

Issue Management System (IMS) Administrator

Instructional User Guide | Version 1



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1.0 - Welcome to IMS

Welcome to the **Issue Management System**, also known as **IMS**, which gives individuals an online resource to voice their concerns about issues they see within Army garrisons, installations, or other Army Communities. IMS provides a streamlined process for Army leadership to review and address issues that are submitted by community members.

The screenshot displays the IMS User Dashboard for AFAP Administrators. The interface features a dark red header with the 'Issue Management System' logo and a user profile for 'Paul'. A sidebar on the left provides navigation for 'Issue Submitter' (Dashboard, Submit Issue, Search Issues, Program Manager Locator) and 'Administrator' (Permissions, Communities, Bulk Import). The main content area, titled 'My Issues', contains a table with the following data:

Issue Number	Title	Issue Creation Date	Issue Status	Owner	Elevated	Category	
Dugway20-169	potholes in the road	Apr 14, 2020	Under Review	Paul Paderson	No	None	 

IMS User Dashboard for AFAP Administrators

Supported browsers for AFWP Applications are Internet Explorer 11, Chrome, and Firefox. You may experience functionality and appearance differences when using the application depending on your browser version.

	Program Manager	Rollup Administrator	AFAP Administrator
Bulk Import Issues	✓	✓	✓
Manage Issues	✓	✓	✓
View Open Issues	✓	✓	✓
Manage Elevated Issues	X	✓	✓
Assign Elevated Issues	X	✓	✓
Manage User Permissions	X	X	✓
Manage Military and RollUp Communities	X	X	✓

1.1 - IMS Registration

Logging in to IMS requires an **AFWP Account**. The **Army Family Web Portal**, also known as **AFWP**, is an online hub for Army Community Service (ACS) where users can create AFWP Accounts to log in to IMS and other AFWP systems.

AFAP Staff Members who require advanced features within IMS will need to be given **administrator permissions** on their IMS Account. Receiving these permissions requires an existing administrator to elevate an existing IMS Account, after the necessary validation has taken place.

Note: For questions about administrator permissions on an IMS Account, **contact an AFAP Program Manager**.

1.1.1 - Single Sign-On (SSO)

AFWP Accounts utilize a **Single Sign-On (SSO)** feature that permits users to log in to different AFWP systems with the same email address and password combination. This reduces the overall number of usernames and passwords to remember between AFWP web applications without any compromise of security.

Tip: If you have ever created an AFWP Account for a **different AFWP system**, you can log in to IMS using the **same credentials** as those systems.

[Back](#)

Welcome to the AFWP Login page! Provide your AFWP email and password to access the suite of AFWP systems (for example, ARC and VMIS). For more information, FAQs, and access to the Help Desk, visit the AFWP Resource Center.

Enter your Email and Password

[Don't have an account? Register here.](#)

Email:

Password:

LOGIN

Clear

[Forgot your password?](#)

ATTENTION: When you are finished using all of your AFWP authenticated applications, please log out of this system and exit your browser to ensure you do not leave any of your applications open to other users of this machine.

YOU ARE ACCESSING A U.S. GOVERNMENT (USG) INFORMATION SYSTEM (IS) THAT IS PROVIDED FOR USG-AUTHORIZED USE ONLY. By using this IS (which includes any device attached to this IS), you consent to the following conditions:

The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE) and counterintelligence (CI) investigations.

At any time, the USG may inspect and seize data stored on this IS.

Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG-authorized purpose.

This IS includes security measures (e.g., authentication and access controls) to protect USG interests—not for your personal benefit or privacy.

Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work products are private and confidential. See User Agreement for details.

Use of this system constitutes consent to monitoring for all lawful purposes.

By clicking the Login button, you agree to comply with the Terms of Use agreement.

Single Sign-On Login Page

1.1.2 - Create an AFWP Account

1. Select **Register** on the **IMS Home Page**.
2. Enter the required information into the **following data fields**:
 - *Email, Password, and Confirm Password.*

Note: Passwords are case-sensitive and require a minimum of 15 characters, including at least 2 of each of the following: **uppercase letters, lowercase letters, numbers, and 2 special characters (@!#\$%^+=)**.

3. Select **Register** to finish creating an AFWP Account.
4. An **automated email** will be sent to the email that was entered in step 2 with a link and a token number.

Note: Links within emails generated from the AFWP system may have the word “caution” before the link, so if you copy it, be sure to remove the word caution.

For example: “caution: <https://www.armyfamilywebportal.com/>” = “<https://www.armyfamilywebportal.com/>”.

5. Select the link in the email to verify the account.

Tip: The verification link is marked by “/verify” to make the verification process easier.

6. On the page that appears, enter the **email address and the token number** provided in the automated email.
7. Select **Verify Email**.

1.2 - AFWP Account Management

AFWP Accounts are managed from a location called the **AFWP Account Management page**. All user types can access this page via the upper-right corner of any AFWP System or directly to the URL (<https://account.armyfamilywebportal.com/>). All user types can access this page to update their associated email address, password, or connect a CAC to their AFWP Account so it can be used to log in to AFWP systems.

Note: Changes made on the Account Management page will apply to **all AFWP systems** associated with logged-in AFWP Account.

1.2.1 - Update Login Credentials

1. Select the **name of the user** in the upper-right corner of any IMS page while logged in.

2. Select **Account Management** from the drop-down list that appears to be taken to the **Account Management page**.
3. Select the **pencil icon**  to the right of the **Email Address** or **Password** field and modify its contents as needed.
4. Select **Save** to confirm the changes.

1.2.2 - Update Profile Information

1. Select the **name of the user** in the upper-right corner of any IMS page while logged in.
2. Select **Account Management** from the drop-down list that appears to be taken to the **Account Management page**.
3. Select the **Profile tab** in the left-hand sidebar of the Account Management page.
4. Update the available fields in the **Personal Information** and **Demographic Information** sections.
5. Select **Save** at the bottom of the page to confirm the changes.

1.2.3 - Connect a CAC

Users can connect their own **Common Access Card (CAC)** with their AFWP Account, making it possible to **log in using their CAC** instead of an email address and password. The CAC must be inserted into the CAC reader **before** beginning the CAC connection process.

To connect a CAC:

1. Select "log in" on the application page and you will be prompted to load your certificate.

Note: Before you register/connect your CAC, you must load the appropriate certificate and enter your pin once you are directed to the SSO page.

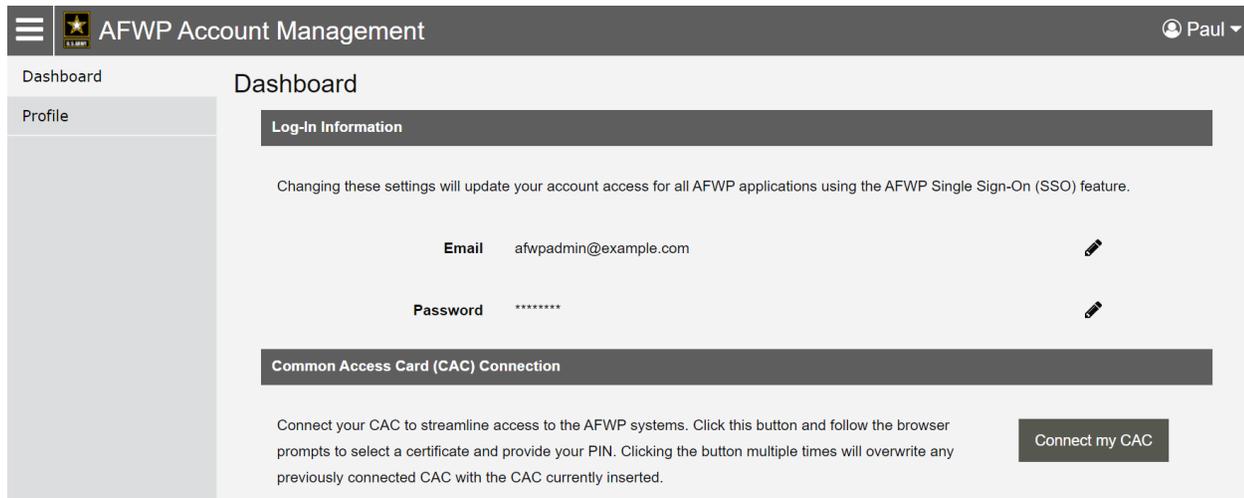
2. Once you login, select "Account Management" from the drop down in the upper right corner and when prompted enter your AFWP Account credentials.
3. Select **Connect my CAC** on the AFWP Account Management page to begin the CAC connection process, and keep the following in mind as you read the instructions on the site carefully:
 - ▶ The connection process will require the CAC's **associated pin** to be entered correctly **each time** the CAC is used to log in.
 - ▶ You **can't connect an expired CAC**, your browser will not allow you to authenticate your CAC.

- ▶ Using a CAC will require you to download specific CAC certificates for specific browsers. Make sure to do this before attempting to connect a CAC to your AFWP Account.

Tip: For more information related to certificates, visit these links:

<http://public.cyber.mil/pki-pke/end-users/getting-started/>

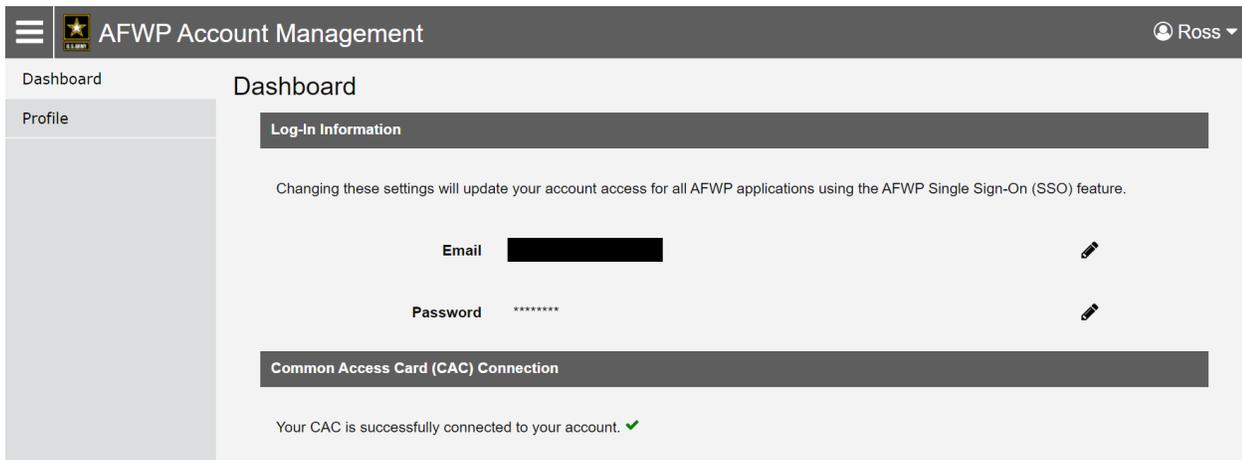
<http://public.cyber.mil/pki-pke/end-users/web-browsers/>



4. Follow the prompts that appear.

1.2.4 - Check if a CAC is connected to your account

- ▶ An AFWP account can only have one CAC connected at a time
- ▶ To see if you have a CAC connected to your AFWP account, go to Account Management. You should see a confirmation there whether you login with your CAC or with your username/password.



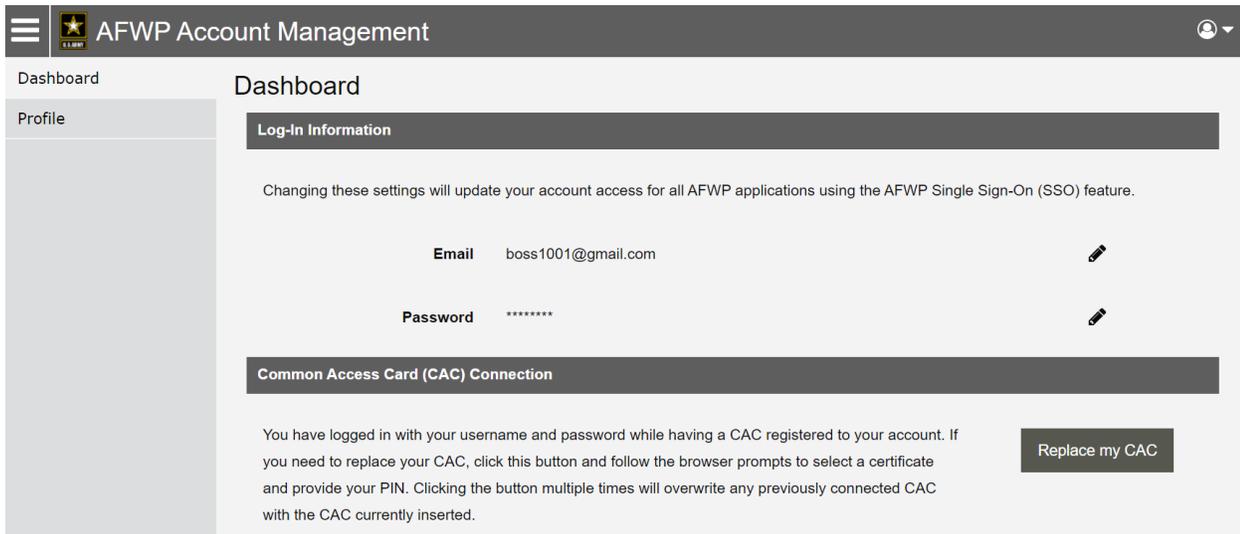
This screenshot shows what should appear when a CAC is successfully added.

1.2.5 - Replace your CAC

Only one CAC can be connected to an account at a time, therefore if you have a new CAC or your CAC needs to be updated, you will need to replace the old CAC with a new one. Keep in mind that a CAC can only be replaced, not removed.

To **replace a CAC**:

1. To replace your CAC - you have to login with your username and password and then connect your replacement CAC
2. Once you login, select "Account Management" from the drop down in the upper right corner.
3. Select **Replace my CAC** on the AFWP Account Management page to begin the CAC connection process, and refer to section 1.1.1 for things to keep in mind.
4. Follow the prompts that appear.



This screenshot shows what should appear when attempting to replace a CAC.

1.2.6 - Recover Forgotten Password

1. Select **Login** from the **IMS Home Page** while logged out.
2. Select **Need to reset your password?** at the bottom of the login page that appears.
3. Enter the **email address** of the AFWP Account that needs to be reset.
4. Select **Reset Your Password** and a **confirmation email** will be sent to the provided email address.
5. There will be two links in the email, be sure to select the URL for **changing your password**.
6. Navigate to the **unique URL** in the confirmation email to log in to IMS.
7. Follow the prompts to **create a new password** and complete the recovery.

Note: *If you change your password for any reason, you will be logged out of any open AFWP system sessions. You will then have to log back in using your new password.*

1.3 - User Dashboard

The **User Dashboard** is the central location of IMS and features a table named **My Issues** that contains issues previously submitted by the logged-in user. My Issues includes expanded information about any issues that the user has submitted, including the **issue number**, **issue**

title, creation date, issue status, owner/submitter, and whether the issue has been elevated.

Tip: Selecting the column headers of the *My Issues* table will **sort the contents** by the column's respective criteria, such as alphabetical order, date of submission, and issue status.

1.4 - Contact the Help Desk

1. Select **FAQ/Help** in the left corner of the footer at the bottom of any page on Account Management.
2. A new tab will open that will direct you to the Army Family Web Portal Resource Center (ARC)
3. Select **Contact the Help Desk** at the bottom of any ARC page.
4. Provide the necessary information in the **following data fields**:
 - *Your Name, Your Email Address, Subject, Category, Message, and Attachment.*
5. Select **Send Message** to complete the submission for review.

Note: Your message will be processed as soon as possible. You may receive direct follow up communication from the help desk via email.

1.5 - Guest Users

Some community members may wish to submit issues **without registering for IMS**. These users have the option to submit issues anonymously as a Guest user without having to sign in to an IMS Account.

Guest users will be **unable to**:

5. Receive follow-up communication about an issue resolution or any needed information.
6. Track previously submitted issues on the User Dashboard.
7. Save search criteria to perform faster searches in the future.
8. Provide profile information about the specific user's community, contact information, etc.

1.6 - Program Manager Locator

A tool available to both Registered and Guest users is the **Program Manager Locator**, and can be accessed from the Navigation Panel at any time. This feature gives users the ability to find out who the Points of Contact (POCs) are for a given Community.

Note: *The information provided is based on the information used by the AVC program.*

To **find a POC** using the Program Manger Locator feature:

1. Select **Program Manager Locator** from the left-hand Navigation Panel on any IMS page.
2. Select the **Community drop-down** at the top of the page and choose the desired Community.
3. Refer to the table below that will populate with the **name, email, and phone number** of that Community's POC(s).

2.0 - Submitting an Issue

Staff Members as well as other Community members can submit issues about problems found within an Army Community. It is encouraged that issues are submitted with clear and detailed descriptions so that the recipient(s) can accurately understand and address them.

Before submitting an issue, it is suggested that users **search for existing issues** to see if the same issue has already been submitted. To learn more about searching for issues, see **Section 3.0 – Search for Existing Issues**.

Note: Submitting an issue to IMS indicates that the user agrees to the IMS and AFWP privacy and usage policies. Submitted issues are not guaranteed a resolution, direct contact, or any other specific outcome. Issues will be handled in a fashion deemed sufficient and appropriate by AFAP and/or other Army officials given the nature, scope, and circumstances of the issue.

Note: Beware of system timeouts. Be sure to save your progress frequently, especially while filling in long forms.

Issue Management System Andrew

Submit an Issue

Complete all of the following fields to describe the issue you would like to submit.

After submitting your issue, it will either be accepted at that Military Community or rejected. If it is accepted, it will be available from the Search page to all users of IMS. If it is rejected upon first review, only you will be able to view the issue within your My Issues table on the dashboard (must be a logged-in user to access this feature).

You will have the ability to edit portions of your issue during the time before it is accepted or rejected. After it is accepted or rejected, you will no longer be able to edit your issue.

* Indicates a required field.

Military Community * Fort Buchanan

Issue Demographic Family Members

Issue Title * What is the problem? Please describe the issue in clear and concise terms.
TRICARE Medical Coverage for Dependent Parents and Parents-in-Law 435

Statement of the Problem * What is the problem? An introductory sentence that states the problem in 1 sentence.
Dependent Parents and Parents-in-Law are not entitled to purchase TRICARE medical coverage. 409

Validation * Why is it a problem? State why it is a problem, with facts/supporting information in 1-8 sentences.
Soldiers and their primary dependents are authorized TRICARE benefits. Dependent Parents and Parents-in-Law are only authorized care on a space available basis and pharmaceuticals from Military Treatment Facilities (MTF). 1779

Impact * What is the impact if not resolved? Why it's important, tell the impact the problem has on quality of life if not resolved in 1 sentence.
Without TRICARE medical coverage, Dependent Parents and Parents-in-Law either purchase expensive outside medical insurance, pay out of pocket for medical care without reimbursement, or neglect their health. 294

Recommended Action * How would you fix the problem? Please describe a viable solution to correct the issue that you have identified.
Authorize Dependent Parents and Parents-in-Law the option to purchase TRICARE medical coverage. 1905

Receive email notifications when this issue is updated.

Privacy and Security

1. This AFWP Website is provided as a public service by the Family and Morale, Welfare and Recreation Command and the Department of Defense.
2. Information presented on the AFWP Website is considered public information and may be distributed or copied unless otherwise specified.

IMS Issue Submission Page for a Guest User

2.1 - Submit an Issue as a Registered User

Users who have created an AFWP Account for IMS or another AFWP system can utilize the full set of features available to IMS users. Learn more about registering for IMS and creating an AFWP Account in **Section 1.1 – Register for IMS**.

Note: An email will be sent automatically to notify the Program Manager **whenever an issue is submitted** for their community.

To **submit an issue** as a registered user:

4. Select **Log In** on the IMS Home Page, or from the top-right corner of any other IMS page.
5. Enter the **email address** and **password** of the AFWP Account associated with the user, and then select **Log In**.
6. After logging in, select **Submit Issue** from the left-hand Navigation Panel on any IMS page.

Note: A complete AFWP Profile is **required** to submit issues in IMS while logged in. Users who have not yet done so will be redirected to **complete their AFWP Profile**.

7. Enter the required information into each of the **following data fields**:
 - a. *Military Community, Issue Demographic, Issue Title, Statement of the Problem, Validation, Impact, and Recommended Action.*

Tip: To facilitate an appropriate and timely response, be sure to **read the description of each field carefully** and provide clear, thorough descriptions of the issue.

8. Check or uncheck **Receive email notifications when this issue is updated** to indicate if follow-up emails should be sent to the user's provided email address.

Note: Receive email notifications when this issue is updated" checkbox on the issue submission page in the only opportunity to opt-in to receive email notifications.

9. **Verify** that the information is accurate and then select **Submit**.
10. After the issue is submitted, select **View issue details** to review what was just submitted, or select **Copy issue** to create a second issue using the same information.

Tip: The **Copy issue** feature is helpful when multiple issues need to be submitted for similar reasons, or if more than one military community or demographic should receive the issue.

2.2 - Edit a Submitted Issue

Users who are not IMS Administrators will only be able to **edit an issue** before it is accepted by a garrison and no longer has an “Under Review” status. However, IMS Administrators do **not** have these same restrictions can always access certain issue fields.

To **edit an issue** submitted by the logged-in user:

1. After logging in, select **Dashboard** from the left-hand Navigation Panel on any IMS page.
2. **Locate the issue** to be edited in the My Issues table.
3. Select the **pencil icon**  to open the selected issue for editing.
4. **Add or modify** any of the information in the fields that are not grayed out.
5. Select **Save** to **confirm the changes** and complete the edit.

2.3 - Copy a Submitted Issue

Users may sometimes need to duplicate a submitted issue, such as when it should be submitted to more than one installation or community. IMS includes a **copy issue** feature that can make this process simpler and less time consuming.

To **copy** a submitted issue:

6. After logging in, select **Dashboard** from the left-hand Navigation Panel on any IMS page.
7. **Locate the issue** to be edited in the My Issues table.
8. Select the **copy icon**  to open a duplicate of the selected issue.
9. **Add or modify** any necessary information before submitting the copied issue.
10. Check or uncheck **Receive email notifications when this issue is updated** to indicate if follow-up emails should be sent to the user’s provided email address.

Note: “Receive email notifications when this issue is updated” checkbox on the issues submission page is the only opportunity to opt-in to receive email notifications.

11. **Verify** that the information is accurate and then select **Submit**.

2.4 - Delete a Submitted Issue

1. After logging in, select **Dashboard** from the left-hand Navigation Panel on any IMS page.

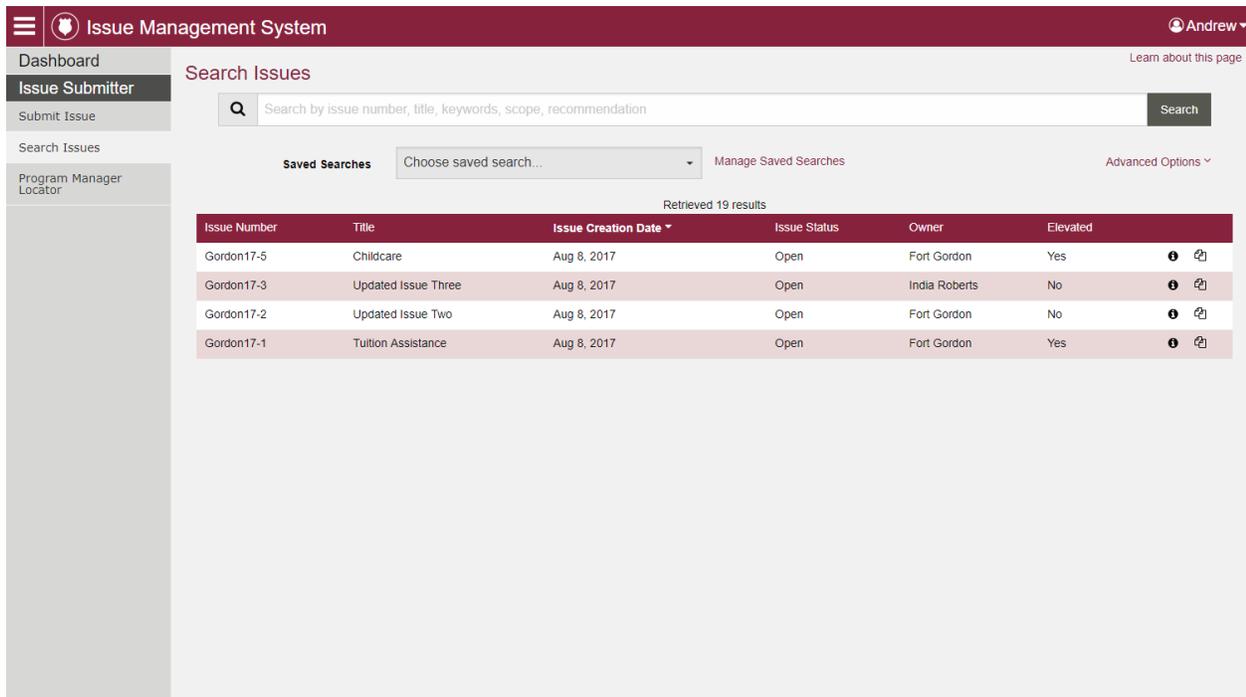
2. **Locate the issue** to be edited in the My Issues table.
3. Select the **pencil icon**  to open the selected issue for editing.
4. At the bottom of the page that appears, select **Delete Issue** and a confirmation prompt will appear.
5. Select **Delete Issue** on the prompt that appears to confirm the deletion.

Note: *In order to delete an issue, it must be in the “Under Review” status.*

3.0 - Search for Existing Issues

Issues that have already been submitted will appear in the **Search Issues** results page, which can be accessed by both Guests and registered users. Users are encouraged to **search for existing issues** before submitting new ones to ensure that no duplicate issues are found.

Note: Only issues that have been **accepted by a garrison** will appear in the search results, and accepted issues can be **viewed by anyone**.



The screenshot shows the 'Search Issues' page in the Issue Management System. The page has a dark red header with the system name and a user profile 'Andrew'. A left-hand navigation panel includes 'Dashboard', 'Issue Submitter', 'Submit Issue', 'Search Issues', and 'Program Manager Locator'. The main content area features a search bar with the placeholder text 'Search by issue number, title, keywords, scope, recommendation' and a 'Search' button. Below the search bar is a 'Saved Searches' section with a dropdown menu and a 'Manage Saved Searches' link. A table displays search results, indicating 'Retrieved 19 results'. The table has columns for 'Issue Number', 'Title', 'Issue Creation Date', 'Issue Status', 'Owner', and 'Elevated'. Four rows of results are visible:

Issue Number	Title	Issue Creation Date	Issue Status	Owner	Elevated
Gordon17-5	Childcare	Aug 8, 2017	Open	Fort Gordon	Yes
Gordon17-3	Updated Issue Three	Aug 8, 2017	Open	India Roberts	No
Gordon17-2	Updated Issue Two	Aug 8, 2017	Open	Fort Gordon	No
Gordon17-1	Tuition Assistance	Aug 8, 2017	Open	Fort Gordon	Yes

IMS

Search Issues page for a Registered User

3.1 - Perform an Issue Search

1. Select **Search Issue** from the left-hand Navigation Panel on any IMS page, either as a Guest or logged-in user.
2. Enter the **desired keywords** to search in the search bar at the top of the page.
3. To use more specific search criteria, select the **Advanced Options** link.
4. Enter any **advanced search criteria** among the following options:
 - b. *Military Community, Owner, Status, Elevated, From Date, and To Date.*

Note: While searching under the "Owner" category, it will only search the current owner not any previous owners.

5. Select **Search** to perform the search.
6. If any results are found, they will appear in the **search table** below.

Tip: Select the **Issue Creation Date column heading** to sort the search results by the order in which they were submitted to IMS.

3.2 - Save Search Criteria

IMS allows users to **save the criteria of a specific search** in order to quickly repeat this search without having to input the same parameters every time, such as military community, owner, status, etc. These personalized searches can be named for easy reference, as well as removed if they are no longer needed.

Note: Saving search criteria is a feature **only available to registered users** and cannot be utilized by Guests.

To **save a search's criteria** in IMS:

1. After logging in, select **Search Issue** from the left-hand Navigation Panel on any IMS page.
2. Select the **Advanced Options** link on the search page to expand the available filters and search options.
3. Select the **desired search criteria** among the following options:
 - c. *Keywords, Military Community, Owner, Status, Elevated, Category, From Date, and To Date.*
4. Select **Search** to populate the results .
5. Select **Save Search** once the desired criteria have been provided.
6. Select the **Saved Searches** drop-down to access the newly created saved search, as well as any previous saved searches created by the logged-in user.

Note: To delete a saved search, select the **Manage Saved Searches** link on the Search page of IMS, then select the **trash can icon**  to the right of the search to be deleted.

3.3 - Export Search Results

The **Export Search Results** feature allows the user to generate a CSV file containing the results of a specific search in IMS. This feature is **only available to registered users** and cannot be accessed by Guests.

To **export search results as a CSV**:

1. After logging in, select **Search** from the left-hand Navigation Panel on any IMS page.

2. **Perform a search** with or without advanced search options enabled.
3. After the results appear, select the **Advanced Options** link on the search page to expand the search options.
4. Select **Export Results** to download the **CSV file** to the user's local computer.

4.0 - Administrator Features

IMS Administrators have access to unique features in IMS to help manage its users and contents. These features will vary for different types of administrator roles and may be limited for individual IMS administrator accounts.

These administrator features include **managing issues, bulk issue importing, account permission management, and community management.**

4.1 - Administrator Roles

IMS Administrators are given permissions for different administrator features based on their specific roles. The different **IMS Administrator roles** include:

1. **Program Manager** – This role is often assigned to a Garrison-Level Program Manager and is able to bulk import issues and manage issues within their assigned community. Any role, including this one, is able to view open issues.
2. **Rollup Administrator** – This role is usually assigned to a Headquarters Program Manager and is able to bulk import issues and manage issues at any community where an issue has been elevated. This role can also assign elevated issues to a rollup community and further manage them.
3. **AFAP Administrator** – This role can access all of the administrator features in IMS, such as managing user permissions and the Military and Rollup Communities available throughout IMS. This role can also view all issues with an Under Review status.

4.1.1 - Add New Users

Additional administrators can be added to IMS from the Permissions page, as one or more of the following roles: **Program Manager, Rollup Administrator** and/or **AFAP Administrator**. Roles are assigned to one or more designated Military Communities when the user is added.

Note: *This feature cannot be used to add or update the roles of an existing user; changes to a user's role must be performed through the editing function instead (see **Section 4.5 – User Permissions**).*

To add a new Administrator user:

1. Select **Permissions** from the left-hand Navigation Panel while logged in as an Administrator.
2. Select **Add New User** in the upper-right corner of the page.
3. In the window that appears, enter the **email address** of the new user in Email field.

4. Provide the **User Role** and **Military Community** of the new user in the respective drop-down menus.
5. If the user requires **more than one role or community**, select **Add Role** at the bottom of the window to add an additional role.

Note: If an additional role or community is added by mistake, the role can be removed by selecting the **trash can icon**  to the right of the Military Community.

6. Once the required roles and communities are listed, select **Save** to **add the new user**. A confirmation email will be sent to the added user, but the user is **not required** to respond.

4.2 - Manage Existing Issues

Managing issues is an administrative feature that varies by each type of IMS Administrator role. If an administrator **cannot** manage specific issues or fields within an issue, additional permissions may be required. Contact an installation program manager for details.

The full list of **issue management features** includes:

1. Editing any information related to an issue.
2. Changing the status of an issue

Note: Inappropriately submitted issues should be **explicitly rejected** from the **“Under Review”** status in order to prevent them from being publicly seen/publicly searched. If it is changed to any other status, it will be visible in a public search.

3. Elevating or de-elevating an issue.
4. Contacting the original issue submitter for more information.
5. Adding an Information Paper to any issue.

Warning: If you are inactive on any attachments page on IMS (issue paper and elevation document), for 15 minutes or more and you try to click it or resume filling it in, you will get an error message. You will need to refresh the page and the 15 minute timer will be reset.

Note: Information papers can be **only** be uploaded into IMS as a **.doc or .docx file**.

Only the **most recent version** of the Information Paper can be downloaded from IMS, meaning the Information Paper **must be re-uploaded** if updates are required.

To **manage an existing issue**:

1. **Locate** a specific issue to be modified using a **Search** or on the **My Issues** section of the **Dashboard**.

2. Select the **pencil icon**  to the right of desired issue.
3. **Add or modify** the information in the available data fields, or select **Elevate** or **De-Elevate** at the bottom of the page.

Note: *If an issue is being Elevated or De-Elevated, a prompt will appear to make sure that all necessary prerequisites have been met for that issue before proceeding.*

Warning: *If you are inactive on any attachments page on IMS (issue paper and elevation document), for 15 minutes or more and you try to click it or resume filling it in, you will get an error message. You will need to refresh the page and the 15 minute timer will be reset.*

4. Select **Accept** to confirm and **save the changes**.

4.2.1 - Issue Elevation Guidelines

When it is required to Elevate or De-Elevate an issue that has been submitted, be sure to keep the following considerations in mind:

1. Issue criteria must first be met **before** an issue can be elevated.
2. A **checklist** will appear when attempting to Elevate an issue, ensuring that all prerequisites are met and considered.

Note: *Once uploaded, only Rollup Admins, AFAPs, and Program Managers (with responsibilities in the community to which the issue was submitted) can see this checklist.*

3. When an issue is de-elevated, any **attached documentation will not be removed automatically**; however, documentation can be removed manually.

Note: *Elevation Checklists can **only** be uploaded to IMS as a **PDF file**.*

4.2.2 - RollUp Communities

Rollup Communities are communities that **represent groupings of Military Communities**. They are intended to allow IMCOM directorates and HQ to be represented in IMS **without the hierarchical constraints** that other systems may use. If an issue goes through the normal lifecycle of IMS, **an issue will be submitted at a Military Community**, be accepted/opened at that military community, and **then be elevated up to a Rollup Community**, and lastly to the Rollup Community that represents IMCOM HQ. If you want to manage the Rollup Community options available, please refer to Section 4.4 Communities.

Note: *At any level an issue can be determined completed, rejected, and unattainable. Once one of these statuses is determined, the issue is no longer able to be elevated or de-elevated.*

Below are the steps that walk you through elevating, accepting, and rejecting issues at various administration levels throughout the system. Please follow the scenario which best fits your role and elevation/de-elevation objective.

▶ I am a **Military Community-Level Program Manager** and would like to **ELEVATE** an issue to a **Rollup Community**

1. Select the issue you would like to elevate.
2. Select elevate.

▶ I am a **Rollup Community Administrator** and would like to **ACCEPT** an issue into my **Rollup Community**

1. Search and Locate Issues that are owned by the Military Community of your interest and are elevated. You can set the dates and category to whatever you would like or you don't have to set them.

Note: The **status** for issues of your interest should be **OPEN**.

2. Select the issue you would like to accept.
3. Select Accept. A window will appear.
4. Select the Rollup Community that you would like to assign the issue into.
5. Make edits and add notes

Warning: Assigning the issue to the Rollup Community also **de-elevates** the issue.

Note: If you decide at a time you would like to push the issue back down to the Military community, you simply reassign the owner to the previous military community

▶ I am a **Rollup Community Administrator** and would like to **REJECT** an issue and return it to the **Military Community Level**

1. Search and Locate Issues that are owned by the Military Community of your interest and are elevated. You can set the dates and category to whatever you would like or you don't have to set them.

Note: The **status** for issues of your interest should be **OPEN**.

2. Make edits, add notes
3. De-elevate

▶ I am a **Rollup Community Administrator** and would like to **ELEVATE** an issue to a **HQ Rollup Community**

1. Select the issue you would like to elevate and select elevate.

► I am a **HQ Rollup Community Administrator** and would like to **ACCEPT** an issue into the **HQ Rollup Community**

1. Search and Locate Issues that are owned by the Rollup Community of your interest and are elevated. You can set the dates and category to whatever you would like or you don't have to set them.

Note: The **status** for issues of your interest should be **OPEN**.

2. Select the issue you would like to accept.
3. Select Accept. A window will appear.
4. Select the HQ Rollup Community that you would like to assign the issue into.
5. Make edits and add notes

Warning: Assigning the issue to the Rollup Community also **de-elevates** the issue.

Note: If you decide at a time you would like to push the issue back down to the Rollup community, you simply reassign the owner to the previous military community.

► I am a **HQ Rollup Community Administrator** and would like to **REJECT** an issue and return it to the **Rollup Community Level**.

1. Search and Locate Issues that are owned by the Rollup Community of your interest and are elevated. You can set the dates and category to whatever you would like or you don't have to set them.

Note: The **status** for issues of your interest should be **OPEN**.

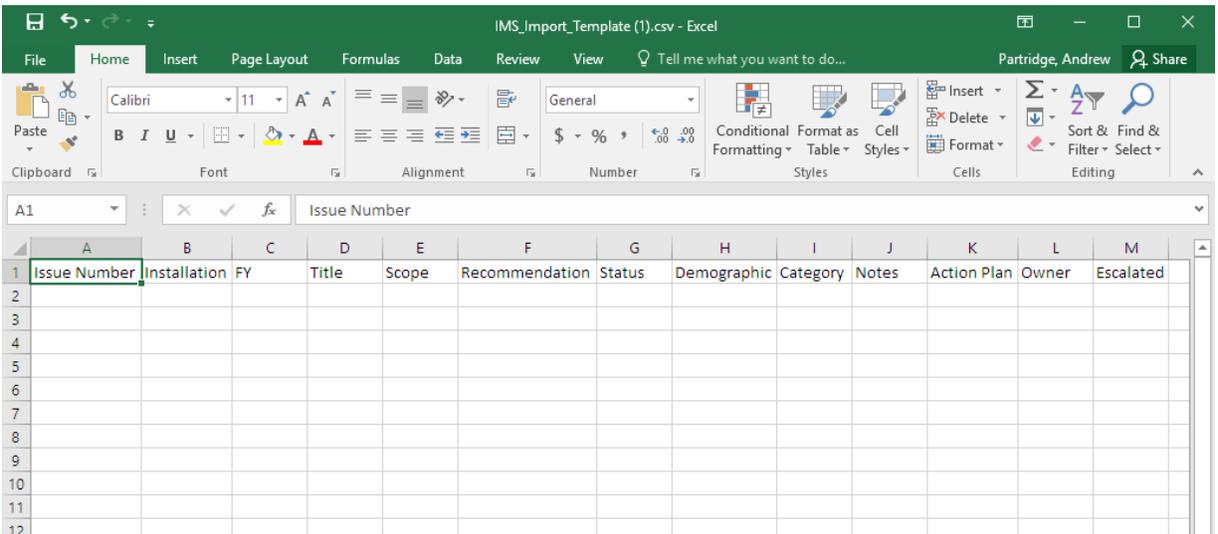
2. Make edits, add notes
3. De-elevate

4.3 - Bulk Issues Import

The **bulk issues import** feature makes it possible to import issues into IMS that have been recorded in a **CSV file**. Using this feature **requires a downloadable template** found on the Bulk Import page of IMS. **Duplicate issues will not be added** if they are imported into IMS.

Imported issues may include new issues being added to IMS, or updated versions of existing issues. The **elevation status of an issue cannot be changed** through bulk issue importing.

Warning: To ensure that the bulk import is completed successfully, be sure to **read the rules for bulk imports** link located on the Bulk Import page. If the results of a bulk issues import are unexpected or incorrect, **review the rules and try again**.



Blank Template for a Bulk Issues Import in Microsoft Excel

To perform a **bulk issue import**:

1. Select **Bulk Import** from the left-hand Navigation Panel while logged in as an IMS Administrator.
2. Select the **rules for bulk imports** link in the center of the page to review the criteria that are required to import a spreadsheet.
3. After reviewing the rules, select **Start Import** on the **Upload** page and choose the correct spreadsheet file to import.

Note: The bulk issue import **will fail** if the import template has been altered or if any other rules for bulk imports are not followed.

Also, if you import an issue into a past FY, the system will automatically date the issue as Jan. 1 of the past FY.

4. Select the **correct spreadsheet file to import** from the user's local computer directory. If the file is imported successfully, the issues will populate the **Preview** page.
5. Select the **specific issues to import** and then select **Import Issues** to complete the import.
6. Review the imported issues on the **Review** page.

4.4 - Communities

The **Communities** page contains two sections – **military communities** and **rollup communities** – and can only be accessed by AFAP Administrators. This page allows communities to be added or edited.

Keep the following in mind when modifying Communities:

6. Rollup Communities can be made **active** or **inactive**, and **only active communities** will appear within the Owner dropdown for a specific issue that the administrator is able to manage.

Note: *In the owner dropdown, the owner options are determined by your administrative role and approved responsibilities within that role.*

7. Military Communities can be made **active** or **inactive**, and **only active communities** will appear in the Community dropdowns for searching and submitting issues.
8. **Add a new Community** by selecting **Add Military Community** or selecting **Add Rollup Community** and providing the name and status of the Community.
9. Select the **pencil icon**  to the right of any listed Community to **modify an existing Community**.
10. Modifying the name of any Community will **change all instances of the Community name** throughout the IMS system.
11. Communities **should only be added** if there is a person in a role to manage issues at that community.
12. There are **no direct relationships or hierarchies** between military communities and rollup communities.
13. Communities **cannot be deleted** once there is any data affiliated with it.

4.5 - User Permissions

The Permissions page can only be accessed by AFAP Administrators and allows **user permissions to be added or removed** on a per-person basis.

Note: *For more information about each of the permissions available to a AFAP Administrator, refer to **Section 4.1 – Administrator Roles**.*

To **modify a user's permissions**:

1. Select **Permissions** from the left-hand Navigation Panel while logged in as a Permissions Administrator.
2. Locate the user with the **Search fields** at the top of the **Permissions** page and then select **Search**.

Note: *For a user to show up on this page, the user must first have an IMS account and have signed in to the IMS system.*

3. Select the **pencil icon**  to the right of the user's name to open the **User Roles** window.

4. Select **Add Roles** to modify which user roles are associated with the selected user.
5. Select **Save Roles** to confirm the permissions change. The newly added role(s) will now appear next to the user's name on the **Permissions** page.