
Retention Management System Sponsorship User Guide

Version 10.18.0

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1 Whats New

Version 10.18.0-Released 2023/02/22

ENHANCEMENTS

- The work bucket counts of the “Contact Soldier” and “Initiate Sponsorship” were reset.
 - Records created prior to November 1, 2022 were closed out.

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 10.17.0-Released 2023/01/18

ENHANCEMENTS

- Any instances of “APFT” were updated to read “ACFT” instead.

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

1 Whats New

- 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, RNG 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

- In the Checklist module in the Administration blade, users can create custom Section Headers and Items that populate in the Checklist.
- 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

- 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

RESOLVED ISSUES

- 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 10.13.0-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

- 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

1 Whats New

- The Counseling 4856 Form was hidden in the Initiate Sponsorship work bucket. Users no longer need counseling forms so the form was hidden in all Sponsorship work buckets.
- 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 child section was added above the 4856 Counseling section in Panel 4 that prompts the user to verify Additional Contact Information in Panel 3.
- The My Reports blade was created in the Command Center. It contains the My Reports, Private Reports, and Shared Reports folders.

RESOLVED ISSUES

- An error in the Panel 4 Sponsor Contact section was resolved.
 - The Sponsor Contact section created an error when trying to create a new sponsor contact.
- An error causing Soldier Contacts to save to the wrong section was resolved.
 - The Soldier Contact section and Soldier Contact tab in Panel 4 were saving to the Sponsor Contact section instead.

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 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.
- 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 the Initiate Sponsorship work bucket previously did not save information. This 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 10.7.0-Released 2022/03/14

ENHANCEMENTS

- 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 a Sponsorship 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 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 will see controls dependent on the work bucket sections.
 - The Counseling and Assign Sponsor sections were updated to be shown in the Initiate Sponsorship work bucket.
- Users under the RSP Shipper Management work bucket will have access to a checklist form that is exportable.
- 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 10.4.0-Released 2021/12/13

ENHANCEMENTS

- A checklist of items for sponsors to complete and upload was added to the sponsorship process.
- A survey for sponsors regarding their onboarding process was added.

Version 10.3.0-Released 2021/10/16

ENHANCEMENTS

- Ability to verify soldier contact information and complete sponsorship checklist.
- 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

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 Sponsorship

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



If you need assistance with your account, 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 your CAC into the reader attached to your computer.

3. Select the authentication certificate and enter your CAC PIN.

▶ The SMMS opens.

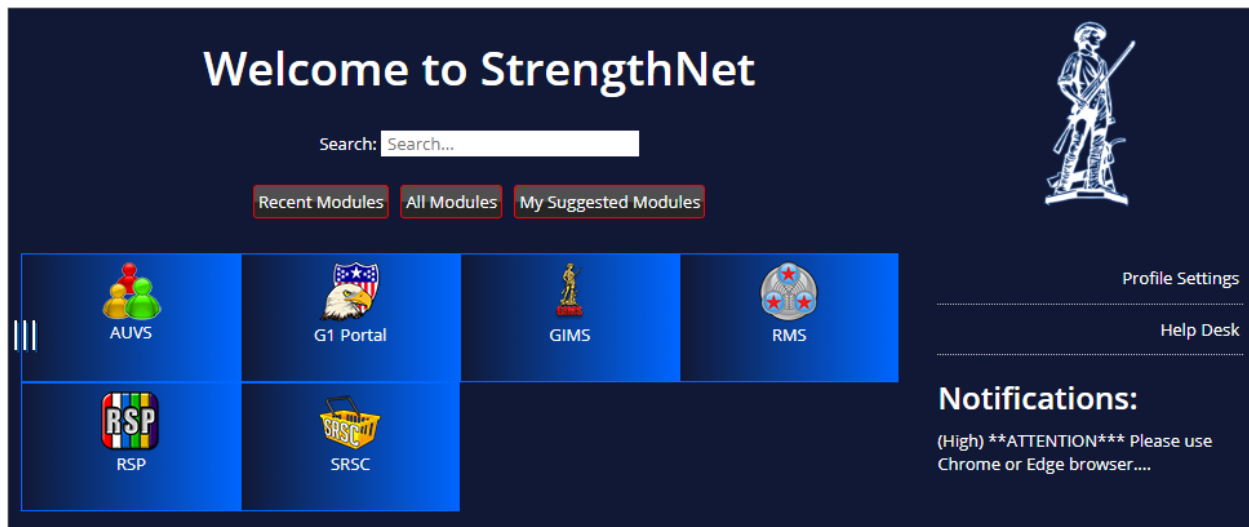
Note - Upon first logging into the SMMS, you must read and accept the Acceptable Use Policy.

4. When you 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 the next time you log in to the SMMS.

2.3 The StrengthNet Landing Page

As soon as you log into SMMS, the StrengthNet Landing Page opens. This page displays links to the most popular products in the SMMS portal.

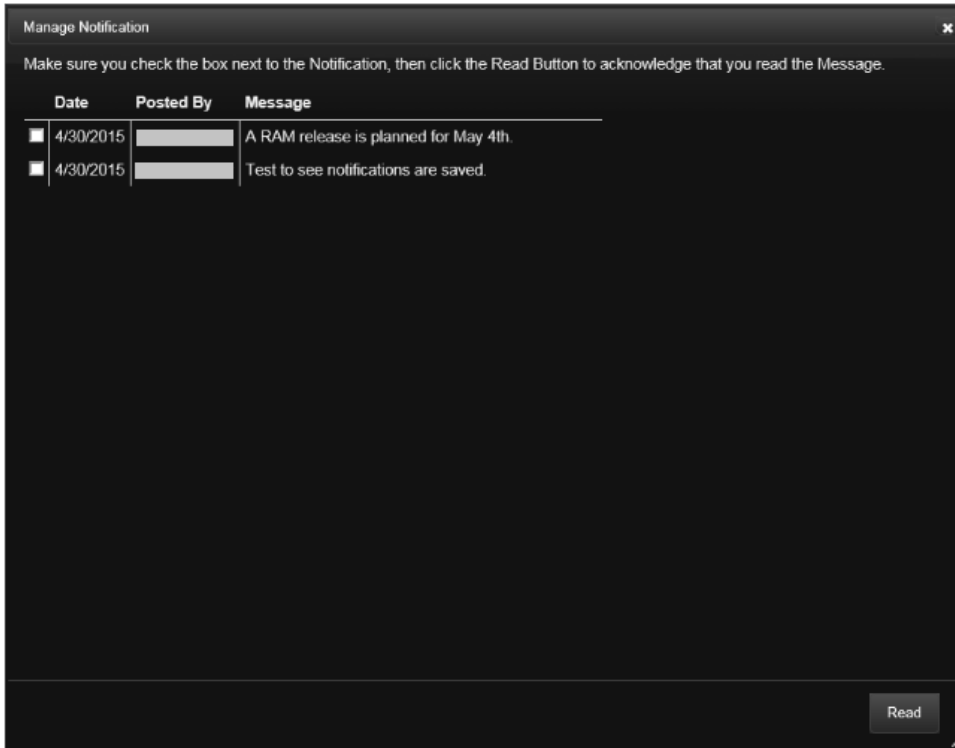


There are three ways to access links on the StrengthNet Landing Page:

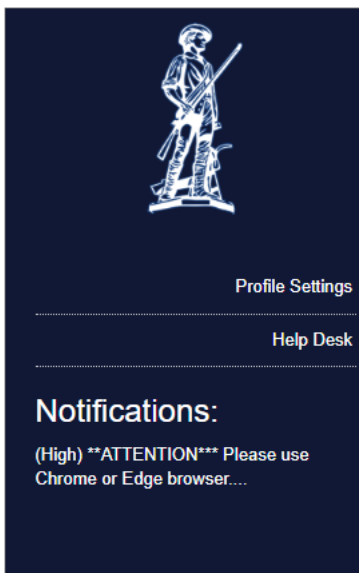
- **Product Boxes:** Clicking the modules in the boxes either opens the module via the webtop, or with some modules, opens the module in your browser window. The *G1 Gateway* product box opens the G1 Gateway website in a separate tab in your browser.
 - Recent Modules: limits the modules displayed to the last ten you have accessed
 - All Modules: default view
 - My Suggested Modules: displays modules matching tags selected in your profile settings
- **Search:** Type the name of a module in the *Search* field. The modules displayed are filtered as you type.
- **Shortcut menu:** Hover your mouse 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 your attention, the *Message Notification* window appears when you open the site. Select the check box for each message and click **Read** to acknowledge the message so it won't appear the next time you log in.

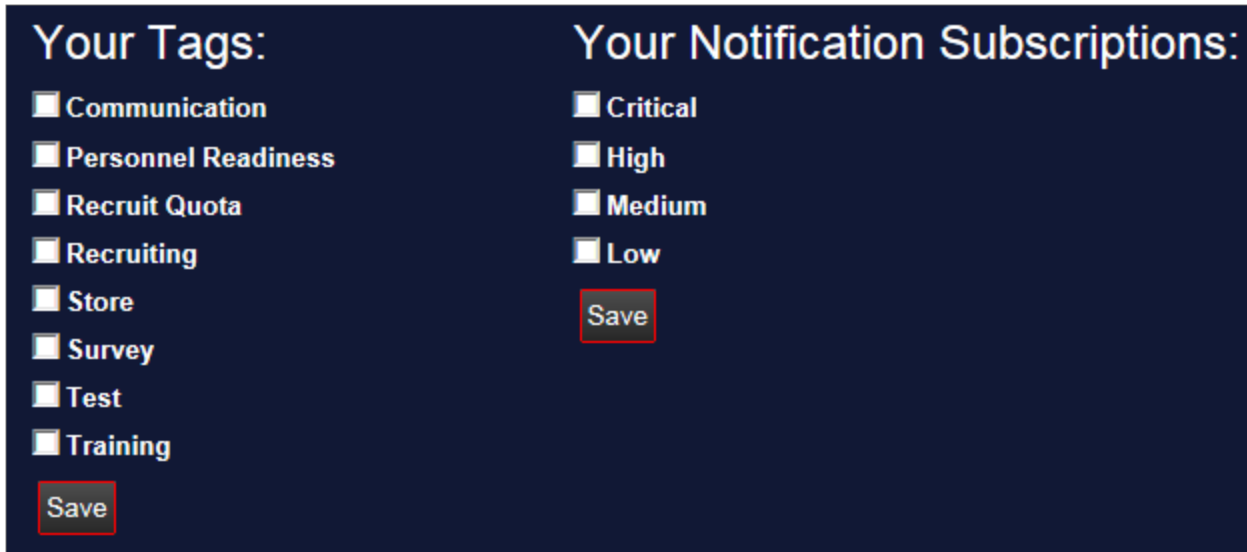


The recent messages from the *Message Notification* window also appear on the right side of the screen for future reference.



2.3.1.1 Profile Settings

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

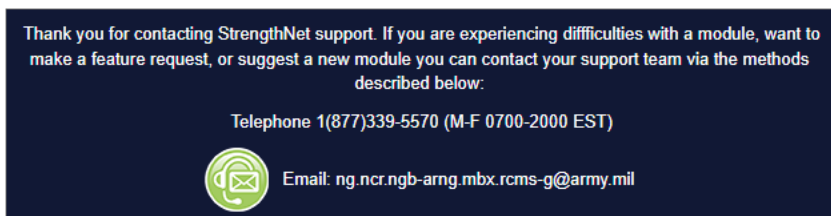


The screenshot shows a dark blue interface with two columns of settings. The left column, titled 'Your Tags:', contains a list of tags with checkboxes: Communication, Personnel Readiness, Recruit Quota, Recruiting, Store, Survey, Test, and Training. A 'Save' button is at the bottom of this column. The 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 you decide which modules are of interest to you and to your mission. Modules matching your selected tags are displayed when you select the *My Suggested Modules* filter. Tags are maintained by administrators.

2.3.1.2 Help Desk

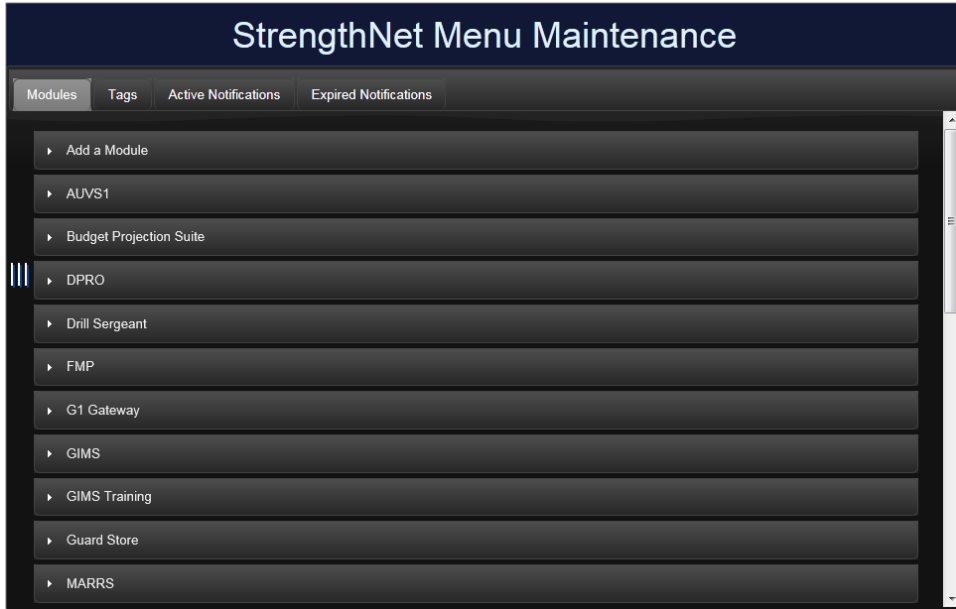
The Help Desk contact information is available from this screen.



The screenshot shows a dark blue box with white text. It starts with a thank you message: '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 contact information: 'Telephone 1(877)339-5570 (M-F 0700-2000 EST)' and 'Email: ng.ncr.ngb-arg.mbx.rcms-g@army.mil'. There is a green circular icon with a white envelope symbol to the left of the email address.

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.

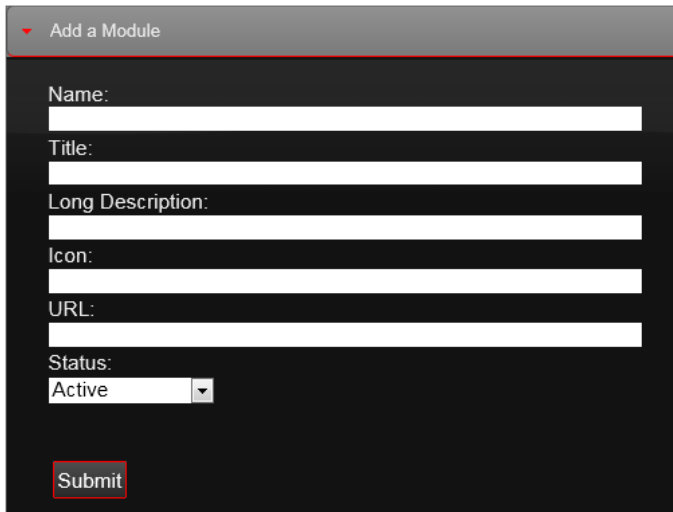


Manage Menu options include:

- *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:

Title:

Long Description:

Icon:

URL:

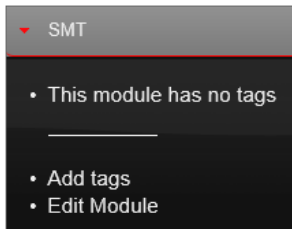
Status:
Active ▼

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.



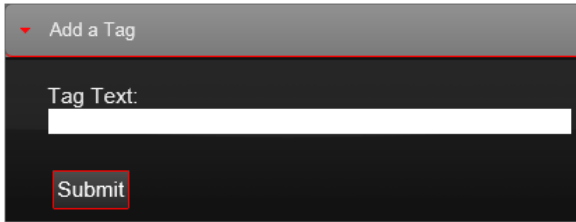
▼ SMT

- 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) you want to apply to the module.

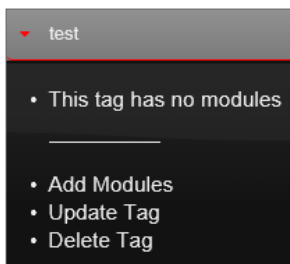
Tags tab

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



A screenshot of the 'Add a Tag' form. The form has a dark background with a light gray header bar containing a red triangle icon and the text 'Add a Tag'. Below the header, there is a text input field labeled 'Tag Text:'. At the bottom of the form, there is a red-bordered button labeled 'Submit'.

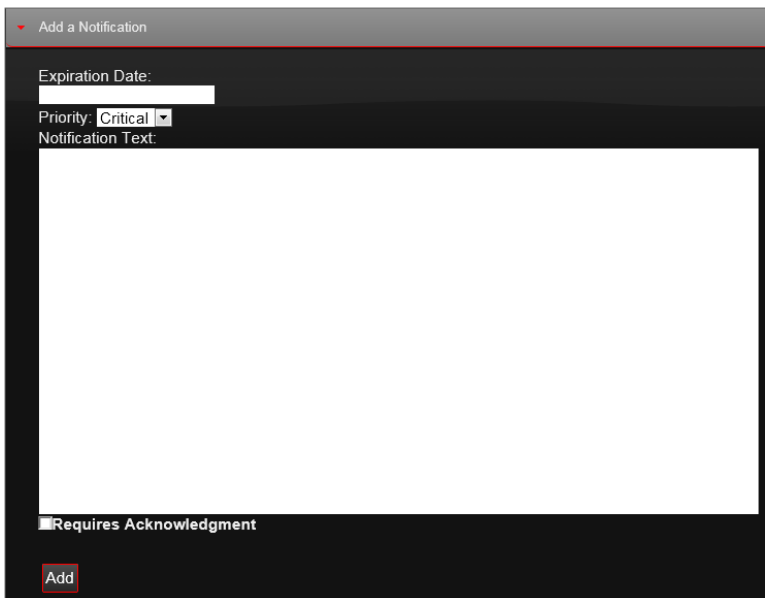
To edit an existing tag, select that tag from the list. The example below illustrates the options to edit a tag labeled "test."



A screenshot of the tag options menu for a tag labeled 'test'. The menu has a dark background with a light gray header bar containing a red triangle icon and the text 'test'. 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:



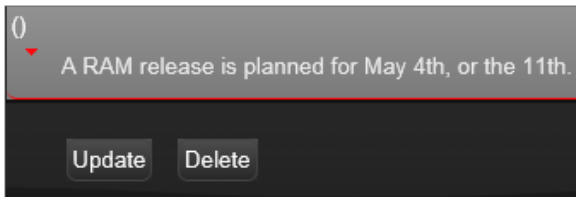
A screenshot of the 'Add a Notification' form. The form has a dark background with a light gray header bar containing a red triangle icon and the text 'Add a Notification'. Below the header, there is a text input field labeled 'Expiration Date:'. Below that, there is a dropdown menu labeled 'Priority: Critical'. Below the dropdown, there is a text input field labeled 'Notification Text:'. At the bottom of the form, there is a checkbox labeled 'Requires Acknowledgment' and a red-bordered button labeled 'Add'.

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 you can select an expired notification to update or delete.

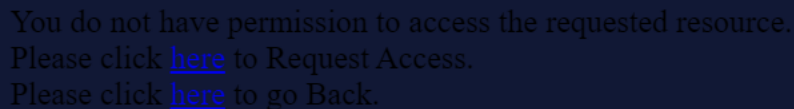


User Management tab

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.

A screenshot of an error message displayed in a dark blue box. The text reads: "You do not have permission to access the requested resource. Please click [here](#) to Request Access. Please click [here](#) to go Back." The word "here" is underlined and blue, indicating it is a hyperlink.

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

Command

Command Value *	Hierarchy Type (Auto-Pop)	Command Level (Auto-Pop)	Unit State
<input type="text"/>	TRAD	<input type="text"/>	<input type="text"/>

SAVE **CANCEL**

Roles and Permissions

Approved

Role *

SAVE **CANCEL**

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

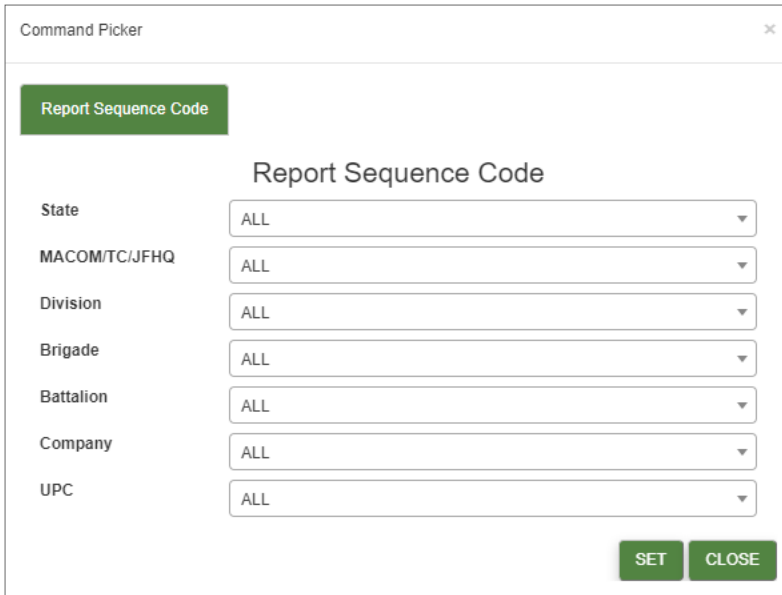
3. First, click the magnifying glass next to the *Command Value* field.

Command

Command Value *



- ▶ 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.

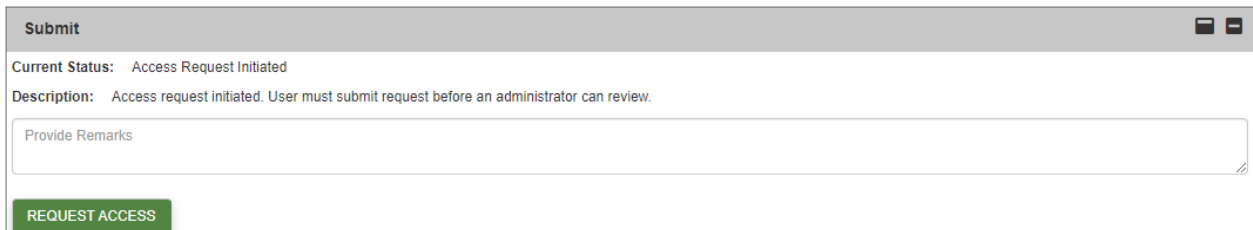
- ▶ Click **SAVE**.

- 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.



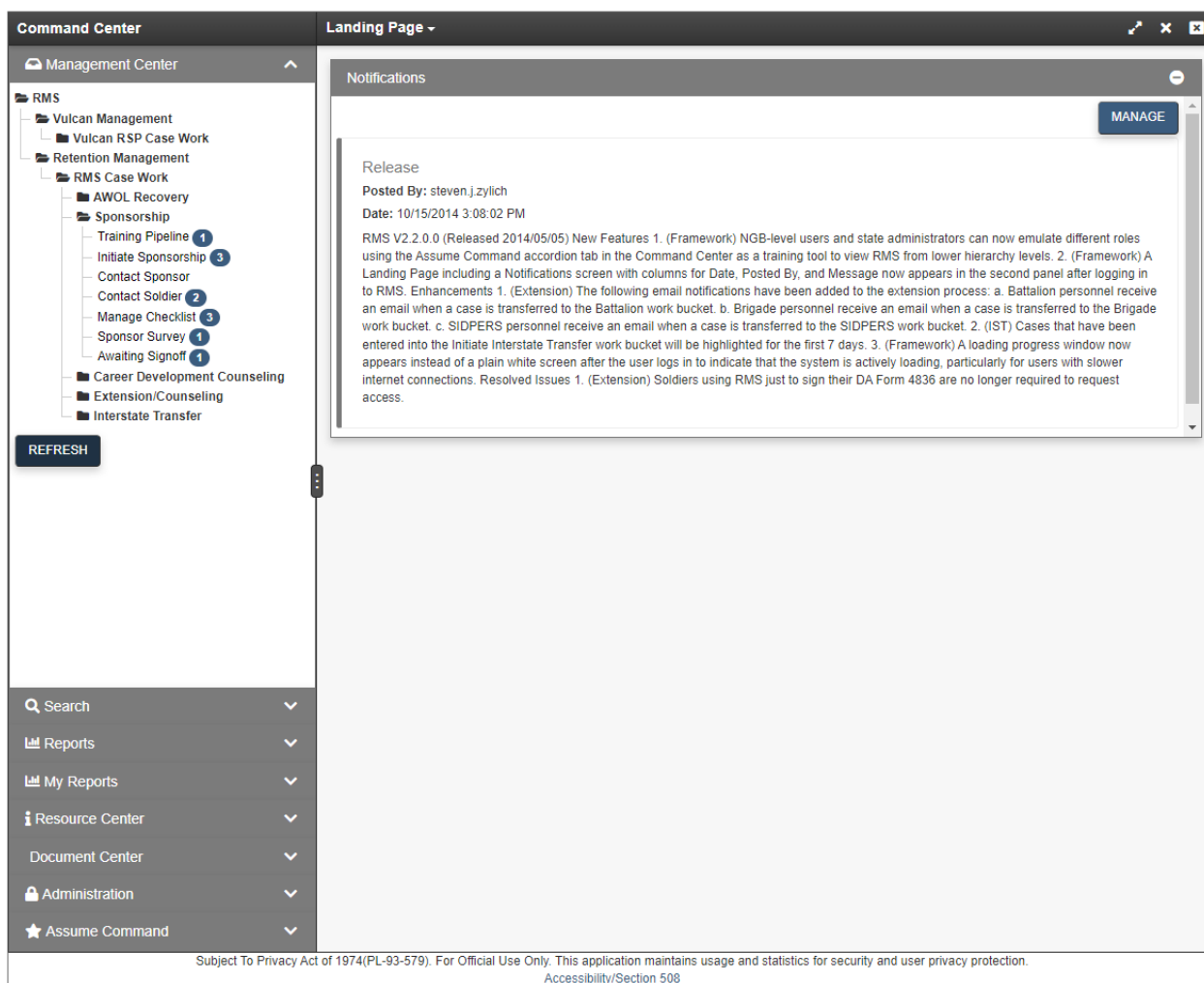
- ▶ Click **YES** in the confirmation window.

- 7. Your request is submitted for Administrator approval.

3 Retention Management Software Overview

3.1 Opening Sponsorship

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



3.2 Introduction to the RMS Sponsorship Interface

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

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

Command Center | **Sponsorship - Initiate Sponsorship (3)**

Management Center

RMS

- Vulcan Management
 - Vulcan RSP Case Work
 - RSP Warrior Sponsorship
 - RSP Routine Monitoring
 - RSP Shipper Management
 - LNO Module
 - Retention Management
 - RMS Case Work
 - AWOL Recovery
 - Sponsorship
 - Training Pipeline 1
 - Initiate Sponsorship 3
 - Contact Sponsor
 - Contact Soldier 2
 - Manage Checklist 3
 - Sponsor Survey 1
 - Awaiting Signoff 4
 - Career Development Counseling
 - Extension/Counseling
 - Interstate Transfer

REFRESH

Search

Reports

My Reports

Resource Center

Document Center

Administration

Assume Command

Soldiers in progress

Last Four	Soldier Name	UPC_CD	Duty MOS	Grade	Gender	Position Title	Prior Service Code
8576	AALA SHAMEL	X72B0	11B	E1	M		NPS
7732	ABDALLAH CORINA	P8AAA	12C	E5	M		NPS
1192	AALA SHAMEL	YH6C0	35M	E4	M		NPS

Showing 1 to 3 of 3 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

From left to right, panels 1 and 2 contain:

1. **Command Center:** see [Command Center](#) on page 27.
2. **Soldier Roster:** see [Soldier Roster](#) on page 28

3 Retention Management Software Overview

The screenshot displays two side-by-side panels from the Retention Management Software. The left panel, titled 'ABLE CLARISSA', shows a 'Soldier Summary' with the following details:

- Soldier Name: ABLE CLARISSA
- Grade: E6
- Date of Commission: 20180204
- Rank: SSG
- ETS Date: 20180204
- Unit Processing Code: PWFA1
- Reserve Component Category: AGR
- UPC Attached

Below the summary is a 'Create Case' section with a table of existing cases:

Case Type	Case Number	Status	Previous Status	Date Created	Created By
Extension	2456575	6 years until ETS date	Case Started	02/17/2014	
Sponsorship	2805804	Training Pipeline	Training Pipeline	12/01/2015	steven.j.zylic
Sponsorship	2805841	Initiate Sponsorship	Case Started	11/09/2021	alec.horn

The right panel, titled 'ABLE CLARISSA (2805804)', shows a 'Summary' for a specific case. The 'Current Status' is 'Training Pipeline' and the 'Description' is 'Training Pipeline'. It includes a 'Provide Remarks' text area and a 'TERMINATE' button. Below is a 'History of Actions' table:

Date	User ID	Comment	Action	Previous Status	N St
11/07/2018 02:22 PM	ANIL.NARLA	test	Terminate	Training Pipeline	Terr Cas
12/01/2015 08:29 AM	steven.j.zylic	New case created.	Sponsorship Initiated		Initi: Spo

At the bottom of the interface, a footer reads: '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'.

Panels 3 and 4 contain:

3. **Soldier Details:** see [Soldier Details](#) on page 29.
4. **Case Details:** see [Case Details](#) on page 31.

3.2.1 Command Center

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



The Command Center is composed of several different blades:

- **Management Center:** See [Management Center](#) below.
- **Search:** See [Search](#) on page 47.
- **My Reports:** Contains private and shared reports. See [My Reports](#) on page 63
- **Resource Center:** Contains documents, user guides, and training videos. See [Resource Center](#) on page 67
- **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 68.
- **Assume Command:** See [Assume Command](#) on page 71.

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 Sponsorship Work Buckets

The work buckets within the Sponsorship module include:

Work Bucket	Case
Training Pipeline	A Sponsorship case is created and added to this work bucket when a Service Member completes training and is considered Battle Handoff ready. A sponsor should be assigned and initial contact made with the Service Member for cases in this work bucket.
Initiate Sponsorship	A Sponsorship case is created and added to this work bucket when a Soldier changes units. A sponsor should be assigned and initial contact made with the Soldier for cases in this work bucket.
Contact Sponsorship	Cases are moved to this work bucket after the assigned sponsor makes initial contact with the sponsor.
Contact Soldier	Cases are moved to this work bucket after initial contact is made with the Soldier.
Manage Checklist	Cases in this work bucket have progressed through the initial steps of assigning a sponsor, the sponsor making initial contact, and the Soldier making initial contact. The sponsor completes and uploads a checklist of items at this stage.
Sponsor Survey	Cases in this work bucket require completion of the Sponsor Survey.
Awaiting Signoff	Cases in this work bucket require the unit administrator's final sign-off before the case can be marked as completed and closed.

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, Grade, Social Security Number (SSN), 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.

Sponsorship - Initiate Sponsorship (7) -

Last Four	Soldier Name	UPC_CD	Duty MOS	Grade	Gender	Position Title	Prior Service Code
4723	ABDALLAH CORINA	QNYT0	42A	E4	F		NPS
5940	OWCZARSKI SIERRA	YKKE0	92F	E1	M		NPS
8261	BUTCHEE FRANKLIN	YOKA1	09S	E4	M		NPS
6192	BOGART CARMEN	PP2AA	25U	E2	F		NPS
6941	KING CHASITY	P2YAA	13A	O4	M		PS
6939	COREAMEJIA KRISTIANA	8BHAA	01A	O5	M		PS
7373	JAMES YUSEF	8BHAA	00F	E8	M		PS

Showing 1 to 7 of 7 entries

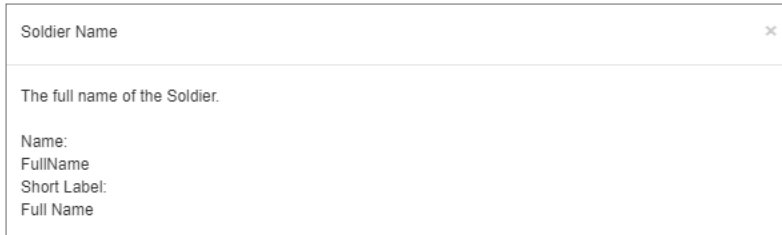
3.2.2.1 Soldier Roster Tools

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

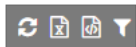
- Filter the results by clicking on the **Show/Hide Filters**  icon at the top of the panel. Enter text above a column in the *Search* field. The results are filtered as you type.




- 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 46 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
Create Case	Add different case types to a Soldier's file.
Documents	Includes all uploaded documents associated with the Soldier. (See Documents on

3 Retention Management Software Overview

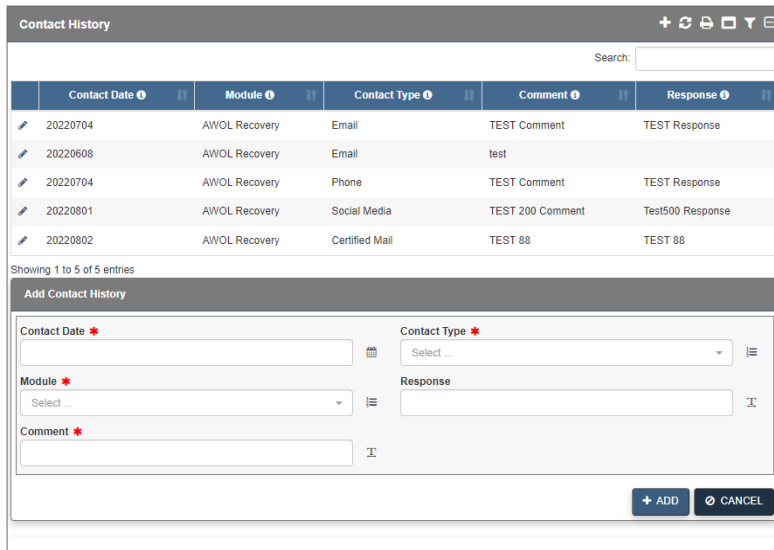
Tab	Function
	page 41 for more information.)
Personnel	Displays basic personnel information for the Soldier, such as AFQT Score, Date of Commission, Duty Position Qualified, etc.
Demographics	Displays demographic information on the Soldier, such as Age, Gender, and Marital Status.
Current Assignment	Displays information on the Soldier's current assignment such as Line, Paragraph, and Position Title.
Active Duty Tours	Displays a summary of the Soldier's ARNG Active Duty Tours.
ATRRS History	Displays information about the Soldier's Army Training Requirements and Resources System (ATRRS) Reservation History (Class Number, Course Number, Completion Status, and Start and End Dates).
Medical Status	Displays information on the medical status of the Soldier, including deployment limitations and other attributes of medical readiness.
SFPA	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.
Line Scores	Displays the line scores for the Soldier which are derived from individual ASVAB subtest scores.
Reenlist/Ext Activity	Displays information on any recent reenlistment or extension activities, if applicable.
Drill Attendance (U)	Displays information on any Drill Attendance codes of "U" (Unsatisfactory Attendance).
SIB Transactions	Displays information on any IPPS-A transactions submitted for the Soldier, if applicable.
Additional Contact Info	Allows you to view existing contact information and edit or add information.
Contact History	Tracks all contact made with the Soldier. (See Viewing and Adding Contact History 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.



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
Case Actions	Displays the different actions that can be taken during the case.
Documents	Displays information on the documents already uploaded for the case and allows users to upload additional documents relating to the case. See Documents on page 41.
Case History	Displays information on the history of actions taken on the case. See Case History on page 42.
Case Remarks	Displays remarks related to the case.
Soldier Contact	History of Soldier contact.

4 Sponsorship

RMS Sponsorship allows you to assign Sponsors to Soldiers who are joining a new Unit, either as a Prior Service or Non-Prior Service accession. From there, the assigned Sponsor is responsible for completing a checklist with the new Soldier, and is able to track the completion of this checklist through the module.

4.1 Initiate a Sponsorship Case

1. Within the *Command Center*, open the *Management Center* tab and expand the **Sponsorship** menu.



2. Click the **Initiate Sponsorship** work bucket to display its Soldier Roster in the second panel.

Last Four	Soldier Name	UPC_CD	Duty MOIS	Grade	Gender	Position Title	Prior Service Code
8576	AALA SHAMEL	X72B0	11B	E1	M		NPS
7732	ABDALLAH CORINA	P8AAA	12C	E5	M		NPS
1192	AALA SHAMEL	YH6C0	35M	E4	M		NPS

Showing 1 to 3 of 3 entries

3. Select a case from the Soldier Roster.

4 Sponsorship

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

The screenshot displays a multi-panel application interface for a soldier's sponsorship. The top-left panel, titled "Soldier Summary (Section ID: 11432)", shows details for WAITES DAVE, including his name, grade (E2), date of commission, rank (PV2), ETS date (20170407), unit processing code (PM3AA), reserve component category (TPU), and UPC attached (7775C). The top-right panel, "Summary (Section ID: 13887)", shows case ID 2806065, start date 20220302, authority sponsorship, sponsor name ALBACH JAMMIE, and name/initiate sponsorship with sponsor email ALBACH.JAMMIE@US.ARMY.MIL. The middle-left panel, "Create Case (Section ID: 9950)", features a search bar and a table of cases. The middle-right panel, "Add Sponsor (Section ID: 70685)", has a dropdown menu with "ALBACH JAMMIE" selected and "SAVE" and "CANCEL" buttons. The bottom-right panel, "Actions (Section ID: 70701)", shows the current status as "Initiate Sponsorship (501)", a description to validate contact info and document counseling, a remarks field, and buttons for "SPONSORSHIP INITIATED (5002)" and "TERMINATE (5006)". Below these is a "History of Actions" table.

Date	User ID	Comment	Action	Previous Status	Next Status
07/13/2022 12:15 PM	alec.horn	Auto Remarks: Reassign Sponsor	Reassign Sponsor	Manage Checklist	Initiate Sponsorship
07/13/2022 12:14 PM	alec.horn	Auto Remarks: Complete Soldier Contact	Complete Soldier Contact	Manage Soldier Contact	Manage Checklist

4. Select a Sponsor from the drop-down menu in the Panel *Add Sponsor* section and click **SAVE**.

This close-up screenshot focuses on the "Add Sponsor (Section ID: 70685)" panel. The "Sponsor" dropdown menu is open, displaying a list of potential sponsors. The first option, "ALBACH JAMMIE (CONST SECTION LEADER)", is highlighted in blue. Other visible options include ANDRASIC GIANNI (VEHICLE DRIVER), ANTILLON ZOLA (VEHICLE DRIVER), ANTOINE CAROLINE (PLUMBER/PIPEFITTER), ARCHDEKIN IKEA (INTERIOR ELECTRICIAN), BELGROVE MARKEITH (INTERIOR ELECTRICIAN), and BIRKETT BRYANNA (PLUMBER/PIPEFITTER). The "SAVE" and "CANCEL" buttons are visible to the right of the dropdown.

Note - Sponsors are typically the same rank as the Soldier they'll be helping.

5. Enter remarks in the provided field.

4 Sponsorship

≡ Actions 🔄 🖨️ 🗑️ 📄

Current Status: Initiate Sponsorship (501)

Description: Validate the soldier contact information, document a 4856 Counseling and select a sponsor for the soldier.

Provide Remarks

SPONSORSHIP INITIATED (5002) **TERMINATE (5006)**

6. Click **SPONSORSHIP INITIATED**.

- ▶ A *Confirmation* box appears.

Confirmation ✕

Please confirm the 4856 Counseling was completed and uploaded to the Documents tab.?

NO **YES**

7. Click **YES**.

- ▶ The fourth panel is refreshed and the case is moved to the *Contact Sponsor* work bucket.

4.2 Contact a Sponsor


From the *Sponsor Contact (Case Actions)* section in panel 4, you can record each time the Sponsor has been notified.



To add a new contact:

1. Click the **Add** icon.

- ▶ The *Add Sponsor Contact (Case Actions)* window opens.

Add Sponsor Contact (Case Actions) ✕

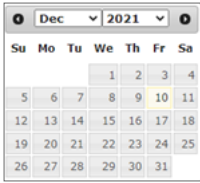
Contact Date *  **Comment *** 

Contact Type *  **Response** 

+ ADD **CANCEL**

2. If the date of contact was not today, select a date by clicking the calendar icon .

4 Sponsorship



3. Select the method of contact from the *Contact Type* drop-down list.

A screenshot of a dropdown menu for selecting a contact type. The menu is open, showing a search bar and a list of options: Certified Mail, Email, In Person, Phone, and Social Media. The 'Certified Mail' option is currently selected and highlighted in blue.

4. Describe the contact in the *Comment* text box.
5. Click **+ADD**.
6. Enter remarks in the provided field.



A screenshot of a software interface showing an 'Actions' panel. The panel title is 'Actions' and it includes icons for refresh, print, and close. Below the title, it shows 'Current Status: Manage Sponsor Contact' and 'Description: Contact the assigned sponsor and log communication.' There is a text input field labeled 'Provide Remarks' and a blue button labeled 'COMPLETE SPONSOR CONTACT' at the bottom.

7. Click **COMPLETE SPONSOR CONTACT**
 - ▶ A confirmation window opens. Click **YES** to proceed to the *Contact Soldier* work bucket.

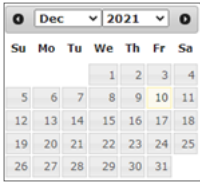
4.3 Contact a Soldier

From the *Soldier Contact* screen, you can record each time the Soldier has been notified.

To add a new contact:

1. Click the **Add**  icon in the *Soldier Contact* section.
2. If the date of contact was not today, select a date by clicking the calendar icon .

4 Sponsorship



3. Select the method of contact from the drop-down list.

4. Describe the contact in the note text box.
5. Click **+ADD**.
6. Enter remarks in the provided field.

7. Click **COMPLETE SOLDIER CONTACT**.
 - ▶ A confirmation window opens. Click **YES** to proceed to the *Manage Checklist* work bucket.

4.4 Manage Checklist

The *Manage Checklist* screen in the fourth panel allows you to keep track of the Sponsorship and introduction process for a Soldier.

4 Sponsorship

The screenshot shows a web application window titled 'Checklist'. The main content area is titled 'Main Checklist' and contains three sections of tasks, each with a list of checkboxes:

- Sponsor**
 - Call the new soldier at home prior to 1st drill
 - Meet new soldier at the armory
 - Fall in with the new soldier
 - Conduct tour of the armory
 - Eat lunch with soldier
 - Introduce soldier to leadership
 - Explain unit history to soldier
 - Explain unit mission to soldier
 - Notify 1SG of completed unit retention NCO interview
 - Ensure First Line Leader assigns a Buddy Sponsor
- Buddy Sponsor**
 - Introduce soldier to squad
 - Update soldier on squad activities
 - Answer questions
 - TAKE CARE OF THE SOLDIER
- Readiness NCO**
 - Provide FRG with soldier's home phone number
 - Review pay and bonus procedures
 - Complete administrative part of MA-MP 1315 and give to unit retention NCO
 - Give soldier a yearly drill schedule and a copy for the soldier's employer

A 'Sponsorship Guidelines' button is located in the top right corner of the checklist area.

1. Select the appropriate check boxes after the relevant action has been completed.

Note - Scroll down to view all of the check boxes.

2. Click **SAVE** at the bottom of the checklist to return to it at a later time.

3. Scroll down to the *Actions* section and enter remarks in the provided field.

The screenshot shows the 'Actions' section of the application. It includes the following elements:

- Header: 'Actions' with refresh, print, and close icons.
- Current Status: Manage Checklist
- Description: Complete sponsorship checklist
- Text input field: 'Provide Remarks'
- Buttons: 'CHECKLIST COMPLETED', 'REASSIGN SPONSOR', and 'TERMINATE'

4. Click an available action button.

4 Sponsorship

- a. Click **CHECKLIST COMPLETED** then click **YES** in the confirmation window to send the checklist to the First Sergeant for approval. The case is moved to the *Sponsor Survey* work bucket.
- b. Click **REASSIGN SPONSOR** to send the case back to the *Initiate Sponsorship* work bucket.
- c. Click **TERMINATE** at any point in the Sponsorship process to terminate the case.

4.4.1 View Sponsorship Guidelines

1. Click **Sponsorship Guidelines** at the top of the checklist.

A rectangular button with a light blue background and a thin border, containing the text "Sponsorship Guidelines" in a dark blue font.

2. The file is downloaded as a Word document.



Sponsorship Guidelines can also be accessed from the *References* folder in the Command Center's Resource Center.

4.4.2 Reassign a Sponsor

1. Click **REASSIGN SPONSOR**.

▶ A confirmation window opens.

A confirmation dialog box with a white background and a thin border. The title bar reads "Confirmation" with a close button (X) on the right. The main content area contains the text "Reassign Sponsor?". At the bottom right, there are two buttons: "NO" and "YES", both in a dark blue color with white text.

2. Click **YES**.
3. The case is returned to the *Initiate Sponsorship* work bucket where you can select a new Sponsor.

4.5 Sponsor Survey

The Sponsor should complete the *Sponsor Questionnaire* after the Sponsorship Checklist is completed.

Sponsor Questionnaire

1. Did you receive Duty Appointment Orders when you were appointed as a sponsor?
 Yes No

2. How far in advance were you appointed as a sponsor before the arrival of your sponsoree (days)?

3. Prior to serving as a sponsor, did you receive training on your sponsorship duties?
 Yes
 Training via: eSAT ACS Both
 No

4. Did the training adequately prepare you for your duties as a sponsor?
 Yes No
 Explain:

5. Were you allowed adequate time away from work to perform your sponsorship duties?
 Yes No
 Explain:

6. How many days did you spend on your sponsorship duties?
 Less than 1 2-4 5-7 8-12 13-15 More than 16

7. How many times have you been a sponsor for inbound personnel?
 1 2-3 3-5 More than 5

8. What is the maximum number of inbound personnel you have sponsored at one time?
 1 2-3 3-5 More than 5

9. What was the greatest challenge you encountered as a sponsor and how did you overcome this challenge?

10. What recommendations do you have for improving the TASP?

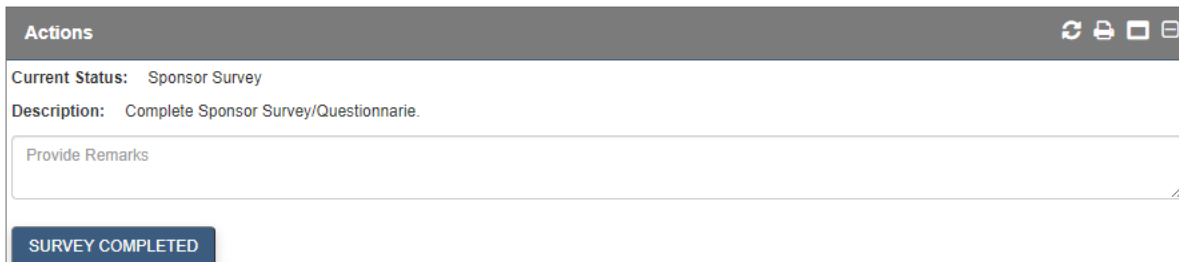
1. Select a response for each item in the questionnaire.

Note - Scroll down to view all of the questions.

2. Click **SAVE** to save your progress.

3. Scroll down to the *Actions* section.

4 Sponsorship



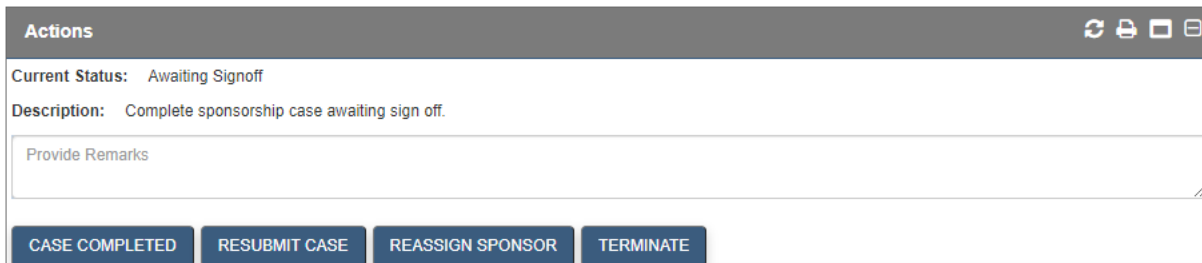
The screenshot shows a software interface titled "Actions" with a dark header bar containing refresh, print, and window icons. Below the header, the "Current Status" is "Sponsor Survey" and the "Description" is "Complete Sponsor Survey/Questionnaire." A text input field labeled "Provide Remarks" is present. At the bottom, a single blue button labeled "SURVEY COMPLETED" is visible.

4. Click **SURVEY COMPLETED**.

▶ The case is moved to the *Awaiting Signoff* work bucket.

4.6 Awaiting Signoff

The Sponsorship case is completed from the *Awaiting Signoff* work bucket. Select an available action button: **CASE COMPLETED**, **RESUBMIT CASE**, **REASSIGN SPONSOR**, or **TERMINATE**.



The screenshot shows a software interface titled "Actions" with a dark header bar containing refresh, print, and window icons. Below the header, the "Current Status" is "Awaiting Signoff" and the "Description" is "Complete sponsorship case awaiting sign off." A text input field labeled "Provide Remarks" is present. At the bottom, four blue buttons are visible: "CASE COMPLETED", "RESUBMIT CASE", "REASSIGN SPONSOR", and "TERMINATE".

Enter remarks and click an available action button:

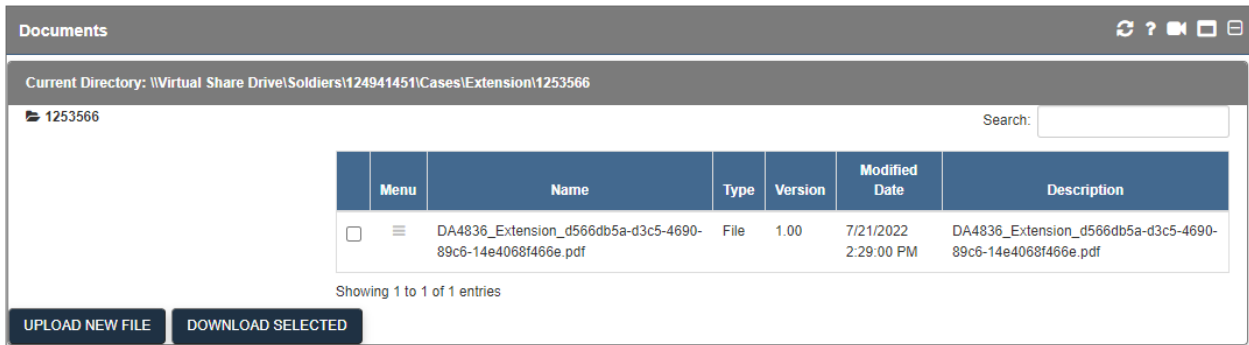
1. **CASE COMPLETED**: sign off on the Sponsorship case to close it.
2. **RESUBMIT CASE**: sends the case back to the *Manage Checklist* work bucket.
3. **REASSIGN SPONSOR**: sends the case back to the *Initiate Sponsorship* work bucket.
4. **TERMINATE**: terminate the case.

5 Additional Actions

By default, the fourth panel opens with the *Case* tab selected. The *Documents*, *Case History*, *Case Remarks*, *Sponsor Contact*, and *Soldier Contact* tabs can also be viewed within this panel.

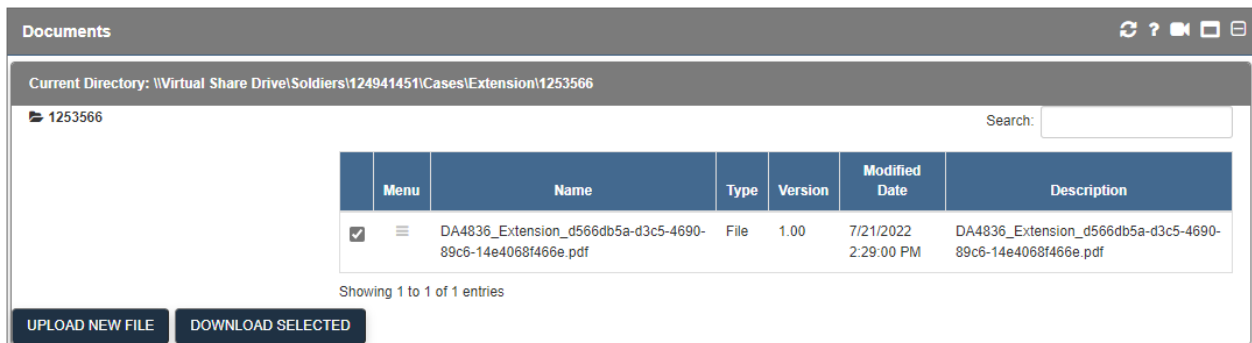
5.1 Documents

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



5.1.1 Download a File

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



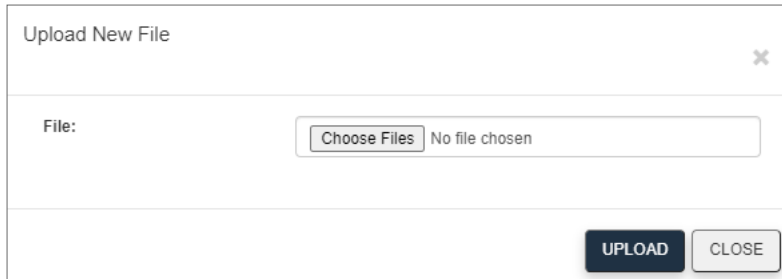
Note - If more than one file is selected, the files are downloaded as a zip file.

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

5.1.2 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.

5.2 Case History

1. In the *Case Details* (fourth) panel, click the **Case History** tab.

5 Additional Actions

- ▶ The *Case History* tab opens, displaying information about previous actions completed for the Soldier.

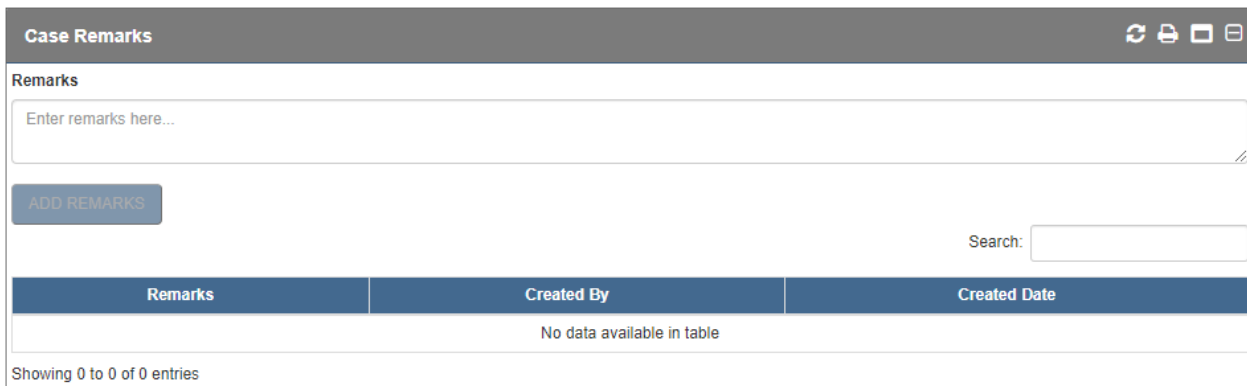


The screenshot shows the 'Case History' tab with a table of case actions. Each row includes a 'CONTACT' button, 'Case Code', 'Date', 'Comments', 'User', and 'Case Status'.

	Case Code	Date	Comments	User	Case Status
CONTACT	Sponsorship	10-23-2018	New Case Created	ANIL.NARLA	Initiate Interstate Transfer
CONTACT	Sponsorship	10-23-2018	New case created.	ANIL.NARLA	Initiate Sponsorship
CONTACT	Sponsorship	12-15-2021	Auto Remarks: Complete Soldier Contact	alec.horn	Manage Checklist
CONTACT	Sponsorship	12-15-2021	Auto Remarks: Complete Sponsor Contact	alec.horn	Manage Soldier Contact
CONTACT	Sponsorship	12-15-2021	Auto Remarks: Reassign Sponsor	alec.horn	Initiate Sponsorship
CONTACT	Sponsorship	12-15-2021	Auto Remarks: Sponsorship Initiated	alec.horn	Manage Sponsor Contact

5.3 Case Remarks

The *Case Remarks* tab stores and displays remarks related to the case.



The screenshot shows the 'Case Remarks' tab with a text input field for entering remarks, an 'ADD REMARKS' button, a search field, and a table with columns for Remarks, Created By, and Created Date. The table currently displays 'No data available in table'.

Showing 0 to 0 of 0 entries

1. To add a remark, enter text in the *Remarks* field and click **ADD REMARKS**.
2. The grid at the bottom of the tab is updated with the entered remark.

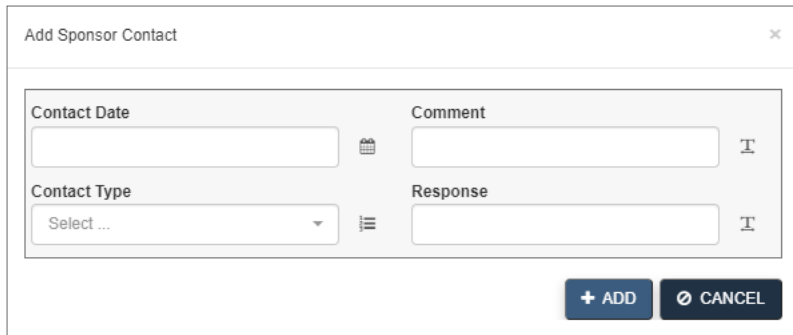
5.4 Sponsor Contact

You can add new sponsor contact information to the case from this tab.

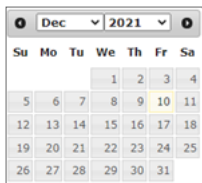
5 Additional Actions

1. Click the **Add+** icon.

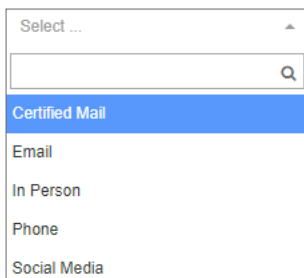
▶ The *Add Sponsor Contact* window opens.



2. If the date of contact was not today, select a date by clicking the calendar icon .



3. Select the method of contact from the *Contact Type* drop-down list.



4. Describe the contact in the *Comment* text box.

5. Click **+ADD**.

6 Contacting the Help Desk















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

1. Call 1-855-249-9311.
2. Email <mailto:ng.ncr.arng.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 Sponsorship 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

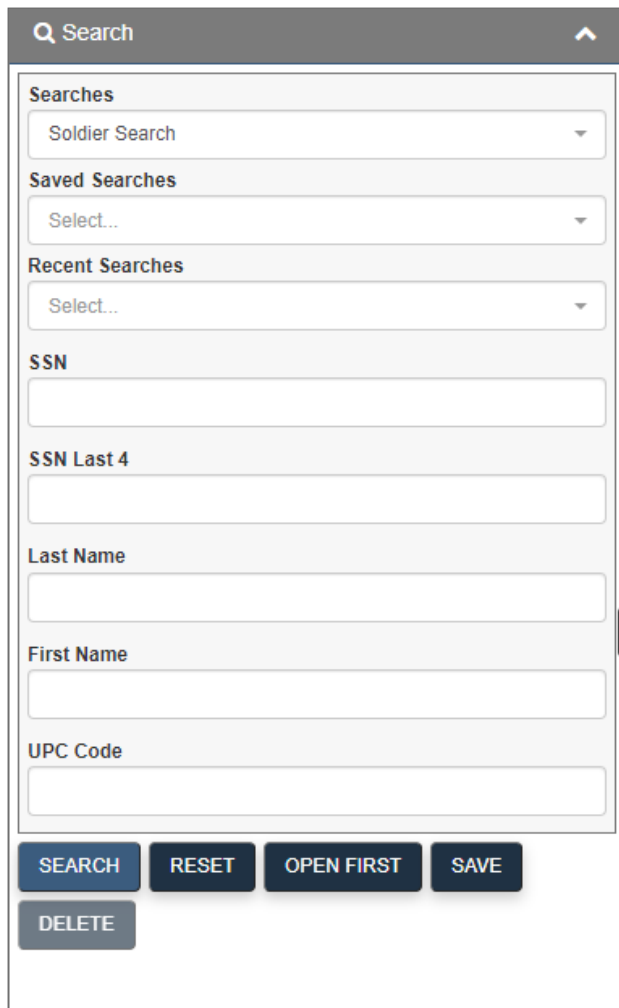
8 Additional Tools

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 29 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 three dropdown menus: 'Searches' (currently set to 'Soldier Search'), 'Saved Searches' (set to 'Select...'), and 'Recent Searches' (set to 'Select...'). The search criteria section includes input fields for 'SSN', 'SSN Last 4', 'Last Name', 'First Name', and 'UPC Code'. At the bottom, there are five buttons: 'SEARCH', 'RESET', 'OPEN FIRST', 'SAVE', and 'DELETE'.

8 Additional Tools

1. Enter information into any of the available fields—*SSN*, *SSN Last 4*, *Last Name*, *First Name*, or *UPC Code*.
2. Click **SEARCH**.
 - ▶ The second panel displays a list of Soldiers matching your search criteria.

Soldier Search: []

Search Results ARNG Current Strength

Show 100 entries

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	

Showing 1 to 100 of 345,839 entries

Previous 1 2 3 4 5 ... 3459 Next

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

8 Additional Tools

- The third panel opens.

COREAMEJIA KRISTIANA 🔍 📄 ✕

🔄 📄

Soldier Summary

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

Create Case
Documents
Personnel
Demographics
Current Assignment
Active Duty Tours
ATRRS History
▼

📄

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 screenshot shows a 'Save Search' dialog box with the following fields and options:

- Search Name:** A text input field.
- Scope:** A dropdown menu currently showing 'Private'.
- Save Type:** Two radio buttons: 'New Save' (which is selected) and 'Overwrite Existing'.
- Buttons:** 'CONFIRM' and 'CANCEL' buttons located at the bottom right of the dialog.

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.

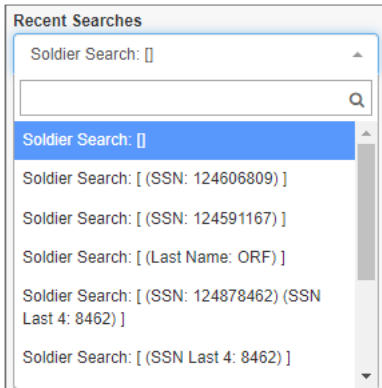
8.1.3 View Saved Searches

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

The screenshot shows a 'Saved Searches' drop-down menu with a 'Select...' option visible.

8.1.4 Recent Searches

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

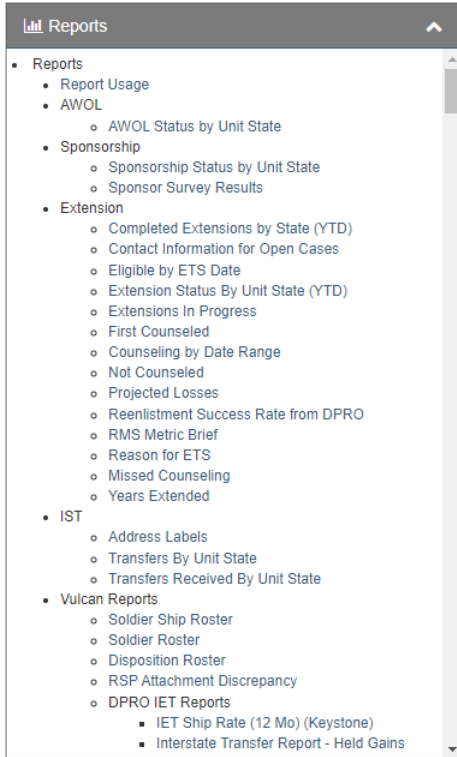


8.2 Reports

Reports are a central tool in RMS Sponsorship. 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 Sponsorship.

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

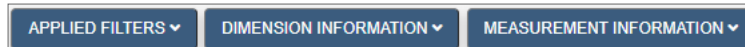
8 Additional Tools



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).



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.

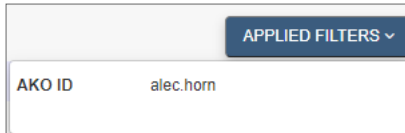
Examples of data stored as measurements include total assigned strength, total gains over a given period of time, MOS-qualified personnel, average age, and an organization's loss rate.

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.

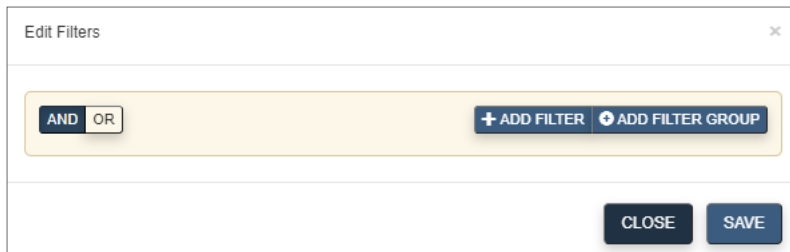
8.2.4 Applied Filters

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

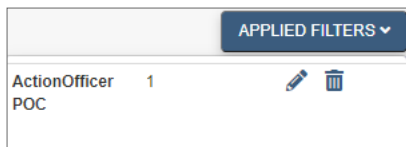
1. Click the **Edit Filters** button  to change the parameters of one of the filters.
 - ▶ The *Edit Filter* screen appears. Click **ADD FILTER**. A drop-down menu appears.



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

8.2.4.2 Deleting a Filter

1. Click the **Delete Filter** icon  under *APPLIED FILTERS*. Click **DELETE** the confirmation window.



Click **DELETE** next to the selected filter.

- ▶ 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.



8 Additional Tools

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.
	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 displaying the SQL code.
	A pop-up window appears displaying Xml code.

8.2.5.1 Report Builder

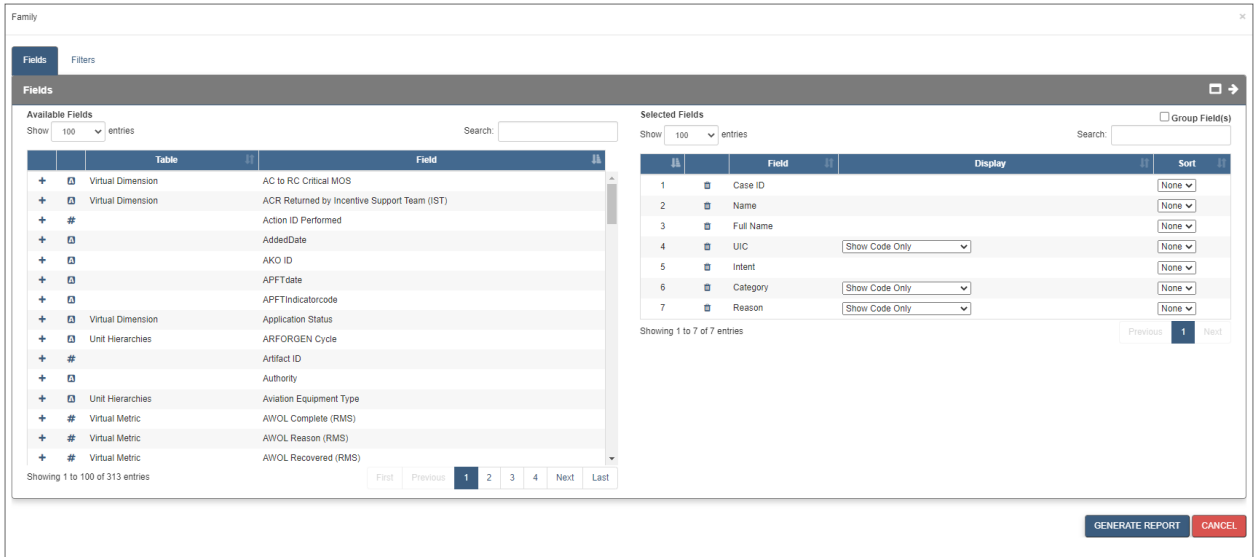
The *Report Builder* tool allows you to modify base reports (see [Aggregate and Base Reports](#) on page 61) with customized dimensions, measurements, and filters.

Note - In RMS Sponsorship, 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 'Family' report builder interface. It is divided into two main panels: 'Available Fields' and 'Selected Fields'.

Available Fields Panel:


Table	Field
Virtual Dimension	AC to RC Critical MOS
Virtual Dimension	ACR Returned by Incentive Support Team (IST)
#	Action ID Performed
	AddedDate
	AKO ID
	APFTdate
	APFTindicatorcode
Virtual Dimension	Application Status
Unit Hierarchies	ARFORGEN Cycle
#	Artifact ID
	Authority
Unit Hierarchies	Aviation Equipment Type
Virtual Metric	AWOL Complete (RMS)
Virtual Metric	AWOL Reason (RMS)
Virtual Metric	AWOL Recovered (RMS)

Selected Fields Panel:

Field	Display	Sort
1 Case ID		None
2 Name		None
3 Full Name		None
4 UIC	Show Code Only	None
5 Intent		None
6 Category	Show Code Only	None
7 Reason	Show Code Only	None

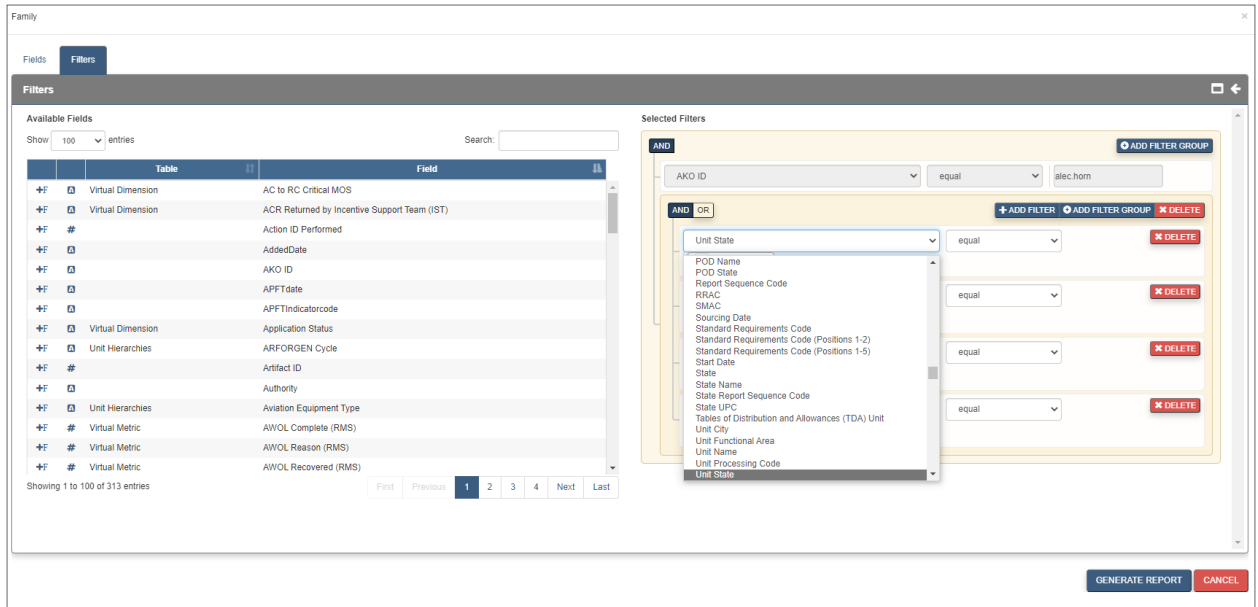
At the bottom right of the interface, there are buttons for 'GENERATE REPORT' and 'CANCEL'.

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

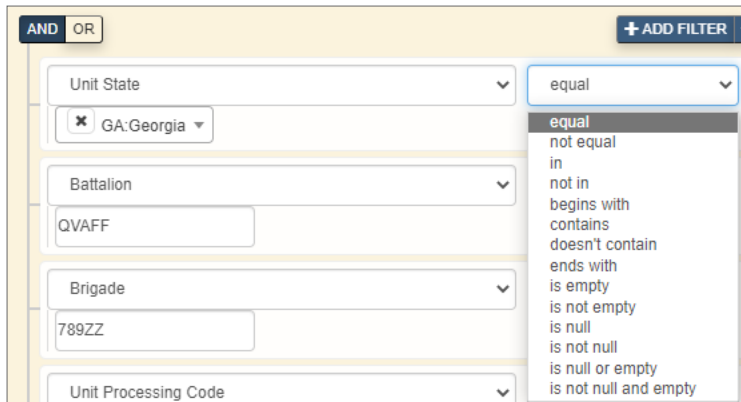
2. Optionally, view more information and filter the metrics and dimensions displayed in the *Fields* panel.
 - Type a metric or dimension name into either of the *Fields* text boxes. The list is now sorted to include only items that match your entry.
3. Add any element from the *Fields* panel to the *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.



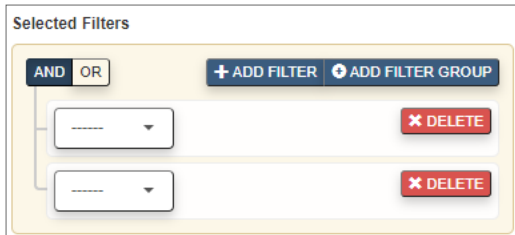
- ▶ If applicable, type a value in the text field that appears to complete adding this filter.
6. Repeat steps two through four as necessary.
 7. Click **GENERATE REPORT**.
 - ▶ The report appears.

Grouping Filters

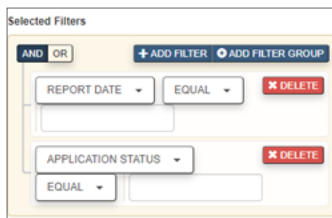
Adding a second filter groups the two filters together with a single operator (*And/Or*). Additional filters can be added to the group or to create a subgroup with a separate operator.

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

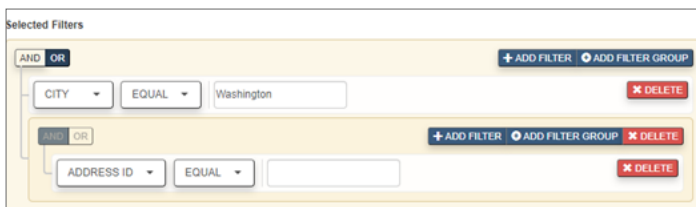
1. Click **ADD FILTER** to add an additional filter at the bottom of the *Selected Filter(s)* panel.



- 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 Remove icon  or click DELETE
Exit <i>Report Builder</i>	Click Cancel .

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.




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 Sponsorship

RMS Sponsorship 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 - Duty Adjustment	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	0	1	3	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 55.

8.2.8 Reports Glossary

See the table below for explanations of report terminology.

Term	Explanation
Aggregate Report	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

8 Additional Tools

Term	Explanation
	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 (e.g., missions) that make up the aggregate counts for all higher-level reports. See Aggregate and Base Reports 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, fund code, project code, 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 (e.g., missions). 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 20121015mission type equals 2B and State equals Missouri. Respectively, these filters limit your search to Soldiers coded as 11B and to data collected prior to October 15, 2012mission types coded for the state of Missouri.
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 qualifiednumber of missions, number of flight hours, and number of seizures.
Metric	A metric is anything that can be counted. Metric and measurement can be used interchangeably.

8.3 Sponsorship Reports

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

8.3.1 Sponsorship Status by Unit State

This report displays the number of Sponsorship cases in each status by state (in progress, completed, or terminated).

8.3.2 Sponsor Survey Results

This report displays the results of the Sponsor survey.

8.4 My Reports

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

8.4.1 My Reports Folder

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

8 Additional Tools

My Saved Reports ▾

My Reports

Show 100 entries Search:

	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.

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

Family

Name

Type

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.

8 Additional Tools

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.

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.

Shared Saved Reports						
Shared Reports						
Show	25	entries	Search: <input type="text"/>			
	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

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

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

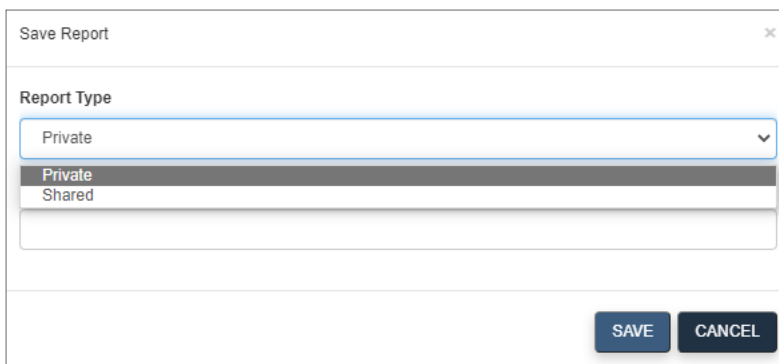
Report Type

Private

Report Name

SAVE CANCEL

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



Save Report

Report Type

Private

Private

Shared

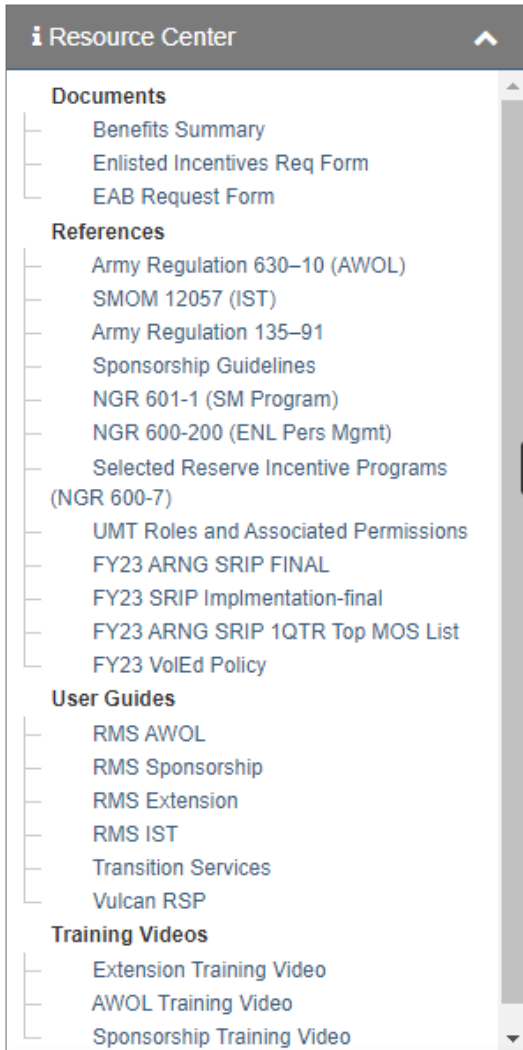
Report Name

SAVE CANCEL

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.

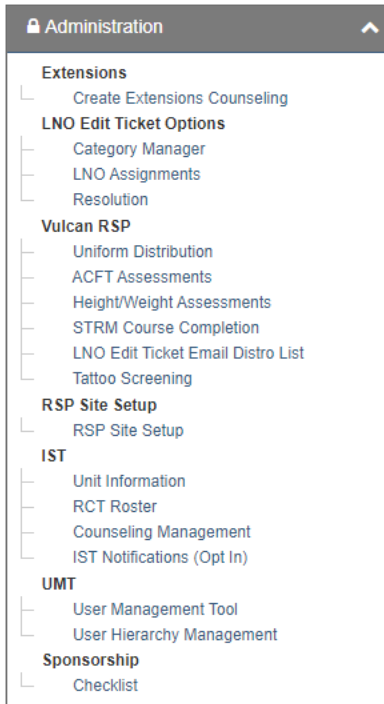


Clicking a link opens the item in a new window.

8.6 Administration

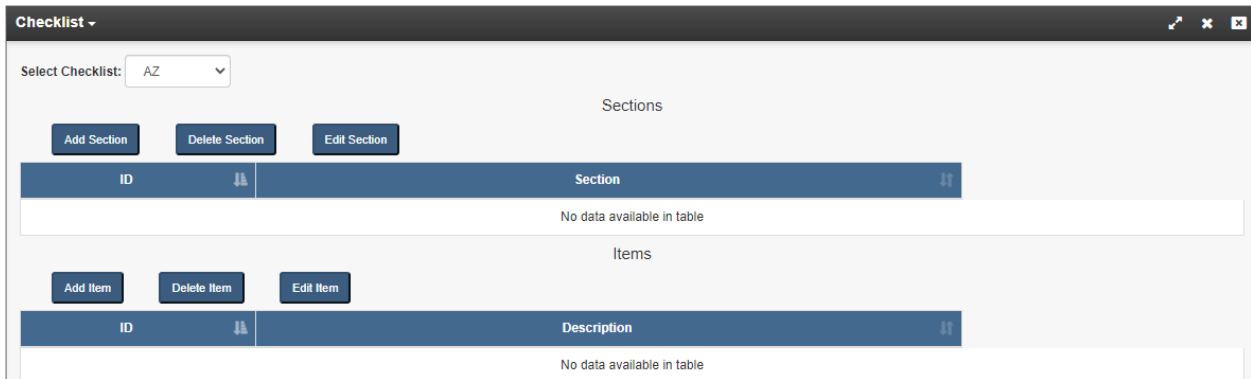
The *Administration* tab contains tools used for administrative action. Open the *Administration* tab in the Command Center to view the tools available to you.

8 Additional Tools



8.6.1 Checklist

1. Click **Checklist** in the *Sponsorship* folder of the *Administration* blade.
2. The *Checklist* screen opens in the second panel.



Add a Section

1. Click **Add Section**.

▶ The *Add Section* window opens.

2. Enter a section name and click **SAVE**.

Adding an Item to a Section

1. Select a section from the *Sections* roster.

2. Click **Add Item**.

▶ The *Add Item* window opens.

3. Enter a section name and click **SAVE**.

Editing a Section or Item

1. Click the section or item you wish to edit.

2. Click the appropriate **Edit** button.

▶ The *Edit Section* or *Edit Item* window opens.

3. Edit information in the fields as needed.

4. Click **SAVE**.

▶ Your edits are saved.

Delete a Section or Item

1. Click the section or item you want to delete.
 - ▶ The selected row is highlighted blue.
2. Click the appropriate **Delete** button.
 - ▶ Click **OK** in the confirmation window.

8.7 Assume Command

Assume Command is located in the bottom tab of 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.

The screenshot shows a window titled "Assume Command" with the following sections:

- Original Role/Level**: Role: NGB Level Admin, Command: NG
- Current Role/Level**: Role: NGB Level Admin, Command: NG
- Choose Role/Level**:
 - Role: A dropdown menu currently showing "NGB Level Admin".
 - Command: A list box showing "NGB" and "NG".
 - A "SELECT COMMAND" button.
- Two buttons at the bottom: "CHANGE MY ROLE" and "RESET MY ROLE".

8.7.1 Original Role

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

The screenshot shows a box titled "Original Role/Level" containing the following text:

- 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.

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

The screenshot shows a dialog box titled "Choose Role/Level". It contains a "Role:" dropdown menu with "NGB Level Admin" selected. Below it is a "Command:" search bar. A list of roles is displayed below the search bar, including "NGB Level Admin", "TCC", "Admin", "NGB Level", "State Level Super Admin", and "IST Help Desk Admin".

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

8 Additional Tools

- ▶ The Command Picker window opens.

The screenshot shows the 'Command Picker' window. At the top, there is a header 'Command Picker' and a sub-header 'Report Sequence Code'. Below this, the text 'Army National Guard' is displayed. A list of fields follows: 'State', 'MACOM/TC/JFHQ', 'Division', 'Brigade', 'Battalion', 'Company', and 'UPC'. The 'State' dropdown menu is open, showing 'ALL' as the selected option. All other dropdown menus are collapsed. At the bottom right, there are two buttons: 'Set' and 'Close'.

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

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

The screenshot shows the 'Command Picker' window with all dropdown menus expanded. The 'State' dropdown menu is now set to 'Alabama'. The other dropdown menus for 'MACOM/TC/JFHQ', 'Division', 'Brigade', 'Battalion', 'Company', and 'UPC' are also expanded, each showing 'ALL' as the selected option. The 'Set' and 'Close' buttons remain at the bottom right.

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:

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

9 User Management Tool

The User Management Tool (UMT) is the RMS Sponsorship common access management product. UMT's main purpose is to provide authorized Army Reserve 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 them or rejecting them, 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.

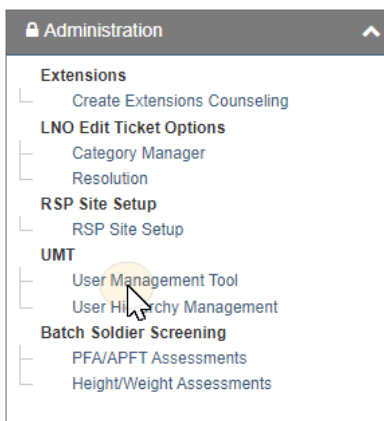
After a request has been approved, users can request role or permission changes, request a change to their command setting, or annually revalidate their access requirements through their application's "Upgrade/Revalidate" tool. Administrators use UMT to approve or deny these changes as well.

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

9.1 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**.



9.2 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 Sponsorship 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 82

- 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 87

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 Sponsorship roles
- RMS Sponsorship available permissions
- Mapping roles to permissions

Automatic Notifications on page 105

Describes notifications that are automatically generated by the system.

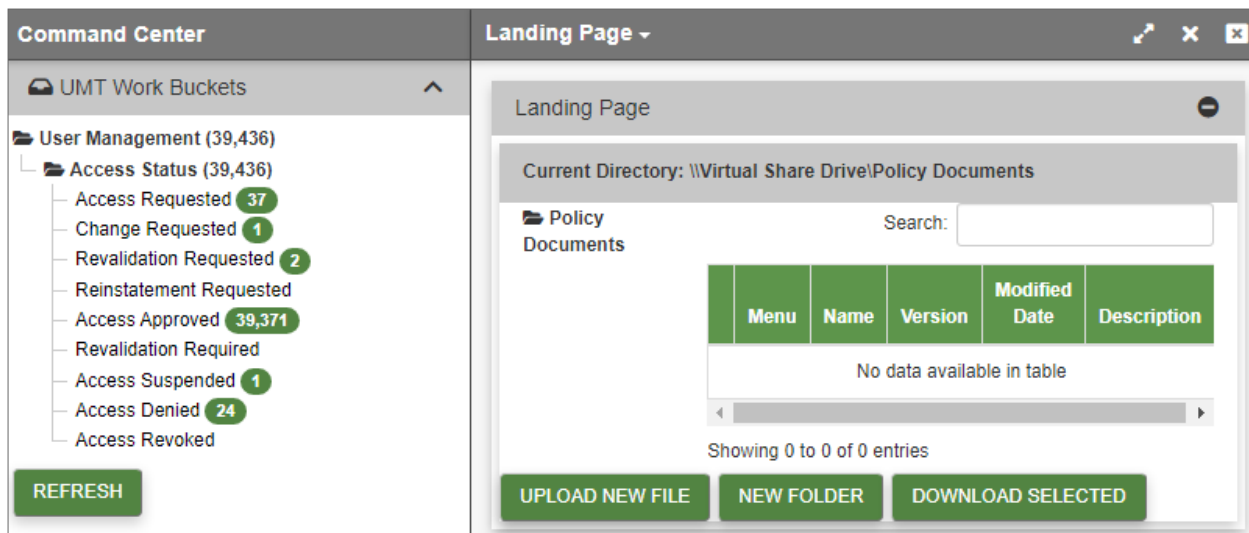
UMT Reports on page 103

Describes reports available in UMT.

9.3 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.

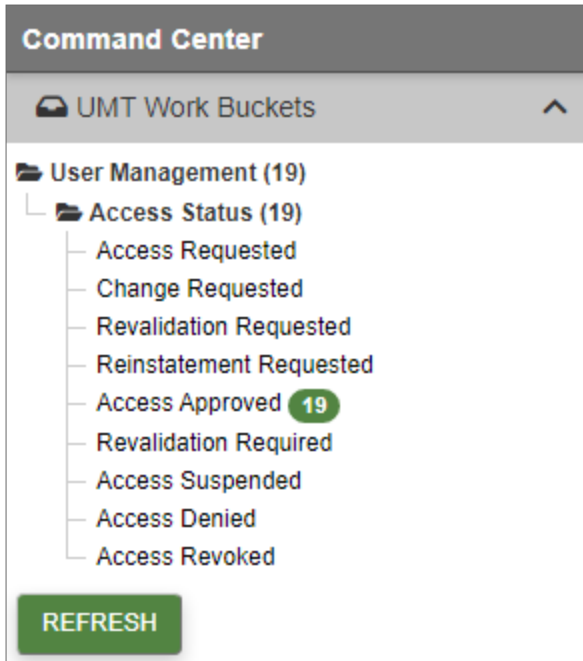
Upon accessing UMT, the first two panels appear. These are the *Command Center* (Panel 1), which provides access to your work buckets, search tools, and reports, and the *Landing Page* (Panel 2), which displays policy documents related to system access.



9.3.1 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 80.

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.

9.3.2 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 82.

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.



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

Below is a complete list of all manual actions that appear in UMT for RMS Sponsorship:

9 User Management Tool

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

9.3.2.1 Mapping Manual Actions to Begin-State Work Buckets

The manual actions are mapped to each work bucket as identified below.

Work Bucket	Description	Admin Actions	User Actions
Access Requested	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"> • Approve Access • Deny Access 	Cancel Request
Change Requested	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"> • Approve Change • Deny Change 	[None]
Revalidation Requested	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"> • Approve Revalidation • Extend Access • Return for Correction • Suspend Access • Revoke Access 	[None]
Reinstatement Requested	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"> • Reinstatement Access • Revoke Access 	[None]
Access Approved	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"> • Suspend Access • Revoke Access 	Request Change

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

9.3.2.2 Mapping Manual Action Transitions to End-State Work Buckets

The table below 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
Approve Access	Case is moved from Access Requested to Access Approved by Admin.
Approve Change	Case is moved from Change Requested to Access Approved.
Approve Revalidation	Case is moved from Revalidation Requested to Access Approved.
Cancel Request	Case is removed from Access Requested (by user).
Deny Access	Case is removed from Access Requested.
Deny Change	Case is moved from Change Requested to Access Approved.
Extend Access	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.

9.3.2.3 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

9.4 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

9.4.1 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 77.

For more information on Reports, see [UMT Reports](#) on page 103.

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



9.4.1.1 UMT Search

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' form within the 'Command Center'. The form includes a 'Searches' dropdown menu set to 'User', a 'Product' dropdown menu set to 'Personnel Division (HRP)', and several input fields: 'Full Name (e.g., "DOE, JOHN")', 'User Name', 'Email', and 'Status'. 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'.

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Depending on your permissions, when you perform a search, Panel 2 displays both your search results and an option to add a new instance of whatever you searched for. In other words, if you searched for roles, you would have the opportunity to create a new role.

Add Role

Application ID *
Select ...

Role Name *
[Text Input]

Role Display Name *
[Text Input]

Role Description *
[Text Input]

Role Display Order *
[Text Input]

Is Default *
 Yes No

Is Administrator *
 Yes No NA

Show In List *
 Yes No

Default Home Page
[Text Input]

Level *
[Text Input]

+ ADD CANCEL

9.4.2 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**.

Landing Page

Current Directory: \\Virtual Share Drive\Policy Documents

Policy Documents Search: [Text Input]

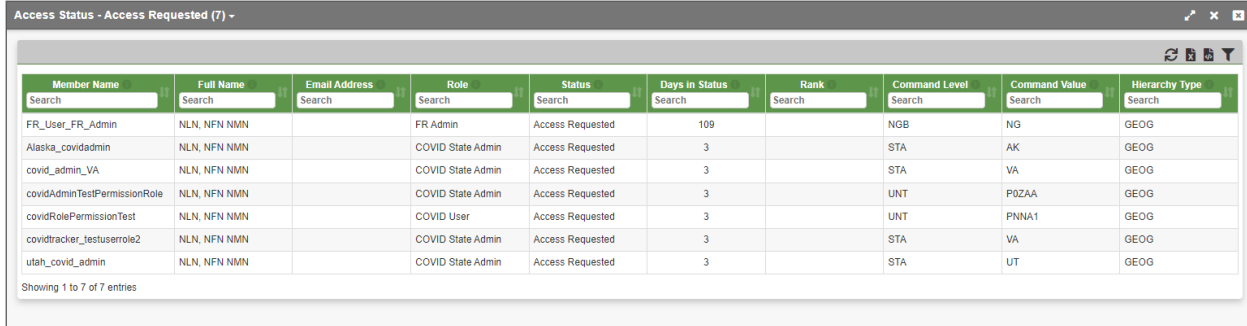
Menu	Name	Version	Modified Date	Description
No data available in table				

Showing 0 to 0 of 0 entries

UPLOAD NEW FILE NEW FOLDER DOWNLOAD SELECTED

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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.



Member Name	Full Name	Email Address	Role	Status	Days in Status	Rank	Command Level	Command Value	Hierarchy Type
FR_User_FR_Admin	NLN, NFN NMN		FR Admin	Access Requested	109		NGB	NG	GEOG
Alaska_covidadmin	NLN, NFN NMN		COVID State Admin	Access Requested	3		STA	AK	GEOG
covid_admin_VA	NLN, NFN NMN		COVID State Admin	Access Requested	3		STA	VA	GEOG
covidAdminTestIPermissionRole	NLN, NFN NMN		COVID State Admin	Access Requested	3		UNT	P0ZAA	GEOG
covidRolePermissionTest	NLN, NFN NMN		COVID User	Access Requested	3		UNT	PNNA1	GEOG
covidtracker_testuserrole2	NLN, NFN NMN		COVID State Admin	Access Requested	3		STA	VA	GEOG
utah_covid_admin	NLN, NFN NMN		COVID State Admin	Access Requested	3		STA	UT	GEOG

Showing 1 to 7 of 7 entries

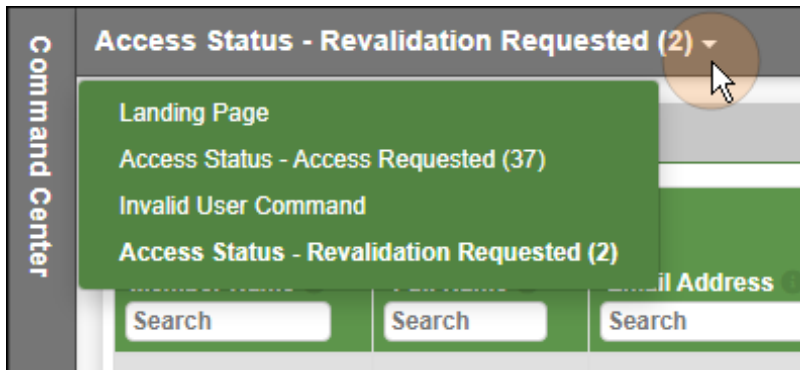


You can filter the list by clicking the **Filter** icon. You can sort the list by clicking at the top of the column you want to sort by (for example, name or command).

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

The Panel Bar

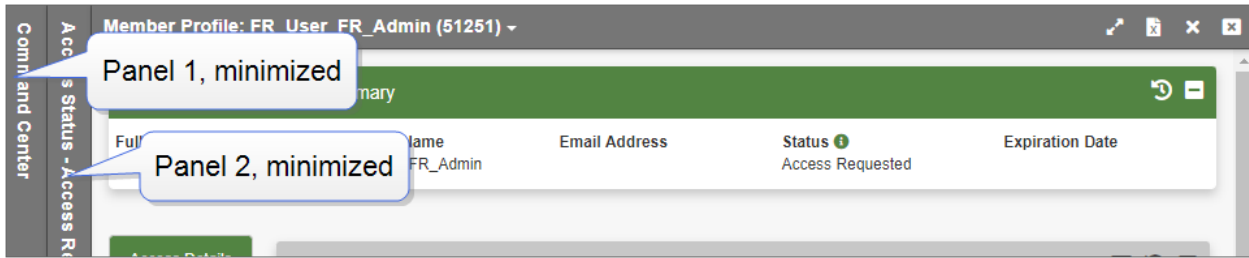
The *Landing Page* is always accessible in Panel 2 from the drop-down list across the top of the panel. Any page that the user does not manually close remains accessible through this drop-down until the user closes the tool itself.



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

Minimizing Panels

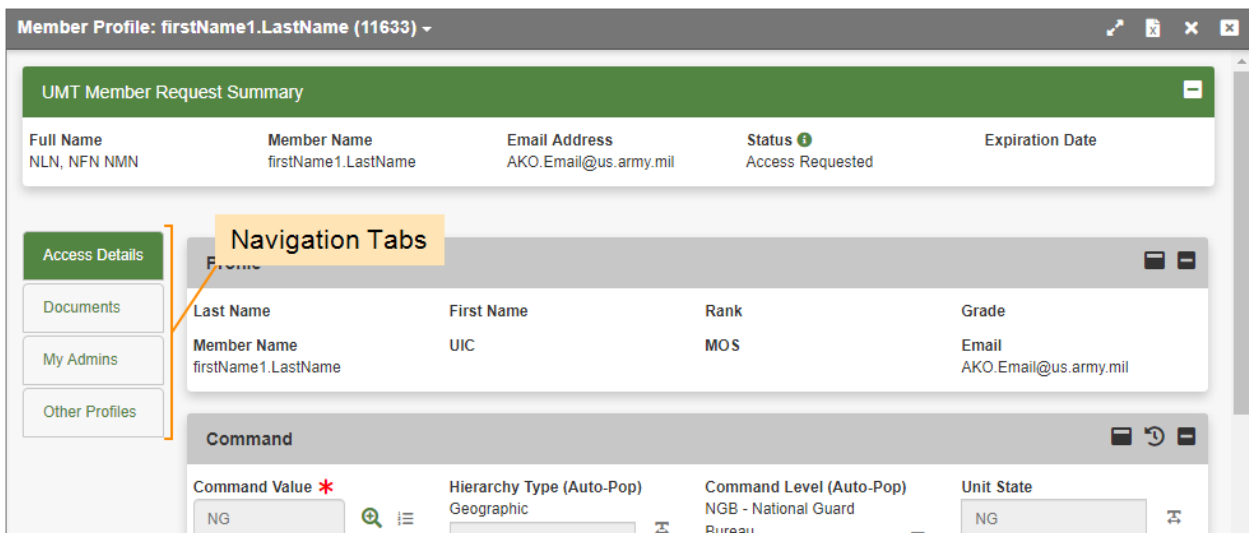
When you select a record in Panel 2, Panel 3 opens as Panels 1 and 2 minimize on the left. You can easily navigate back to Panel 1 or Panel 2 by clicking the minimized panels.



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.

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



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

Access Details tab

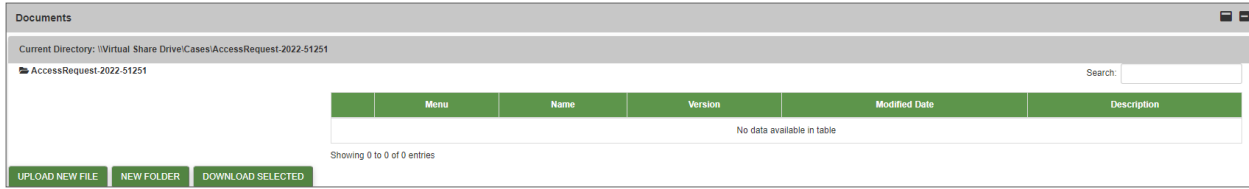
Access Details contains the command information and most of the possible actions for a case. It is described here: [Controlling User Roles and Permissions in Panel 3](#) on the next page.

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. For example, in order for a user to be appointed as a Mini Administrator within RMS Sponsorship, a Memorandum for Record must be

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uploaded. These additional documents are managed under the *Documents* tab, shown below:



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.

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.

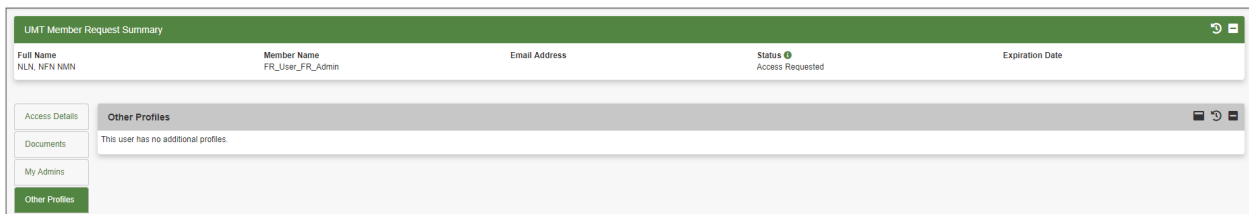
To create a new folder for uploaded documents, click **NEW FOLDER**. A pop-up window appears and prompts you to create a folder name. After you do, click **CREATE**.

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 RMS 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.



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.

9.4.4 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 is divided into two sections:

UMT Member Request Summary

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

Access Details (highlighted in a callout box)

Profile

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

Command

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 90
- 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 101
- A read-only section where you can view all actions taken on a user's account: **History of Actions** on page 102

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.

9.4.4.1 Profile

The *UMT Profile* is the first section that appears under *Access Details*. In RMS Sponsorship, 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 Sponsorship administrative personnel.

9.4.4.2 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 Sponsorship.

The screenshot displays the 'UMT Member Request Summary' interface. At the top, a green header bar contains the title and navigation icons. Below the header, a summary row shows: Full Name (NLN, NFN, NMIN), Member Name (FR_User_FR_Admin), Email Address, Status (Access Requested), and Expiration Date. A sidebar on the left lists 'Access Details', 'Documents', 'My Admins', and 'Other Profiles'. The main content area is divided into two sections: 'Profile' and 'Command'. The 'Profile' section shows fields for Last Name, First Name, Rank, Grade, Member Name, and Email. The 'Command' section features three main fields: 'Command Value' (with a red asterisk and a search icon), 'Hierarchy Type (Auto-Pop)' (with a dropdown menu showing 'Geographic' and 'GEOG'), and 'Command Level (Auto-Pop)' (with a dropdown menu showing 'NGB - National Guard Bureau' and 'NGB'). A 'Unit State' field is also present. 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.

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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

9.4.4.3 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 screenshot below is an example not specific to RMS Sponsorship. It illustrates what an administrator sees when a user has requested a new permission.

The screenshot displays the 'Role and Permissions' interface. On the left, the 'Current' section shows the user's role as 'NGB Admin' and a list of permissions including 'Access as an Administrator', 'Create a New Thread', 'Reply to an Existing Thread', 'Surveys', 'Aviation', and 'Tools'. On the right, the 'Requested' section shows the user's current role as 'NGB Admin' and a list of requested permissions including 'Aviation', 'Tools', 'Access Cohort Tool', 'Allow View/Edit EMT Optimization Settings', 'Execute Model Optimizations', 'Site Administration', 'Access Debug Information', 'Allow Access to Staging Reports/Dashboards/Present', 'Manage Application Updates', and 'Entity Tools'. A blue banner at the bottom states: '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.

Annotations in the screenshot:

- Speech bubble: "User's existing role and permissions" pointing to the 'Current' section.
- Speech bubble: "New permission user has requested" pointing to the 'Requested' section.
- Speech bubble: "Before clicking **SAVE**, check here to see a summary of the changes you've approved" pointing to the bottom banner.

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 Sponsorship User and Administrator Roles

All users in RMS Sponsorship 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 fine-grained 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.

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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 than 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 Sponsorship Role	Description	Level	Administrative Role?
IST Help Desk Admin	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
Vulcan NGB Level Admin	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
Vulcan State Level Admin	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
State Level Admin	Can do everything in RMS for their own state, including approve user requests in UMT.	0	Yes
State Level Super Admin	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
NGB Level	Can view all data but cannot edit anything.		No
IST Help Desk	Can complete any IST action for any state.		No
State Level	Can view all data for their own state, but cannot edit anything.		No
State IST Coordinator	Can complete losing or gaining state actions and approvals for Soldiers in their state.		No
IPPS-A	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
Battalion Level	Can view all data for their own battalion, but cannot edit anything.		No

RMS Sponsorship Role	Description	Level	Administrative Role?
Brigade Level	Can view all data for their own brigade, but cannot edit anything.		No
Sponsor	Can log attempts to contact a Soldier and track sponsorship activities on the <i>Manage Checklist</i> screen.		No
Vulcan LNO	Training Liaison Officers at the various IET Sites can open and maintain LNO Tickets and have read-only access to other Soldier information.		No
Vulcan User	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
Vulcan Read Only	Users with NGB, State, and RSP Site level roles can also be restricted to read-only access.		No
Financial Counselor	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
Transition Counselor	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
Unit Level	Can complete actions for any unit they have been granted access to in UMT.		No

Permissions

RMS Sponsorship has a list of permissions associated with one or more role. These permissions are organized into eight functional groups: Administration, Aviation, Entity Tools, Forum, Reports, Site Administration, Surveys, and Tools.

Group	Permission	Description
Administration	AWOL: Display work buckets	Ability to display AWOL work buckets.
Administration	AWOL Close AWOL Case	Ability to terminate an AWOL case.

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Group	Permission	Description
Administration	AWOL Complete Case	Ability to complete 4856 counseling and close the case.
Administration	AWOL Contact Soldier	Ability to contact an AWOL soldier and record their information.
Aviation	AWOL Counsel Soldier	Ability to counsel a soldier from an AWOL case.
Entity Tools	AWOL Edit Case	Ability to edit AWOL cases.
Entity Tools	AWOL Update Contact Info	Ability to update contact information on a AWOL case.
Forum	Document Center: Delete	Ability to delete files from a Soldier's document center.
Forum	Document Center: Upload	Ability to upload files to a Soldier's document center.
Forum	Document Center: Vulcan RSP	Ability to view Vulcan RSP from a Soldier's document center.
Forum	Extension: Battalion Review	Ability to review Extension cases in the Battalion work bucket.
Forum	Extension: Brigade Review	Ability to review Extension cases in the Brigade work bucket.
Reports	Extension: Display work bucket's	Ability to display Extension work buckets.
Reports	Extension: IPPS-A Review	Ability to review Extension cases in the IPPS-A work bucket.
Reports	Extension: State Review	Ability to review Extension cases in the State work bucket.
Reports	Extension Counseling	Ability to conduct counseling for Extension cases.
Reports	Extension Enter into IPPS-A	Ability to enter an extension in IPPS-A and complete it.

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Group	Permission	Description
Reports	Extension Enter Override	Ability to override data value for Soldier's in Extension cases.
Reports	Extension Issue Incentive Contract	Ability to issue a bonus contract for Extension cases.
Site Administration	Extension Override Eligibility	Ability to override eligibility for Extension cases.
Site Administration	Extension Process 4836	Ability to complete and upload document 4836 to the case.
Site Administration	IST: Display work bucket's	Ability to display IST work buckets.
Surveys	IST: Help Desk	Ability to access the IST Help Desk.
	IST: Help Desk Admin	Grants IST Help Desk access to users.
Surveys	IST: Override Risk Level	Ability to override risk levels for IST cases.
Surveys	IST: Reject Para/Line	Ability to reject assigned Paragraph/Lines for IST cases.
Tools	IST: Reopen Case	Ability to reopen IST cases.
Tools	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.

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Group	Permission	Description
	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.
	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.

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Group	Permission	Description
	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.
	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.

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Group	Permission	Description
	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.
	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.

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Group	Permission	Description
	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

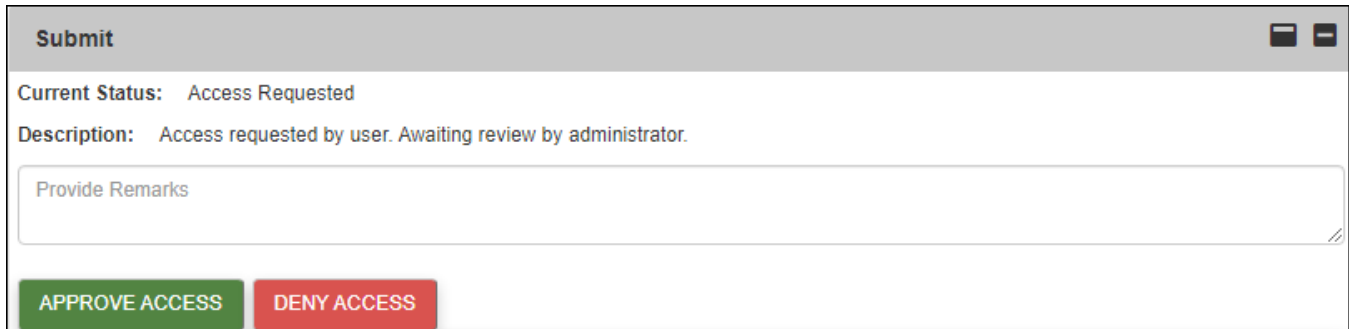
Each role has a corresponding list of default and optional permissions that control what the user can do. The chart below displays a cross-tab of roles (across the top) and permissions (down the side). Items shown with a “D” (in green) are *Default* permissions, meaning the user obtains this permission 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.

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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
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	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	D	D	D	D	D						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	O	D				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	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				D	D	O													
Extension: Process: 4836				D	D	O				O	D	D	D						D
IST: Display Workbuckets	D	O	O	D	D	D	D	D	D	O	D	O	O				O	O	D
IST: Help Desk	D			D	D	O	D												
IST: Help Desk Admin	D			D	D	O													
IST: Override Risk Level	D			D	D	O	D												
IST: Reject Para/Line	D			D	D	O	O												
IST: Reopen Case	D			D	D	O	D												
IST: Reset Case	D			D	D	O	O												
IST: State Level User	O			D	D	O		D	D										
IST: Terminate Case	D			D	D	O	O												
IST: Unit Level User	O			D	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	D	O	O												
NGB Admin	D			D	D	O													
Process: Vulcan LNO; Action: Case Closed; Current: New; To: Closed		D		D	D									D					
Process: Vulcan LNO; Action: Case Closed; Current: Returned to LNO; To: Closed		D		D	D									D					
Process: Vulcan LNO; Action: Case Closed; Current: Returned to State; To: Closed		D		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	O	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					
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						D
Sponsorship: Close Sponsorship		D	D	D	D	O					D	O	D						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						D
Sponsorship: Print Checklist		D	D	D	D	O					D	O	D						D
Sponsorship: Reassign Sponsor		D	D	D	D	O					D	O	D						D
Sponsorship: Return Checklist		D	D	D	D	O					D	O	D						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				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	
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
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							D
View Reports	D	D	D	D	D	D	D	D	D	D	D	D	D	D	D	D	D	D	D
View Vulcan	O	O	O	D	D	D	O	O	O	O	O	O	O	O	O	O	O	O	D
VSD Delete Files	D	D	D	D	D	O	O	O	O	O	O	O	O	O	O	O	O	O	D
VSD Upload Files	D	D	D	D	D	O	O	O	O	O	O	O	O	O	O	O	O	O	D
Vulcan Can Edit		D	D	D	D	O	O	O	O	O	O	O	O	O	O	O			D
Vulcan Edit Closed Ticket		O		O	D	O													
Vulcan LNO: Terminate Case		D		D	D	O													
Vulcan NGB Admin		D		D	D	O													

9.4.4.4 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, then performs extensive 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

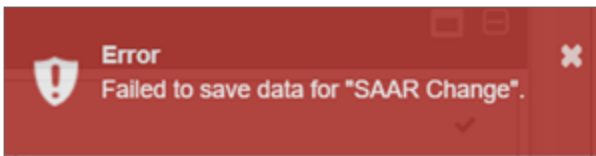
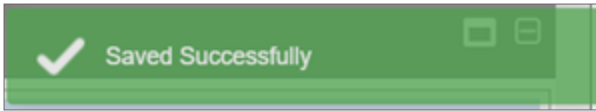
Automated validation tests typically check for three required entries:

- Has a Command value been selected and has that section been saved?
- Has a Roles and Permissions value been selected and has the section been saved?

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

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.”



9.4.4.5 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 historic action, in the event that the number of actions makes finding one difficult.

History of Actions					
Date	User ID	Comment	Previous Status	Action	Status
07/16/2009 08:37 AM	firstName1.LastName	NGB Staff	Access Request Initiated	Request Access	Access Requested
07/16/2009 08:37 AM	firstName1.LastName		Access Revoked	Request Access	Access Request Initiated
07/16/2009 08:37 AM	firstName1.LastName		Access Requested	Approve Access	Access Approved

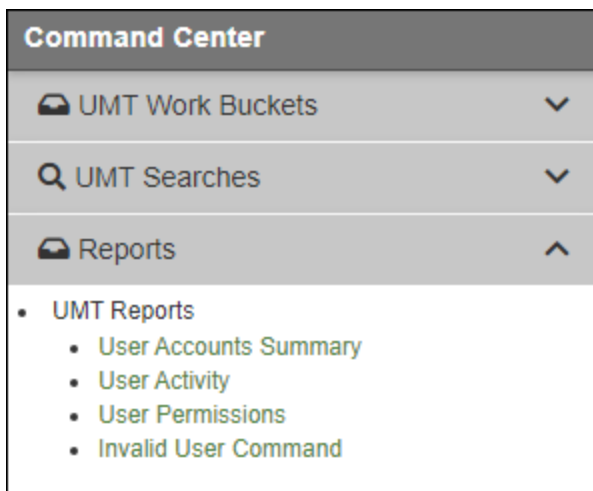
Showing 1 to 3 of 3 entries

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

Field	Description
Date	The date and time the particular action was taken.
User ID	The unique identifier for the individual or process that performed the action.
Comment	Remarks provided by the administrator or automated function that concern the action performed.
Previous Status	The state (or work bucket) the account was in prior to the action being performed.
Action	The event that caused a change in status.
Status	The state (or work bucket) the account is in after the completion of the action.

9.5 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.



9.5.1 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 with two columns: 'State' and 'User Management Count'. The table shows one row for 'Access Approved' with a count of 3, and a 'Total' row also showing a count of 3.

State	User Management Count
Access Approved	3
Total	3

9.5.2 User Activity

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

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

9.5.3 User Permissions

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

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

9.5.4 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.

The screenshot shows a web application window titled "Invalid User Command". At the top, there are three filter buttons: "APPLIED FILTERS", "DIMENSION INFORMATION", and "MEASUREMENT INFORMATION". Below these is a search bar containing "UMT: Invalid Command User List" and a toolbar with various icons. A "Home" link is visible. Below the toolbar, it says "Showing 1 to 1 of 1 entries" and "Show 100 entries". The main content is a table with two columns: "Unit State" and "Case Count".

Unit State	Case Count
CA	1
Total	1

9.6 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. Generally speaking, remarks that are “Required” fields are included in the emails.

The chart below 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
Access Requested	X			X	
Access Requested		X		X	
Access Request Canceled	X			X	
Access Approved	X			X	
Access Denied	X		X	X	
Access Extended (Revalidation Required)	X			X	
Access Extended (Revalidation Requested)	X			X	
Access Revoked	X		X	X	
Access Suspended (Administrator Action)	X		X	X	
Access Suspended (Unapproved Revalidation)	X		X	X	
Access Suspended (Non-Revalidation)	X		X		X
Access/Change Request Auto-Denied	X		X		X

Action	Sent to User	Sent to Admin	Includes Remarks	State-Driven	Time-Driven
Access/Change Request Auto-Denied		X	X		X
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

9.6.1 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 results in a state change and that member being moved into the *Access Requested* work bucket, both the user and Admin receive automated notifications.

9.6.2 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

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accessed within a predefined number of days.

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

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