DEPARTMENT OF THE ARMY – CIO/G-6

Information Technology Approval System (ITAS)

Desk Side Reference
User Manual

Version 1.0
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SECTION 1: INFORMATION TECHNOLOGY APPROVAL SYSTEM INTRODUCTION & PURPOSE

The Army requires an IT Waiver to purchase non-standard IT as well as several other scenarios dictated by Army and DoD waiver policy. The IT Waiver Approval System will address four types of waivers:

- IT hardware and software purchases outside of Computer Hardware Enterprise Software and Solutions (CHESS).
- IT hardware and software purchases using operational tempo (OPTEMPO) funds.
- Wireless purchases outside the NexGen Wireless Blanket Purchase Agreement (BPA).
- All Data Center IT purchases (hardware, software and services) both within CHESS and outside of CHESS

ITAS (formerly Goal 1 Waiver) is being created to re-engineer the process for obtaining an IT Waiver into a more transparent, efficient and effective process that enables improved management of IT inventory to better inform users involved in the budget process.

Purpose of the ITAS System

The ITAS will have the following operational improvements to manage waivers for the Army:

- Provide a more efficient and effective workflow to resolve stakeholder and CIO/G-6 process owner challenges
  - Standardized roles and responsibilities
  - Create a standardized workflow review and approval process
  - Increased transparency of the IT Waiver request throughout the approval lifecycle
  - Support financial traceability and auditability by incorporating APMS and eProbe data
  - Detailed training manuals and roles and responsibilities checklists
- Provide IT Inventory Analysis reporting
  - Enable IT costs savings by identifying software licenses purchased by multiple organizations that may be available as an Enterprise license
  - Enable better tracking of IT inventory life cycle costs
  - IT Waivers require validated requirements, an authoritative APMS record identifier and available resources (resources described by the Key4 levels of detail APPN, MDEP, CMD and APE)
  - Inform required IT inventory that should be added to CHESS by identifying frequently requested hardware and software that should be available on CHESS as standard Army IT

What is ITAS Used For:
- IT hardware and software purchases outside of Computer Hardware Enterprise Software and Solutions (CHESS).
- IT hardware and software purchases using operational tempo (OPTEMPO) funds.
- Wireless purchases outside the NexGen Wireless Blanket Purchase Agreement (BPA).
- All Data Center IT purchases (hardware, software and services) both within CHESS and outside of CHESS

SECTION 2: GENERAL INFORMATION

ITAS Resource Center and Portal Page

The primary source to obtain information on ITAS is the ITAS Home Page (link below). The Home Page provides links to the training manuals, Admin, Analyst, and System Owner Reports, Policy and Guidance Documentation, system outage messages and links to the various Modules.

ITAS PORTAL HOME PAGE LINK
https://www.eprobe.army.mil/enterprise-portal/web/itas/home

What You Will See When You Access the Portal Page

The screen below details the various elements of the ITAS portal page. From here, you'll be able to navigate to any of the various modules, be alerted to upcoming scheduled system outages, access help desk and training information, and access to user role management (Admin's).
NOTE: The exact layout of the ITAS Home Page will vary from the one depicted below.

ITAS Portal Landing Page

Login to ITAS

The ITAS Production Application can be accessed from the ITAS Home Page at
https://www.eprobe.army.mil/enterprise-portal/web/itas/home

A CAC card is **REQUIRED** to access the system.

ITAS Modules

ITAS is a tool which comprises the following modules:

- Data Entry Module – Includes initial data entry of the waiver submission form

- Workflow Module – Includes the workflow process once the initial waiver form has been completed and submitted. Includes all reviews, approvals, and disapprovals.

- Reporting Module – use of the Oracle Business Intelligence – Enterprise Edition reporting tool

- User Role Management – approving new user accounts and assigning roles

ITAS Desk Side Reference Manual:

This desk side reference consists of several sections. The first section includes the introduction and purpose of the IT Approval System. The second section includes detailed discussions for each of the 3 modules. The third section includes Administrator functions in ITAS as well as any other miscellaneous topics.

This manual provides the ITAS Community with a desk side, quick reference guide to accessing and managing the data associated with IT Waivers.

The Data Entry Module – The data entry module deals with the initial completion of the waiver form.

The Workflow Module – An explanation and training on the Workflow functionality. While more geared to Administrators, it is included for both situational awareness and knowledge, as well as actions administrators will be required to perform.

The Reporting Module – Reports provide an interactive means to analyze IT Waivers. Both Standard and Ad Hoc Reports are available. A separate user guide is available which explains the functionality of the Oracle Business Intelligence – Enterprise Edition Reporting Tool.

User Role Management – Explanation for Administrators responsible for approving new user accounts and assigning users with additional roles within their SubOrg or Command

ITAS Definitions:

Information Technology Approval System

Security: With the exception of specific resource and financial information, all ITAS users have the ability to see ALL waivers across the Army. Edit and approval/disapproval rights are established according to your roles and the Command/SubOrg User Group(s) of which you are a member.

User Groups: Groups with security defined to allow users read, create, and edit rights. Users added to a specific User Group will inherit the security permission from that group.

User Groups, Permissions & Roles

The table below defines each user group and its user access to the different ITAS objects and data.

User Group	Reporting Module	Workflow Module	Assigning of Permissions	Permissions Assigned by:
ITAS Base User	Read	Read	None	**Default Role upon account creation**
ITAS Submitter	Read	Create & Edit their waiver (if returned for comments)	None	**Default Role upon account creation**
SubOrg G-6 Admin	Read	Read, Approve and Return within their SubOrg	Assign SubOrg G-8 and SubOrg Analyst	Command Admin
SubOrg G-8 Reviewer	Read	Read, Edit Waiver Funding	None	Command Admin
SubOrg Analyst	Read	Read	None	Command Admin
Command G-6 Admin	Read	Read, Approve and Reject within their Command	Assign Command G-8, IA Reviewer, Analyst, and IT Waiver Lead Approver	HQDA CIO/G-6 Admin
Command G-8 Admin	Read	Read, Edit Waiver Funding	None	Command Admin
Command IA Reviewer	Read	Approve & Reject within their Command	None	Command Admin
Command IT Waiver Lead Approver	Read	Approve & Reject within their Command	None	Command Admin
Command Analyst	Read	Read	None	Command Admin
NETCOM Reviewer (Conditional Review)	Read	Recommend Approve & Reject	None	HQDA CIO/G-6 Admin
2nd Army Reviewer (Conditional Review)	Read	Recommend Approve & Reject	None	HQDA CIO/G-6 Admin
HQDA G-3/5/7 OPTEMPO Reviewer (Conditional Review)	Read	Recommend Approve & Reject	None	HQDA CIO/G-6 Admin
EIEMA Domain Reviewer (Conditional Review)	Read	Read, Approve and Reject within their Domain	None	HQDA CIO/G-6 Admin
EIEMA Domain Analyst	Read	Read	None	HQDA CIO/G-6 Admin

HQDA CIO ADCCP Reviewer (Conditional Review)	Read	Read, Approve and Reject Data Center Waivers	None	HQDA CIO/G-6 Admin
HQDA CIO Admin	Read	Read, Approve and Reject	Ability to assign all roles	HQDA CIO/G-6 Admin
HQDA CIO IT Waiver Lead Approver (Conditional Review)	Read	Read, Approve and Reject	None	HQDA CIO/G-6 Admin

SECTION 3: NEW USER ACCOUNT REGISTRATION & ACCOUNT MANAGEMENT

New User Account Registration – <u>No</u> PPB BOS or APMS Account

When a user accesses the portal page and clicks the ITAS application, if there is no active user role, the user will be redirected to the user role management to register for an account. Use the link below to be redirected to the ITAS registration page.

https://www.eprobe.army.mil

The available dropdown selections are PPB BOS and ITAS. The user shall pick "ITAS" from the "Please select a system your require access to". NOTE: Registering for a PPB BOS account is a separate process managed by and requiring the approval of the G-8 PPB BOS Administrator.

The main registration screen will be displayed to the user. The user's EDIPI ID, First Name, Last Name will be pulled from CAC card automatically and as read only fields. The user will need to fill out all required fields and submit the registration request.

All fields with asterisks (*) in front are mandatory. The Command and SubOrg are the user's home Command and SubOrg. Once the user is registered, the ITAS user can submit waivers for other commands and SubOrgs. By default, all registered users will be granted with the "ITAS Base User" and ITAS Submitter" roles which allow the user to access portal page, submit ITAS waivers and view reports. If additional roles are required, the user can specify the roles in "Add Additional Applications/Role" section, or the user can request any additional roles at a later time after the account is registered. The following are the sample user account registration for smith.j.amy.1290340000 (PKI ID read in through CAC).

Upon clicking the "Submit", the following confirmation message will be displayed and the registration request will be sent to the higher level admin – SubOrg G-6 Technical Reviewer and Command Admin for the home Command and SubOrg the user specified in the registration form. Once the admin users approve the account registration, the user will be notified through email.

If the ITAS user goes back to the URM system prior to his account is approved and registered, the following page will be displayed.

Once the user account is approved, when the ITAS user goes to URM system, the following page will be displayed. The account status is "Active" with the expiration date. By default, the following user roles will be granted to a new ITAS user: ITAS Site-Member – allows the new user to access ITAS Home Page; ITAS Base User and ITAS Submitter – allows the new user to access the ITAS application to create new waivers and view existing waivers as well as view access to reports.

If additional user roles were requested during the user registration, after the user account is created, the administrators can approve the requested user roles. Once the user account is created, the ITAS user can request additional users in the "My Account" page. The ITAS user can select a layer from "Request Additional Applications / Role" section; a new window will pop up with all the roles available for the selected value. The ITAS user can follow the instruction and select the required user roles.

Upon clicking "OK", the requested roles will be display and the user can make changes by canceling the request, or submit it for approval. The email notification will be sent to the administrators for approval.

New User Account Registration – <u>With</u> an existing PPB BOS or APMS Account

If the logged in user is an existing PPBBOS or APMS user, the user's account is established in the URM system. ITAS account registration shall be required in order to gain the access to ITAS. The following figures describe the steps to request the ITAS account and user roles. Navigate to the APMS Home Page below and click on the "Assign Roles" link.

https://www.eprobe.army.mil/enterprise-portal/web/apms/home

The URM "My Account" page contains the logged in user's profile information and the options to request the ITAS access. The logged in user can click "Register for ITAS" to access the ITAS user account registration form.

As the user is an existing URM user, the profile information will be pulled and shown as read only. Two mandatory fields shall be filled in for ITAS account registration – Command and Sub Org. The user shall

select the home command and Sub Org. Once submitted, the SubOrg G-6 Technical Reviewer and Command admin will be notified and can go to URM system to review and approve the account. The user can request additional roles through "Add Additional Applications/ Roles" section, or leave it blank and request the additional roles at a later time.

Upon submitting, the confirmation page will be displayed as below. The SubOrg G-6 Technical Reviewer, Command Admin for the requested SubOrg and Command will be notified and can provide the approval. The user will be notified once the account is approved.

New ITAS Portal User

Your request for an ITAS account has been successfully submitted.

An email will be sent to you shortly to confirm your email address. Please access the link in the message so your email address can be verified.

You will receive an email upon approval of your request or when additional information is needed to process your request.

Eligibility: Headquarters Department of Army personnel and subordinate commands, to include other DoD Departments, involved in the PPBE process.

If the ITAS goes back to the URM system prior to his account is approved and registered, the following page will be displayed with the message "The request for this ITAS account has been submitted and is pending approval."
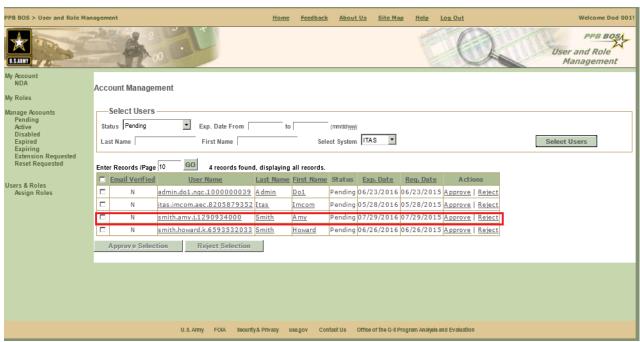
Once the ITAS account is approved by an administrator (admin approval steps are described in the following section), the user shall be notified through email and can login to ITAS system. When the user goes to URM system, the "My Account" page will be displayed by default.

For an ITAS account without additional roles requested, the following ITAS user roles will be granted by default:
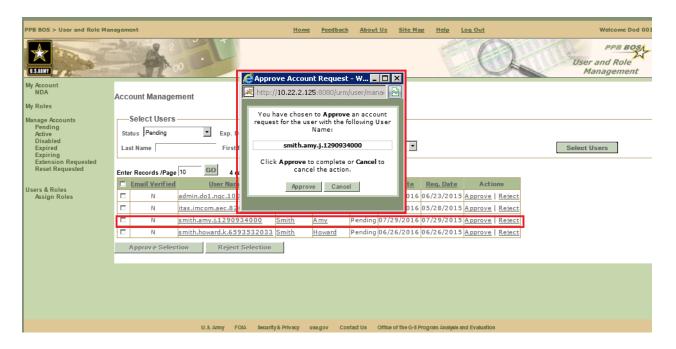
- ITAS Site-Member – allow the new user to access PPB BOS Portal Site
- ITAS Base user, ITAS Submitter – allows the new user to access ITAS application to create new waivers and view existing waivers
- ITAS User – allows the new user to access ITAS Reports

Administrator Approval for New User Accounts

ITAS Administrators at the SubOrg, Command and HQDA CIO levels log into URM system, the default display is the "Account Management" Page. The Administrator can view all the pending requests. The smith.j.amry.129034000 request is one of pending requests that shall be approved. The ITAS Administrators can check the checkbox and either click "Approve Selection" to approve the registration, or click "Reject Selection" to reject the registration. All approved or rejected requests will be removed from the display.
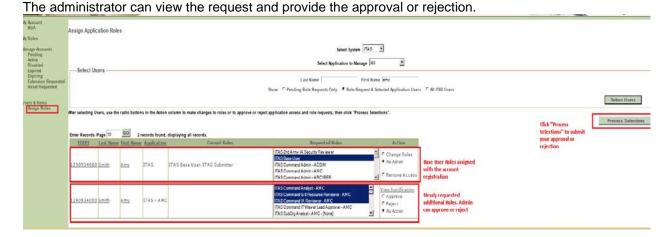

Once "Approve" is clicked, the confirmation page will pop up and email notification will be sent to the requester when the account registration is approved or rejected.

Assigning Additional User Roles

The administrators will have the ability to "Assign Roles" at the left navigation panel and can click to access the "Assign Roles" page. ITAS user roles are divided to 2 layers. The first layer is labeled as "ITAS". All the Base User, Submitter, HQDA CIO Level, Command Admin Level roles are under this "ITAS" layer. The second layer is labeled as "ITAS – <Command>", for example, "ITAS – AMC", "ITAS – ASA (ALT)" etc. All the Command level roles except for Command Admin roles and all SubOrg Level roles are under this Command layer.

The Command Admin can assign other Command Level roles as well as the SubOrg level roles. The HQDA CIO Admin can assign roles at all levels.

The administrator can view the request and provide the approval or rejection.

Account Management (Reset, Disable, Extend Expiration)

After creation, all accounts will be active for 12 months. The administrators will be notified when an account is expiring. The Administrator will be notified via email 45 days before the account expiration,

then at 30 days, 15 days, and a final reminder at 5 days. On the night of the account expiration date, the account will be reset to "Expired" and the user will lose the access to the ITAS system. The administrators can disable an existing account, reset, extend the "Expiring" and "Expired" accounts.

SECTION 4: GENERAL LAYOUT & DISPLAY

- ITAS tool Home Page View Menu allows users to:
  - o Hide or display ITAS logo
  - o Create, Save or delete customized layouts
  - o Manage display columns (add, remove columns)
  - o Sort columns with preferred orders
  - o Reorder Columns
- ITAS users can open new waivers, updating pending waivers, and access/manage waivers in the workflow.

ITAS Logo

- Allows the user to hide the top ITAS Logo. When the ITAS Logo is unchecked, ITAS logo will be hidden allowing for additional screen display.

Layouts

- Allows the user to save or update any desired layout for future uses.
- A user can save multiple different layouts for different views.

Manage Display Columns

- Allows the user to manage columns (add or remove the desired column for display)

- Once the "Manage Column" is clicked, the user can manage columns to display or hide any columns desired

Detach

- Detaches the top section in the pop-up page for a better view

Sort

- Provides the ability to perform advanced sorting when the users want to sort the waiver by associating multiple columns (up to 3 columns) with the desired cascading order.

Reorder Columns

- Allows the user to reorder the displayed column to a preferred order

Refresh

- Allows the user to refresh current view

Topic & Status

- Presents the user with the default view to show any waiver assigned to the user and group

- Default selection is "My Group Tasks" which will display all waivers in which you are a member of
- Allows the user to change the topic to view any waiver or other topic type
- TIP: How do I see the status of any waiver? Click the Topic dropdown and select the "All Tasks" option. Utilize the "Search" field to find the exact waiver.
- Present the waiver by the state, default set to "Open"
- Allows the user to change the state to view any or other waiver status

Information Buttons

- The blue "i" icon buttons found throughout ITAS provide additional information for the data element

Search

- Allows the user to search a waiver based on waiver title, waiver title partial name, waiver id etc.

SECTION 5: CREATING A NEW WAIVER

Understanding Linkages to APMS

- Waivers are submitted against an open registered item in APMS
- Basic system information is retrieved for the item from APMS
- Financial and Resource linkage
    - o Retrieve APMS Budgeted funding for each ITAS Waiver
        - Key-4 combination
        - OSDPE (Office, Secretary of Defense Program Element)
        - Treasury Code
        - Validate ITAS funding against APMS budgeted funding
    - o Retrieve Data Center Information from APMS. Waivers submitted for a Data Center Record in APMS will automatically invoke a data center review by the HQDA CIO Admin
    - o Retrieve Internet Protocol Version 6 (IPV6) Compliance Information from APMS

How do I Create a New Waiver

In order to create a new waiver, click the "Create New Waiver" button on the main toolbar, a new Waiver ID will be assigned and new waiver form will be displayed at the lower section for user to enter their data.

Navigation Tree

Cloning a Waiver

Step 1: Locate the existing waiver that you want to clone

Step 2: Click on the Clone button.

A confirmation dialog will be displayed along with the new waiver id.

Information Technology Approval System

The new cloned waiver will have most of the data prefilled. The Subject will have the word "CLONE – "prepended. Customer Required by Date field will be blanked out. The Documents section will also be empty.

NOTE: It is not possible to clone a waiver associated with an APMS item that has been deleted.

Printing a Waiver

In order to print a waiver, click on the Print button to export the waiver in PDF format. Depending on the browser used, a dialog box similar to the one below will be displayed prompting the user to save or open the PDF file.

Policy Compliance Form

- Stoplight indicators are displayed to assist the user identify complete, partially complete and incomplete fields and forms.
    - o Green – Entire Waiver Form or individual data element is complete
    - o Yellow – Waiver Form is partially complete
    - o Red – Waiver Form or individual data element is missing or incomplete
- The left navigation tree will present the form completion status
    - o Green means the form is complete (all mandatory fields are entered)

- o Yellow means the form is partial completed
- o Red means no data is entered in the form
- By default, there are 4 questions will be asked. If the ITAS user answers any of these four questions with a "Yes", the message on the screen "An ITAS Waiver is not required" will be displayed.
- The light next the field indicates if the field is a mandatory field. Once data is entered and form is saved, the light will turn green.
- The field fly-over message will be displayed when the user moves the mouse over this field and the message will provide the guidance.

NOTE: The initial four Policy Compliance questions will determine if a waiver is required.

▽ Waiver Forms (20150629137346)
  ● Policy Compliance

Policy Compliance

Are you renewing software licenses not for a data center previously procured through CHESS?	●
Are you procuring an IT Service Contract?	●
Is this a USMA procurement in support of the academic and cadet development mission? (6 June 2013 COTS-IT outside CHESS Memo)	●
Is this procurement for a Non-PEO/PM manager MIP system? (6 June 2013 COTS-IT outside CHESS Memo)	●

Save

- Based on the responses to the initial questions above, other policy compliance questions will be prompted (see below).
- The purpose of the questions below will trigger the corresponding workflow step(s) and the type of waiver.

▽ Waiver Forms (20150629137346)
  ● Policy Compliance

Policy Compliance

Are you renewing software licenses not for a data center previously procured through CHESS?	No	●
Are you procuring an IT Service Contract?	No	●
Is this a USMA procurement in support of the academic and cadet development mission? (6 June 2013 COTS-IT outside CHESS Memo)	No	●
Is this procurement for a Non-PEO/PM manager MIP system? (6 June 2013 COTS-IT outside CHESS Memo)	No	●
Will the procurements be through CHESS?		●
Will the items being procurement be hosted or reside in a data center?		●
Will the item be a wireless procurement?		●
Are you procuring COTS-IT life cycle replacement using OPTEMPO (mission) or OCO funding?		●
Is the item on the DOD Unified Capabilities Approved Products List (UC APL)?		●
Does this IT Purchase Support a MARS system?		●

Save

- The NextGen BPA question is prompted only the wireless question is answered with a "Yes"
- Once the Policy Compliance form is completed and the user saves the form, the indicator on the left navigation tree light will be green.

APMS Information Form

The APMS Information Form is where the submitter associates the waiver against a registered investment in APMS.

- IMPORTANT NOTES
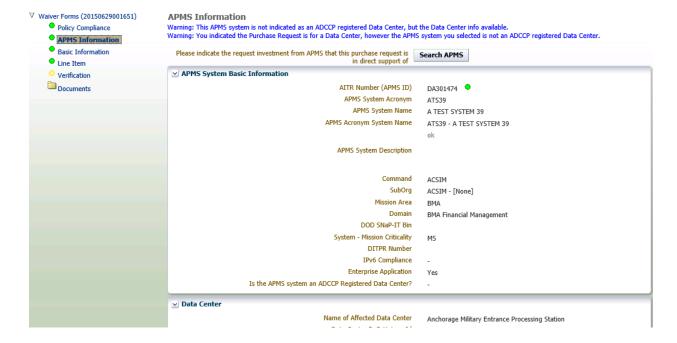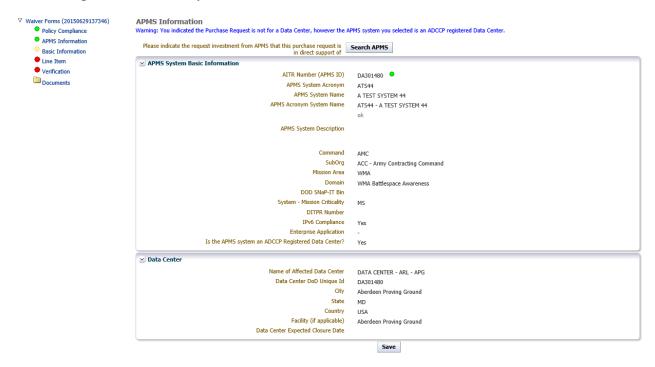 o It is not possible to select an APMS item that has been initiated for deletion or for any type of transfer request
  o It is not possible to initiate a deletion request for an APMS investment that has an open waiver against it
  o A confirmation check to ensure the selected AITR # is valid and accurate will be performed by either the SubOrg Admin or the Command Admin during the workflow process. If it is not valid and accurate, the waiver will be returned to the submitter
  o Only one APMS system can be selected for the waiver. If more APMS system shall be associated, a separate waiver shall be requested.
  o APMS investments are tagged as being a Data Center. Messages will be displayed if there are inconsistencies with responses to the Data Center question on the Policy Compliance Form.

- There are a variety of ways to search for the appropriate APMS investment
- The search page will be popup to show the search criteria
- After the APMS item has been selected and the user confirms and saves, the General Information from APMS will be auto-populated into the ITAS waiver which prevents duplicative data entry.

Basic Information Form

- This Form is where the submitter completes general information about the waiver such as the Subject, Justification, and Priority.
- The Waiver Type is derived based on the responses in the "Policy Compliance" Form. The table below displays the logic to derive the various waiver types

The Priority Level will be set based on the entered date and the following rules:

Customer Requested By Date	Priority Level
Within 7 calendar days of waiver submission date	Critical Work Stoppage
8 calendar days to 14 days of waiver submission date	Urgent
15 calendar days to 30 days of waiver submission date	High
Greater than 30 calendar days from waiver submission date	Routine

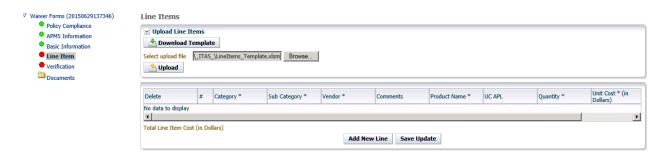| Will the procurements be through CHESS?	Will the items being procurement be hosted or reside in a data center?	Will the item is a wireless procurement?	Are you procuring COTS-IT life cycle replacement using OPTEMPO (mission) or OCO funding?	Outcome (which value shall be checked on Waiver Type field)
No	No	No	No	Outside CHESS
No	No	No	Yes	Outside CHESS
No	No	Yes	No	Outside CHESS
No	No	Yes	Yes	Outside CHESS
No	Yes	No	No	Outside CHESS Outside CHESS - Data Center
No	Yes	No	Yes	Outside CHESS Outside CHESS - Data Center
No	Yes	Yes	No	Outside CHESS Outside CHESS - Data Center
No	Yes	Yes	Yes	Outside CHESS Outside CHESS - Data Center
Yes	No	No	No	No Waiver is required
Yes	No	No	Yes	Inside CHESS - OPTEMPO
Yes	No	Yes	No	Inside CHESS - Wireless
Yes	No	Yes	Yes	Inside CHESS - OPTEMPO Inside CHESS - Wireless
Yes	Yes	No	No	Inside CHESS - Data Center
Yes	Yes	No	Yes	Inside CHESS - OPTEMPO Inside CHESS - Data Center
Yes	Yes	Yes	No	Inside CHESS - Wireless Inside CHESS - Data Center
Yes	Yes	Yes	Yes	Inside CHESS - OPTEMPO Inside CHESS - Wireless Inside CHESS - Data Center

Line Item Form

Users will be able to edit their waiver's Line Item before submission or if it's returned for adjustment.

Click on Line Item to enter line items data.
To enter line items offline using an excel file, download the template using the "Download Template" and enter the line items there.
To upload the line items, click on the "Browse" button and select the excel file.

To upload the line items, click on the "Browse" button and select the excel file.

To add a new line item, click on the "Add New Line" button

The Sub Category dropdown list changes based on the Category selection

Vendor and Product Name can be entered manually or select from dropdown.

Since the Vendor and the Product Name list is too long, click the "Search…" button at the end of the dropdown to search for a value.

To narrow down the list, enter value in the "Product Name" and click the "Search" button to search.

Double click on an item to select the value, or click on the item and click the "OK" button.

The Product Name dropdown list will change based on Vendor value.

After select/type in a Vendor, the Product Name will show products related to that Vendor. If the Vendor does not have any product, the whole Product Name list will be shown.

For example, select "Dell" in the Vendor List, and then click on the Product Name dropdown. The dropdown will only show Product related to "Dell" vendor.

To mark a line item for deletion, check the checkbox in the "Delete" column.

Click on the "Save Update" button to save all line items changes and remove line items that are marked to delete.

The application will check if a line item's vendor and product name is in the UC APL list and will mark that line with a "Yes" in the "UC APL" column.

The application will also check for completeness of a line item and will display the error message if it found an incomplete line item.

The Total Line Item will be re-calculated.

Verification Form

- Allow the ITAS user to enter the verification information

Document Upload Form

Users will be able to edit their waiver's supporting documents before submission or if it's returned for adjustment.

Users will be able to edit their waiver's Documents before submission or if it's returned for adjustment.
To upload a document, select the document type from the "Document Type" dropdown.
If the document type is not one of the listed, select "Other" and enter a description of the document type in the field "Purpose, if Other is chosen above".

If no purpose was entered for "Other" Document Type, an error message will be displayed.

Click the "Browse" button to select a file. The file must be less than 5MB in size.

Click the "Upload" button to begin the upload process. Once the file is uploaded and is less than 5MB, the file will be listed in the table.

If the file is larger than 5MB, an error will be displayed.

To download the uploaded document, click on the download icon in the "Download" column. To delete the uploaded document, click on the delete icon in the "Delete" column. A confirmation dialog will be displayed to confirm the deletion.

SECTION 6: WORKFLOW

The ITAS workflow is a standard and repeatable process and is dependent based on the responses to the Policy Compliance Form, type of waiver and the items being purchased. At each review step, there is a standard list of checks and validations to be performed before moving forward in the process. Additionally, there are built in feedback loops for rejected or returned waivers as well as a Command-level approval process for certain categories of items purchased. The figure below depicts the entire potential review process, however, all items will not have to be reviewed and approved by each of the parties below (e.g. the G-3/5/7 Review is only invoked if the purchase contains OPTEMPO funding).

Activities and mandatory reviews at each step in the process are detailed in the individual sections below.

General Information

Click on the Claim button to claim the waiver so the Admin can begin their review/approval process.

After the waiver is claimed, an Admin can change their mind and click on the Unclaim button to release the waiver so another Admin in their group can claim and take action.

ITAS Workflow

SubOrg Workflow Diagram

SubOrg G-6 Reviews & Mandatory Checklists

This is the SubOrg review form for SubOrg G-6 technical reviewer and SubOrg G-8 resource reviewer to validate and take action on a waiver. SubOrg G-6 technical reviewer will claim the request first. Once the request is claimed, SubOrg G-6 Technical Reviewer can go through the checklist, and provide the recommendation for approval, rejection and returning the waiver to the previous user for information. Upon clicking submit, the request will be sent to SubOrg G-8 Resource Reviewer.

Above and below, the SubOrg G-6 selects the item to act on and clicks "Claim" to lock the record.

After an administrator claims the waiver request, the "Acquired By" column in the inbox will display the user's PKI ID displayed below.

"Unclaim" a waiver request for workflow review

The "Unclaim" function allows the locked waiver be released from the current acquirer, so an administrator at the same level can then claim and own the waiver. To "Unclaim" a waiver, the administrator who acquired this waiver (or other administrators at the same or higher level) can click the "Unclaim" button in the Summary page displayed below. The review form will be released for others to claim.

SubOrg Reviews

When a waiver is submitted to the workflow, ITAS system will examine if a SubOrg exists for the APMS system that the waiver is associated with. If the waiver is associated with an APMS system under a valid SubOrg, the ITAS SubOrg review will be triggered as the first workflow process step. If the waiver is associated with an APMS system under a "[None]" SubOrg, this step will be skipped.

For example, if a waiver is submitted for an APMS system under AMC – [None], the waiver will be sent to AMC Command directly; if a waiver is submitted for an APMS system under "AMC – ACC – Army Contracting Command", the wavier will be sent to administrator of "AMC – ACC – Army Contracting Command" SubOrg.

Screen shot above displays the item with an associated SubOrg being processes for SubOrg review. The screen shot below, depicts an item skipping the SubOrg step.

SubOrg G-6 Technical Review

The ITAS SubOrg G-6 Technical Reviewer can click on the "SubOrg G-6 Technical Review" from the left navigation panel to begin the SubOrg G-6 Technical Review Process. The ITAS SubOrg G-6 Technical Reviewer must first claim the waiver for reviewing.

Upon clicking the "Claim", the SubOrg G-6 Technical Review form becomes editable displayed below.

The first question for SubOrg G-6 Technical Reviewer is to validate if the APMS AITR Number is valid and accurate. Once the SubOrg G-6 Technical Reviewer selects "Yes", the following questions will be rendered and prompted for answers.

SubOrg G-6 Technical Review can either recommend approval which will move the waiver to the next level admin, or reject the waiver which will reject and permanently close the waiver, or return the waiver to the submitter for adjustments. When a waiver is returned to the submitter, the submitter will be notified through email and can claim the wavier for modification.

With the SubOrg G-6 Technical Reviewer's approval submission, the workflow will move the waiver to the SubOrg G-8 Resource Review and the light indicator next to "SubOrg G-6 Technical Review" at the left navigation panel will turn green.

SubOrg G-8 Reviews & Applying Funding

This step in the process is where resources are assigned to the waiver request. The SubOrg G-8 Resource Reviewer will be notified through email when the item is in their queue and can claim the request.

SubOrg G-8 Resource Review Form contains the following sections:

Line Items

- o This line items table is read only and line items data is copied from Line Item Form

Funding Data in APMS for an AITR Number (in Dollars)

- o This funding data table is read only and funding data is copied from APMS system
- o The AITR Number will be shown for a reference

ITAS G-8 Entered Funding Data

- o This G-8 Entered Funding Data table is editable once the wavier is claimed by G-8
- o G-8 Resource Reviewer can allocate the APMS funding for the ITAS line items

Review Section

- o Allows G-8 Resource Reviewers to approve, reject or return the waiver to the submitter
- o Allow G-8 Resource Reviewer to enter comments if any

First, the SubOrg G-8 Resource Reviewer should "Claim" the item so the form becomes editable as displayed above and below.

After assigning resources, the SubOrg G-8 Resource Review can recommend approval which will move the waiver to the next level admin, or if there are issues, they can reject the waiver

which will permanently close the waiver, or return the waiver to the submitter for adjustments. When a waiver is returned to the submitter, the submitter will be notified through email and can make any adjustments. When the SubOrg G-8 Resource Review assigns the resources and there are no issues or errors, they can click "Submit" to move the waiver to the next level review, or save the current changes by clicking "Save Changes" then go back at a later time to submit the waiver.

Once the SubOrg G-8 Resource Technical Reviewer submits the approval, the workflow will move the waiver to the Command Review step and the light indicator next to "SubOrg G-8 Resource Review" at the left navigation panel will turn green.

SubOrg G-8 Entered Funding Data

The "ITAS G-8 Entered Funding Data" can be edited by SubOrg G-8 Resource Reviewers and Command G-8 Resource Reviewers. The G-8 Resource Reviewer can

- Add New Line – Enter a new funding line

- Delete Selections – Deleted existing funding line(s) and reset to the system default

- Apply Funding Selections – Apply the same Key-4 funding to all or selected lines

- Save Funding Info – Save the funding data and trigger the system validation

By default, the "G-8 Entered Funding data" will show the same number of funding lines that match to lines in the "Line Items" table. If additional lines are required, G-8 Resource Reviewer can click "Add New Line" to add a new funding line.

Note: Column "CI" (Commitment ID) is derived based on the category and subcategory in each Line Item.

Depending on the number of items in the waiver and the various funding sources identified in APMS, the G-8 Resource Reviewer will have a variety of methods to associate funding to the waiver. Also, depending on the type of funding appropriation, they can use multi-year funding from APMS.

As displayed below, there are four main sections to the G-8 Resource Review Form:
1) The Submitter Waiver Request Section
2) The available resource funding pulled and read-only from APMS
3) The G-8 reviewer resource funding allocation section
4) The G-8 waiver recommendation section

As displayed below, the G-8 can allocate an entire line item from the waiver to an entry from APMS.

IMPORTANT NOTE: It is only possible to select a funding source that has been identified in APMS.

In the example below, a single waiver funding line can be split across fiscal year data from APMS. For line item #1, $1000 is associated with FY15 funds and the remainder is associated with FY16 funds. Likewise, if there were multiple funding sources in APMS, they could apply across multiple funding lines and fiscal years.

- Policy Compliance
- APMS Information
- Basic Information
- Line Item
- Verification
- Funding
- Documents
7 Approval Tracking Forms
 ▽ SubOrg Review
  SubOrg G-6 Technical Review
  SubOrg G-8 Resource Review
Consolidated Task History

Line Items

#	Category *	Sub Category *	Vendor *	Comments	Product Name *	UC APL	Quantity *	Unit Cost * (in Dollars)	Line Cost (in Dollars)
1	Rents/Utilities (OC...	Power Costs: Elect...	AMX, LLC		Enova DVX-3155H...	Yes	1	1,221	1,221
2	Services (OC 25)	Enterprise E-Mail	Nokia		Nokia N810 Intern...		2	350	700
3	Supplies and Mate...	Electronic/Commu...	ZZZ		ZZZ Copier		1	121	121

Total Line Item Cost (in Dollars) 2,042

Funding Data in APMS for DA03788 (in dollars)

Funding Source	Mdep	Appn	PEG	Ape	Cmd	Usage	Type	FY2013	FY2014	FY2015	FY2016
BASE_DOLLARS	STAC	OMA	SS	422123000	6A0	Sustainment	Budgeted	0	30000	20000	20000

Budgeted Data Last Updated By and Date : ADMIN at 2013-01-14 11:27:44

G-8 Entered Funding Data

Funding Line 3 is not fully entered.
Warning: Funding for line items, 2 have not been accounted for.
Line Items 2 and 3 are not fully funded.

As the #1 line item is fulfilled, the error message for #1 is passed, now we need to cover the funding for #2 and #3

Funding for the line item #1 is from different funding source or Fiscal Year (FY), the total amount fulfill the funding for #1 line item

	#	Line Item	CI Code	Funding Source	Mdep	Appn	Ape	Cmd	FY	Amount
☐	1	1	233L	BASE_DOLLAR	STAC	OMA	422123000	6A0	FY2015	1,000
☐	2	1	233L	BASE_DOLLAR	STAC	OMA	422123000	6A0	FY2016	221
☐	3	3	2615			OMA				

[Add New Line] [Delete Selections] [Apply Funding Selections] [Save Funding Info]

Last Updated By and Date : 001.dod.jasper.7541224537 at 2015-07-28 12:47:28   <- The G-8 user's most recent entry is logged

When the G-8 Resource Reviewer wants to use the same funding source to apply to all or selected Line Items, they can check the top checkbox to select all items, or select the desired line and click "Apply Funding Selections", a new pop up window will be displayed for G-8 to select the funding source and the same Key-4 selection will be applied to all items.

Show-stopper - as displayed below, when there is no funding associated with the APMS item, it will not be possible for the resource reviewer to complete their step in the ITAS process. The system owner for the APMS item will be required to enter their resource information in APMS in order for the waiver to proceed.

Information Technology Approval System

Since there is no funding in APMS, the "Select Funding Source" will show the blank selection.

When the APMS funding amounts are available and the "Selection Funding Source" will show the available funding source and Key-4 data in the dropdowns. The SubOrg G-8 Resource Review can select data from the dropdown and then click "Apply", the selected funding source with key-4 will be applied to the checked lines

Once the "Select Funding Source" popup is chosen and SubOrg G-8 Resource Reviewer clicks "Apply", the Funding source with the key-4 will apply to all selected funding lines except for FY and Amount columns. SubOrg G-8 Resource Reviewer can enter the FY and Amount information

Once the FY and Amount information is entered, SubOrg G-8 Resource Reviewer can click "Save Funding Info" to save changes. ITAS system will run the validation and display the

message to show if the validation passes or fails. When the validation passes successfully, the following message will be displayed: "All funding data entered has passed the validation successfully. Please proceed with the request recommendation for approval"

The SubOrg G-8 Resource Reviewer can fill out the "Recommend Approval" and "Comments" field and submit the forms, or the SubOrg G-8 Resource Reviewer can save the current changes and come back later to the waiver to submit the approval.

NOTE: During the funding data validation process, ITAS system will check against the funding request for the waiver as well as other waivers which are associated with the same system and share the same funding source.

Case 1: In 2015, Waiver A is associated with APMS system DA301386 and requested the funding amount of $421 for FY2015. Waiver B is requested after Waiver A. Waiver B is also associated with APMS system DA301386 and requested the funding amount of $199,995 for FY2015 from the same funding source and Key-4. APMS system DA301386 has total funding of $200000 for FY2015. The Waiver A will pass the funding validation and Waiver B will fail the funding validation with the following error message.

Line Items

#	Category *	Sub Category *	Vendor *	Comments	Product Name *	UC APL	Quantity *	Unit Cost * (in Dollars)	Line Cost (in Dollars)
1	Supplies and Mate...	Credit Card purch...	Cisco	Comment2	Asus Router		1,005	199	199,995

Total Line Item Cost (in Dollars) 199,995

Funding Data in APMS for DA301386 (in dollars)

Funding Source	Mdep	Appn	PEG	Ape	Cmd	Usage	Type	FY2013	FY2014	FY2015	FY20
BASE_DOLLARS	A2AA	OMA	SS	421010000	220	Sustainment	Budgeted	0	0	0	0
OCO	A2AP	OMA	SS	111011000	890	Sustainment	Budgeted	0	0	0	0
BASE_DOLLARS	A2AP	OMA	SS	111011000	890	Sustainment	Budgeted	0	0	0	0
BASE_DOLLARS	FL6P	ACFT		A01234000	5D0	Sustainment	Budgeted	0	0	0	0
BASE_DOLLARS	FL6P	ACFT		A02700000	5E0	Sustainment	Budgeted	0	20000	20000	2000

Budgeted Data Last Updated By and Date : dod.014 at 2015-04-16 13:45:34

G-8 Entered Funding Data

Funding Line 1 is over budget. Funding Source for this line is shared by Waivers 20150728094118

	#	Line Item	CI Code	Funding Source	Mdep	Appn	Ape	Cmd	FY	Amount
	1	1	26RB	BASE_DOLLAR	FL6P	ACFT	A02700000	5E0	FY2015	199,995

Add New Line   Delete Selections   Apply Funding Selections   Save Funding Info

Last Updated By and Date : 001.dod.jasper.7541224537 at 2015-07-28 15:25:15

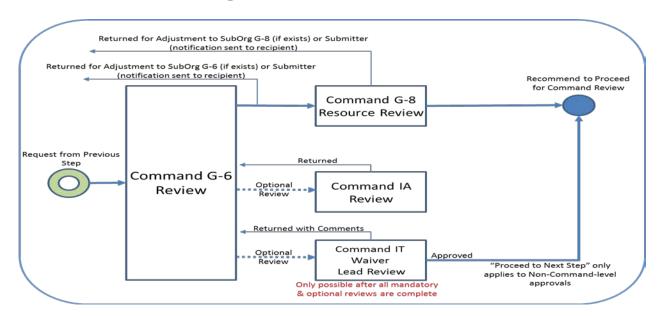SubOrg Review – G-8 Funding Data Validation Failed (Shared Key-4 Over budget)

Case 2: In 2015, Waiver A is associated with APMS system DA301386 and requested the funding amount of $421 for FY2015. Waiver B is requested after Waiver A. Waiver B is also associated with APMS system DA301386 and requested the funding amount of $199,995 with FY specified as FY2014. APMS system DA301386 has the funding of $200000 for 2014 and 2015 each for the specified funding source and Key-4. Both Waiver A and Waiver B will pass the funding validation as the aggregated funding amounts requested for the different Fiscal Year not exceeds the total amount in APMS.
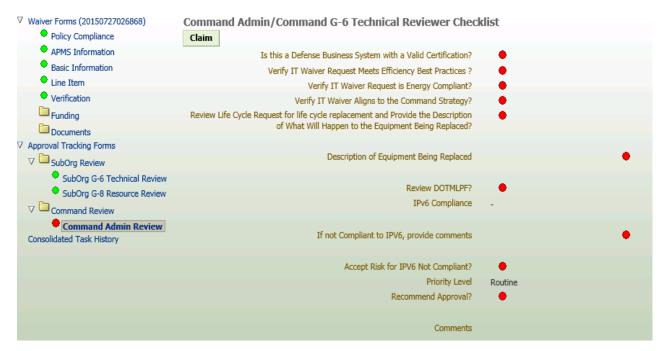
Command Workflow Diagram

Command G-6 Reviews & Mandatory Checklists

If a waiver request is submitted for an APMS system that has no SubOrg, the SubOrg review phase will be skipped and the waiver will be sent directly for Command Review. The command admin will claim, review and validate the waiver. The Command Admin has the option to approve, reject and return the waiver to the previous user for information, or coordinate for optional reviews from the IA Reviewer or IT Waiver Lead Approver.

ITAS Command Administer can click on the "Command Admin Review" from the left navigation panel and begin the Command Admin Review process. ITAS Command Admin must first click "Claim" to lock the waiver for review.

Once the waiver form is claimed, the Command Admin can fill out the all required fields and click "Submit to Command G-8 Resource Reviewer" to send the waiver request to the Command G-8 Resource Reviewer, or the Command Admin can choose "Save without Submission" to save the current changes and take action at a later time.

The Command Admin will also have the option to coordinate with other Command Administrators by clicking "POC Coordination".

The Command Admin can either provide the approval by selecting "Yes" or reject the waiver by selecting "No" which will reject and close the waiver permanently, or return the waiver to the previous users (either the submitter or SubOrg G-6 Technical Reviewer) for any adjustment.

Once the "Submit to Command G-8 Resource Reviewer" is selected, the confirmation page below will be displayed. The waiver will then be sent to the Command G-8 Resource Reviewer who will be notified through email that the action is in their queue.
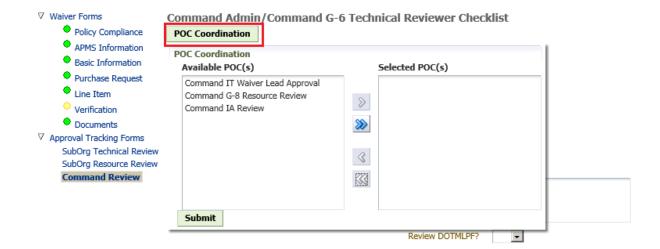
Command G-8 Reviews & Applying Funding

Command G-8 Resource Reviewer will be notified through email and can claim the request. The functionality and process for the Command G-8 review is identical to the SubOrg. Please reference the SubOrg G-8 section above.

Command Optional Coordination Reviews & Mandatory Checklists

- This is the command admin can coordinate with other command level reviewer for coordination.
- Command IA Review, Command IT Waiver Lead Approval and Command G-8 Resource Review can be coordinated by Command Admin. Once a POC is coordinated, this POC's will be notified via email and approval will become mandatory.
- Not all organizations will utilize or need to utilize the "Command IT Waiver Lead Approval" role. This is generally used for a review and approval by a GO/SES member of the organization and may not be required. If used, all required and optional reviews must be complete in order to send a waiver to this approval step however to prevent an incomplete or not fully reviewed waiver from being forwarded to this level.
- Only after all pending coordination is completed, Command Admin cannot move the request forward.
- If a POC is coordinated by mistake, the Command Admin will have the option to undo the coordinate.
- Command G-8 Resource Review is mandatory at command review level. If no POC coordination, the Command Admin submit will directly send the request to Command G-8 Resource Reviewer.
-

Information Technology Approval System

Command-level Approvals

Waivers submitted to purchase certain items may be approved at the Command-level step and will not be required to proceed to the HQDA CIO/G-6 approval steps. The tables below detail which waiver purchases can be approved by the Command.

NOTE: If a waiver contains both Command approval <u>AND</u> HQDA CIO/G-6 items, the entire waiver will have to be approved by HQDA. There are no partial waivers. For example: If a waiver contains a purchase for a Heat/Air Conditioning item and a Wireless item, the entire waiver would have to proceed to the HQDA CIO Admin for approval, therefore it is recommended that Command-level items be consolidated into a single waiver or waivers.
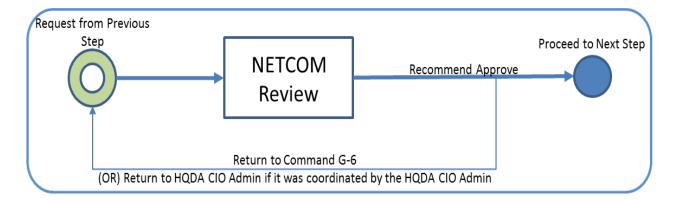
Category	Sub-Category	Command Level	CI Code
Rents/Utilities (OC 23)			
	Building Rental Costs	Command	2310
	Power Costs: Electricity/Gas	Command	233L
	Heat/Air Conditioning	Command	233L
	Wireless: Mobile Voice/Data Service Fees	HQDA CIO Admin	233M
	Commercial ISP Service Fees	HQDA CIO Admin	233M
	Satellite Circuit Services Fees	Command (NETCOM)	233N
	Long Haul Circuits (Base)	Command (NETCOM)	233P
	Long Haul Circuits (Mission Funded)	Command (NETCOM)	233P
	Communications, Other	HQDA CIO Admin	233R

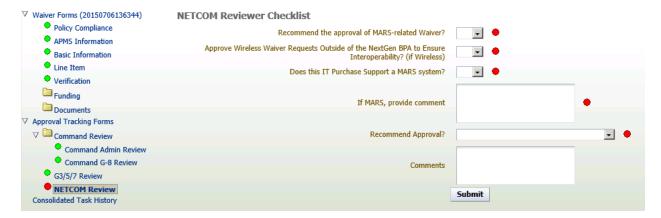| Category	Sub-Category	Command Level	CI Code
Supplies and Materials (OC 26)			
	IT Supplies	Command	260N
	Electronic/Communications Equip Depot Level Rprbl	Command	2615
	Electronic/Communications Equip Repair Parts	Command	2635
	Credit Card purchases	Command	26RB

Category	Sub-Category	Command Level	CI Code
Printing (OC 24)			
	Printing / Copier rental	HQDA CIO Admin	2400
Services (OC 25)			
	Remote Management Services	Command	251K
	Equipment Maintenance	HQDA CIO Admin	2575
	Help Desk	HQDA CIO Admin	251K
	Training	Command	251K
	Information Assurance	HQDA CIO Admin	251M
	System Adminstration	HQDA CIO Admin	257F
	Network Management	HQDA CIO Admin	257F
	Enterprise License Agreements	HQDA CIO Admin	257G
	Software Maintenance Licenses/Fees	HQDA CIO Admin	257G
	Enterprise E-Mail	HQDA CIO Admin	257H
	Data Hosting on Army owned Equipment (Commercial)	HQDA CIO Admin	257J
	Data Hosting Fees (DISA)	HQDA CIO Admin	257K
	Application Hosting Fees (DISA)	HQDA CIO Admin	257K

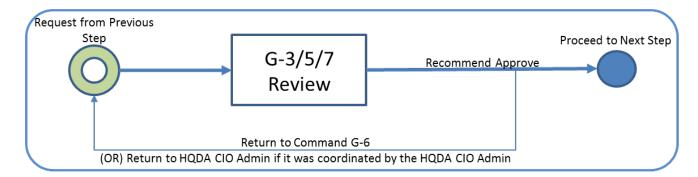| Category	Sub-Category	Command Level	CI Code
Equipment/Software (OC 31)			
	Servers [Investment][over $250,000 per item]	HQDA CIO Admin	310E
	Storage Devices (NAS/SAN/Tape/Optical Drives) [Investment][over $250,000 per item]	HQDA CIO Admin	310E
	Operating System and Database Software	HQDA CIO Admin	310F
	Software (COTS)	HQDA CIO Admin	310F
	Business Software (ERP)	HQDA CIO Admin	310G
	Commercially Developed Application Software	HQDA CIO Admin	310G
	Software Development/Engineering	HQDA CIO Admin	310G
	Servers [Expense]	HQDA CIO Admin	310H
	Storage Devices (NAS/SAN/Tape/Optical Drives) [Expense]	HQDA CIO Admin	310H
	Multifunctional Devices (Printer/scanner/copiers/faxes etc.) [Investment][over $250,000 per item]	HQDA CIO Admin	310I
	Multifunctional Devices (Printer/scanner/copiers/faxes etc.) [Expense]	HQDA CIO Admin	310O
	Network Security Devices (Firewall /Intrusion Detection) [Investment][over $250,000 per item]	HQDA CIO Admin	310R
	Routers & Switches [Investment][over $250,000 per item]	HQDA CIO Admin	310R
	Network Security Devices (Firewall /Intrusion Detection) [Expense]	HQDA CIO Admin	310S
	Routers & Switches [Expense]	HQDA CIO Admin (if data center) Command (if not Data Center)	310S
	IT Infrastructure (Cables/Fiber Optical/Network Connectors)[Investment][over $250,000 per item]	HQDA CIO Admin	310T
	Satellite Equipment - Fixed Installation [Investment][over $250,000 per system]	HQDA CIO Admin	310T
	Telecommunications Equipment [Investment][over $250,000 per system]	HQDA CIO Admin	310T
	Video Teleconferencing Equipment [Investment][over $250,000 per system]	HQDA CIO Admin	310T
	IT Infrastructure (Cables/Fiber Optical/Network Connectors) [Expense]	HQDA CIO Admin (if data center) Command (if not Data Center)	310U
	Satellite Equipment - Fixed Installation [Expense]	HQDA CIO Admin	310U
	Telecommunications Equipment [Expense]	HQDA CIO Admin	310U
	Video Teleconferencing Equipment [Expense]	HQDA CIO Admin	310U
	IT - Embedded Electronics [Investment][over $250,000 per item]	HQDA CIO Admin	310V
	IT - Embedded Electronics [Expense]	Command	310W
	Wireless Devices [Expense]	HQDA CIO Admin	310X
	IT - ICS/SCADA Devices [Expense]	Command (if purchase is less than $250K)	310Y
	Data Encryption Equipment - Tactical [Expense]	HQDA CIO Admin	310Z
	Radios/Communications Equipment [Investment][over $250,000 per system]	HQDA CIO Admin	310Z
	Satellite Equipment - Tactical [Investment][over $250,000 per system]	HQDA CIO Admin	310Z
	End User Devices (Desktops/Laptops/Tablets/Thin Client) [Investment][over $250,000 per item]	HQDA CIO Admin	31B0
	End User Devices (Desktops/Laptops/Tablets/Thin Client) [Expense]	HQDA CIO Admin	31B1

NETCOM Review & Mandatory Checklist

- If the waiver request is for MARS or wireless, the NETCOM review is mandatory
- After Command Admin steps, NETCOM Reviewer will be notified and can claim the request.
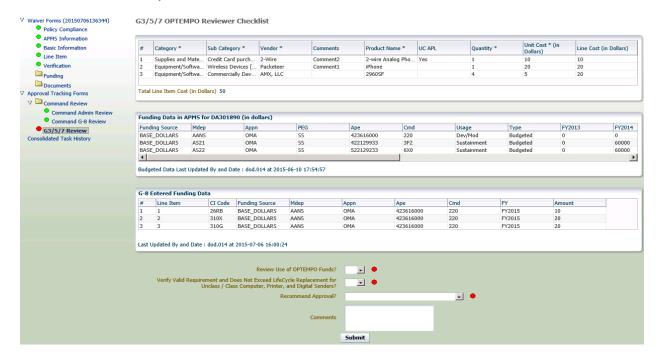

- NETCOM review will go through the checklist and provide their approval or rejection.
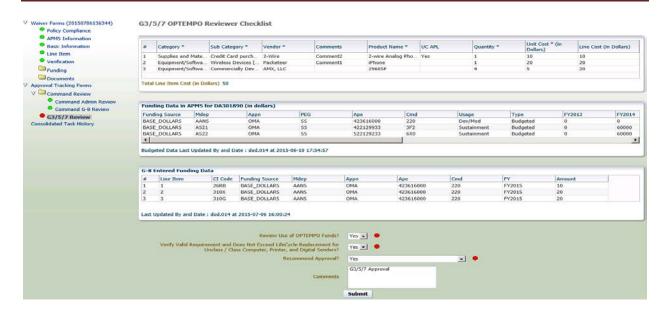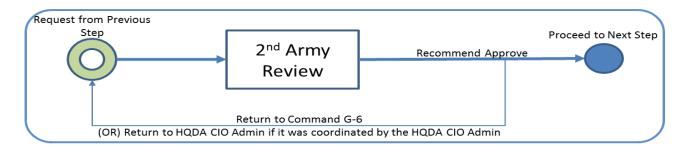
G-3/5/7 Review & Mandatory Checklist

- The G3/5/7 review step is invoked if the waiver contains an OPTEMPO funding request
- After Command Admin step, G3/5/7 Reviewer will be notified and claims the request and review the Key-4 data.
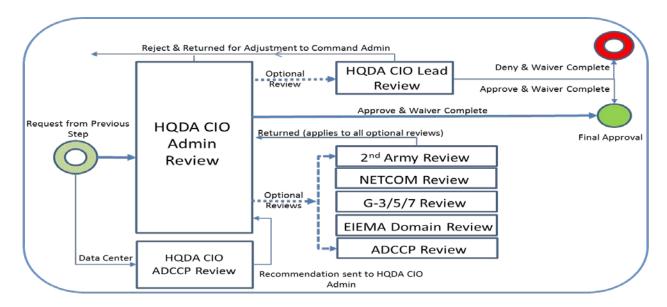
2nd Army Security Review & Mandatory Checklist

- The 2nd Army review step is invoked if the waiver contains an item not on the Approved Products List

HQDA CIO Admin Reviews & Mandatory Checklists

- The HQDA CIO Admin will claim the request to lock it for review and complete the checklist

- HQDA CIO Admin will be able to coordinate with other reviewers or, go through the checklist and approve, reject or return the waiver.

HQDA CIO Optional Coordination Reviews

- The Coordination POCs include
    - 2nd Army Security Reviewer
    - G3/5/7 OPTEMPO Review
    - EIEMA Domain Review
    - NETCOM Review
    - HQDA ADCCP Review
    - HQDA CIO Lead Approval

- Once Coordination occurs, the reviewer who is coordinated with will be notified and can take action for the review.

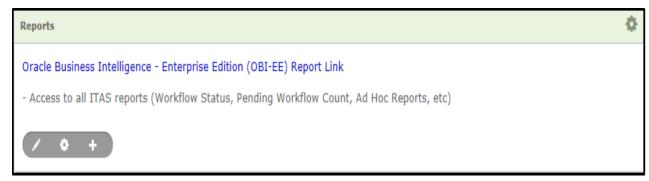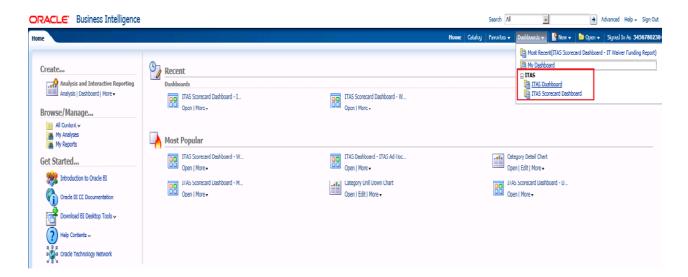## Email Notifications

The following tailored automated notification emails are sent:

a. To the group at the next level of approval for action
b. To the submitter of an action when the item is rejected at any step in the process
c. To all groups in the approval chain when an item is rejected
d. To all groups in the approval chain when an item has completed the process

SECTION 7: REPORTING

ITAS report is created based on Oracle OBIEE framework. There are two set of ITAS reports locate under "Dashboards". All reports under "ITAS Scorecard Reports" folder are standard reports while the reports under "ITAS Reports" folder are customizable. All registered ITAS users will have the access right to the ITAS reports.
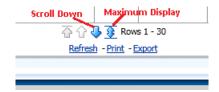

Each standard report will contains two sections. The upper section is the optional filter section for users to select any search criteria in order to narrow the search; the lower section is the result display section and used to display the data.
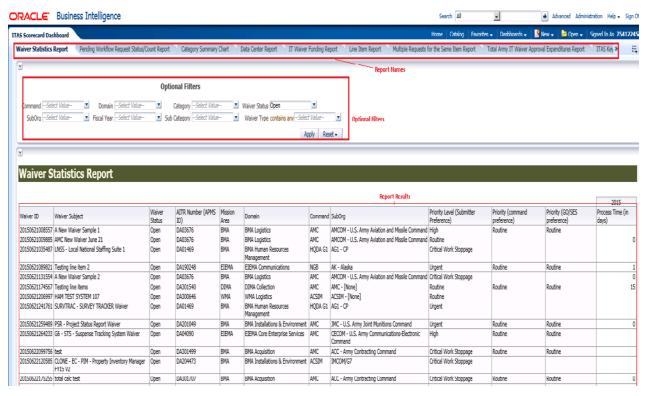
30 rows will be displayed by default, ITAS users can click the down arrow to see more data, or choose the bi-direction arrow to display all data in the single report screen.

The footer section in each report provides the options to refresh report data, print report in PDF or HTML format, or export report data to PDF, Excel, Power Point, Web Archive, or data directly.

ITAS Scorecard Report View (Standard)

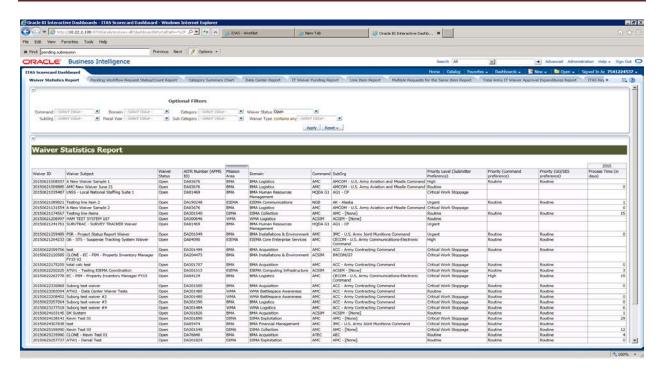Upon choosing the "ITAS Scorecard Reports", the ITAS user will be rendered to the following page.

Wavier Statistic Report

All workflow approval action, outcome and comments are captured and displayed in the "Consolidated Task History" form.

The default displayed report is "Wavier Statistic Report"". This report is accessible by all ITAS users and used to track the overall processing time for each ITAS waiver selected.

Pending Workflow Count/Approval Stage Report

There are two separate reports under the "report "Pending Workflow Count/Approval Stage Report" tab. Both reports are accessible by all ITAS users and can be used to track all pending waiver requests in the workflow approval process.

The report display at the top is used to show the count, status and stage of each waiver that is in the workflow approval process. The report at the bottom is the drilled-down detail report for the top section.

Category Summary Chart Report

The "Category Summary Chart" Report is accessible by all ITAS users and can be used to track the funding allocation for each category, subcategory, and the drilled-down capability is provided for each category and subcategory.

The total funding amounts will be displayed for each category. ITAS user can click each category to drill down to the subcategory level.

ITAS user can perform the further drill down based on each subcategory by clicking on the subcategory and then review the amount at waiver level.

ITAS user can click "Return" to return to the main report screen, or click "back" to go back to the previous screen.

Data Center Report

"Data Center Report" is accessible by all ITAS users and is created to show all waiver requests for data center type.

IT Waiver Funding Report

"IT Waiver Funding Report" is created to show the funding data for each waiver. This report is a restricted report and only authorized users can view this report.

Authorized Users:

- G/3/5/7, HQDA CIO Admin and HQDA CIO Lead Approver can view funding data for all waivers

- Command Admin, Command G-8 Resource Reviewer, Command IT Lead Approver, Command Analyst can view waiver funding data within the command

- SubOrg G-6 Technical Reviewer, SubOrg G-8 Resource Reviewer, SubOrg Analyst can view waiver funding data within the SubOrg

- Submitter can view waiver funding data for the waiver he submitted

For ITAS users who have no authority to view this report, the following screen will be displayed.

Line Item Report

"Line Item Report" is report is accessible by all ITAS users. This report is created to show the line item data with the funding source and Key-4 for each waiver. The funding amount is excluded in this report.

Multiple Requests for the Same Item Report

"Multiple Requests for the Same Item Report" is accessible by all ITAS users and can be used to track the number of requests submitted for the same item. If the same item is requested for more than a certain number, HQDA CIO Admin may create a request to CHESS to add the item to the CHESS system. The waiver count can be specified through the optional field.

Total Army IT Waiver Approval Expenditures Report

"Total Army IT Waiver Approval Expenditures Report" is accessible by all ITAS users and can be used to track the number of waivers created for each command, suborg and domain. This report can be drilled down to show the waiver level detail for each selected command, SubOrg and Domain.

The ITAS user can click the number at the "Wavier Count" column to see the drilled down report.

ITAS Key System Information Change Report

"ITAS Key System Information Change Report" is accessible by all ITAS users and can be used to track any key data changes in ITAS workflow process.

The Key Data Elements can be tracked in this report are

- APMS System ID

- Funding Source

- Usage

- APE

- APPN

- MDEP

- CMD

- Category

- Sub Category

- Comments

- Fiscal Year for funding

- Unit Cost

- Line Cost

- Amount

- QUANTITY

- Vendor

- Product

- Waiver Required Date

- Waiver Type

- Waiver Status

ITAS users can specify the "Data Element Changed" filter to check any key data element changes.

Waiver Approval Time Report

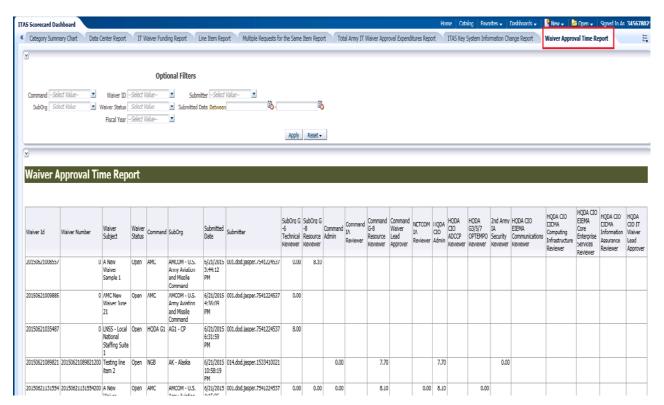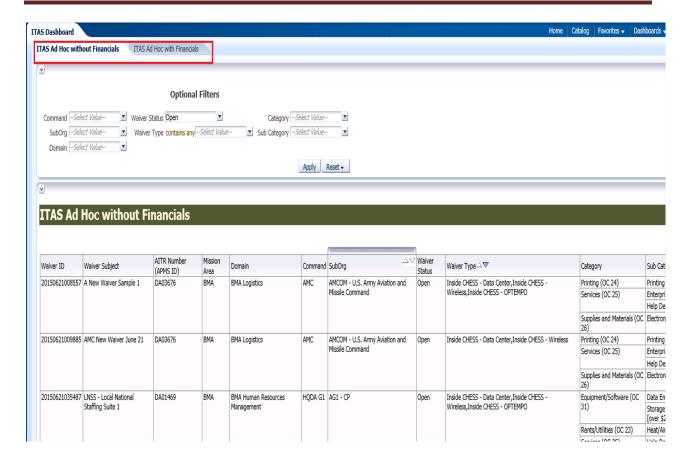"Waiver Approval Time Report" is accessible by all ITAS users and can be used to track the process time for each workflow review step in ITAS workflow process.

ITAS Scorecard Dashboard

Home | Catalog | Favorites ▾ | Dashboards ▾ | New ▾ | Open ▾ | Signed In As 34567802

« Category Summary Chart | Data Center Report | IT Waiver Funding Report | Line Item Report | Multiple Requests for the Same Item Report | Total Army IT Waiver Approval Expenditures Report | ITAS Key System Information Change Report | **Waiver Approval Time Report**

Optional Filters

Command --Select Value-- | Waiver ID --Select Value-- | Submitter --Select Value--
SubOrg Select Value | Waiver Status Select Value | Submitted Date Between ___ - ___
Fiscal Year --Select Value--

Apply | Reset ▾

Waiver Approval Time Report

Waiver Id	Waiver Number	Waiver Subject	Waiver Status	Command	SubOrg	Submitted Date	Submitter	SubOrg G-6 Technical Reviewer	SubOrg G-8 Resource Reviewer	Command Admin	Command IA Reviewer	Command G-8 Resource Reviewer	Command Waiver Lead Approver	NETCOM IA Reviewer	HQDA CIO Admin	HQDA CIO ADCCP Reviewer	HQDA G3/5/7 OPTEMPO Reviewer	2nd Army IA Security Reviewer	HQDA CIO EIEMA Communications Reviewer	HQDA CIO CIIMA Computing Infrastructure Reviewer	HQDA CIO EIEMA Core Enterprise Services Reviewer	HQDA CIO CIIMA Information Assurance Reviewer	HQDA CIO IT Waiver Lead Approver
20150621008657	0	A New Waiver Sample 1	Open	AMC	AMCOM - U.S. Army Aviation and Missile Command	6/21/2015 3:44:12 PM	001.dod.jasper.7541224537	0.00	8.10														
20150621009885	0	AMC New Waiver June 21	Open	AMC	AMCOM - U.S. Army Aviation and Missile Command	6/21/2015 4:36:09 PM	001.dod.jasper.7541224537	0.00															
20150621035487	0	LNSS - Local National Staffing Suite 1	Open	HQDA G1	AG1 - CP	6/21/2015 6:31:59 PM	001.dod.jasper.7541224537	8.00															
20150621089821	20150621089821200	Testing line item 2	Open	NGB	AK - Alaska	6/21/2015 10:58:19 PM	014.dod.jasper.1533410021			0.00		7.70			7.70			0.00					
20150621131554	20150621131554200	A New Waiver	Open	AMC	AMCOM - U.S. Army Aviation	6/21/2015 4:15:0?	001.dod.jasper.7541224537	0.00	0.00	0.00		8.10		0.00	8.10		0.00						

ITAS Reports View (Ad Hoc - Customizable)

ITAS user can access customizable report through "ITAS Dashboard" folder from the main menu "Dashboard". There are two ad hoc reports available for user to customize.

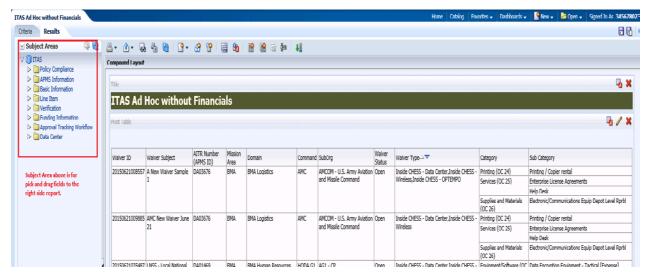# Information Technology Approval System

Ad Hoc reports can be customized to show any fields in a user preferred view. In the report footer, there is a link called "Analyze". ITAS users can click this link to create customized reports.
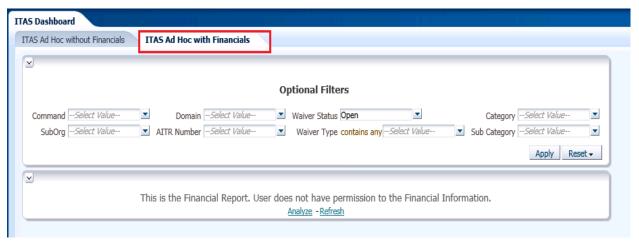

ITAS Ad Hoc without Financial

"ITAS Ad Hoc without Financial" report is accessible by all ITAS users. Upon clicking "Analyze", the following page will be displayed. At the left side, it is the "Subject Areas" for users to select from. ITAS users can expand the folder and select any preferred fields from and drag to the right side. ITAS user can save the change by clicking save icon.
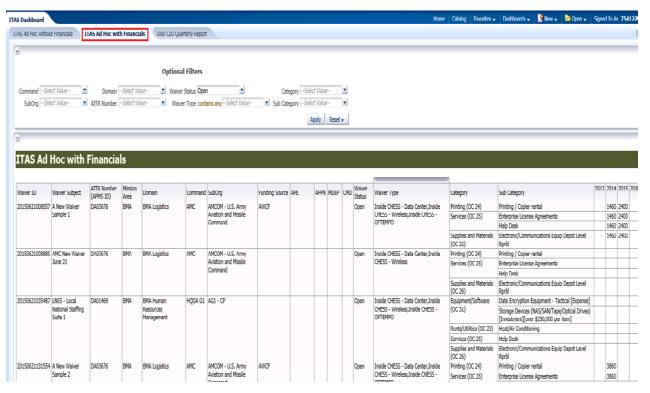
ITAS Ad Hoc with Financial

"ITAS Ad Hoc with Financial" report is a restricted report and not accessible by all ITAS users, not for authorized users.

For ITAS users who have no authority to view the financial information, the following page will be displayed.

For ITAS users who have the authority to view the financial information, the following page will be displayed.
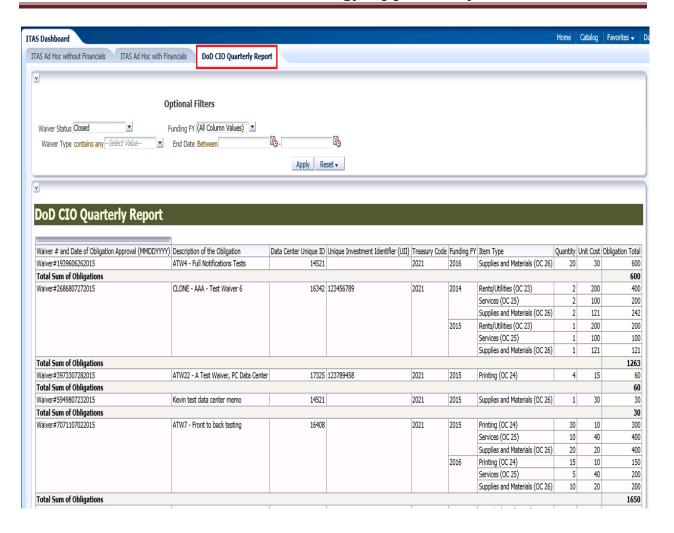
DoD CIO Quarterly Report

"DoD CIO Quarter Report" is accessible for ITAS Ad Hoc with Financial" report is a restricted report and only accessible by ITAS OBIEE Admin user. An unauthorized users cannot see the report tab.

For the authorized users, the DoD CIO Quarterly Report will be displayed. The ITAS user can specify the filter conditions in order to view a report for a specified Fiscal Year, waiver type and for a particular period.

ITAS User Roles Definitions

Base User – <u>Default user role</u> that enables the user access to ITAS to view waiver submissions.

ITAS Submitter – <u>Default user role</u> that enables the user to submit a waiver.

SubOrg Admin – This role enables the user to approve/reject in the Workflow Module as well as approve new user's requests within their SubOrg. View rights to resource information for their SubOrg.

SubOrg Analyst - View rights to resource information for their Command. View only rights for items in workflow.

SubOrg G-8 – This role enables the user to approve/reject in the Workflow Module as well as assign SubOrg Admin's and individual system owners. View rights to resource information for their Command.

Command Analyst - View rights to resource information for their Command. View only rights for items in workflow.

Command Admin – This role enables the user to approve/reject in the Workflow Module as well as assign SubOrg Admins and approve new ITAS accounts within their Command. View rights to resource information for their Command.

Command G-8 – This role enables the user to complete waiver resource information and approve/reject in the Workflow Module. View rights to resource information for their Command.

Command Information Assurance Reviewer – This role enables the user to review and provide comment on waivers forwarded to them in the Workflow Module.

Command IT Waiver Lead Approver – This role enables the user to approve/reject in the Workflow Module. View rights to resource information for their Command.

NETCOM Reviewer – This role enables the user to approve/reject in the Workflow Module.

ARCYBER/2nd Army Reviewer – This role enables the user to approve/reject in the Workflow Module.

G-3/5/7 Reviewer – This role enables the user to approve/reject in the Workflow Module.

EIEMA Domain Admin – This role allows an EIEMA Domain Admin review rights for waivers forwarded to them.

HQDA CIO Admin – This role enables the user to approve/reject in the Workflow Module as well as assign Admin's at all levels as well as the ability to approve all new user accounts.

HQDA CIO Lead – This role allows an individual assigned to this group to review/approve/reject waivers forwarded to them.