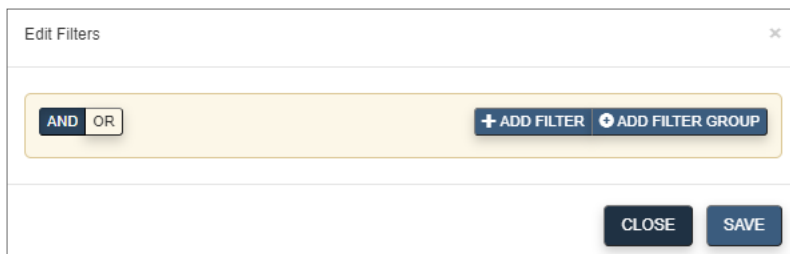
## 8.2.4 Applied Filters

The **APPLIED FILTERS** button displays the current filter on the report, if applicable. Any additional filters you apply appear when you click it, as do any drill-down criteria you add.



### 8.2.4.1 Editing a Filter

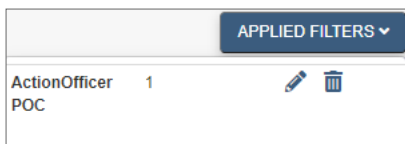
1. Click the **Edit Filters** button  to change the parameters of one of the filters.
  - ▶ The *Edit Filter* screen appears. Click **ADD FILTER**. A drop-down menu appears.



2. To update the filter, select an operator from the drop-down list.
3. Next, select the value by which to filter the report.
4. Click **SAVE** to confirm your selections.
  - ▶ The updated report appears.

### 8.2.4.2 Deleting a Filter

Click the **Delete Filter** icon  under **APPLIED FILTERS**. Then click **DELETE** in the confirmation window.



- ▶ The updated report appears.



**Note** - This option is not available for the *Run Date* filter, which must appear on all reports.








## 8.2.5 Report Tools








Report tools are displayed at the top of the panel beneath the report information buttons. They include various options for editing, saving, and viewing a report.



The following table explains each of the icons that can be found in the *Reports* blade. Icons with complex functions are explained in greater depth in their own section of the user guide.

 **Note** - Available icons may vary among products.

Button	Result
	A <i>Save Report</i> dialogue screen appears.
	The report is emailed to the email account associated with your profile.
	A pop-up window appears with options for subscribing to the report.
	A pop-up window appears with basic options for editing an aggregate report.
	A pop-up window appears with in-depth options for editing an aggregate report.
	The base report appears.
	A collection of dashboards appear, displaying the information from your report.
	A pop-up window appears with instructions for exporting the report data to a Microsoft Excel spreadsheet.
	A pop-up window appears with instructions for exporting the aggregate and base reports as separate tabs in a Microsoft Excel spreadsheet.
	View advanced options for sorting the report.
	A pop-up window appears with instructions for exporting the report data to a Microsoft Excel Comma Separated Values File.
	The <i>Report Builder</i> screen appears. It allows you to select specific measurements, dimensions, and filters to include within the base report.
	A pop-up window appears displaying Formation View for the selected metric and POD or UPC.

	A chart displaying the information from your report appears .
	View the report's data.
	Print the report.
	A pop-up window appears with <i>Dimensions</i> and <i>Measurements</i> panels explaining the data in your report.
	A pop-up window appears with an email to send to all Soldiers returned by a base report. For more, see <b>Report Email Notification</b> on page 1. This icon is only available to specific users.
	A pop-up window appears displaying the SQL code.
	A pop-up window appears displaying Xml code.


### 8.2.5.1 Report Builder

The *Report Builder* tool allows you to modify base reports (see [Aggregate and Base Reports](#) on page 80) with customized dimensions, measurements, and filters.

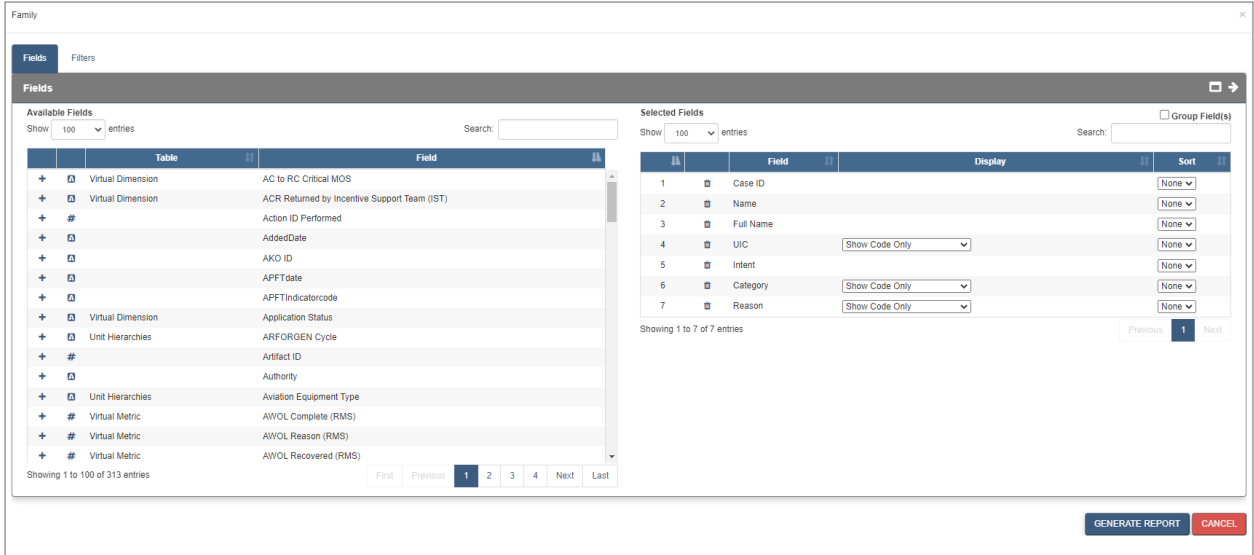


**Note** - In RMS Extension, filters determine what data you see and how it is configured in any given report, dashboard, or view.

## Building a Report with Report Builder

1. From within a base report, click the **Edit Base Report** button .


► The *Report Builder* appears.



The screenshot shows the 'Report Builder' interface for a 'Family' report. It features two main panels: 'Available Fields' and 'Selected Fields'. The 'Available Fields' panel contains a list of fields with columns for 'Table' and 'Field'. The 'Selected Fields' panel shows a list of fields with columns for 'Field', 'Display', and 'Sort'. The 'Selected Fields' panel also includes a 'Group Field(s)' checkbox and a 'Sort' dropdown menu. At the bottom right, there are 'GENERATE REPORT' and 'CANCEL' buttons.

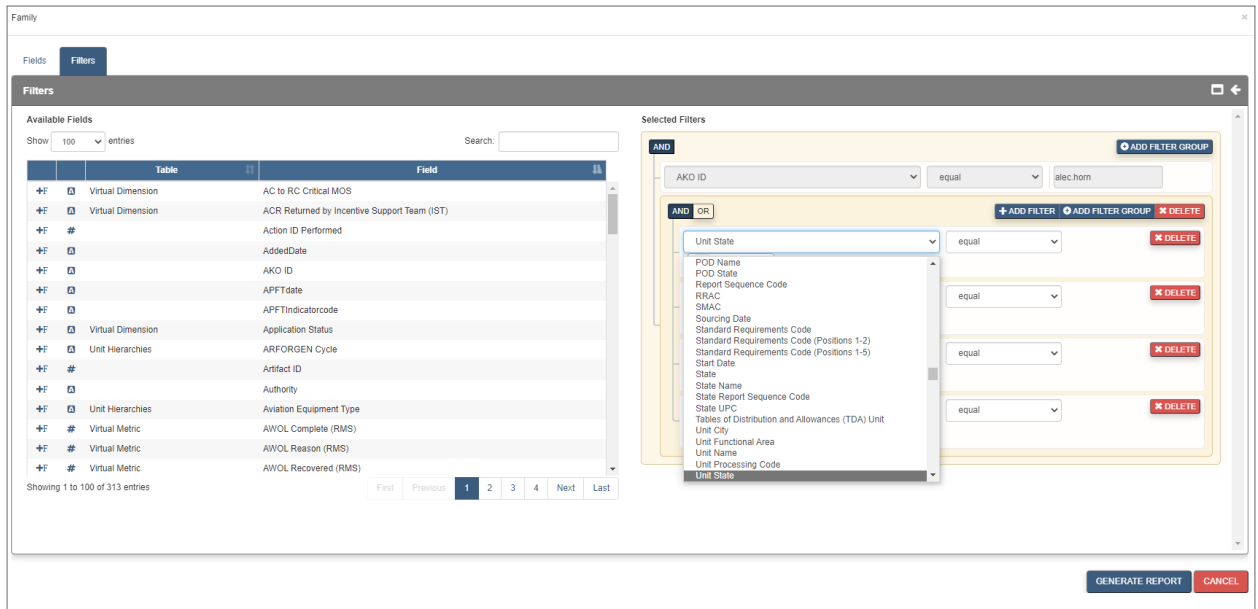


**Note** - The **Edit Base Report** button is not available in all base reports.

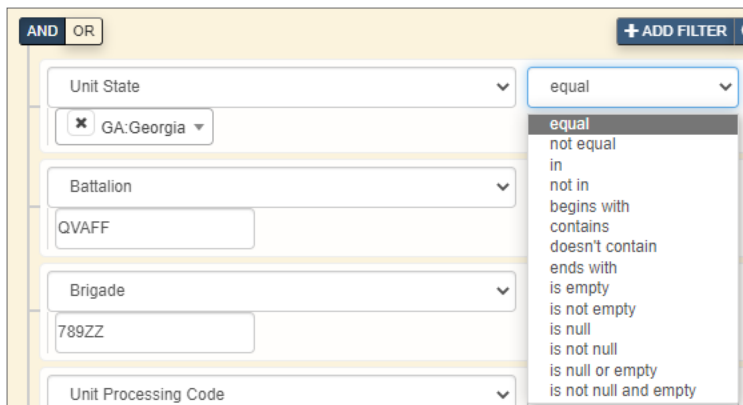
2. Optionally, view more information and filter the metrics and dimensions displayed in the *Fields* panel.
  - Type a metric or dimension name into either of the *Fields* text boxes. The list is now sorted to include only items that match your entry.
3. Add any element from the *Fields* panel to the *Selected Fields* panel to add it as a column in your report.
  - Click the + icon on an element in the *Fields* panel to add it to the *Selected Fields* panel.
  - Click the *Remove* icon  on an element in the *Selected Fields* panel to remove it.
  - Change the *Sort* order of any field to ascending, descending, or none.
  - Change the primary, secondary, and additional sorts as needed by adjusting the number fields in the *Sort* column.
4. Add any element from the *Fields* list to the *Selected Filters* panel from the *ADD FILTER* drop-down to filter which results are returned in the report.

## 8 Additional Tools

- ▶ The *Select Operation* menu appears.



5. Choose an option from the *Select Operation* menu.



- ▶ If applicable, type a value in the text field that appears to complete adding this filter.
6. Repeat steps two through four as necessary.
  7. Click **GENERATE REPORT**.
    - ▶ The report appears.

### Grouping Filters

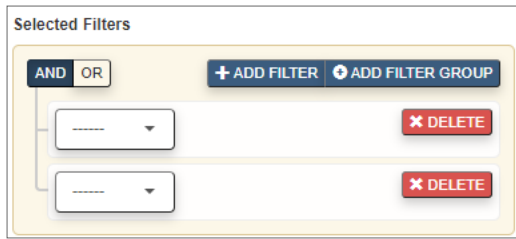
Adding a second filter groups the two filters together with a single operator (*And/Or*). Additional filters can be added to the group or to create a subgroup with a separate operator.



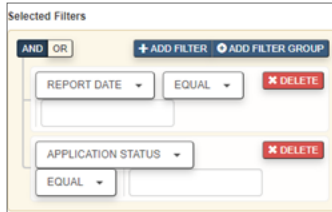
**Note** - The *Run Date* filter is not grouped with any other filters.

## 8 Additional Tools

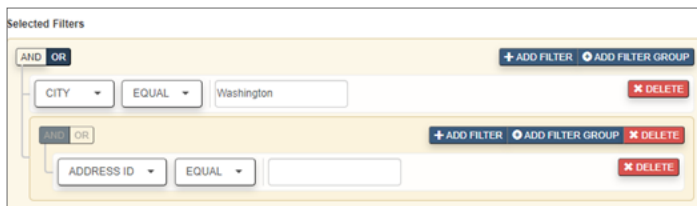
1. Click **ADD FILTER** to add an additional filter at the bottom of the *Selected Filter(s)* panel.



- ▶ The filters are grouped with a single operator.




2. Click **ADD FILTER GROUP** to add an additional filter on top of another filter to create a subgroup.



- ▶ The subgroup is created with a separate operator.

### Other Report Builder Actions

Task	Action
Delete an element from the <i>Selected Field(s)</i> or <i>Selected Filter(s)</i> panel	Click the <b>Remove</b> icon  or click <b>DELETE</b>
Exit <i>Report Builder</i>	Click <b>Cancel</b> .

### 8.2.5.2 Sort the Report

To sort a report, click the header of the column by which you want to sort. Clicking the header more than once toggles between sorting in ascending order and descending order.

### 8.2.5.3 Save the Report

1. Click the **Save as New Report** icon .

▶ The *Save Report* window opens.




**Tip** - Saving a report saves the report specifications, including any preferences or filters you set for the report. When a saved report is opened, the report is populated with the latest data available.

2. In the *Report Type* drop-down list, select either **Private** or **Shared**. *Private* is for reports that only you can see and *Shared* are reports that everyone can see.
3. Enter a name in the *Report Name* text box and click **SAVE** to save the report.

### 8.2.5.4 Subscriptions in RMS Extension

RMS Extension provides access to many products and presentations through a subscription service that automatically sends the selected item(s) to your .milEnterprise email account.

Daily subscriptions are sent out every day between 8 p.m. and 6 a.m.

Weekly subscriptions are sent Monday through Friday between 6 p.m. and 6 a.m. (Monday's subscription email contains Friday data). If there are still weekly subscriptions in the queue after 6 a.m., they will be sent the following day(s) until all jobs have processed.

Monthly subscriptions are sent to the users beginning the first of each month and continue until all subscriptions are sent (meaning some users may receive their subscription on the second or third of the month or later). Monthly subscriptions contain end of month data for the previous month. If a user creates this type of subscription in the middle of the month they will receive one subscription immediately containing the data for the previous month. The job will then be scheduled as a normal Monthly subscription.





**Note** - No new subscriptions will be generated on holidays and/or weekends, but any subscriptions that are still pending from the previous day will be sent out.

## Subscribing from Reports


## 8 Additional Tools



1. Select the desired report.
2. Drill down to the necessary level of detail, or click the **Go to Base Report** icon  to view Soldier-level data.

 **Tip** - Click the **Home** link to return to the unfiltered report.

 Home / Unit State : AK / POD :

3. Click the **Subscriptions** icon  in the *Report Tools* section to open a *Subscriptions* menu.
4. Change the *Subscription Name*, *Frequency*, and *Output Format* of the subscription as necessary.
5. Click **SAVE**.

### 8.2.6 Drilling Down

Drilling down in a report allows you to view information at any scope, from the NGB to the Soldier level. An example of drilling down in a report is listed below.

1. From any non-base report (see [Aggregate and Base Reports](#) on the next page) click a link from the left-most column to drill down one level.

Case Type Code	Case Type Code - Description	Submitted	In-Progress	Completed	All Count
AA-AER	AA - Academic Evaluation Report (AER)	2	10	24	36
AA-AGR	AA - AGR	1	2	13	16
AA-BONUS	AA - Bonus	1	13	33	47
AA-DESP	AA -	0	4	5	9
AA-DISCH	AA -	1	6	4	11
AA-DOR	AA - DOR (Discharge)	1	4	9	14
AA-LOD	AA - LODs	0	2	1	3
AA-MEB	AA - Request to be seen by MEB	0	0	2	2
AA-MGIB	AA - MGIB	0	4	1	5
AA-MOB	AA - Adjustment to MOB Report Date	0	2	1	3
AA-NCOER	AA - Noncommissioned Officer Evaluation Report (NCOER)	1	3	14	18
AA-OER	AA - Officer Evaluation Report (OER)	0	1	7	8
AA-OMPF	AA - Request for document removal from OMPF	0	5	2	7

- ▶ The report reloads, filtered to show data for the selected group.
2. From here, click a specific Division to drill into information about the Brigadees in the chosen Division.
  - ▶ The report reloads, filtered to show data for the selected Division grouped by Brigade.
3. Continue to drill down in this way until the report is a roster of Soldiers.

- The report is now a base report. For more information about base reports, see [Aggregate and Base Reports](#) below.



**Note** - Not all reports have the same drilling order. The order depends on how the current report is configured. This general procedure, however, is accurate for drilling on any report.

## 8.2.7 Aggregate and Base Reports

### Aggregate Reports

Aggregate reports are created when a set of values has a mathematical operation performed against it. Any report level above a Base Report is an aggregate report, particularly marked by multiple rows of data combined into a single row on a report, thus providing counts. Raw counts may represent a minimum, maximum or average. You see aggregated data as you drill down through the levels of a report until you arrive at the base report, at which point one row of data in the base report corresponds to one row of data in the database.

Unit State	Unit State - Description	Family	Education	Job	Medical	Financial	Legal	Transportation	Expectations Not Met	Communication	Morale	Religion	Flagged	Other	
GA	Georgia	0	0	0	0	0	0	0	0	0	0	0	0	1	0
IA	Iowa	0	1	0	0	0	0	0	0	0	0	0	0	0	0
KS	Kansas	0	0	0	0	0	0	0	0	1	0	0	0	0	0
MA	Massachusetts	0	0	0	0	0	0	0	0	0	0	0	0	1	0
MI	Michigan	0	0	0	0	0	0	0	0	1	0	0	0	0	0
NY	New York	1	0	0	0	0	0	0	0	0	0	0	0	1	0
VA	Virginia	0	2	0	0	0	0	0	1	1	0	0	0	0	0
	Total	1	3	0	0	0	0	0	1	3	0	0	0	3	0

### Base Reports

A base report, the lowest drilling level for any report, is a roster of items that make up the aggregate counts for all higher-level reports. There are two ways to access base reports directly from any report where you have permission to access it:

- Click the **Go To Base Report** icon
- Click any of the blue numbers to the right of the column listing States.



**Note** - If there is no further level of aggregate information to drill into, you cannot click on the value.

From within a base report, the *Report Tools* panel features a *Report Builder* icon instead of the standard *Basic Edit* and *Advanced Edit* icons associated with aggregate reports. For more information on Report Builder, see [Report Builder](#) on page 74.

## 8.2.8 Reports Glossary

See the table below for explanations of report terminology.

Term	Explanation
Aggregate	Aggregate reports are created when a set of values has a mathematical operation performed against it.



## 8 Additional Tools

Term	Explanation
Report	Any report level above a Base Report is an aggregate report, particularly marked by multiple rows of data combined into a single row on a report, thus providing counts. Raw counts may represent a minimum, maximum or average. You see aggregated data as you drill down through the levels of a report until you arrive at the base report, at which point one row of data in the base report corresponds to one row of data in the database.
Base Report	The lowest drilling level for any report, a base report is a roster of the individual items that make up the aggregate counts for all higher-level reports. See <a href="#">Aggregate and Base Reports</a> on the previous page.
Data Mart	Reports can run directly against a data mart or can link directly to a data mart. All reports either represent a portion or portions of data mart data. A data mart is a central source for data pertaining to a certain focus. Each data mart defines the dimensions and measurements available to you as well as the roll-up definitions (table joins) that derive the information. Data marts pull their data from select source tables, which define how a user or report queries against them.
Dimension	Dimensions are any field that's not measuring something. They are values stored as text codes in the Data Store. Since they do not represent binary "Yes/No" values, dimensions cannot be directly summed; however, in some instances, it may be possible to convert a dimension into a measurement for summing. Dimensions can be used to filter or group results. They can also be columns in any report. Examples of data stored as dimensions include age, civilian education level, gender, grade, rank, and years in service.
Drill Down	Drilling down refers to clicking a link in the left-most column of a report to view the report's information at the level below. Users can continue to drill down until the report is a base report, which is usually a roster of items. Not all reports have the same drilling order. The order depends on how the current report is configured.
Field	Fields are all the available pieces of information around which you build your report. Any field can act as a selected field, a selected filter, or both. A selected field displays beside the Soldiers as a column in the report. A selected filter limits the items included in the report based on what you typed in the <i>Search</i> box.
Filter	Filters are any criteria used to limit the population of the report. Filters consist of a field or piece of metadata, along with a logical operator and a value on which to filter. You can apply any number of filters to any report, and only data that matches all filters is represented. Examples of filters include primary MOS equals 11B and run date is less than 20121015. Respectively, these filters limit your search to Soldiers coded as 11B and to data collected prior to October 15, 2012.
Measurement	Measurements define a count of an item to be analyzed. They are sums and rates derived from information stored as binary "Yes/No" values in the Data Store. Examples of data stored as measurements include assigned strength, total losses, and MOS qualified.
Metric	A metric is anything that can be counted. Metric and measurement can be used interchangeably.

### 8.3 Extension Reports

An overview of each report available for Extension is listed below.

### 8.3.1 Completed Extensions by State (YTD)

This report displays the number of extensions processed in each state through RMS, compared with the total number of extensions processed in each state. It includes a percentage column showing the percent completed in RMS.

**Completed Extensions by State (YTD)**

This report compares extensions processed using the RMS system against all extensions processed by state. The report defaults to extensions for the current fiscal year.

Home

Showing 0 to 0 of 0 entries Show 100 entries

RMS Ext	Tot Ext	Percent Completed in RMS
No Data Found.		

### 8.3.2 Contact Information for Open Cases

This report displays the contact information for open cases for soldiers who do not have an intent recorded. You can click any number or state abbreviation to drill down to a roster of every case in that work bucket status or state.

**Contact Information for Open Cases**

The contact information for open cases for soldiers who do not have an intent recorded.

Home AKO ID : alec.horn

Showing 0 to 0 of 0 entries Show 100 entries

Unit State	Unit State - Description
No Data Found.	

### 8.3.3 15 Months to ETS

This report displays by state the number of Soldiers who are eligible to extend and are within 0 to 450 days of their ETS date, the number of Soldiers ineligible to extend, and the total number of extension cases. Cases that are completed, currently waiting for signatures, or being reviewed by the Battalion, Brigade,

## 8 Additional Tools

State, or IPPS-A are excluded from the report.

15 Months to ETS Report

RMS Eligible by ETS Date Datamart

Showing 1 to 54 of 54 entries

Unit State	Unit State - Description	Extension Eligible to Extend (RMS)	RMS Extension InEligible To Extend	Extension 0-450 Days (RMS)
AK	Alaska	0	354	354
AL	Alabama	0	1,908	1,908
AR	Arkansas	0	1,089	1,089
AZ	Arizona	0	1,246	1,246
CA	California	1	3,485	3,486
CO	Colorado	0	958	958
CT	Connecticut	0	562	562
DC	District of Columbia	0	223	223
DE	Delaware	0	317	317
FL	Florida	0	1,811	1,811
GA	Georgia	0	1,967	1,967
GU	Guam	0	260	260
HI	Hawaii	0	630	630
IA	Iowa	0	1,480	1,480
ID	Idaho	0	689	689
IL	Illinois	0	1,773	1,773
IN	Indiana	0	2,336	2,336
KS	Kansas	0	1,183	1,183
KY	Kentucky	0	1,396	1,396
LA	Louisiana	1	2,318	2,319
MA	Massachusetts	0	1,499	1,499
MD	Maryland	0	1,092	1,092

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Accessibility/Section 508

### 8.3.4 Extension Status by Unit State (YTD)

This report displays by state the number of extension cases that have been submitted for review by the unit, the number awaiting action by IPPS-A, the number marked completed by IPPS-A, and the number closed for the current fiscal year. Each status has an accompanying percentage column, showing the user what

## 8 Additional Tools

percentage of that state's cases are in that status.

**Extension Status By Unit State (YTD)**

**Extension Status by Unit State**

This report breaks out all extension cases that have been submitted for review by the unit, marked completed by SIDPERS or closed for the current fiscal year. The In-Progress column includes all extension cases submitted by the unit for review to Battalion, Brigade, State or for electronic signature. The closed column is a count of all extension cases completed thru RMS that now have an updated ETS date in SIDPERS.

Home AKO ID : alec.horn

Quick Filter

AND

FISCAL YEAR EQUAL

APPLY

Showing 0 to 0 of 0 entries Show 100 entries

Unit State	Unit State - Description
No Data Found.	

### 8.3.5 Extensions in Progress

This report shows all the extensions that are currently being processed. Extensions being processed are extensions that are being reviewed by the Battalion, Brigade or State, extensions that are waiting for Soldier or Officer signatures, extensions waiting to be entered into IPPS-A and extensions that have been completed using RMS that are waiting for the IPPS-A feed to update their ETS date and move the case to

## 8 Additional Tools

the closed work bucket.

Extensions In Progress ▾
🔍 ✕

### RMS Extensions in Progress

APPLIED FILTERS ▾
DIMENSION INFORMATION ▾
MEASUREMENT INFORMATION ▾

This report shows all the extensions that are currently being processed. Extensions being processed are extensions that are being reviewed by the Battalion, Brigade or State, extensions that are waiting for Soldier or Officer signatures, extensions waiting to be entered into SIDPERS and extensions that have been completed using RMS that are waiting for the SIDPERS feed to update their ETS date and move the case to the closed workbucket.

Home
Show  entries

Showing 1 to 28 of 28 entries

Unit State	Unit State - Description	BN	BDE	St	SIDPERS	Compl	Tot
AL	Alabama	42	0	0	0	38	80
CA	California	39	0	0	0	0	39
CT	Connecticut	0	40	0	0	0	40
FL	Florida	0	0	0	0	38	38
GA	Georgia	0	0	36	0	78	114
IL	Illinois	0	38	0	0	39	77
KS	Kansas	41	0	37	37	0	115
KY	Kentucky	38	0	0	0	0	38
LA	Louisiana	0	0	0	0	121	121
MA	Massachusetts	0	36	0	0	0	75
MD	Maryland	43	0	0	0	41	84
MN	Minnesota	0	0	0	0	38	38
MO	Missouri	0	0	39	0	0	39
MS	Mississippi	0	0	0	0	78	78
ND	North Dakota	0	0	41	0	37	78
NH	New Hampshire	0	0	0	0	38	38
NJ	New Jersey	38	0	0	0	0	38
NY	New York	0	0	0	0	38	38
OK	Oklahoma	0	0	37	0	0	37
OR	Oregon	36	0	0	0	0	36
PA	Pennsylvania	0	0	0	0	44	44
PR	Puerto Rico	0	36	0	0	0	36
SC	South Carolina	0	0	0	0	28	28

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### 8.3.6 First Counseled

This report displays the time frame in which the initial Soldier counseling or contact took place for a case.

**First Counseled**

**RMS First Counseled**

This report displays the time frame initial soldier counseling or contact took place for a case.

Showing 1 to 50 of 50 entries  
Show 100 entries

Unit State	Unit State - Description	271 - 365 Days until ETS Date	181 - 270 Days until ETS Date	121 - 180 Days until ETS Date	91 - 120 Days until ETS Date	31 - 60 Days until ETS Date	61 - 90 Days until ETS Date	1 - 30 Days until ETS Date	Never Been Counseled
AK	Alaska	0	0	0	0	0	0	0	40
AL	Alabama	40	0	119	0	39	0	0	117
AR	Arkansas	0	0	0	0	0	36	0	183
AZ	Arizona	0	37	0	0	0	0	121	37
CA	California	39	122	40	0	40	79	78	475
CO	Colorado	0	0	38	0	38	0	0	115
CT	Connecticut	40	0	0	0	41	40	77	80
FL	Florida	38	114	0	38	38	0	38	266
GA	Georgia	153	38	36	0	36	0	0	186
GU	Guam	0	0	0	0	0	0	0	38
HI	Hawaii	0	37	0	0	0	0	0	78
IA	Iowa	0	39	75	0	42	0	0	162
ID	Idaho	0	0	0	0	0	0	0	110
IL	Illinois	76	0	39	77	0	80	0	152
IN	Indiana	37	0	38	77	0	0	39	78
KS	Kansas	78	74	0	79	78	37	0	78
KY	Kentucky	43	38	38	40	38	0	0	39
LA	Louisiana	41	80	81	41	39	118	122	370
MA	Massachusetts	0	76	36	36	0	0	191	219
MD	Maryland	41	41	41	42	0	43	0	208
ME	Maine	0	0	77	0	0	0	0	37
MI	Michigan	37	36	0	37	0	0	0	74
MN	Minnesota	0	0	0	0	0	40	0	184

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### 8.3.7 Counseling by Date Range

This report displays all extension cases that have been counseled within an adjustable date range, grouped by the number of days to ETS date.

## 8 Additional Tools

**Counseling by Date Range**

**RMS Extension Counseling By Date Range** APPLIED FILTERS DIMENSION INFORMATION MEASUREMENT INFORMATION

The user can select all extension cases that have been counseled within a changeable date range. The cases are grouped by the number of days to ETS date.

Home Quick Filter

AND

Run Date equal

APPLY

Showing 1 to 100 of 1,845 entries Show 100 entries

Previous 1 2 3 4 5 ... 19 Next

Case ID	Name	Soldier Name	Unit Name	Unit Processing Code	Counseling Date	Counselor First Name	Counselor Last Name	Counselor Title	Eligibility	Intent
1213689	271 - 365 days	ACEITUNO MYRON	HHC BSTB 86TH IBCT MTN	P8VT0	20140122	dede	miskell	analyst	APFT, PHA	Extend
1213689	271 - 365 days	ACEITUNO MYRON	HHC BSTB 86TH IBCT MTN	P8VT0	20140122	dede	miskell	analyst	APFT, PHA	Extend
1213689	271 - 365 days	ACEITUNO MYRON	HHC BSTB 86TH IBCT MTN	P8VT0	20140122	dede	miskell	analyst	APFT, PHA	Extend
1213689	271 - 365 days	ACEITUNO MYRON	HHC BSTB 86TH IBCT MTN	P8VT0	20140122	dede	miskell	analyst	APFT, PHA	Extend
1213689	271 - 365 days	ACEITUNO MYRON	HHC BSTB 86TH IBCT MTN	P8VT0	20140122	dede	miskell	analyst	APFT, PHA	Extend
1213689	271 - 365 days	ACEITUNO MYRON	HHC BSTB 86TH IBCT MTN	P8VT0	20140122	dede	miskell	analyst	APFT, PHA	Extend
1213689	271 - 365 days	ACEITUNO MYRON	HHC BSTB 86TH IBCT MTN	P8VT0	20140122	dede	miskell	analyst	APFT, PHA	Extend
1213689	271 - 365 days	ACEITUNO MYRON	HHC BSTB 86TH IBCT MTN	P8VT0	20140122	dede	miskell	analyst	APFT, PHA	Extend
1213689	271 - 365 days	ACEITUNO MYRON	HHC BSTB 86TH IBCT MTN	P8VT0	20140122	dede	miskell	analyst	APFT, PHA	Extend
1213689	271 - 365 days	ACEITUNO MYRON	HHC BSTB 86TH IBCT MTN	P8VT0	20140122	dede	miskell	analyst	APFT, PHA	Extend
1213689	271 - 365 days	ACEITUNO MYRON	HHC BSTB 86TH IBCT MTN	P8VT0	20140122	dede	miskell	analyst	APFT, PHA	Extend

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### 8.3.8 Not Counseled

This report displays by state the number of extension cases that have not been counseled while in their current work bucket, determined by the number of days to ETS. These cases may have been counseled while in a different work bucket.

**Not Counseled** APPLIED FILTERS DIMENSION INFORMATION MEASUREMENT INFORMATION

This report displays extension cases that have not been counseled while in their current workbucket (Days to ETS). These cases may have been counseled while in a different workbucket.

Home AKO ID : alec.horn

Showing 0 to 0 of 0 entries Show 100 entries

Unit State	Unit State - Description
No Data Found.	

### 8.3.9 Projected Losses

This report shows the number of cases in each state that are projected losses. The columns in the report display the reason for why the Soldier is not extending and the total number of losses projected by that state.

### 8.3.10 Reenlistment Success Rate from DPRO

This report displays the Careerist, Obligor and Total retention success rates for the past 12 complete months. Success rates are not mission based; rather, they represent the percentage of Soldiers who reenlist relative to the total number that resolve their retention status (i.e., either reenlist or ETS.) Soldiers that are still in the reenlistment window who have not yet decided their status are not included in the computation.

### 8.3.11 RMS Metric Brief

This report displays Army National Guard retention data in various graphs.



### 8.3.12 Reason for ETS

This report displays the numbers of ETS by unit based on reason category.

Unit State	Unit State - Description	Family	Education	Job	Medical	Financial	Legal	Transportation	Expectations Not Met	Communication	Morale	Religion	Flagged	Other
GA	Georgia	0	0	0	0	0	0	0	0	0	0	0	0	1
IA	Iowa	0	1	0	0	0	0	0	0	0	0	0	0	0
KS	Kansas	0	0	0	0	0	0	0	0	0	1	0	0	0
MA	Massachusetts	0	0	0	0	0	0	0	0	0	0	0	0	1
MI	Michigan	0	0	0	0	0	0	0	0	1	0	0	0	0
NY	New York	1	0	0	0	0	0	0	0	0	0	0	0	1
VA	Virginia	0	2	0	0	0	0	0	1	1	0	0	0	0
Total		1	3	0	0	0	0	0	1	3	0	0	0	3

### 8.3.13 Missed Counseling

This report displays the numbers of counselings not performed within the fiscal year.

Fiscal Year	Missed 30 Day Counseling	Missed 60 Day Counseling	Missed 90 Day Counseling	Missed 120 Day Counseling	Missed 180 Day Counseling	Missed 270 Day Counseling	Missed 365 Day Counseling	Missed 450 Day Counseling
2012	0	0	2,840	0	3,276	0	0	0
Total	0	0	2,840	0	3,276	0	0	0

### 8.3.14 Years Extended

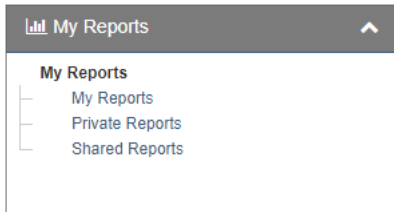
This report displays the numbers of extensions made by year and by state.

1 Year	1 Year %	2 Years	2 Years %	3 Years	3 Years %	4 Years	4 Years %	5 Years	5 Years %	6 Years	6 Years %	Other	Other %
No Data Found.													

## 8.4 My Reports

This blade stores reports specific to the user and contains the *My Reports*, *Private*, and *Shared* reports folders.

## 8 Additional Tools



### 8.4.1 My Reports Folder

This folder stores reports associated with the user in the *My Reports* grid.

A screenshot of a software window titled 'My Saved Reports'. The window displays a table of reports under the heading 'My Reports'. The table has columns for 'Name', 'Created Date', 'Last Modified Date', 'Scope', '# of Times Accessed', and 'Last Accessed Date'. Each row includes icons for 'View', 'Edit', and 'Remove'.

	Edit	Remove	Name	Created Date	Last Modified Date	Scope	# of Times Accessed	Last Accessed Date
			abc	2022/06/06 16:33	2022/06/06 16:33	Private	0	2022/06/06 16:33
			Alaska-Soldier Roster	2022/06/06 14:37	2022/06/06 14:37	Private	0	2022/06/06 14:37
			CA	2022/06/06 16:33	2022/06/06 16:33	Shared	0	2022/06/06 16:33
			no data	2022/06/06 14:38	2022/06/06 14:38	Shared	0	2022/06/06 14:38
			test	2021/11/16 15:57	2022/06/06 14:36	Private	0	2021/11/16 15:57
			Test Completed Ext by State	2022/06/08 09:31	2022/06/08 09:31	Private	0	2022/06/08 09:31
			Vulcan Warrior Roster Builder with class number	2022/07/06 14:33	2022/07/06 14:33	Shared	0	2022/07/06 14:33


Showing 1 to 7 of 7 entries

Previous 1 Next

Click the **View** icon to open the saved report.

Click the **Delete** icon to remove the report from the *My Reports* folder.

## 8 Additional Tools

Click the **Edit** icon  to open the *Edit Report Details* window and change the report name and type.

Family ✕

**Name**

**Type**

Private ▼

**SAVE** **CLOSE**











### 8.4.2 Private Reports

This folder contains private reports saved by the user. Reports saved to this folder are displayed in the *Private Reports* grid.

**Private Saved Reports** ↗ ✕ ✕


### Private Reports

Show  entries Search:

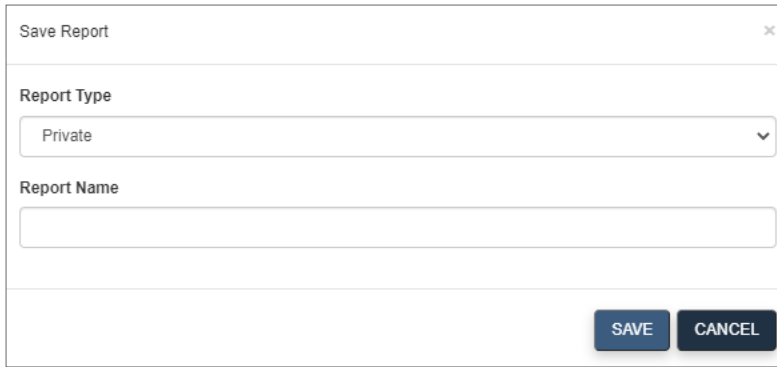
	Name 	Created Date 	Last Modified Date 	Owner 	# of Times Accessed 	Last Accessed Date 
	abc	2022/06/06 16:33	2022/06/06 16:33	Alec.horn	0	2022/06/06 16:33
	Alaska-Soldier Roster	2022/06/06 14:37	2022/06/06 14:37	Alec.horn	0	2022/06/06 14:37
	test	2021/11/16 15:57	2022/06/06 14:36	alec.horn	0	2021/11/16 15:57
	Test Completed Ext by State	2022/06/08 09:31	2022/06/08 09:31	alec.horn	0	2022/06/08 09:31

Showing 1 to 4 of 4 entries Previous **1** Next

To save a report to this folder:

1. Open a report from the *Reports* blade.
2. Click the **Save** icon  from among the report tools.
3. The *Save Report* window opens.

## 8 Additional Tools



Save Report

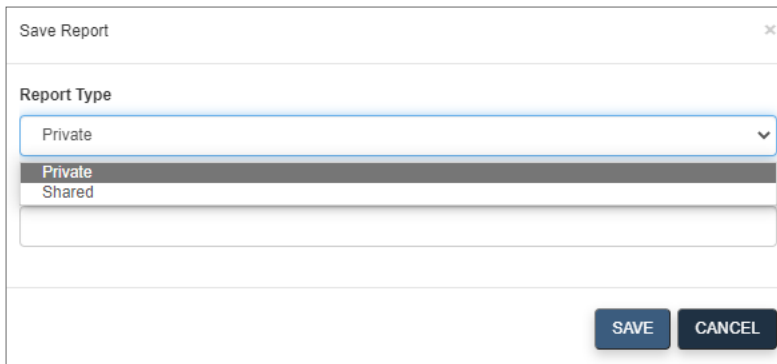
Report Type

Private

Report Name

SAVE CANCEL

4. Choose the **Private** report type from the drop-down and give the report a name.



Save Report

Report Type

Private

Private

Shared

SAVE CANCEL

5. Click **SAVE**.

▶ The report is saved to the *Private Reports* folder.

### 8.4.3 Shared Reports

This folder contains shared reports saved by the user. Reports saved to this folder are displayed in the *Shared Reports* grid.

## 8 Additional Tools

Shared Saved Reports


Shared Reports

Show 25 entries Search:

Name	Created Date	Last Modified Date	Owner	# of Times Accessed	Last Accessed Date
0801	2016/12/05 13:53	2016/12/05 13:53	karla.avery	0	2016/12/05 13:53
09S BCT Grad Date	2017/07/31 12:41	2017/07/31 12:41	ted.wilson	0	2017/07/31 12:41
09S Report	2015/01/15 14:37	2015/01/15 14:37	joey.tipton	0	2015/01/15 14:37
1-112th IN Reason for ETS	2015/06/30 11:31	2015/06/30 11:31	ashley.n.sherman	0	2015/06/30 11:31
109th RSP Soldiers	2015/09/30 12:46	2015/09/30 12:46	don.stockton	0	2015/09/30 12:46
1138th MP CO RSP Report	2015/11/17 10:30	2015/11/17 10:31	matthew.takach	0	2015/11/17 10:30
146 MMB RSP Status v.2	2016/02/12 14:41	2016/02/12 14:41	alexis.m.johnson2	0	2016/02/12 14:41
153rd TC RMS Monthly report	2016/11/01 09:41	2016/11/01 09:41	lemuel.price	0	2016/11/01 09:41
168 AV ETS ROSTER	2019/10/02 09:47	2019/10/02 09:47	brandy.d.potter	0	2019/10/02 09:47
16th EN BDE ETS Report for Weekly NoVal	2018/05/25 09:13	2018/05/25 09:13	victoria.l.williams4	0	2018/05/25 09:13
16th EN BDE Projected Loss Query 20180313	2018/03/13 11:24	2018/03/13 11:24	nicklaus.bendure	0	2018/03/13 11:24
16th EN BDE Sponsorship Report	2018/03/29 11:42	2018/03/29 11:42	nicklaus.bendure	0	2018/03/29 11:42
179 EXT Status	2016/05/02 09:22	2016/05/02 09:22	bobby.legates	0	2016/05/02 09:22
181BSB_ETS_Roster_v1	2019/08/16 13:21	2019/08/16 13:21	jason.wymer	0	2019/08/16 13:21

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Accessibility/Section 508

To save a report to this folder:

1. Open a report from the *Reports* blade.
2. Click the **Save** icon  from among the report tools.
3. The *Save Report* window opens.

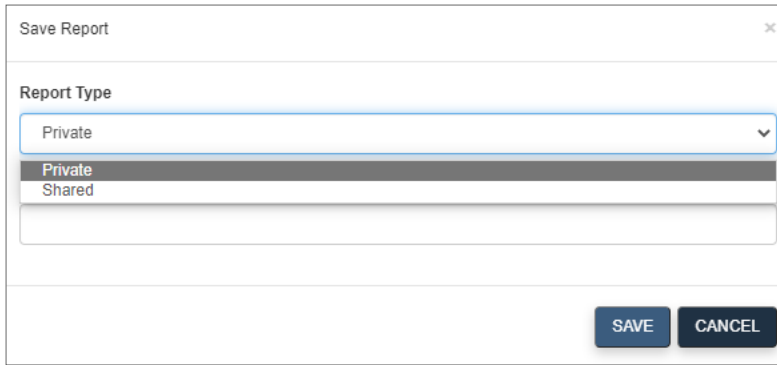
Save Report

Report Type  
Private

Report Name

SAVE CANCEL

4. Choose the **Shared** report type from the drop-down and give the report a name.

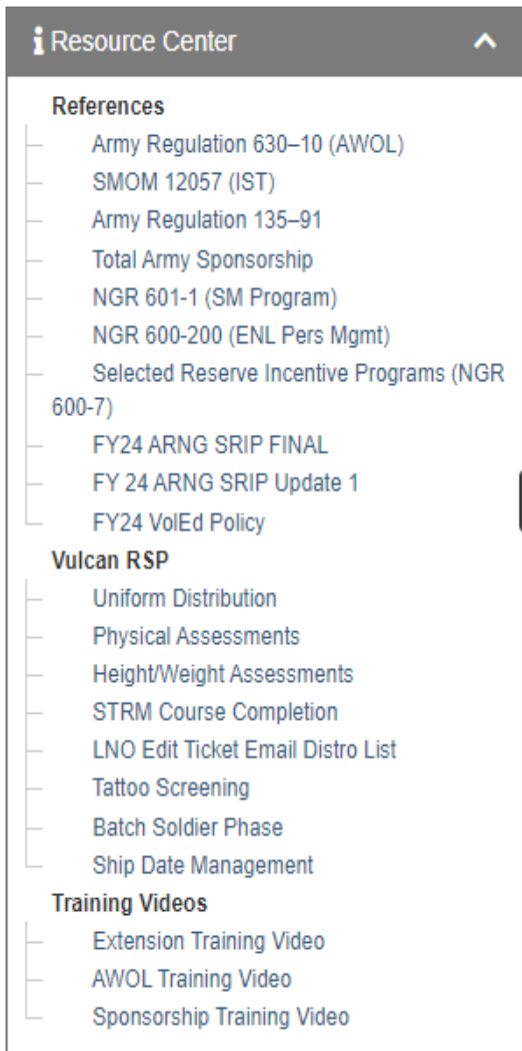


5. Click **SAVE**.

▶ The report is saved to the *Shared Reports* folder.

## 8.5 Resource Center

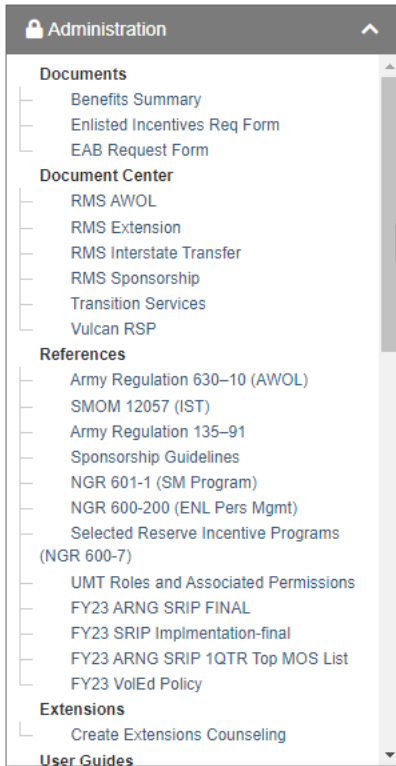
The *Resource Center* blade includes reference documents, user guides, and training videos for the application.



Clicking a link opens the item in a new window.

## 8.6 Administration

The *Administration* tab contains tools used for administrative action. Open the *Administration* tab in the Command Center to view the tools available to you.



## 8.6.1 Create Extensions Counseling

The *Create Extensions Counseling* tool allows Admin users to print prepopulated DA Form 4856 extension counseling forms for multiple Soldiers.

1. Expand the *Administration* folder in the *Administration* accordion tab of the *Command Center* panel.
2. Click **Create Extensions Counseling** in the *Extensions* folder.





## 8 Additional Tools

3. *Create Extensions Counseling* opens in the second panel.

Search

SSN:

SSN 4:

Last Name:

First Name:

UPC Code:

RESET SEARCH

Show 10 entries Search:

SSNID	Name	SSN Last 4	State	UPC
No data available in table				

Showing 0 to 0 of 0 entries Previous Next

CREATE COUNSELING FORM

4. Enter information into any of the available fields in the *Search* panel and click **SEARCH**.
  - ▶ Soldiers matching your search criteria appear in the roster.

Search

SSN:

SSN 4:

Last Name:

First Name: Matt

UPC Code:

RESET SEARCH

Showing 1 to 10 of 184 entries

CREATE EXTENSIONS FORM

SSNID	Name	SSN Last 4	State	UPC
124577689	SALAMA MATT	7689	NH	8BHHD
124579222	SALAMA MATT	9222	ME	QCRAA
124581091	SALAMA MATT	1091	VT	P8ZAA
124583119	SALAMA MATT	3119	MA	8A6AA
124586512	SALAMA MATT	6512	FL	P95C0
124588433	SALAMA MATT	8433	CT	Y3XA0
124591299	SALAMA MATT	1299	CT	X5UAA
124593105	SALAMA MATT	3105	CT	8ADZW
124597599	SALAMA MATT	7599	NY	QQ7A0
124599430	SALAMA MATT	9430	NY	P07T0

Showing 1 to 10 of 184 entries Previous 1 2 3 4 5 ... 19 Next

CREATE EXTENSIONS FORM

5. Click **CREATE COUNSELING FORM**.

- ▶ The *Counseling* window opens.

6. Fill out the appropriate information.
7. Click **PRINT PDF**.
  - ▶ A PDF of the DA Form 4856 opens in a new window populated with your input.
8. Edit the PDF input fields as needed.
9. Optionally, click the signature fields to enter CAC-authenticated digital signatures of the individual counseled and the counselor.

## 8.7 Assume Command

*Assume Command* is located in the Command Center panel. This functionality is available to NGB-level users and state administrators. Assume Command allows you to emulate different roles as a training tool to view RMS from lower hierarchy levels. It also grants or restricts access to actions and content based on

your role.

★ Assume Command
^

**Original Role/Level**

Role: NGB Level Admin  
Command: NG

**Current Role/Level**

Role: NGB Level Admin  
Command: NG

**Choose Role/Level**

Role:

Command:

### 8.7.1 Original Role

You can see your assigned role within the Assume Command tab in the *Original Role/Level* section.

**Original Role/Level**

Role: NGB Level Admin  
Command: NG

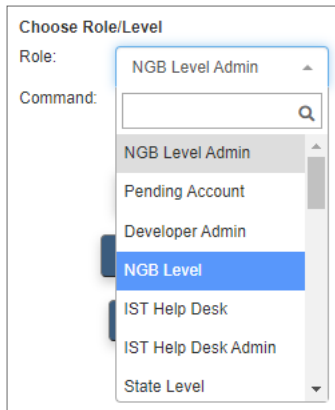
RMS is equipped with the ability to change your role in order to view RMS through the eyes of a different user—as long as that user role you assume command for does not have greater permissions than your original role. This functionality allows you to see the screens that another user would see, which can help with troubleshooting any problems other users are having.

### 8.7.2 Change Role

If your role is IST Help Desk Admin, NGB Level Admin, or State Level Admin, you can change your command level to one of the 54 states and territories.

## 8 Additional Tools

1. Click the **Role** drop-down menu to select a preset role.



Choose Role/Level

Role: NGB Level Admin

Command:

- NGB Level Admin
- Pending Account
- Developer Admin
- NGB Level**
- IST Help Desk
- IST Help Desk Admin
- State Level

2. Select the desired role and click **CHANGE MY ROLE**.

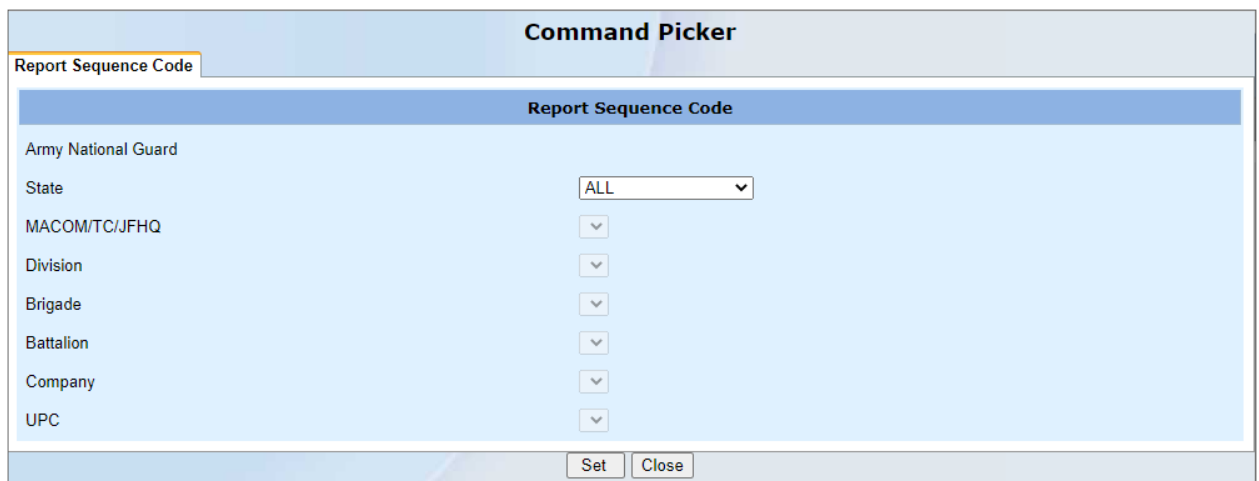
**CHANGE MY ROLE**

- ▶ Your role is changed and you are taken back to the Management Center section of the Command Center. The next time you visit the Assume Command tab, your changed role is reflected in the *Current Role/Level* box.

3. Click **Select Command**.

**SELECT COMMAND**

- ▶ The Command Picker window opens.



**Command Picker**

Report Sequence Code	
Army National Guard	
State	ALL
MACOM/TC/JFHQ	
Division	
Brigade	
Battalion	
Company	
UPC	

Set Close

4. Choose a state from the drop-down list.

## 8 Additional Tools

- ▶ The drop-down lists for the other fields become available.

Command Picker

Report Sequence Code

Report Sequence Code

Army National Guard

State: Alabama

MACOM/TC/JFHQ: ALL

Division: ALL

Brigade: ALL

Battalion: ALL

Company: ALL

UPC: ALL

Set Close



**Note** - The default choice is ALL for the Command Picker. Optionally, by selecting a specific state, MACOM, division, etc, the system filters the work buckets, limiting the number of Soldiers you see.

5. Select the necessary information from each list.  
Each piece of information limits what can be selected from the following drop-down list.



**Note** - The information selected affects what cases are visible in your work buckets.

6. Click **Set** when finished.

- ▶ The command level is automatically updated.

Choose Role/Level

Role: NGB Level Admin

Command: STA  
AL

SELECT COMMAND

7. To return to your original role and level, click **RESET MY ROLE**.

- ▶ Your role is reset and you are taken back to the Management Center section of the Command Center. The Assume Command tab now shows matching entries for *Original Role/Level* and *Current Role/Level*.

Original Role/Level

Role: NGB Level Admin  
Command: NG

Current Role/Level

Role: NGB Level Admin  
Command: NG

## 8.8 RSP Portal

The *RSP Portal* blade is located at the bottom of the Command Center and can be used to access training resources housed in the Recruit Sustainment Portal (RSP).

### 8.8.1 Training Sections

The blade opens with *Training Sections* preselected in the *Searches* field. You can enter a specific name in the *Name* field or simply click **SEARCH** to see all results.

Module ID	Name
Ship and Enlistment Options	Ship and Enlistment Options
Ship and Enlistment Options	Duties and Responsibilities
Ship and Enlistment Options	Administration
Ship and Enlistment Options	Training
Ship and Enlistment Options	Logistics
Ship and Enlistment Options	Timeline
Ship and Enlistment Options	Course Assessment
Duties and Responsibilities	Establishing a Bank Account
Duties and Responsibilities	Identifying Rank Structure
Duties and Responsibilities	Establishing myPay Account
Duties and Responsibilities	Identify Military Time
Duties and Responsibilities	Identify Military Drill and Ceremony
Duties and Responsibilities	Establishing Direct Deposit
Duties and Responsibilities	Recognizing the Phonetic Alphabet
Duties and Responsibilities	Navigate On Land
Duties and Responsibilities	Apply First AID
Duties and Responsibilities	Recite General Orders
Duties and Responsibilities	Summary
Administration	Resilience Training Sec. 1
Administration	RSP Resilience Training Module
Administration	RSP Resilience Training Module
Administration	RSP Resilience Training Module
Administration	RSP Resilience Training Module
Administration	RSP Resilience Training Module
Administration	RSP Resilience Training Module

Showing 1 to 29 of 29 entries

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## 8 Additional Tools

Click a training module to open its details in Panel 3.

The screenshot shows a web application window titled "Training Sections Ship and Enlistment Options (1)". The interface is divided into several sections:

- Training Sections Summary:** A table with columns for Name, Position, Is Required, and Section Content. The entry for "Ship and Enlistment Options" is shown with a position of "1" and a module of "Ship and Enlistment Options".
- Training Subsection:** A section with tabs for "Training Subsection" and "Documents". It contains detailed information about ship options and enlistment categories, including text and broken image placeholders.
- Footer:** A small text block at the bottom stating "Subject To Privacy Act of 1974(PL-93-579). For Official Use Only. This application maintains usage and statistics for security and user privacy protection. Accessibility/Section 508".

### 8.8.2 Module

Selecting **Module** in the *Searches* drop-down allows you to search for RSP training modules. You can also search by *Module Name*.

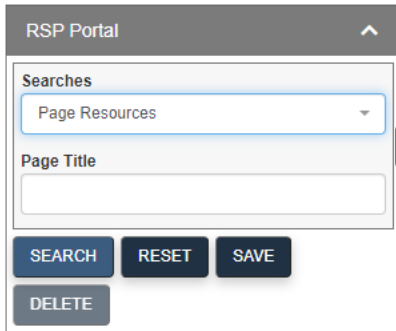
The screenshot shows the "Command Center" interface with the "Module Search Results" panel open. The "Searches" dropdown menu is set to "Module". The search results display a list of module names:

- Direct Ship SOP
- Stripes for Skills
- Resilience Training

Below the list, it indicates "Showing 1 to 3 of 3 entries". The interface includes a "Module Name" search field and buttons for "SEARCH", "RESET", "SAVE", and "DELETE".

## 8.8.3 Page Resources

Selecting **Page Resources** in the *Searches* drop-down allows you to search for RSP resources. You can also search by *Page Title*.



The screenshot shows a web interface titled "RSP Portal" with a search section. The "Searches" dropdown menu is set to "Page Resources". Below it is a text input field labeled "Page Title". At the bottom of the search section are four buttons: "SEARCH", "RESET", "SAVE", and "DELETE".



# 9 User Management Tool

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## 9.1 User Management Tool

The User Management Tool (UMT) is the RMS Extension common access management product. UMT's main purpose is to provide authorized National Guard administrators the ability to grant access and permissions to other users. Users with Common Access Cards (CACs) can request access to products, and administrators can review these requests, granting or denying them access, through UMT. Administrators validate the requested command settings, assign users one of the product's predefined roles, provide access to specific permissions within the role, and establish the member's product expiration date.

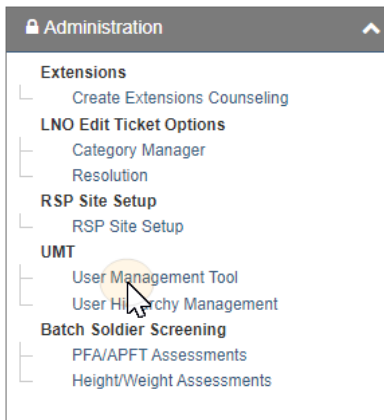
After a request has been approved, users can request role or permission changes, request a change to their command setting, or annually revalidate their access requirements through their application's "Upgrade/Revalidate" tool. Administrators use UMT to approve or deny these changes as well.

UMT also allows administrators to produce reports concerning their users, their roles and permissions, and various other product statistics.

## 9.2 Accessing UMT

Only users with administrative privileges can access UMT.

To access UMT, select the **Administration** blade in the *Command Center* then click **User Management Tool**.



## 9.3 UMT Overview

If you have experience with the multi-panel case management format used in many SIMS applications, the UMT interface will be familiar to you. This chapter covers both basic and in-depth information about how to use UMT.

**Managing a user's access to RMS Extension always follows the same basic steps:**

1. In the *Command Center*, open one of the work buckets or perform a search.
  - Panel 2 displays one or more names (unless the work bucket is empty or the search found no results).
2. Click a name from the list in Panel 2.
  - Panel 3 opens, and the other panels are minimized.
3. Review the information provided in Panel 3 and update it as needed.
4. Select the appropriate action to allow or deny access.

The following user guide sections contain basic information for new users and detailed reference information.

**Understanding the Case Management Framework on the next page**

- How UMT organizes cases (users) into work buckets
- How actions work, including how actions and work buckets are connected

**Navigating the UMT Panels on page 112**

- Using the Command Center to find users via work buckets and Search
- Using Panel 2
- Using Panel 3

**Controlling User Roles and Permissions in Panel 3 on page 117**

In addition to a detailed explanation of the *Access Details* tab of Panel 3, you can find information on:

- Setting roles and permissions for a user
- RMS Extension roles
- RMS Extension available permissions
- Mapping roles to permissions

**Automatic Notifications on page 133**

Describes notifications that are automatically generated by the system.

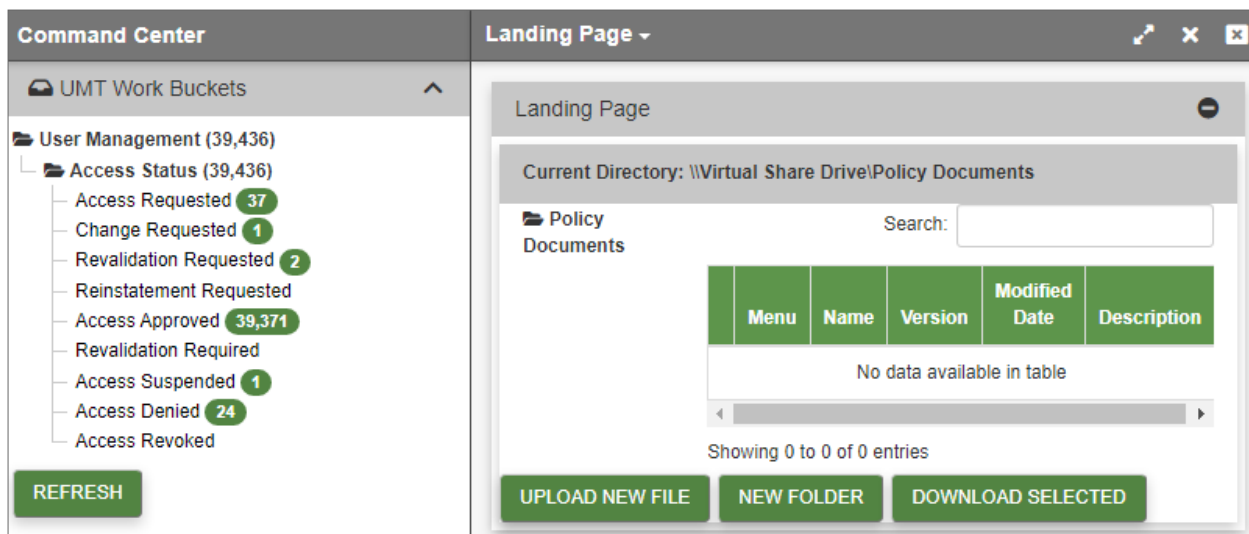
**UMT Reports on page 131**

Describes reports available in UMT.

## 9.4 Understanding the Case Management Framework

UMT leverages Case Management, a user interface that incorporates multiple panels which each perform a different function, allowing users to work on multiple items at once. Panels can be opened on top of one another without needing to close them out, and different panels can be opened side-by-side. This section covers the basics of navigating the three-panel layout of UMT.

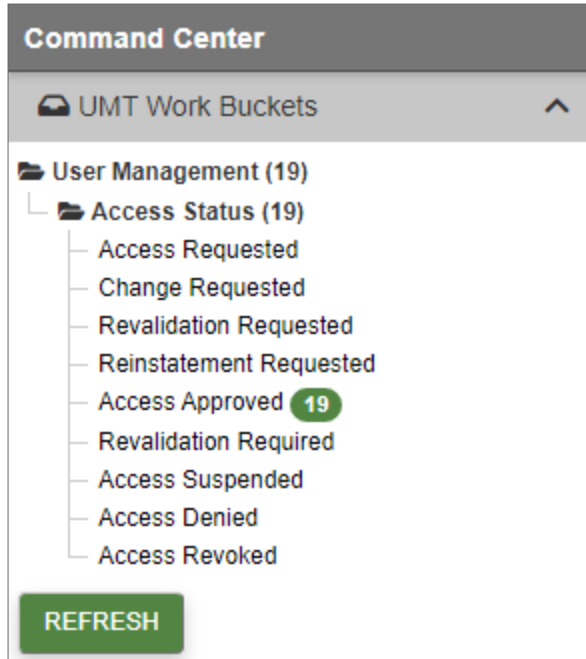
Upon accessing UMT, the first two panels appear. These are the *Command Center* (Panel 1), which provides access to your work buckets, search tools, and reports, and the *Landing Page* (Panel 2), which displays policy documents related to system access.



### 9.4.1 Understanding Work Buckets

UMT contains several work buckets from which Administrators manage access. These work buckets represent current states of cases and appear in the *UMT Work Buckets* blade under the *Command Center*.

Users' command settings and role levels act as constraints on which records they can manage. These constraints are applied as filters that reduce the number of records (or cases) that appear in the Administrators' work buckets. For example, if you are a Brigade Administrator, you only see those who requested brigade, battalion or company/detachment access within your brigade.



Records also appear in work buckets based on what unit the user requested; if a user requests the wrong unit, the right administrator won't be able to see it. The number of cases you can access in each work bucket appears to the right of each work bucket label.

For a description of each work bucket, see [Mapping Manual Actions to Begin-State Work Buckets](#) on page 110.

If a user has requested access but you cannot see the request, please contact the Help Desk so we can review and correct the user's request, if possible.

## 9.4.2 Understanding Actions

The transition of records between work buckets occurs in one of two ways:

- A user or Administrator within UMT performs a manual action (for example, approving an access request).
- An automated, time-based event moves the record (for example, a user's access has expired).


For more on automated events, see [Time-Based State Transitions](#) on page 112.

Manual actions are initiated by clicking action buttons that appear throughout the tool, such as those illustrated below:



The system typically performs validation tests prior to performing an action, and the transition is instantaneous once the validation test is successfully completed.



**Tip** - After clicking an action button, you may need to click **REFRESH** (underneath the work buckets) to see the updated work bucket counts. 

Following is a complete list of all manual actions that appear in UMT forRMS Extension:

9 User Management Tool

Action	Description	Account Type
<b>Approve Access</b>	Approve an applicant's request for access through the SAAR expiration date.	Admin
<b>Approve Change</b>	Approve changes requested by a member to their role or permissions, or to the duration or scope of their access.	Admin
<b>Approve Revalidation</b>	Approve a member's revalidation request, returning them to Access Approved until their new Account Expiration date.	Admin
<b>Cancel Request</b>	Cancel your request for access to the application.	User
<b>Deny Access</b>	Deny an applicant's request for access. The stated reason for denial is included in an automatically generated email.	Admin
<b>Deny Change</b>	Deny changes requested by a member to their role or permissions, or to the duration or scope of their access.	Admin
<b>Extend Access</b>	Extend a member's access for a short period of time while their revalidation action is pending.	Admin
<b>Reinstate Access</b>	Reinstate a suspended member's access, moving them back to Access Approved or to Revalidation Required (if Account Expiration is imminent).	Admin
<b>Request Access</b>	Submit your request for access to the application. Ensure that all required forms and requested content have been provided.	User
<b>Request Change</b>	Submit your request for a change to your role or permissions, or to the duration or scope of your access.	User
<b>Request Reinstatement</b>	Request reinstatement to the application after being suspended.	User
<b>Request Revalidation</b>	Submit your request to extend/revalidate your access to the application. Ensure that all required forms and requested content have been provided.	User
<b>Return for Correction</b>	Return a member's revalidation request for rework prior to granting approval.	Admin
<b>Revalidate Temporarily</b>	Move a suspended user to the Revalidation Required state to facilitate a request for revalidation.	Admin
<b>Revoke Access</b>	Revoke a member's access to the application. Reentry after revocation requires a new access request by the user.	Admin
<b>Suspend Access</b>	Suspend a member's access to the application for a short period of time, after which their access is automatically revoked unless the member's access is reinstated.	Admin

### 9.4.2.1 Mapping Manual Actions to Begin-State Work Buckets

The manual actions are mapped to each work bucket as identified in the following table.

<b>Work Bucket</b>	<b>Description</b>	<b>Admin Actions</b>	<b>User Actions</b>
<b>Access Requested</b>	Users whose access requests have been submitted, and who are waiting for a review and approval of these requests by an administrator.	<ul style="list-style-type: none"> <li>• Approve Access</li> <li>• Deny Access</li> </ul>	Cancel Request
<b>Change Requested</b>	Users who have requested changes to their access parameters (i.e., command, role, permissions and/or expiration date), and who are waiting for a review and approval of these requests by an administrator.	<ul style="list-style-type: none"> <li>• Approve Change</li> <li>• Deny Change</li> </ul>	[None]
<b>Revalidation Requested</b>	Users who have requested revalidation of their access parameters (i.e., command, role, permissions and/or expiration date), and who are waiting for a review and approval of these requests by an administrator.	<ul style="list-style-type: none"> <li>• Approve Revalidation</li> <li>• Extend Access</li> <li>• Return for Correction</li> <li>• Suspend Access</li> <li>• Revoke Access</li> </ul>	[None]
<b>Reinstatement Requested</b>	Previously approved users whose access has been suspended (due to non-use, an expiration of their account, or administrative action), whose access requests have been submitted, and who are waiting for a review and approval of these requests by an administrator.	<ul style="list-style-type: none"> <li>• Reinstate Access</li> <li>• Revoke Access</li> </ul>	[None]
<b>Access Approved</b>	Users who have been approved for system access through their account expiration date, within the scope of their command setting, role and permissions.	<ul style="list-style-type: none"> <li>• Suspend Access</li> <li>• Revoke Access</li> </ul>	Request Change

Work Bucket	Description	Admin Actions	User Actions
<b>Revalidation Required</b>	Revalidation is required for user to maintain system access. User must submit a revalidation request for administrator review.	<ul style="list-style-type: none"> <li>Extend Access</li> <li>Suspend Access</li> <li>Revoke Access</li> </ul>	Request Revalidation
<b>Access Suspended</b>	Previously approved users whose access has been suspended due to non-use, an expiration of their account, or administrative action. Users in this category must submit a reinstatement request to reobtain access.	<ul style="list-style-type: none"> <li>Revalidate Temporarily</li> <li>Reinstate Access</li> <li>Revoke Access</li> </ul>	Request Reinstatement
<b>Access Denied</b>	Users whose access requests have been denied by an administrator. Users in this category may submit a new access request to obtain access.	<ul style="list-style-type: none"> <li>Approve Access</li> </ul>	Request Access
<b>Access Revoked</b>	Previously approved users whose access has been revoked. Users in this category must submit a new access request to reobtain access.	<ul style="list-style-type: none"> <li>[None]</li> </ul>	Request Access

Users (i.e., members or prospective members) can impact the state of a case, even without access to the UMT tool, through actions in the *Access Request* or *Upgrade/Revalidate* tools. For example, a new user can cancel a request, removing the case from the *Access Requested* work bucket.

#### 9.4.2.2 Mapping Manual Action Transitions to End-State Work Buckets

The following table lists whether a case is moved between work buckets, added, or removed based on its current state and the action taken.

Action	Resulting End State
<b>Approve Access</b>	Case is moved from Access Requested to Access Approved by Admin.
<b>Approve Change</b>	Case is moved from Change Requested to Access Approved.
<b>Approve Revalidation</b>	Case is moved from Revalidation Requested to Access Approved.
<b>Cancel Request</b>	Case is removed from Access Requested (by user).
<b>Deny Access</b>	Case is removed from Access Requested.
<b>Deny Change</b>	Case is moved from Change Requested to Access Approved.
<b>Extend Access</b>	Case is not moved, but the user's Expiration Date is extended.

Action	Resulting End State
Reinstate Access	Case is moved from Access Suspended to Accessed Approved or Revalidation Required.
Request Access	Case is added to Access Requested.
Request Change	Case is moved from Access Requested to Change Requested (by user).
Request Reinstatement	Case is moved from Access Suspended to Reinstatement Requested (by user).
Request Revalidation	Case is moved from Revalidation Required to Revalidation Requested (by user).
Return for Correction	Case is moved from Revalidation Requested to Revalidation Required.
Revalidate Temporarily	Case is moved from Access Suspended to Revalidation Required.
Revoke Access	Case is removed from all relevant work buckets.
Suspend Access	Case is moved from all relevant work buckets to Access Suspended.

Most actions that occur in UMT result in automatic notifications that alert both users and Admins of the changes.

### 9.4.2.3 Time-Based State Transitions

A small number of state transitions occur as the result of the passage of time, as opposed to a manual action taken by an Administrator or user. Time-base transitions include:

- Suspensions for non-use or failure to re-validate
- Auto-denials due to inaction on requests by Administrators
- Revocations after a period of suspension

## 9.5 Navigating the UMT Panels

UMT uses a three-panel layout, with each panel serving a different function:

- **Panel 1:** The *Command Center*, which allows users to view lists of records and reports
- **Panel 2:** The *Landing Page*, which displays results from work buckets in the Command Center
- **Panel 3:** The *Interactive User Managements Functions* page, where users perform most management activities



## 9.5.1 Panel 1: The Command Center

The *Command Center* lets you access information through sections referred to as blades. Depending on how your application is configured, your *Command Center* view may include up to three blades: *UMT Work Buckets*, *UMT Searches*, and *Reports*, as seen below.

Select a blade to view records, search for records, or view reports. Performing a search or selecting a work bucket or report displays relevant information in Panel 2.

For more information on UMT work buckets, see [Understanding Work Buckets](#) on page 107.

For more information on Reports, see [UMT Reports](#) on page 131.

For more information on UMT searches functionality, see [UMT Searches](#) below.



### 9.5.1.1 UMT Searches

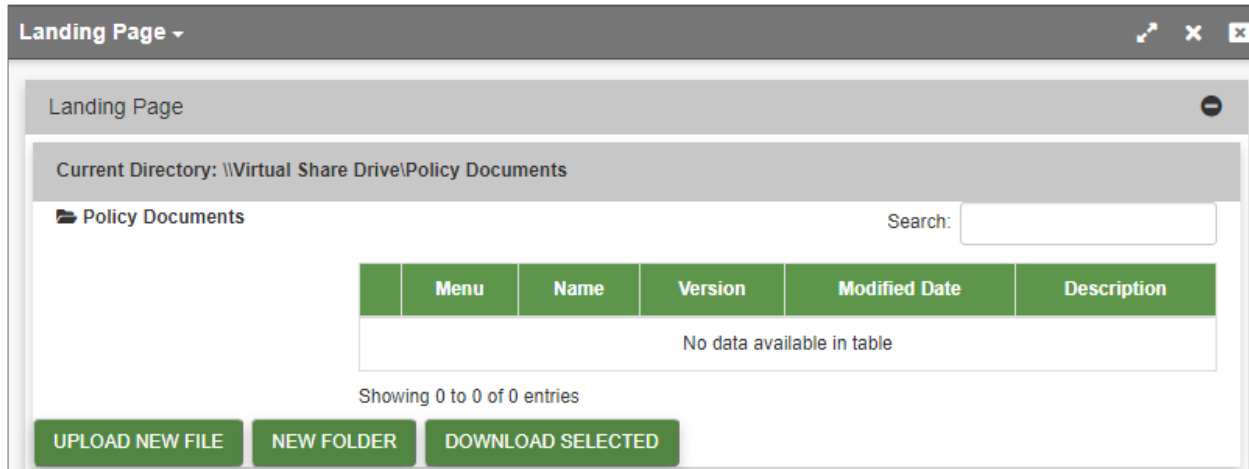
If you have the necessary permissions, you can perform a search for a user or set of users.

To perform a search, choose the search type in the Searches box, enter one or more search terms, and click **SEARCH**. There is also an option to **SAVE** your search if it's one that you use often. The **RESET** button removes all the search terms you've entered.

 A screenshot of the 'UMT Searches' search form. The form is titled 'Searches' and includes a dropdown menu for 'User' (currently set to 'User'), a 'Product' dropdown menu (set to 'Personnel Division (HRP)'), and several text input fields: 'Full Name (e.g., "DOE, JOHN")', 'User Name', and 'Email'. There is also a 'Status' dropdown menu. At the bottom of the form are four buttons: 'SEARCH', 'RESET', 'SAVE', and 'DELETE'. Two callout boxes are present: one pointing to the 'User Name' field with the text 'Fill in one or more search terms', and another pointing to the 'SEARCH' button with the text 'Click SEARCH'.

## 9.5.2 Panel 2: Landing Page and Results Display

When you initially access UMT, Panel 2 opens to the *Landing Page*. This page initially displays a Virtual Share Drive directory containing policy and procedure documents concerning user access. To download a particular document, select the box(es) in column 1 and click **DOWNLOAD SELECTED**.



Any time you select something in the *Command Center* – for example, open a work bucket or perform a search – the results appear in Panel 2. UMT displays work bucket contents and search results as lists.

Full Name	FASC-N	Email Address	Role	Status	Days in Status	Rank	Command Level	Command Value	Hierarchy Type
Randolstnn, anil.naria	anil.naria	AKO.EnterpriseEmail	NGB Admin	Access Approved	701		NGB	NG	GEOG
[NLN], [NFN]	FR_User_NSCU		NGB Suicide CIMS User	Access Approved	625		NGB	NG	GEOG
[NLN], [NFN]	FR_User_NWS		NGB Watch SIR	Access Approved	625		NGB	NG	GEOG
[NLN], [NFN]	FR_User_SSCU		State Suicide CIMS User	Access Approved	625		STA	VT	GEOG
[NLN], [NFN]	christopher.gerber		NGB Admin	Access Approved	615		NGB	NG	GEOG
[NLN], [NFN]	jags.putchala	AKO.EnterpriseEmail	NGB Admin	Access Approved	615		NGB	NG	GEOG
[NLN], [NFN]	myesha.dubose		NGB Admin	Access Approved	615		NGB	NG	GEOG
[NLN], [NFN]	neil.deabreu		NGB Admin	Access Approved	537		NGB	NG	TRAD
[NLN], [NFN]	nuzhat.sanwar		NGB Admin	Access Approved	537		NGB	NG	TRAD
[NLN], [NFN]	penny.doss		NGB Admin	Access Approved	537		NGB	NG	TRAD
[NLN], [NFN]	rod.stuart		NGB Admin	Access Approved	537		NGB	NG	TRAD
[NLN], [NFN]	test.user	AKO.EnterpriseEmail	State Suicide CIMS User	Access Approved	442		STA	AR	TRAD
[NLN], [NFN]	Test_SSCU_Nuz		State Level Read - Only User	Access Approved	442		STA	NH	GEOG

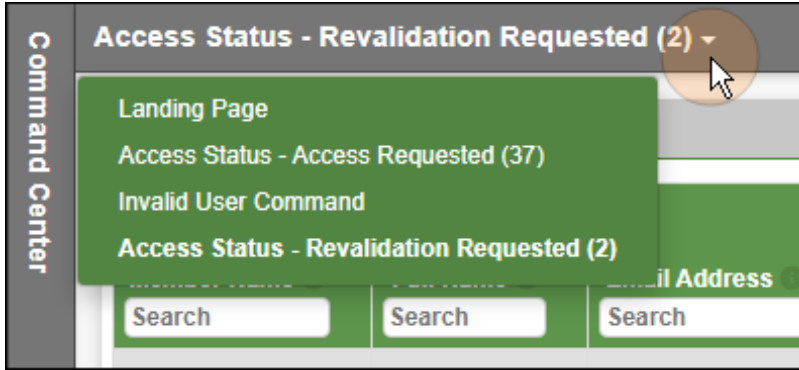


**Tip** - You can filter the list by clicking the **Filter** icon. You can sort the list by clicking at the top of the column you want to sort by (for example, name or command).

Selecting a record from the list in Panel 2 opens it in Panel 3.

### The Panel Bar

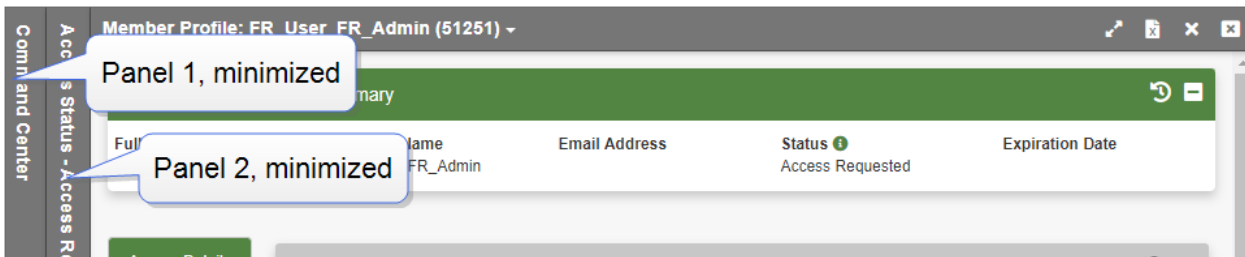
The *Landing Page* is always accessible in Panel 2 from the drop-down list across the top of the panel. Any page that the user does not manually close also remains accessible through this drop-down until the user closes the tool itself.



**Note** - In Panel 3, the panel bar works the same way it does in Panel 2.

### Minimizing Panels

When you select a record in Panel 2, Panel 3 opens as Panels 1 and 2 minimize on the left. You can easily navigate back to Panel 1 or Panel 2 by clicking the minimized panels.



The top right corner of each panel bar contains several different icons, including tools to Refresh, Export, or Filter information. Hovering the cursor over an icon opens a tool tip describing the icon's function.

### 9.5.3 Panel 3: User Management Functions

Panel 3 displays information about your users and their access settings. From here you can manage their roles and permission, as well as the scope and duration of their access. This panel includes a *Summary* section at the top and navigational tabs that appear on the left side immediately beneath the *Summary*. These

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tabs include *Access Details*, *Documents*, *My Admins*, and *Other Profiles*.

The screenshot shows the 'Member Profile: FR\_User\_NWS (51244)' interface. At the top, there is a 'UMT Member Request Summary' table with columns: Full Name [NLN], [NFN], FASC-N FR\_User\_NWS, Email Address, Status Access Approved, and Expiration Date. Below this is a sidebar with tabs: Access Details (selected), Documents, My Admins, and Other Profiles. The main content area is divided into sections: 'Profile', 'Command', and 'Roles and Permissions'. The 'Command' section includes fields for Command Value (NG), Hierarchy Type (Auto-Pop) Geographic, Command Level (Auto-Pop) NGB - National Guard Bureau, and Unit State (NG). There are 'SAVE' and 'CANCEL' buttons. The 'Roles and Permissions' section shows 'Current Role NGB Watch SIR' and 'Requested Role \* NGB Watch SIR'.

The *Access Details* page opens by default. Clicking one of the other tabs opens relevant information pertaining to that tab.

### Access Details Tab

*Access Details* contains the command information and most of the possible actions for a case. It is described here: [Controlling User Roles and Permissions in Panel 3](#) on the next page.

### Documents Tab

UMT allows the user to upload and download a member's System Authorization Access Request (SAAR) as part of the registration process. An Administrator may occasionally request (or a user may supply) additional supporting documentation to justify the user's access request. These additional documents are managed under the *Documents* tab, shown below:

The screenshot shows the 'Documents' tab interface. It displays the current directory path: \\Virtual Share Drive\Cases\AccessRequest-2022-51251. Below the path is a search bar and a table with columns: Menu, Name, Version, Modified Date, and Description. The table is currently empty, displaying 'No data available in table'. At the bottom, there are buttons for 'UPLOAD NEW FILE', 'NEW FOLDER', and 'DOWNLOAD SELECTED'.

To upload a new document, click **UPLOAD NEW FILE**. A pop-up window appears and prompts you to upload a file. Click **Choose File** and select a file to upload, enter a File Name and Description, and click **UPLOAD**.



**Note** - For RCMS products, the file type must have one of these extensions: pdf, tiff, tif, xps, xls, xlsx, png, doc or docx.

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To download existing documents, select one or more check boxes in the left-most column, then click **DOWNLOAD SELECTED**. The document appears in a .zip file at the bottom of the screen and is added to your *Downloads* folder.

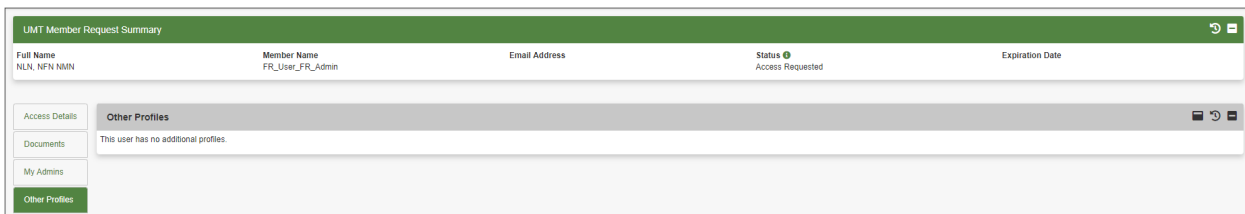
To create a new folder for uploaded documents, click **NEW FOLDER**. A pop-up window appears and prompts you to create a folder name. After you do, click **CREATE**.

### My Admins Tab

My Admins shows a list of relevant administrators, including name, rank, email address, command value, and command level.

### Other Profiles Tab

The *Other Profiles* tab provides access to a report listing all GuardOne products to which a member has ever requested access. This report contains the product name, the member's role and current status, the date that the member last accessed the product, and the date that the member's access to the product expires.



The screenshot displays the 'UMT Member Request Summary' interface. At the top, there is a green header bar with the title 'UMT Member Request Summary' and a refresh icon. Below the header is a table with the following columns: 'Full Name' (value: NLN, NFN MNM), 'Member Name' (value: FR\_User\_FR\_Admin), 'Email Address', 'Status' (value: Access Requested), and 'Expiration Date'. Below the table, there is a section titled 'Other Profiles' with a sub-header 'Other Profiles' and a message: 'This user has no additional profiles.' On the left side of the interface, there is a vertical navigation menu with options: 'Access Details', 'Documents', 'My Admins', and 'Other Profiles' (which is currently selected and highlighted in green).



**Note** - This report is for informational purposes only. If you are an administrator for multiple products, you must access UMT through each product individually to manage the user accounts for that product.

## 9.5.4 Controlling User Roles and Permissions in Panel 3

The *Access Details* section of Panel 3 is the main work area where you review and manage the cases in your work buckets.

The screenshot shows a web application window titled "Member Profile: firstName1.LastName (11633)". On the left is a vertical sidebar with "Command Center" and "Access Status - Access Requested (37)". The main content area has a green header "UMT Member Request Summary". Below it is a table with the following data:

Full Name	Member Name	Email Address	Status	Expiration Date
NLN, NFN NMN	firstName1.LastName	AKO.Email@us.army. mil	Access Requested	

Below the table is a "Profile" section with a green "Access Details" callout box. The "Profile" section contains the following data:

First Name	MOS	Email
UIC	Grade	AKO.Email@us.army. mil
Rank		

At the bottom of the main content area is a "Command" section.

*Access Details* includes several sub-sections:

- The user's profile: **Profile** below
- A section for the user's command setting: **Command** on the next page
- A section used to establish the user's role and permissions: **Roles and Permissions** on page 120
- A section where you execute actions to move the case across work buckets (e.g., approve, deny, return for re-work, etc.): **Submit** on page 129
- A read-only section where you can view all actions taken on a user's account: **History of Actions** on page 130

While the contents of each section are similar, they may vary slightly based on the work bucket selected. For example, a new access request only shows the prospective member's *requested* command, while a change request for an existing member shows both their *current* and *requested* command in order to help you assess the change. Sections may also vary in their editability based on the work bucket selected. For example, a case in the *Access Revoked* state displays most of its data as read-only, since that case cannot be re-opened or changed.

### 9.5.4.1 Profile

The *UMT Profile* is the first section that appears under *Access Details*. In RMS Extension, the *Profile* is a non-editable section containing information mostly extracted from the user's Common Access Card, including Last Name, First Name, Rank, Grade, Member Name, UIC, MOS, and Email. These are all common fields that are considered as part of the approval process. Fields that are not applicable to a given member are left blank. Any desired changes to these field values must be addressed at the source – fields cannot be edited by RMS Extension administrative personnel.

### 9.5.4.2 Command

The *Command* section displays the command access level requested by a prospective member or previously assigned to an existing member’s account. Command access governs the detailed records that are visible to that member (e.g., Soldier-level), and the entry level at which they access RMS Extension.

The screenshot shows the 'UMT Member Request Summary' interface. At the top, there is a summary bar with fields: Full Name (NLN, NFN, NMIN), Member Name (FR\_User\_FR\_Admin), Email Address, Status (Access Requested), and Expiration Date. Below this is a 'Profile' section with fields: Last Name, First Name, Rank, Grade, Member Name (FR\_User\_FR\_Admin), and Email. The 'Command' section is highlighted and contains four fields: Command Value (NG), Hierarchy Type (Auto-Pop) (GEOG), Command Level (Auto-Pop) (NGB - National Guard Bureau), and Unit State (NG). A search icon is located to the right of the Command Value field. At the bottom right of the Command section are 'SAVE' and 'CANCEL' buttons.

Existing members accessing the UMT Command section typically see read-only values above Command Value, Hierarchy Type, and Command Level fields, which represent approved values. If a change is requested, the newly requested values appear in the editable text boxes, and the user has the ability to override these fields as needed. To make these edits, click **Search** to the right of the Command Value field, select the correct values by navigating through the C2 structure drop-downs in the pop-up window that appears (the Command Picker), and click **SET** to return to the original screen. Modifications made through this single dialog are extended to all three edit boxes. Click **SAVE** to save changes and finish.

### Command Edit Log

To see past changes to the user’s command, click **Edit Log**. The edit log shows when specific changes were made, and by whom.

The screenshot shows the 'Edit Log' window with a search bar and a table of changes. The table has the following data:

Label	Previous Value	Updated Value	Updated On	Updated By
Command Level (Auto-Pop)	NGB - National Guard Bureau	STA - State	2022-08-19T18:15:51.363	anil.naria
Command Value	NG	AK	2022-08-19T18:15:51.363	anil.naria
Hierarchy Type (Auto-Pop)			2022-08-19T18:15:51.363	anil.naria
Unit State	NG	AK	2022-08-19T18:15:51.363	anil.naria

Showing 1 to 4 of 4 entries

### 9.5.4.3 Roles and Permissions

The next section is the *Roles and Permissions* section, where the administrator manages items including which internal tools members can access and the level of data visible to users.



**Note** - The following screenshot is an example not specific to RMS Extension. It illustrates what an administrator sees when a user has requested a new permission.

The screenshot displays the 'Role and Permissions' configuration window. It is split into two main panes: 'Current' on the left and 'Requested' on the right. The 'Current' pane shows the role 'NGB Admin' and a list of permissions under various categories like 'Surveys', 'Aviation', and 'Tools'. The 'Requested' pane shows the same role and a list of permissions, with a '+' icon indicating a new permission is being added. Callouts point to specific elements: 'User's existing role and permissions' points to the 'Current' role; 'New permission user has requested' points to the '+' icon; and 'Before clicking SAVE, check here to see a summary of the changes you've approved' points to the summary box at the bottom. The summary box contains the text: 'Once approved, the user will retain their current role of 'NGB Admin'. The user will gain the permission(s) 'Access Cohort Tool'.' At the bottom right, there are 'SAVE' and 'CANCEL' buttons.

Available roles and permissions vary by product and appear within functionally defined permission groups that can be collapsed or expanded by clicking on the chevron (▶) to the left of each group. For existing members, *Current* roles and permissions are displayed on the left and *Requesting* roles and permissions are displayed on the right.

Each role is associated with one or more permissions, which are either included in the role by default or are optionally added by the administrator. Permissions included in the role by default are considered *Default*, and those that can be added manually are considered *Non-Default*. On the *Requested* side, *Default* permissions are underlined and appear before *Non-Default* permissions within each group.

Administrators can change a user's role and can add or revoke individual permissions as required. To change a role, click on the drop-down box under *Requesting*, and select the new role. To change permissions, toggle them on or off by checking the check boxes next to each one.

When a role is changed, *Default* permissions associated with the new role are added to the user's permissions and any *Default* permissions associated exclusively with the old role are removed. *Non-Default* permissions are preserved. A summary at the bottom of the page appears listing all changes.

Click **SAVE** to finalize all changes and finish.



## Roles and Permissions Edit Log

To see past changes to the user's role and permissions, click  **Edit Log**. The edit log shows when specific changes were made, and by whom.

### RMS Extension User and Administrator Roles

All users in RMS Extension are assigned a role which determines what they can access, view, and manage. Each role includes various associated *permissions* that define the specific functions, activities, and products to which a member may have access within the application.

UMT is designed to give administrators control over what each user can do. Each role has a default set of permissions and optional permissions. It is possible to add or remove specific permissions for each individual user.

*Example: A role provides access to an optional permission allowing users to view system debug information. Having this role does not guarantee that the user has access to this debug information, however, since the permission is optionally granted.*

It is also important to note that roles (and/or permissions) that are associated with administrative functions (such as "Granting Permissions") provide a given user with access to UMT through the ribbon menu. Users without an administrative role (or relevant permission) do not see this link.

The ability to approve roles is based upon the *level* of an administrative user. Levels are assigned to each role and range from 0 (the highest level) to 99 (the lowest level). As a general rule, administrative users can only view and approve UMT functions for members assigned a role at a lower level. Administrators assigned a role at level 0 can see and perform actions on all members.



**Note** - An Administrator assigned the top-level role, 0, can approve all other roles. Any role with a level below 0 can only approve roles below that level (e.g., a level 1 role can approve any level 2 or below; a level 4 role can approve any level 5 or below).

RMS Extension Role	Description	Level	Administrative Role?
<b>IST Help Desk Admin</b>	Can complete any IST action for any state, including approve users in UMT. IST Help Desk Admin have access to the <i>Administration</i> tab functions for IST.	0	Yes
<b>Vulcan NGB Level Admin</b>	Can view the status of RSP in all states in the nation. They can see statistics summarizing the status of RSP in each state, view many reports, and complete all tasks that State Administrators and Users can complete.	0	Yes

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<b>RMS Extension Role</b>	<b>Description</b>	<b>Level</b>	<b>Administrative Role?</b>
<b>Vulcan State Level Admin</b>	Can view all the RSP Sites within a particular state. They can see statistics summarizing the status of the RSP in each of the existing RSP sites, identify units that are RSP site, view many reports, and complete many other essential tasks.	0	Yes
<b>State Level Admin</b>	Can do everything in RMS for their own state, including approve user requests in UMT.	0	Yes
<b>State Level Super Admin</b>	Can view and complete everything in RMS, including adding Admin users and approving user requests in UMT. They have access to the <i>Override Eligibility</i> button on the fourth-panel <i>Extension Eligibility</i> screen to bypass all eligibility rules.	0	Yes
<b>NGB Level</b>	Can view all data but cannot edit anything.		No
<b>IST Help Desk</b>	Can complete any IST action for any state.		No
<b>State Level</b>	Can view all data for their own state, but cannot edit anything.		No
<b>State IST Coordinator</b>	Can complete losing or gaining state actions and approvals for Soldiers in their state.		No
<b>IPPS-A</b>	Can click the <i>Entered into IPPS-A</i> button to complete an Extension case in the IPPS-A work bucket, or click <i>Return to Unit</i> to request corrections.		No
<b>Battalion Level</b>	Can view all data for their own battalion, but cannot edit anything.		No
<b>Brigade Level</b>	Can view all data for their own brigade, but cannot edit anything.		No
<b>Sponsor</b>	Can log attempts to contact a Soldier and track sponsorship activities on the <i>Manage Checklist</i> screen.		No
<b>Vulcan LNO</b>	Training Liaison Officers at the various IET Sites can open and maintain LNO Tickets and have read-only access to other Soldier information.		No
<b>Vulcan User</b>	Users with access to the RSP Site level can view all the Soldiers assigned to a particular RSP Site. They can see statistics summarizing the status of the Site, define a Site Drill Schedule, update Soldier information in bulk, and complete many other essential tasks.		No

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<b>RMS Extension Role</b>	<b>Description</b>	<b>Level</b>	<b>Administrative Role?</b>
<b>Vulcan Read Only</b>	Users with NGB, State, and RSP Site level roles can also be restricted to read-only access.		No
<b>Financial Counselor</b>	User can send a case for and sign-off on a case Budget. Work buckets are displayed, allows users to view a case budget and report.		No
<b>Transition Counselor</b>	Users are allowed to approve a case, effectively closing a case. Work buckets are displayed and allow a user to perform duties of a Transition Counselor such as sign DD2958 as a Transition Counselor, view Reports, and ability to upload files to the VSD Library.		No
<b>Unit Level</b>	Can complete actions for any unit they have been granted access to in UMT.		No

### Permissions

RMS Extension has a list of permissions associated with one or more role.

<b>Group</b>	<b>Permission</b>	<b>Description</b>
Administration	Approve and disapprove roles	
NGB Admin	Process renewals	
RSB User	Adjudicate and require approval permissions	
RRB Commander	View Restricted Data	
RRB S1	Navigate and manage packets with first level signatory "action" abilities	
RRNCO User	Initiate case and complete preparatory information	Restricted to own case information only in read capacity
RRB User	Edit at state level. Cannot sign as other RRB roles.	

<b>Permission</b>	<b>Description</b>
AWOL: Display work buckets	Ability to display AWOL work buckets.
AWOL Close AWOL Case	Ability to terminate an AWOL case.
AWOL Complete Case	Ability to complete 4856 counseling and close the case.
AWOL Contact Soldier	Ability to contact an AWOL soldier and record their information.

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Permission	Description
AWOL Counsel Soldier	Ability to counsel a soldier from an AWOL case.
AWOL Edit Case	Ability to edit AWOL cases.
AWOL Update Contact Info	Ability to update contact information on a AWOL case.
Document Center: Delete	Ability to delete files from a Soldier's document center.
Document Center: Upload	Ability to upload files to a Soldier's document center.
Document Center: Vulcan RSP	Ability to view Vulcan RSP from a Soldier's document center.
Extension: Battalion Review	Ability to review Extension cases in the Battalion work bucket.
Extension: Brigade Review	Ability to review Extension cases in the Brigade work bucket.
Extension: Display work bucket's	Ability to display Extension work buckets.
Extension: IPPS-A Review	Ability to review Extension cases in the IPPS-A work bucket.
Extension: State Review	Ability to review Extension cases in the State work bucket.
Extension Counseling	Ability to conduct counseling for Extension cases.
Extension Enter into IPPS-A	Ability to enter an extension in IPPS-A and complete it.
Extension Enter Override	Ability to override data value for Soldier's in Extension cases.
Extension Issue Incentive Contract	Ability to issue a bonus contract for Extension cases.
Extension Override Eligibility	Ability to override eligibility for Extension cases.
Extension Process 4836	Ability to complete and upload document 4836 to the case.
IST: Display work bucket's	Ability to display IST work buckets.

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Permission	Description
IST: Help Desk	Ability to access the IST Help Desk.
IST: Help Desk Admin	Grants IST Help Desk access to users.
IST: Override Risk Level	Ability to override risk levels for IST cases.
IST: Reject Para/Line	Ability to reject assigned Paragraph/Lines for IST cases.
IST: Reopen Case	Ability to reopen IST cases.
IST: Reset Case	Ability to reset IST cases.
IST: State Level User	Grants state level access to the user for IST cases.
IST: Terminate Case	Ability to terminate IST cases.
IST: Unit Level User	Grants unit level access to the user for IST cases.
IST: Update Contact Info	Ability to update contact information on an IST case.
IST: Verify Orders	Ability to verify cases and orders for IST cases.
NGB Admin	Grants NGB Administrator access to user.
Process: Vulcan LNO; Action: Case Closed; Current: New; To: Closed	Ability to close Vulcan LNO cases from the New work bucket.
Process: Vulcan LNO; Action: Case Closed; Current: Returned to LNO; To: Closed	Ability to close Vulcan LNO cases from the Returned to LNO work bucket.
Process: Vulcan LNO; Action: Case Closed; Current: Returned to State; To: Closed	Ability to close Vulcan LNO cases from the Returned to State work bucket.
Process: Vulcan LNO; Action: Case Terminated; Current: New; To: Terminated	Ability to terminate Vulcan LNO cases from the New work bucket.
Process: Vulcan LNO; Action: Case Terminated; Current: Returned to LNO; To: Terminated	Ability to terminate Vulcan LNO cases from the Returned to LNO work bucket.
Process: Vulcan LNO; Action: Case Terminated; Current: Returned to State; To: Terminated	Ability to terminate Vulcan LNO cases from the Returned to State work bucket.

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Permission	Description
Process: Vulcan LNO; Action: Return to LNO; From: Returned to State; To: Returned to LNO	Ability to move Vulcan LNO cases from the Returned to State work bucket to the Returned to LNO work bucket.
Process: Vulcan LNO; Action: Returned to LNO; Current: New; To: Returned to LNO	Ability to move Vulcan LNO cases from the New work bucket to the Returned to LNO work bucket.
Process: Vulcan LNO; Action: Returned to State; Current: Returned to LNO; To: Returned to State	Ability to move Vulcan LNO cases from the Returned to LNO work bucket to the Returned to State work bucket.
Sponsorship: 1st Drill Orientation	Grants 1st Drill Orientation sponsor access.
Sponsorship: 1st Line Leader	Grants 1st Line Leader sponsor access.
Sponsorship: 1st Sergeant	Grants 1st Sergeant sponsor access.
Sponsorship: Commander	Grants Commander sponsor access.
Sponsorship: Display work bucket's	Ability to display Sponsorship work bucket's.
Sponsorship: Initial Contact Prior to 1st Drill	Ability to access Initial Contact Prior to 1st Drill.
Sponsorship: Readiness NCO	Grants Readiness NCO access.
Sponsorship: Supply Sergeant	Grants Supply Sergeant access.
Sponsorship Add Note	Ability to add a note to a Sponsorship case.
Sponsorship Assign Sponsor	Ability to assign a sponsor to a Sponsorship case.
Sponsorship Close Sponsorship	Ability to mark a Sponsorship case as closed.
Sponsorship Complete Checklist	Ability to complete the checklist for a Sponsorship case.
Sponsorship Contact Soldier	Ability to contact a Soldier about their Sponsorship case.
Sponsorship Contact Sponsor	Ability to assign and contact a sponsor to a Sponsorship case.
Sponsorship Print Checklist	Ability to print a checklist for a Sponsorship case.

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Permission	Description
Sponsorship Reassign Sponsor	Ability to reassign a sponsor for a Sponsorship case.
Sponsorship Return Checklist	Ability to return a checklist to the sponsor for a Sponsorship case.
Sponsorship Terminate Case	Ability to terminate a Sponsorship case.
Sponsorship Update Contact Info	Ability to update contact information on a Sponsorship case.
State Admin	Grants State Admin access to the user.
Transition Service: Approve Case	Allows user to approve a case effectively closing it.
Transition Service Budget Review	Allows user to send a case for budget review.
Transition Service Budget Sign Off	Allows user to sign off on a case budget.
Transition Service Commander Sign	Allows user to sign DD2958 as a Commander.
Transition Service Display	Ability to display Transition Display work bucket's
Transition Service Terminate Case	Allows user to terminate a case.
Transition Service: Transition Counselor	Allows user to perform duties of a Transition Counselor.
Transition Service: Transition Counselor Signoff	Allows user to sign DD2958 as a Transition Counselor
Transition Service: View Budget	Allows user to view a case budget.
Transition Service: View Question History Tab	Allows user to view the question history tab.
View Reports	Ability to access and view the Reports blade.
View Vulcan	Ability to view Vulcan work bucket's.
VSD Delete Files	Ability to delete files from VSD library.
VSD Upload Files	Ability to upload files to the VSD library.
Vulcan Can Edit	Ability to edit Vulcan cases.

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Permission	Description
Vulcan Edit Closed Ticket	Ability to edit closed Vulcan tickets.
Vulcan LNO: Terminate Case	Ability to terminate Vulcan LNO cases.
Vulcan NGB Admin	Grants Vulcan NGB Admin access to user.
Vulcan View Document Tab	Ability to view the Document tab in the 3rd and 4th panels of the Vulcan work bucket.
Vulcan Add Comments	Ability to add comments in Vulcan work buckets.
Vulcan Disposition Override	Ability to override disposition for Vulcan cases no matter the IET status.
Vulcan VSD Delete Files	Ability to delete files from the Vulcan VSD library.
Vulcan VSD Upload Files	Ability to upload files to the VSD library.
Admin: Receive Notifications	Ability for administrators to receive notifications.
Extension: Display Career Development Counseling	Ability to display Career Development Counseling work buckets
Vulcan LNO	Grants Vulcan LNO access to user.
Vulcan Read Only	Grants Vulcan Read Only access to user.
Vulcan State Admin	Grants Vulcan State Admin access to user.
Vulcan User	Grants Vulcan User access to user.

### Mapping of Roles to Permissions

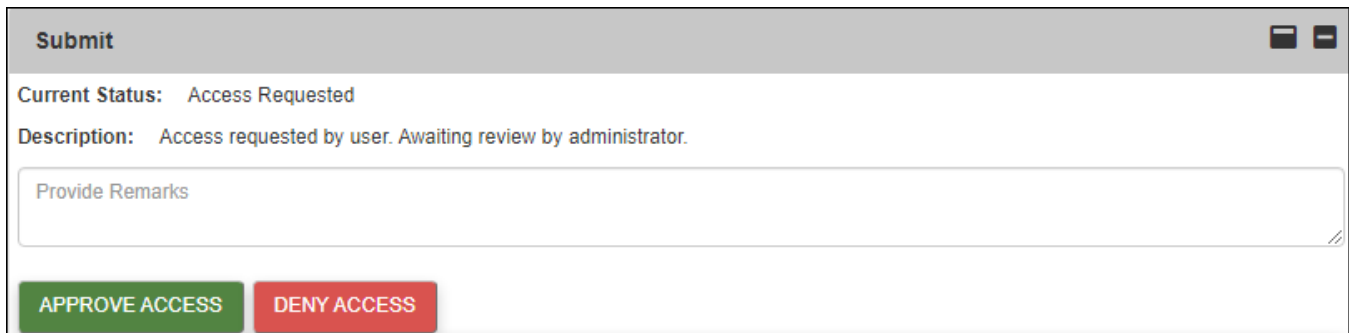
Each role has a corresponding list of default and optional permissions that control what the user can do. The chart below displays a cross-tab of roles (across the top) and permissions (down the side). Items shown with a “D” (in green) are *Default* permissions, meaning the user obtains this permission by default at the time they are awarded the role. Items shown with an “O” (in gray) are optional permissions, meaning these permissions are available to be assigned, but not assigned by default.

See [Appendix A](#) on page 136.



### 9.5.4.4 Submit

The *Submit* section allows the user to record remarks and perform actions that result in a change of status.



**Submit**

Current Status: Access Requested

Description: Access requested by user. Awaiting review by administrator.

Provide Remarks

APPROVE ACCESS DENY ACCESS

Entering a remark before clicking an action button provides a narrative that is stored with the action you take. Remarks are frequently transmitted to users or administrators as a component of the automated notification system. Remarks are mandatory for all actions with a RED action button, and optional but recommended for actions with a GREEN action button. In the example above, approval of the access request does not require a remark, but denial does require a remark explaining the reason, which is transmitted back to the user.

Selecting an action moves a case from one state (work bucket) to another. In the example above, the member's case resides in the *Access Requested* work bucket until the user clicks either **APPROVE ACCESS** or **DENY ACCESS**. Once one of these actions is performed, the case moves to the appropriate work bucket. Changes might include a modified command setting, a new role, or changes to permissions.

#### Action Validations

When you click an action button, the system first asks for confirmation of the action and then performs validation tests to ensure that all required entries have been completed. Below is a screen shot of the confirmation pop-up. To confirm and continue, click **YES**. To return to your case and not continue, click **NO**.



Confirmation

Approve Access?


YES NO

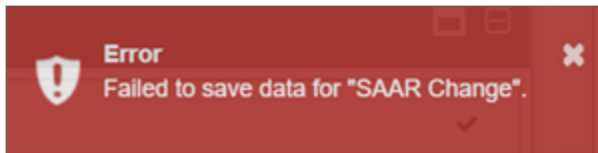
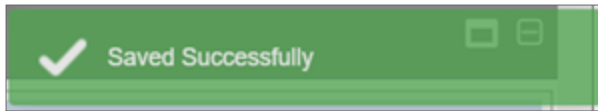
Automated validation tests typically check for three required entries:

- Has a Command value been selected (for those applications configured to require this selection)?
- Have Role and Permission values been selected?

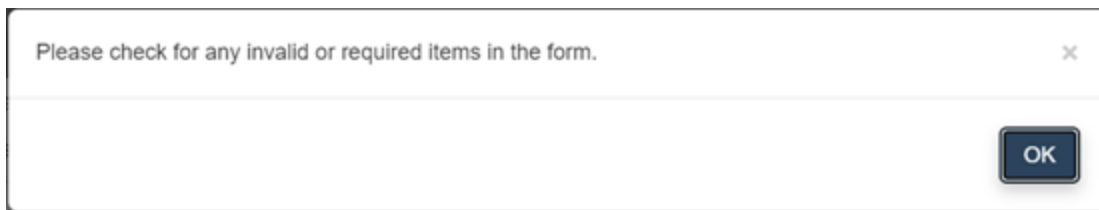
- Has a SAAR been uploaded, has that form been certified, and has an expiration date up to one year in the future been entered?

When validation tests are performed, a corresponding message appears:

- Red or green colored messages indicate whether the action was successful. Green messages indicate success, and automatically close after a few seconds. Red messages indicate that an issue was encountered and must be manually closed by clicking **Close** .



- Pop-up messages generally provide clearer explanations of what you must do to proceed with your action. An example is “Please check for any invalid or required items in the form.”



### 9.5.4.5 History of Actions

The *History of Actions* table within the *Submit* section displays all actions which have previously been taken on a user’s account, either by an Administrator or by automated processes. This section lists actions chronologically, with the most recent at the top. The *Search* box allows the user to search for a specific historical action if the number of actions makes finding one difficult.

History of Actions					
Date	Full Name	Comment	Previous Status	Action	Status
3/28/2022 9:46:15 AM	SYSTEM	New Case Created			Access Request Initiated
3/28/2022 9:46:15 AM	SYSTEM	New Account / New Profile Admin Creation	Access Request Initiated	Approve Access	Access Approved

Showing 1 to 2 of 2 entries

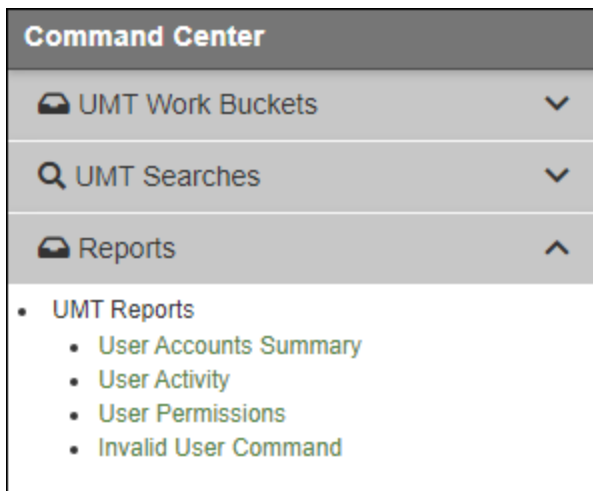
The table below lists each field displayed in the *History of Actions* section:

Field	Description
<b>Date</b>	The date and time the particular action was taken.

Field	Description
<b>Full Name</b>	The name of the individual or process that performed the action.
<b>Comment</b>	Remarks provided by the administrator or automated function that concern the action performed.
<b>Previous Status</b>	The state (or work bucket) the account was in prior to the action being performed.
<b>Action</b>	The event that caused a change in status.
<b>Status</b>	The state (or work bucket) the account is in after the completion of the action.

## 9.6 UMT Reports

Reporting is accessed via the *Reports* blade in the Command Center. Users can view the *User Accounts Summary*, *User Activity*, *User Permissions*, and *Invalid User Command* reports from there.



### 9.6.1 User Accounts Summary

This report provides the number of UMT members in each state.

The screenshot shows the 'User Accounts Summary' report interface. It includes a title bar, a description, and a table. The table has two columns: 'State' and 'User Management Count'. The table content is as follows:

State	User Management Count
Access Approved	3
Total	3

### 9.6.2 User Activity

This report provides access to usage statistics drillable by Calendar Year and Calendar Month.

## 9 User Management Tool

Calendar Year	User Management Count
2019	737
2018	449
2017	117
2016	120
2015	4,358
2014	6,899
2013	1,722
2012	26
2011	30
Total	14,458

### 9.6.3 User Permissions

This report provides the number of users by different roles and permissions.

Role	User Management Count
[Null]	6,398
Total	6,398

### 9.6.4 Invalid User Command

This report identifies, for any module that requires a Command Hierarchy selection, those users whose Command Level/Command Value settings are no longer valid. These users will have problems using the module until these values are updated.

*Example: BDE/XYZAA is now converted to BDE/ABCAA or DIV/XYZAA. The user's setting of BDE/XYZAA needs to be updated.*

This report helps identify these users.

Unit State	Case Count
CA	1
Total	1

## 9.7 Automatic Notifications

UMT provides both state-driven and time-driven notifications. Depending on the state or time, notifications are sent to either the User, Admin, or both, and may or may not include remarks entered by the User or Admin in the User Interface. In general, remarks that are “Required” fields are included in the emails.

The following chart summarizes by action who receives the notifications, whether the notification includes remarks, and whether the notification is driven by a state change or time-base event.

Action	Sent to User	Sent to Admin	Includes Remarks	State-Driven	Time-Driven
<b>Access Requested</b>	X			X	
<b>Access Requested</b>		X		X	
<b>Access Request Canceled</b>	X			X	
<b>Access Approved</b>	X			X	
<b>Access Denied</b>	X		X	X	
<b>Access Extended (Revalidation Required)</b>	X			X	
<b>Access Extended (Revalidation Requested)</b>	X			X	
<b>Access Revoked</b>	X		X	X	
<b>Access Suspended (Administrator Action)</b>	X		X	X	
<b>Access Suspended (Unapproved Revalidation)</b>	X		X	X	
<b>Access Suspended (Non-Revalidation)</b>	X		X		X
<b>Access/Change Request Auto-Denied</b>	X		X		X
<b>Access/Change Request Auto-Denied</b>		X	X		X

Action	Sent to User	Sent to Admin	Includes Remarks	State-Driven	Time-Driven
Change Approved	x			x	
Change Denied	x		x	x	
Change Requested	x			x	
Change Requested		x		x	
Non-Use Warning	x				x
Profile Command (Auto-Modified)	x				x
Reinstatement Requested	x				
Reinstatement Requested		x	x		
Reinstatement Approved	x			x	
Reinstatement Approved (Revalidation Required)	x			x	
Reinstatement Request Approved (Revalidation Required)	x			x	
Reinstatement Denied	x		x		
Revalidation Requested	x			x	
Revalidation Requested		x		x	
Revalidation Approved	x			x	
Revalidation Request Returned	x		x	x	
Revalidation Requested Warning	x				x
Revalidation Required	x				x
Revalidation Required (Warning)	x				x

### 9.7.1 State-Driven Notifications

State-driven notifications occur automatically when an action results in a change of the member's status (or state). State changes are typically associated with a change to the number of records that appear in a given work bucket. For example, as shown in the chart above, when a request for access is submitted and that member is moved into the *Access Requested* work bucket, both the user and Admin receive automated notifications.

### 9.7.2 Time-Based Notifications

Some notifications are driven by the passage of time, rather than a change in state. For example, after an extended period of non-use, the system sends a notification of account suspension if the application is not accessed within a predefined number of days.

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The following chart lists that thresholds for time-based notifications:

<b>Event</b>	<b>Event Description</b>	<b>Days</b>
<b>Access/Change Request</b>	Number of consecutive days in an Access Requested state before approval is automatically denied	90
<b>Warning for Non-Usage</b>	Number of consecutive days of non-usage before being warning of a pending move into a Suspended state	90
<b>Suspension for Non-Usage</b>	Number of consecutive days of non-usage before being placed into a Suspended state	120
<b>Revalidation Required (Entry)</b>	Number of days prior to the SAAR expiration date that a case is moved into a Revalidation Required state	45
<b>Revalidation Required (1st Warning)</b>	Number of days prior to being Suspended while in Revalidation Required state that a 1st reminder email sent	15
<b>Revalidation Required (2nd Warning)</b>	Number of days prior to being Suspended while in Revalidation Required state that a 2nd reminder email sent	7
<b>Revalidation Required Non-Action Warning</b>	Number of days after being placed into a Revalidation Requested state that a reminder email of pending Suspension is sent	15
<b>Extension (SAAR Expired)</b>	Number of calendar days access can be extended by the Administrator if the SAAR expiration date has expired	30
<b>Extension (SAAR Active)</b>	Number of additional days of access that can be granted by the Administrator if the SAAR expiration date has not expired	30
<b>Revocation after Reinstatement Request</b>	Number of consecutive days allowed in a Reinstatement Request state before access is automatically Revoked	30
<b>Revocation after Suspension</b>	Number of consecutive days allowed in a Suspended state before access is automatically Revoked	30
<b>Removal after Revocation</b>	Number of consecutive days in a Revoked state before case is removed from all work-buckets	90

# 10 Appendix A

Roles/Permissions	IST Help Desk Admin	Vulcan NGB Level Admin	Vulcan State Level Admin	State Level Admin	State Level Super Admin	NGB Level	IST Help Desk	State Level	State IST Coordinator	IPPS-A Level	Battalion Level	Brigade Level	Sponsor	Vulcan LNO	Vulcan User	Vulcan Read Only	Financial Counselor	Transition Counselor	Unit Level	
AWOL: Display Workbuckets	O	O	O	D	D	D	D	D	D	D	D	D	D				O	O	D	
AWOL Close AWOL Case				D	D	D	D	D	D	D	D	D	D							D
AWOL Complete Case				D	D	D		D			D	D								D
AWOL Contact Soldier				D	D	D	D	D	D	D	D	D	D							D
AWOL Counsel Soldier				D	D	D	D	D	D	D	D	D	D							D
AWOL Edit Case				D	D	D		D			D	O								D
AWOL Update Contact Info				D	D	D	D	D	D	D	D	D	D							D
Document Center: Delete		O	O	O	D	O								O	O	O				
Document Center: Upload		D	O	D	D	O								D	O	O				
Document Center: Vulcan RSP		D	D	D	D	O								D	D	D				
Extension: Battalion Review	D			D	D	O		D			D	D								
Extension: Brigade Review	D			D	D	O		D				D								
Extension: Display Workbuckets	O			D	D	D	O	D	O	D	D	D						O	O	D
Extension: IPPS-A Review					D	D				D										
Extension: State Review				D	D	O		D												
Extension Counseling	D			D	D	O		O			D	D	D							D
Extension: Display Career Development Counseling	O	O	O	O	O	O		O	O	O	O	O	O					O	O	D
Extension Enter into IPPS-A	D			D	D	O				D										
Extension Enter Override	D			D	D	O		O					D							D
Extension Issue Incentive Contract				D	D	O	D	D	D	D	D	D	D							D
Extension Override Eligibility				O	D	O														
Extension Process 4836				D	D	O		O		O	D	D	D							D
IST: Display Workbuckets	D	O	O	D	D	D	D	D	D	O	O	O	O					O	O	D
IST: Help Desk	D				D	O	D													



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Roles/Permissions	IST Help Desk Admin	Vulcan NGB Level Admin	Vulcan State Level Admin	State Level Admin	State Level Super Admin	NGB Level	IST Help Desk	State Level	State IST Coordinator	IPPS-A Level	Battalion Level	Brigade Level	Sponsor	Vulcan LNO	Vulcan User	Vulcan Read Only	Financial Counselor	Transition Counselor	Unit Level
IST: Help Desk Admin	D			D	O														
IST: Override Risk Level	D			D	O	D													
IST: Reject Para/Line	D			D	O	O													
IST: Reopen Case	D			D	O	D													
IST: Reset Case	D			D	O	O													
IST: State Level User	O		D	D	O		D	D											
IST: Terminate Case	D			D	O	O													
IST: Unit Level User	O			D	O			D		O	O								D
IST: Update Contact Info	D		D	D	D	D	D	D		O	O								D
IST: Verify Orders	D			D	O	O													
NGB Admin	D			D															
Process: Vulcan LNO; Action: Case Closed; Current: New; To: Closed		D		D										D					
Process: Vulcan LNO; Action: Case Closed; Current: Returned to LNO; To: Closed		D		D										D					
Process: Vulcan LNO; Action: Case Closed; Current: Returned to State; To: Closed		D		D										D					
Process: Vulcan LNO; Action: Case Terminated; Current: New; To: Terminated		D	O	D	O														
Process: Vulcan LNO; Action: Case Terminated; Current: Returned to LNO; To: Terminated		D	O	D	O														
Process: Vulcan LNO; Action: Case Terminated; Current: Returned to State; To: Terminated		D	O	D	O														
Process: Vulcan LNO; Action: Return to LNO; From: Returned to State; To: Returned to LNO		D	D	D	D									D					
Process: Vulcan LNO; Action: Returned to LNO; Current: New; To: Returned to LNO		D	D	O	D	O								D					
Process: Vulcan LNO; Action: Returned to State; Current: Returned to LNO; To: Returned to State		D	O	O	D	O								D					

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Roles/Permissions	IST Help Desk Admin	Vulcan NGB Level Admin	Vulcan State Level Admin	State Level Admin	State Level Super Admin	NGB Level	IST Help Desk	State Level	State IST Coordinator	IPPS-A Level	Battalion Level	Brigade Level	Sponsor	Vulcan LNO	Vulcan User	Vulcan Read Only	Financial Counselor	Transition Counselor	Unit Level	
Sponsorship: 1st Drill Orientation		D	D	D	D	O					D	O	D							D
Sponsorship: 1st Line Leader		D	D	D	D	O					D	O	D							D
Sponsorship: 1st Sergeant		D	D	D	D	O					D	O	D							D
Sponsorship: Commander		D	D	D	D	O					D	O	D							D
Sponsorship: Display Workbuckets	O	O	O	D	D	O	D	O	D	O	D	O	D				O	O		D
Sponsorship: Initial Contact Prior to 1st Drill		D	D	D	D	O					D	O	D							D
Sponsorship: Readiness NCO		D	D	D	D	O					D	O	D							D
Sponsorship: Supply Sergeant		D	D	D	D	O					D	O	D							D
Sponsorship Add Note		D	D	D	D	O					D	O	D							D
Sponsorship Assign Sponsor		D	D	D	D	O					D	O								D
Sponsorship Close Sponsorship		D	D	D	D	O					D	O								D
Sponsorship Complete Checklist		D	D	D	D	O					D	O	D							D
Sponsorship Contact Soldier		D	D	D	D	O					D	O	D							D
Sponsorship Contact Sponsor		D	D	D	D	O					D	O								D
Sponsorship Print Checklist		D	D	D	D	O					D	O	D							D
Sponsorship Reassign Sponsor		D	D	D	D	O					D	O								D
Sponsorship Return Checklist		D	D	D	D	O					D	O								D
Sponsorship Terminate Case		D	D	D	D	O					D	O	D							D
Sponsorship Update Contact Info		D	D	D	D	O					D	O	D							D
State Admin				D	D					O										
Transition Service: Approve Case				D	D	O	D													D
Transition Service Budget Review				D	D	O											D			
Transition Service Budget Sign Off				D	D	O											D	O		

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Roles/Permissions	IST Help Desk Admin	Vulcan NGB Level Admin	Vulcan State Level Admin	State Level Admin	State Level Super Admin	NGB Level	IST Help Desk	State Level	State IST Coordinator	IPPS-A Level	Battalion Level	Brigade Level	Sponsor	Vulcan LNO	Vulcan User	Vulcan Read Only	Financial Counselor	Transition Counselor	Unit Level	
Transition Service Commander Sign				D	D	O					O	O								
Transition Service Display	O	O	O	D	D	D	O	D	O	O	D	D	O					D	D	
Transition Service Terminate Case				D	D	O													D	
Transition Service: Transition Counselor				D	D	O					O	O							D	D
Transition Service: Transition Counselor Signoff				D	D	O													D	
Transition Service: View Budget				D	D	O					O	O						D	O	D
Transition Service: View Question History Tab				D	D	O					O	O							O	D
View Reports	D	D	D	D	D	D	D	D	D	D	D	D	D	D	D	D	D	D	D	D
View Vulcan	O	D	D	D	D	D	O	O	O	O	O	O	O	O	D	D	D			D
VSD Delete Files	D	D	D	O	D	O	O	O	O	O	O	O	O	O	O	O	O	O		D
VSD Upload Files	D	D	D	D	D	D	D	O	D	D	D	D	D	D	D	D	D	D	D	D
Vulcan Can Edit		D	D	D	D	O	O	O	O	O	O	O	O	D	D					D
Vulcan Edit Closed Ticket	O			O	D	O														
Vulcan LNO: Terminate Case		D			D															
Vulcan NGB Admin		D			D															
Vulcan View Document Tab		D	D	D	D	O	O							D		O				
Vulcan Add Comments		D	D	O	D	O	O				O	O		D	D					
Vulcan Disposition Override		O	O	O	D	O														
Vulcan VSD Delete Files		D	D		D	O								O	O	O			O	
Vulcan VSD Upload Files		D	D	O	D	O								D	D					
Admin: Receive Notifications					O															
Vulcan LNO		O	O	O	O	O		O						D						
Vulcan Read Only				O	O	D		O								D				

Roles/Permissions	IST Help Desk Admin	Vulcan NGB Level Admin	Vulcan State Level Admin	State Level Admin	State Level Super Admin	NGB Level	IST Help Desk	State Level	State IST Coordinator	IPPS-A Level	Battalion Level	Brigade Level	Sponsor	Vulcan LNO	Vulcan User	Vulcan Read Only	Financial Counselor	Transition Counselor	Unit Level	
Vulcan State Admin			D	O	O															
Vulcan User				O	O	O		O												