

# IMS Quick User Transition Guide – Administrators

## Timeline

Current IMS on AOS will be unavailable after **June 4<sup>th</sup>, 2021**. Therefore, you will not be able to log into IMS on AOS or enter data into the system after that date.

- BEFORE **June 4<sup>th</sup>, 2021** please be sure to export and save select data from IMS on AOS [See section “Saving Data from IMS on AOS” below]
- AFTER **June 4<sup>th</sup>, 2021** please be sure to manually manage any issues in the interim and manually track any issues you yourself want to submit to IMS.

## Glossary

AFAP	Army Family Action Plan
AFWP	Army Family Web Portal
AOS	Army One Source
ARC	Army Family Web Portal Resource Center
IMCOM	Installation Management Command
IMS	Issue Management System

Modernized IMS will be available on AFWP **June 14<sup>th</sup>, 2021**.

## STEP 1: Save Data from IMS on AOS

You will need to export the following items listed below from IMS on AOS and save them on your personal computer and/or print them for your records. This will enable you to check/validate issue data within modernized IMS and provide backups should you need to re-enter or correct any issue data.

- AOS username and email
  1. Review your AOS username and email in your AOS profile.
  2. Ensure the email address listed is an up-to-date address to an email inbox you currently use. Update your email address on AOS if needed.
  3. Record your AOS username and email in a secure space on your computer or phone as you may need to reference it when creating an AFWP account for access to modernized IMS.
- Information associated with issues for your garrison (both historical issues and open issues currently being managed)
  1. Go to Manage Issues, and click "Download Issues for Data Migration".
  2. Select your community, and click "Submit" to view the list of issues.
  3. Click "Download Issues", and open the CSV file to confirm you have the data.

## STEP 2: Access the IMS Training Site and Practice Using Modernized IMS

The IMS Training Site is available for use by all levels of IMS users. Access to the IMS Training Site can be found:

- On the “Getting Started – IMS” page on ARC (<https://www.training.armyfamilywebportal.com/home>)  
OR
- Directly via the IMS Training Site URL: (<https://ims.training.armyfamilywebportal.com/>).

NOTE: The training Site is for training purposes ONLY and therefore should NOT be used to enter in live or actual data reflecting current AFAP program activity. The site will not contain data reflective of the AFAP at your garrison. IMCOM reserves the right to purge the data on the training site at any time.

Be aware that there will be other users simultaneously accessing the Training Site so there may be actions taken on issues you practice submitting and managing as other administrative users are also training themselves.

System distributed emails will NOT be functional on the Training Site.


### STEP 3: Create an Account for AFWP

On **June 14<sup>th</sup>, 2021** you will be able to create an AFWP account to access the modernized IMS.

**If you do NOT have an AFWP Account, use the following instructions to establish an account:**

***Note:** If CAC-related popups appear during this account registration process, please select cancel until you have completed the registration process. If you would like to connect your CAC to your account AFTER you have registered your account, please see your respective IMS user guide.*

1. Go to <https://ims.armyfamilywebportal.com/>
2. Select **Register** on the **IMS Home Page**. This will take you to the AFWP Account Management page.
3. Enter the required information into the **following data fields**:

 *Email, Password, and Confirm Password.*

***Note:** When selecting an email, we recommend using the same email you have listed in your AOS account. Single-Sign-On passwords are **case-sensitive** and require a minimum of **15 characters** that include the following: 2 uppercase letters, 2 lowercase letters, 2 numbers, and 2 special characters (!#\$%^@).*

4. Select **Register**.
5. An **automated email** will be sent to the email that was entered in step 3 with a link and a token number.
6. Select the link in the email to verify the account. (If you encounter trouble with the link, please go to <account.armyfamilywebportal.com/verify> to complete verification)
7. On the page that appears, enter the **email address and the token number** provided in the automated email.
8. Select **Verify Email**.

**If you DO have an AFWP Account, use the following instructions to access the modernized IMS:**

1. Go to <https://ims.armyfamilywebportal.com/>
2. Select **Log In**.
3. Use your AFWP account credentials (email and password) to complete the requested fields on the Single-Sign-On page.
4. Select **Login**.

**Note:** In order to receive your **program manager permissions in modernized IMS**, you must first log into IMS. Once you login, the AFWP Help Desk staff will locate your account and provide you the necessary permissions. If you need to change your permissions or access level, please contact the AFWP Help Desk and/or your AFAP Program at IMCOM HQ.

#### Step 4: Check Issues in Modernized IMS

Once you have access to your user account within modernized IMS, please compare the data from AOS IMS exported/saved records for your garrison to the issues seen in the modernized IMS in order to ensure the data has migrated properly. The most critical issues to check are those that are still open and being managed at your garrison level. Be sure to check that the issue owner and status are correct. Do anticipate some slight discrepancies in issue content/information due to the streamlining of the system. For example, some issues with incredibly long text fields on AOS IMS have been shortened in modernized IMS. If you have any major discrepancies, please contact your local ACS or AFWP Help Desk.

Note that the issues migrated from IMS on AOS to the modernized IMS may have been previously tied to you as an individual user. The issues migrated from IMS on AOS will not be associated with your user account in the modernized system. Your issues will be in the modernized IMS and can be located via the Search Issues feature.

#### Step 5: Note Critical Differences Between IMS on AOS and IMS on AFWP

Below is a brief list of differences you will find in the modernized IMS on AFWP.

- Streamlined issue submission, review, and elevation process which provides a greater level of transparency in tracking your issue through the AFAP process.
- User dashboard with a “My Issues” list so that you can easily track issues only you have submitted through the AFAP process in one central location. This is NOT an administrative dashboard.
- Enhanced system-generated email notifications that will support transparent communication when your issue progresses through the AFAP process.
- Bulk import feature that will support the addition of new issues and update existing issues to support the diverse issue collection methods.
- Simplified role structure, not tied to a hierarchy, to minimize the likelihood of issues getting “lost” or “stuck” in the system.
- “Saved Searches” feature with the ability to save customized search criteria for workflow enhancements.
- A combination use of the fields assigning “Owner” and indicating “Elevation” status will be used to move issues through the AFAP Process. See Section 4.2.1 Issue Elevation Guidelines in the IMS Administrator User Guide for more details.

#### User Training and Support

The modernized IMS on AFWP will be accompanied by a self-service model of training. This self-service consists of the: IMS user guide for Submitters, short training videos, and Frequently Asked Questions (FAQs). These materials were designed to be intuitive and enable you to address most of your issues before reaching out for help.

To access the user guide, short training videos, and FAQs, please visit the “Getting Started” page for IMS on the ARC:

## I have questions about modernized IMS, who should I ask for help?

In order to provide you a timely and accurate response, it is critical that you direct your IMS-related questions to the correct support person.

- Modernized IMS User Support is limited to addressing only technical questions or concerns for the modernized system.
- All programmatic related questions should be directed to your local ACS.

Examples of technical/system questions vs programmatic questions are below. This can help you determine what type of question you are asking and where it should be directed.

### Technical/System Question Examples:

- "I tried to reset my password but I never got the email with the temporary password. What should I do?"
- "My bulk issues import keeps failing, what can I do to fix it?"

### Programmatic Question Examples:

- "If someone submits an issue that is not appropriate for AFAP, can I reject it right away?"
- "What does an issue ready for escalation to the IMCOM Directorates look like?"
- "How quickly must I work to either resolve or escalate an issue?"

## Trouble Shooting

### Quick Troubleshooting Tips

If you are struggling to access any of the training sites, try following the below troubleshooting tips before contacting the AFWP Help Desk:

- AllowListing
  - The site you are trying to access may be blocked by your IT department. We recommend you request the site be AllowListed. Please reach out to your IT department to request this.
- Browser
  - Supported browsers for AFWP systems are the latest versions of Internet Explorer 11, Microsoft Edge, Chrome, and Firefox. You may experience functionality and appearance differences depending on your browser version.
- URL Confirmation
  - Be sure to double check that you are accessing the full and exact URL address that you are intending to access. For example, make sure each URL begins with "https://" For example, if a link in your email appears to have the word "caution" inserted into it, please remove the word and make sure the url begins with "https://"

### Who do I contact with questions or concerns?

The centralized AFWP Help Desk is accessible via ARC. You can submit technical questions or feedback in this central location.

1. Select "Contact the Help Desk" in the footer at the bottom of any ARC page :  
<https://www.armyfamilywebportal.com/>
2. Provide the necessary information in the following data fields:

- a. Your Name, Your Email Address, Subject, Category, Message, and Attachment.
3. Select **Send Message** to complete the submission for review