

DRAFT



e-SMS Tool

Army Safety and Occupational Health Management System (ASOHMS) Portal

Version 1.0

User Manual

March 2018

Prepared by:

Concurrent Technologies Corporation

DISTRIBUTION STATEMENT D: Distribution authorized to the DoD and U.S. DoD contractors only; Proper date to be determined by Program Manager and affixed by contractor. Other requests shall be referred to: Commanding Officer, SPACE AND NAVAL WARFARE SYSTEMS CENTER PACIFIC, Code 22410, San Diego, CA 92152-5001.

WARNING: This document contains technical data whose export is restricted by the Arms Export Control Act (Title 22, U.S.C., sec. 2751, et seq.) or the Export Administration Act of 1979, as amended, Title 50, U.S.C., App. 2401 et seq. Violation of these export laws are subject to severe criminal penalties. Disseminate in accordance with the provisions of DoD Directive 5230.25.

DRAFT

Table of Contents

1.0	e-SMS Tool ASOHMS Portal Introduction	4
1.1	Hierarchy overview	4
1.2	User Roles Overview	5
1.3	Applicability of User Guide Sections Based on Your User Role(s)	7
2.0	Getting Started with the ASOHMS Portal	7
2.1	Self-Registration	8
2.2	Logging In.....	9
2.3	Self-Service Password Reset.....	11
2.3.1	Logging In After Password Reset	11
2.4	The ASOHMS Portal Homepage and General Layout	12
2.5	Active User Role.....	13
2.6	Selected Site.....	13
3.0	Uploading a GAP Spreadsheet.....	14
3.1	Introduction to GAP Spreadsheet Uploads	14
3.2	Uploading a Spreadsheet.....	15
3.3	Reviewing Previous GAP Spreadsheet Uploads.....	18
4.0	Viewing/Editing the GAP Action Plan	18
4.1	General Layout of the GAP Action Plan.....	19
4.1.1	GAP Action Plan Columns	20
4.2	Actions Available from GAP Action Plan Main Display	20
4.2.1	Toggle Status Rating.....	20
4.2.2	Attach File.....	21
4.2.3	Add Note.....	23
4.2.4	View Details and Edit Details.....	23
5.0	Managing GAP Action Plan Assignments.....	30
5.1	Editing Assignments within the ‘Edit GAP Assignments’ Modal.....	31
5.1.1	‘Assignment(s) Overview’ Tab.....	32
5.1.2	‘Criteria Reference’ Tab	32
5.1.3	‘Item Reference’ Tab	33
6.0	Exporting GAP Action Plan Data into a Spreadsheet.....	34
7.0	Administration of Users and Roles	34

DRAFT

7.1	Manage Users and Roles View Customization and Filtering	35
7.2	Users and Roles Main Display Table.....	36
7.3	Scope of Users Available to Edit	36
7.4	User Approval and Deactivation.....	37
7.5	Editing User Information	37
7.6	Editing User Roles	38
7.7	Triggering a Password Reset For Another User	41
7.7.1	Logging In After Password Reset	41
8.0	View/Edit Total Case Incident Rate/Days Away, Restricted, Time Off (TCIR/DART) Data	42
8.1	Adding BLS and TCIR/DART Data.....	42
8.1.1	Adding Bureau of Labor Statistics (BLS)	42
8.1.2	Adding TCIR/DART Information	43
8.2	Rate Calculations.....	44

1.0 e-SMS Tool ASOHMS Portal Introduction

The e-SMS ASOHMS Portal is an extension of the previously existing SMCX e-SMS Tool and serves as a centralized data repository and management information system for Army sites utilizing the Army Safety and Occupational Health Management System (ASOHMS) as part of the overall effort to implement a culture of safety among all staff.

The ASOHMS portal is available on the public internet at <https://asohms.smscx.org>. Anyone can view the login screen and self-register, but only users approved by an administrator can log in to the application.

The ASOHMS Portal utilizes the concept of a GAP Action Plan. The GAP Action Plan is essentially an organized list of the safety-related capability objectives (criteria/elements) needing to be met in order to complete the ASOHMS program. Each 'site' within the ASOHMS Portal maintains its own copy/version of the GAP Action Plan.

- The GAP Action Plan, originally administered using a Microsoft Excel® spreadsheet, is now incorporated into the ASOHMS Portal software's user interface. These legacy spreadsheets can be used as a starting point for an ASOHMS Portal GAP Action Plan via file upload.

1.1 Hierarchy overview

'Sites' within the ASOHMS Portal are organized into a three-level hierarchy. Each item in the hierarchy (at any of the three levels) is considered a 'site', and therefore maintains its own independent copy of the GAP Action Plan.

- The first and highest level of the hierarchy is the Command/Army Service Component Command (ASCC)/Direct Reporting Unit (DRU) level.
- The second and 'middle' level of the hierarchy is the Division/Major Subordinate Command (MSC)/Region/Lab level.
- The third and lowest level of the hierarchy is the District/Center/Site Location level.

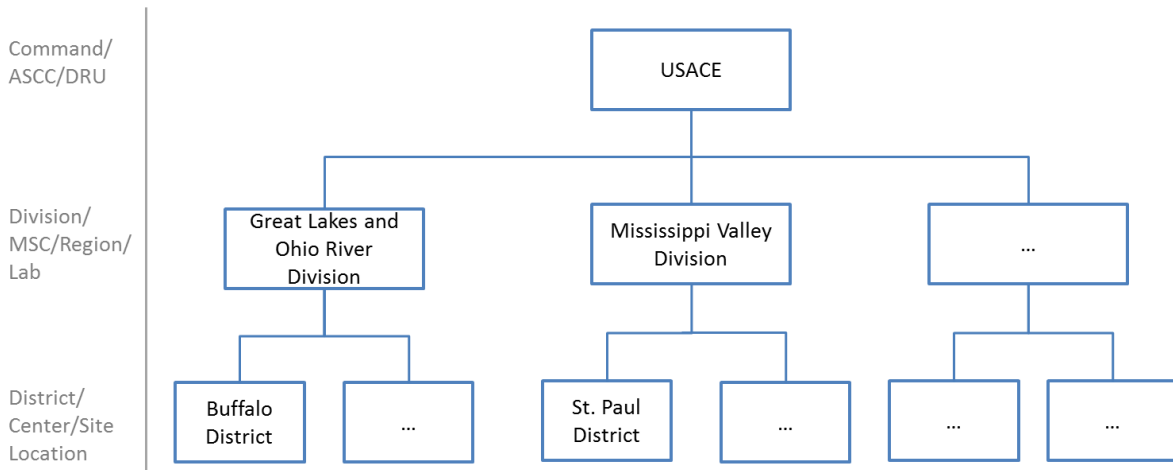


Figure 1: Example of ASOHMS Hierarchy based on USACE

DRAFT

1.2 User Roles Overview

There are seven different types of user roles available within the ASOHMS Portal. The seven roles are:

- Site Observer
- Site User
- Site Coordinator
- District/Center/Site Location Admin
- Division/MSC/Region/Lab Admin
- Command/ASCC/DRU Admin
- System Administrator

Every role (except for System Administrator) is tied to a particular site within the ASOHMS Portal hierarchy when it is assigned to a specific user. Tying a role to a specific site is what gives the role assignment context (e.g. if I am the site coordinator, what site am I the site coordinator for?) The role of **System Administrator** is never tied to a specific site since they have authority over the entire hierarchy. Details of which roles can be tied to which sites within the hierarchy are as follows:

- **Site Observer, Site User, and Site Coordinator** can be tied to any site within the hierarchy (at any of the three levels)
- **District/Center/Site Location Admin** can only be tied to a site at the 3rd (lowest) level (District/Center/Site Location) of the hierarchy (as its name implies)
- **Division/MSC/Region/Lab Admin** can only be tied to a site at the 2nd (middle) level (Division/MSC/Region/Lab) as its name implies
- **Command/ASCC/DRU Admin** can only be tied to a site at the 1st (highest) level (Command/ASCC/DRU) as its name implies

Any given user can optionally be assigned more than one role. So for instance, someone could be granted the role of *Site Coordinator* at Site A and the role of *District/Center/Site Location Admin* at Site B. However, any given user can only be acting within one role at any given time within the system. Users can change their active role at any time after logging in (if they have been assigned more than one role; more details on this later in the user guide).

DRAFT

Roles:	Site Observer	Site User	Site Coordinator	District/ Center/Site Location Admin	Division/ MSC/ Region/ Lab Admin	Command/ ASCC/ DRU Admin	System Admin
System Functions :							
View entire action plan	✓	✓	✓	✓	✓	✓	✓
Edit Action Plan items specifically assigned to user (change statuses, uploaded files, create notes, etc.)		✓	✓	✓	✓	✓	
Edit entire Action Plan (change statuses, uploaded files, create notes, etc.) for all GAP items			✓	✓	✓	✓	✓
Edit user assignments for GAP items, criterion, capability objectives, and entire stages <i>NOTE: Only users who are site users, site coordinators, District/Center/Site Location Admin, Division/MSC/Region/Lab Admin, or Command/ASCC/DRU Admin for site currently being managed are eligible for assignment)</i>			✓	✓	✓	✓	✓
Upload GAP Excel Spreadsheet for data ingestion into ASOHMS Portal Action Plan			✓	✓	✓	✓	✓
Export Action Plan data into Excel spreadsheet	✓	✓	✓	✓	✓	✓	✓
Edit registration info, modify roles, reset passwords of all users (includes approving pending users)							✓
Edit registration info, modify certain roles, reset passwords of all users who fall under hierarchy element associated to user role (includes approving pending users)				✓	✓	✓	
Add/Delete Role of <i>Site Observer, Site User, and Site Coordinator</i> for users who fall under hierarchy element associated to user role				✓	✓	✓	
Add/Delete Role of <i>District/Center/Site Location Admin</i> for users who fall under hierarchy element associated to user role					✓	✓	
Add/Delete Role of <i>Division/MSC/Region/Lab Admin</i> for users who fall under hierarchy element associated to user role						✓	
Add/Delete Role of <i>Command/ASCC/DRU Admin</i> for all users							✓
Delete any user							✓
Access the View/Edit TCIR/DART Data				✓	✓	✓	✓

Figure 2: User Roles to System Functions Matrix

DRAFT

1.3 Applicability of User Guide Sections Based on Your User Role(s)

Depending on the user role(s) assigned to you within the ASOHMS Portal, some parts of this user guide may not be applicable to you. The below table outlines some guidelines of the applicable sections based on your role:

User Role	Applicable User Guide Sections
Site Observer	1.0, 2.0, 4.1, 4.2.4, 6.0, 7.7.1
Site User	1.0, 2.0, 4.0, 6.0, 7.7.1
Site Coordinator	1.0, 2.0, 3.0, 4.0, 5.0, 6.0
District/Center/Site Location Admin	[Entire User Guide]
Division/ MSC/Region/Lab Admin	[Entire User Guide]
Command/ASCC/DRU Admin	[Entire User Guide]
System Admin	[Entire User Guide]

2.0 Getting Started with the ASOHMS Portal

The ASOHMS Portal can be located on the public internet at <https://asohms.smscx.org>. When accessing the aforementioned URL, you will be taken to the login screen.



Figure 3: Login Screen

You will not be able to login to the application until two activities have taken place (and in the following order):

1. You complete the self-registration form and submit it (instructions for this follow in the next section)
2. An administrator within the ASOHMS Portal assigns you at least one user role (thereby ‘approving’ your account)

DRAFT

2.1 Self-Registration

In order to self-register, you will need to click the 'Register' button that appears below the 'Username' and 'Password' text boxes on the login screen. You will need to complete the form that appears. Note that the fields marked with asterisks are required fields. Some of the fields are self-explanatory, but some additional details for fields that may not be follows:

- **Password** - must be at least 8 characters and contain at least one lowercase and one uppercase letter, one special character, and one number
- **Supervisor Name / Supervisor Email** – collected so that emails that are generated and sent to you if/when you are assigned any items within an action plan can be carbon copied to your supervisor
- **Command/ASCC/DRU *** – it is important that you make a selection from this dropdown (e.g. MEDCOM or USACE) unless you think your role within the system will be system administrator and that you should have control over the entire hierarchy of sites within the ASOHMS portal. Providing this information also helps steer your registration to the right administrators to get your account approved and your role(s) established.
- **Division/MS/Region/Lab *** – This dropdown appears immediately after you have made a selection from the Command/ASCC/DRU dropdown. It allows you to be more precise in identifying what portion of the ASOHMS e-Tool hierarchy you belong within and will help steer your registration to the right administrators to get your account approved and your role(s) established.
- **District/Center/Site Location *** - This dropdown appears immediately after you have made a selection from the Division/MS/Region/Lab dropdown. It allows you to be more precise in identifying what portion of the ASOHMS portal hierarchy you belong within and will help steer your registration to the right administrators to get your account approved and your role(s) established.

*** Note:** The **Command/ASCC/DRU**, **Division/MS/Region/Lab**, and **District/Center/Site Location** dropdowns should be used to define the area of the hierarchy that you think you will be responsible for working on initially. The dropdowns allow you to be as broad or as concise as you think your responsibilities will be. For example, if you think you will be involved in ASOHMS across the whole of USACE, you should select 'USACE' from the **Command/ASCC/DRU** dropdown and leave the **Division/MS/Region/Lab** dropdown empty. Conversely, if you think your ASOHMS-related responsibilities will lie within a single district, like Pittsburgh, for example, you would choose 'USACE', from the **Command/ASCC/DRU** dropdown, then 'Great Lakes and Ohio River Division' from the **Division/MS/Region/Lab** dropdown, then 'Pittsburgh District' from the **District/Center/Site Location** dropdown.

DRAFT

ASOHMS Portal Self-Registration

Email (Username)*:	<input type="text" value="safetypro@army.mil"/>
Password*:	<input type="password" value="....."/>
Confirm Password*:	<input type="password" value="....."/>
First Name*:	<input type="text" value="Ima"/>
Middle Initial:	<input type="text"/>
Last Name*:	<input type="text" value="SafetyPro"/>
Phone*:	<input type="text" value="123-123-1234"/>
Supervisor Name:	<input type="text" value="Geroge Washington"/>
Supervisor Email:	<input type="text" value="washington@army.mil"/>
Command/ASCC/DRU (Level 1):	<input type="text" value="USACE"/>
Division/MS/Region/Lab (Level 2):	<input type="text" value="Great Lakes and Ohio River Division"/>
District/Center/Site Location (Level 3):	<input type="text" value="Pittsburgh District"/>

Figure 4: Example of a completed self-registration form

After filling out the form, click the ‘Submit Registration’ button at the bottom of your screen. If any of the required fields were left blank, you will see red text indicating what fields need attention. Once correcting those areas and clicking ‘Submit Registration,’ you will be taken to a Self-Registration confirmation screen resembling the one in the screenshot below. Completing your self-registration will also generate an e-mail to be sent to the email address you used to create your account. At this point, you can close your web browser. **Remember**, you will not be able to login until an administrator has assigned you at least one role within the ASOHMS portal (thus ‘approving’ your account).

ASOHMS Portal Self-Registration

User registration successful. Note, that you will not be able to login until an administrator has assigned you at least one role within the ASOHMS system.

Figure 5: Self-Registration Confirmation Message

After your self-registration has been approved by an administrator and you have been assigned your role(s), you will receive an email telling you as much. The email will outline what role(s) you have been assigned within the ASOHMS Portal as well. At this point, you will be able to login to the ASOHMS Portal.

2.2 Logging In

In order to login to the ASOHMS portal, you will need to navigate to the login screen, which can be found at <https://asohms.smscx.org>. You will need to provide your username and password in the ‘Username’ and ‘Password’ text

DRAFT

boxes. Remember your username is the same as the email you used to self-register (e.g. 'my.name.here@army.mil'). After entering your username and password, click the 'Login' button.

Login to the ASOHMS Portal

Username:

Password:

Note: Please register if you don't already have an account.

Figure 6: ASOHMS Portal Login Screen

If you have forgotten your password, you will need to reach out to an administrator. They will be able to reset your password for you.

After clicking Login, if your username and password are correct, one of two possible views will appear. If you only have one role assigned to you, you will be taken straight to the ASOHMS Portal homepage, which is discussed in the next section of this user guide. Alternatively, if you have more than one role assigned to your account within the system, you will need to choose which role will be your active role initially. In this case, you will be presented with a modal that will allow you to choose your active role. You will simply need to click the 'Choose Role' button adjacent to the role you would initially like to fulfill within the ASOHMS Portal. After you have chosen a role, you will be transported to the ASOHMS Portal homepage. Note that you can change your active role later on after you have logged in as well. The directions for how to do this are discussed later in this user guide.

Choose Active Role	
Role Description	
System Admin	<input type="button" value="Choose Role"/>
Command/ASCC/DRU Admin for USACE	<input type="button" value="Choose Role"/>
District/Center/Site Location Admin for Pittsburgh District	<input type="button" value="Choose Role"/>
Site Coordinator for Pittsburgh District	<input type="button" value="Choose Role"/>

Figure 7: Choose Active Role Modal

Finally, be aware for security reason the ASOHMS Portal will automatically log users out of the application after approximately 20 minutes goes by with no activity (links or buttons being clicked) at any point after a user has logged in. You will find if 20 minutes of inactivity occurs, the next time you click any link or button within the software you will be redirected back to the login screen. This is the intended behavior of the software and is in place to make the application safer. At this point, you can simply log back into the ASOHMS Portal to resume your work.

DRAFT

2.3 Self-Service Password Reset

If you find yourself unable to login to the ASOHMS Portal due to a lost or forgotten password, you may simply use the self-service password reset function, which you can find on the login screen of the application. To begin, click the ‘Forgot Password’ button, shown in Figure 6 above. This will take you to the ‘ASOHMS Portal Self-Service Password Reset’ screen.

ASOHMS Portal Self-Service Password Reset

If you have forgotten your ASOHMS Portal password, you may use the form below to reset it. You will receive an email sent to your username (email address) specified below with further instructions several minutes after submitting this form.

ASOHMS Portal Username
(Email Address):

[Reset Password](#)

Figure 8: ASOHMS Portal Self-Service Password Reset Screen

On the ‘ASOHMS Portal Self-Service Password’ screen, simply type your username (email address) into the text box and then click the ‘Reset Password’ button. As the text on the screen already explains, you will be sent an email to your username (email address) with further instructions several minutes after clicking the ‘Reset Password’ button.

Once your e-mail arrives, it will give you two special links. The first link can be used to confirm you do in fact intend to reset your password. The second link can be used to cancel the password request. If you cancel the request, your password will remain unchanged from whatever it was previously.

If you click the link to ‘confirm’ the password reset request, you will be taken to the ‘ASOHMS Portal Self-Service Password Reset Confirmation’ screen (seen below in Figure 9). Text on the screen will confirm your password has now been reset. It will provide notification you will be receiving another e-mail shortly containing a new, one-time-use, password. You can use this new password to login to the application one time.

ASOHMS Portal Self-Service Password Reset Confirmation

Your password reset request has been confirmed. You will receive an email shortly that contains a new password for your e-SMS account.

[Go to ASOHMS Portal Login](#)

Figure 9: ASOHMS Portal Self-Service Password Reset Confirmation Screen

2.3.1 Logging In After Password Reset

After logging in using your new password, you will be prompted to create a new password. New passwords are required to contain at least 8 characters, 1 uppercase and 1 lowercase letter, and 1 special character.

DRAFT

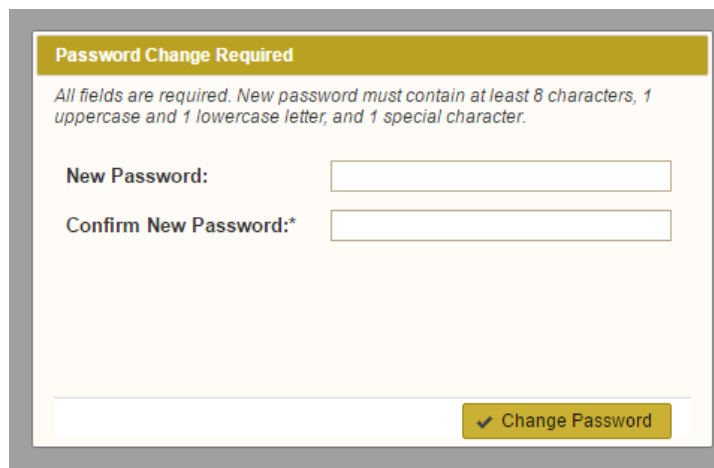


Figure 10: ‘Password Change Required’ Modal is Displayed to User After They Login During the Password Reset Process

2.4 The ASOHMS Portal Homepage and General Layout

Once logged into the ASOMS Portal, you will be taken to the homepage. The homepage and the general layout of the application may be customized for your particular Command, ASCC, or DRU that you registered under. For example, USACE users will see a homepage that resembles the following screenshot after they login. Note that only cosmetics can be customized, all of the buttons and core functionality are the same across all Commands, ASCC’s, and DRU’s.



Figure 11: USACE-customized ASOHMS Portal Homepage

Running across the top of the page immediately beneath the header are four buttons set above a gold background. Those buttons are the following:

- **Release Notes** – Click on this button to read any notes regarding the latest build of the ASOHMS Portal software that has been deployed (version #, etc.)

DRAFT

- **Change Password** – Can be used to change the password for your user account. Note that new passwords are required to contain at least 8 characters, 1 uppercase and 1 lowercase letter, and 1 special character.
- **Help** – Links to the ASOHSM Portal User Guide
- **Logout** – Logs a user out of the ASOHMS Portal Application. It is recommended that for security reason after you complete your work within the ASOHMS Portal that you click this button to log you out of the software.

2.5 Active User Role

Below the aforementioned four buttons set against a gold background, near the horizontal-middle of the screen you will see a label for ‘Logged in as.’ This label shows the name and email for the currently logged in user. Below it, a label titled ‘Active Role’ displays a human-readable description of your active user role. If your user account has been assigned more than one role, you will see a ‘Change’ button next to, or immediately below, the description of your user role. Clicking this ‘Change’ button will launch a modal allowing you to select your active role, in the same manner discussed earlier in section 2.2 of this user guide.

A key concept within the ASOHMS Portal application for users who have been assigned more than one role is recognizing you can only be fulfilling one role at any given time. So for example, you were granted the role of *Site Coordinator* at Site A and the role of *District/Center/Site Location Admin* at Site B you can only be acting within one of those capacities at any time. So if you have work you need to do in both capacities, you might login and choose *Site Coordinator* at Site A to be your active role first. You would then proceed to do anything you need to do for Site A. When finished, you would click the ‘Change’ button near the ‘Active Role’ label to change your active role to *District/Center/Site Location Admin* at Site B. At this point, you could carry on with your responsibilities for Site B.

2.6 Selected Site

Next, to the right of the ‘Logged in as’ and ‘Active Role’ labels, immediately below the header and gold section divider, you will see the ‘Selected Site’ label. If your active role is *Site Observer*, *Site User*, *Site Coordinator*, or *District/Center/Site Location Admin* the name of the site corresponding to your role will be displayed beside the ‘Selected Site’ label. Alternatively, if your active role is *Division/MS/Region/Lab Admin*, *Command/ASCC/DRU Admin*, or *System Admin*, you will see the text ‘(No Site Selected)’ beside the ‘Selected Site’ label until you have explicitly selected a site to manage. This is because your role is broad enough to encompass more than one individual site.

If your current role is *Division/MS/Region/Lab Admin*, *Command/ASCC/DRU Admin*, or *System Admin* and you are ready to select a site, click the ‘Choose’ button displayed to the right of the ‘(No Site Selected)’ text. This action will display the ‘Choose Site to Manage’ modal seen in Figure 12 below. This modal will allow you to choose the exact site you want to manage using a series of cascading select boxes.

Remember each item on the ASOHMS Portal hierarchy is a site in and of itself. So, for example, in Figure 12 below, ‘USACE’ and ‘Great Lakes and Ohio River Division’ each have their own sites, in addition to the sites displayed in the ‘District/Center/Site/Location (Level 3)’ dropdown (e.g. ‘Buffalo District’, ‘Chicago District’, etc.) If, for instance, you wanted to select ‘Great Lakes and Ohio River Division’ as your ‘Selected Site,’ you would simply leave the ‘District/Center/Site Location (Level 3)’ select box empty and click on the ‘Save’ button at the bottom of the modal.

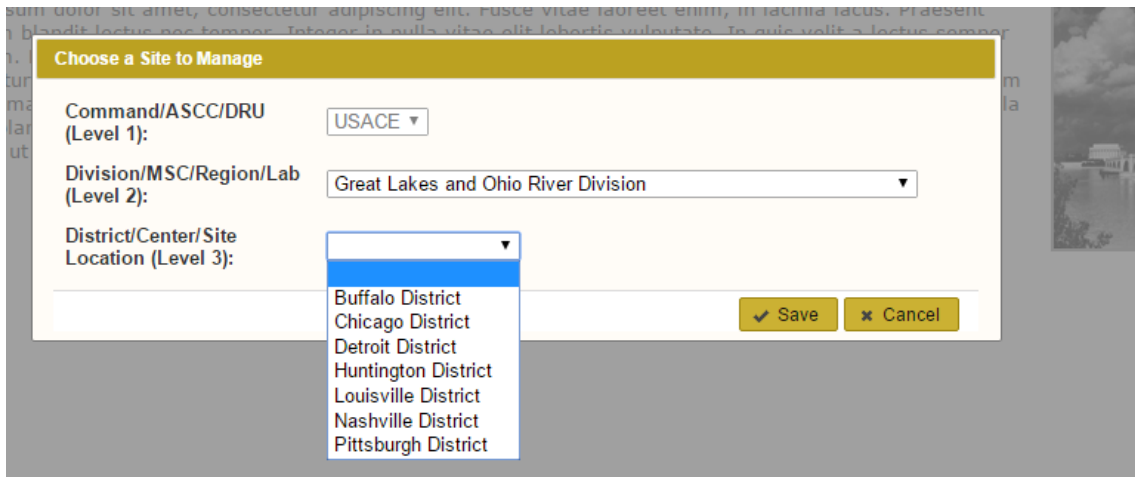


Figure 12: Choose Site to Manage Modal

After selecting a site to manage, you will see new main menu options appear on the right of your screen regarding to the GAP Action Plan. Additionally, the 'Selected Site' label will also display the name of the site you have selected. As seen in Figure 13 below, you can change your currently selected site at any time by clicking the 'Change' button adjacent to the name of your selected site. Additionally, if you want to clear your selected site, you may do so by clicking the 'Clear' button.

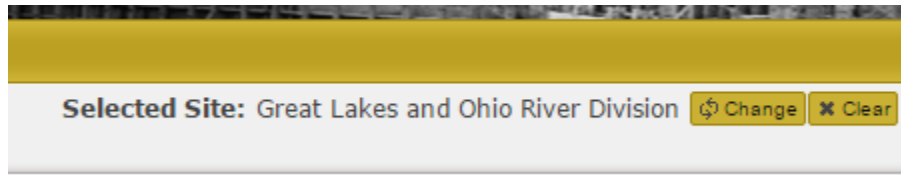


Figure 13: 'Selected Site' label when a site is selected

Running along the left of the screen is the main menu. The options that display under the main menu are different depending on your active user role and whether or not you are currently managing a specific site. The menu options and what they do are discussed later in this guide in full detail.

3.0 Uploading a GAP Spreadsheet

Uploading a GAP Spreadsheet is an optional feature that can be used to import the statuses and comments collected within an Excel ASOHMS worksheet into the ASOHMS Portal action for an individual site.

3.1 Introduction to GAP Spreadsheet Uploads

Uploading a GAP Spreadsheet requires a properly formatted GAP spreadsheet. The ASOHMS Portal imports information from the 'GAP Analysis' tab of this spreadsheet. The only changes that should occur to data within the GAP Analysis tab to ensure the data is properly formatted is within the three (3) columns for 'Status' and the three (3) columns for 'COMMENTS' (there one of each column for each stage within the 'Gap Analysis' tab).

Uploading a GAP Spreadsheet is considered an optional feature because you can work on a GAP Action Plan within the ASOHMS Portal without ever uploading a spreadsheet. The GAP Action Plan will simply have 'Unknown' for all the

DRAFT

GAP item statuses and no 'Comments' available if a spreadsheet has not been uploaded. So if you want to 'start from scratch' and/or you do not have a spreadsheet to upload, you can proceed to section 4.0 which discussing the viewing and editing of the GAP Action Plan.

1	Final Audit Criteria	Criterion Purpose	STAGE I	Purpose	COMMENTS
2	C0.1 Leadership Engagement and Personnel/Soldier Participation				
3	1. All elements (Engaged Leaders and Personnel Involvement, Area Of Responsibility (AOR) / Worksite Analysis, Hazard Prevention and Control, and Safety and Health Training) and sub-elements of a basic safety and health program are included in a signed document.	Alignment of all personnel in support of achieving organization's safety objectives.	Written and signed SOH management system documents address the scope and complexity of hazards at the organization and incorporates all Army SOH management system elements (Leader Engagement and Personnel Involvement, Area of Responsibility / Worksite Analysis, Hazard Prevention and Control, and Safety and Health Training) and sub-elements of the	Ensure hazards in Army systems and facilities are identified and the risks associated with these hazards are properly managed.	<div style="background-color: #f08080; padding: 2px;">No Action Taken</div> Lorem ipsum dolor sit amet, consectetur adipiscing elit. Fusce vitae laoreet enim, in lacinia lacus. Praesent bibendum blandit lectus nec tempor. Integer in nulla vitae elit lobortis vulputate. In quis velit a lectus semper bibendum. Nulla euismod neque nec mauris molestie, vel sollicitudin erat euismod. Nunc a augue orci. Sed consectetur
4	2. The written SOH program addresses the methods personnel use to report hazards (including those not in their AOR or work area), report near misses, submit suggestions, etc. to leaders, supervisors or managers.	The organization establishes, implements and maintains procedure(s) for ongoing hazard identification.	The documented hazard reporting and control process addresses "Personnel Reports of Hazards" and can be done anonymously.	The organization established, implemented and maintains procedure(s) for ongoing hazard identification.	<div style="background-color: #f08080; padding: 2px;">No Action Taken</div> Lorem ipsum dolor sit amet, consectetur adipiscing elit. Fusce vitae laoreet enim, in lacinia lacus. Praesent bibendum blandit lectus nec tempor. Integer in nulla vitae elit lobortis vulputate. In quis velit a lectus semper bibendum. Nulla euismod neque nec mauris molestie, vel sollicitudin erat euismod. Nunc a augue orci. Sed consectetur
5	3. The organization conducts self-evaluations every calendar year producing recommendations for improvements each with an assigned action officer.	The organization conducts self-evaluation of the safety program annually.	The organization's annual self-evaluation incorporate all aspects of the SOH program, including recommendations for improvement.	The organization conducts self-evaluation / audits of the SOH program	<div style="background-color: #ffff00; padding: 2px;">In Progress</div> Lorem ipsum dolor sit amet, consectetur adipiscing elit. Fusce vitae laoreet enim, in lacinia lacus. Praesent bibendum blandit lectus nec tempor. Integer in nulla vitae elit lobortis vulputate. In quis velit a lectus semper bibendum. Nulla euismod neque nec mauris molestie, vel sollicitudin erat euismod. Nunc a augue orci. Sed consectetur
6	4. Leaders demonstrate effective, visible leadership with respect to the SOH program. Provide examples.	Leaders demonstrate commitment to the SOH management system.	Written SOH program documentation requires senior leaders, managers, and supervisors to set examples by practicing proactive visible leader behaviors demonstrating their commitment to the SOH program.	Leaders demonstrate commitment to the SOH management system.	<div style="background-color: #ffff00; padding: 2px;">In Progress</div> Lorem ipsum dolor sit amet, consectetur adipiscing elit. Fusce vitae laoreet enim, in lacinia lacus. Praesent bibendum blandit lectus nec tempor. Integer in nulla vitae elit lobortis vulputate. In quis velit a lectus semper bibendum. Nulla euismod neque nec mauris molestie, vel sollicitudin erat euismod. Nunc a augue orci. Sed consectetur
7	5. The organization has communicated established personnel SOH policies, results-oriented goals, and objectives to personnel.	The organization's goals and objectives should be aligned to execute the organization's SOH Management System.	The organization has established annual SOH goals in the organization's written SOH Strategic Plan with specific, measurable, attainable, relevant, and timely (SMART) objectives.	The organization's goals and objectives are aligned to execute Army Safety Management System.	<div style="background-color: #f08080; padding: 2px;">No Action Taken</div> Lorem ipsum dolor sit amet, consectetur adipiscing elit. Fusce vitae laoreet enim, in lacinia lacus. Praesent bibendum blandit lectus nec tempor. Integer in nulla vitae elit lobortis vulputate. In quis velit a lectus semper bibendum. Nulla euismod neque nec mauris molestie, vel sollicitudin erat euismod. Nunc a augue orci. Sed consectetur

Figure 14: The 'Gap Analysis' tab of a properly formatted GAP spreadsheet

3.2 Uploading a Spreadsheet

A link entitled 'Manage GAP Spreadsheet Uploads' will appear on the main menu after a site has been selected for management. Refer to section 2.6 for more information on selecting a site to manage.



Figure 15: Location of 'Manage GAP Spreadsheet Uploads' Link

DRAFT

The 'Manage GAP Spreadsheet Uploads' section will have a button named 'Upload New GAP Spreadsheet' located in the top-right corner of the main content area. This button can be used to initiate a new GAP spreadsheet upload.

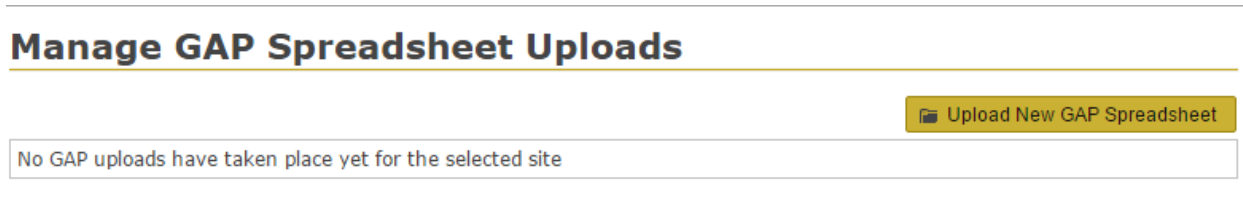


Figure 16: 'Manage GAP Spreadsheet Uploads' section layout

Clicking the 'Upload New GAP Spreadsheet Upload' button opens the 'Upload New GAP Spreadsheet' modal. The first option in the modal is the 'Affected Stages' option. This option allows you to select which stages' information should be imported from the GAP Spreadsheet and which should be ignored. So for example, if 'Stage One' was checked, and 'Stage Two' and 'Stage Three' were unchecked, only the information from Stage 1 within the spreadsheet being uploaded would be imported into the ASOHMS Portal. In this example, any information that already existed for Stage Two and Stage Three within the ASOHMS Portal GAP Action Plan would be completely unaffected by this upload. Additionally, there are no restrictions as to when a site can upload a GAP Action Plan for a particular stage (e.g. there is no check for stage 1 being 'complete' before stage 2 can be uploaded, etc.)

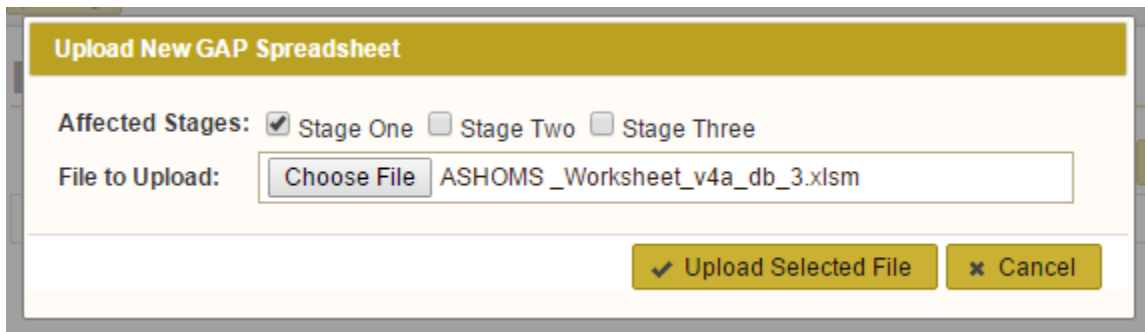


Figure 17: Upload New GAP Spreadsheet Modal

In the next step for uploading a GAP spreadsheet, you will need to click the 'Browse' button to choose a file from disk to be uploaded. Typically, the GAP Spreadsheet should have an '.xslm' file extension.

It is noted if you already have information saved within your GAP Action Plan (either as a result of previous GAP spreadsheet uploads or from editing information within the ASOHMS Portal GAP Action Plan itself) a warning will be displayed at the top of the 'Upload New GAP Spreadsheet' modal in orange. The warning will pinpoint which of the three stages already have information saved that could be at risk of overwriting should a GAP Spreadsheet Upload occur that affects those stages. For example, in Figure 18 below, the message indicates only Stage 1 has any saved information at this point. This means that if you check the box for 'Stage One' in the 'Affected Stages' option, that you will potentially be overwriting any statuses and comments previous collected for stage 1. Conversely, if you check 'Stage Two', 'Stage Three', or both, and you leave 'Stage One' unchecked, you will only be making changes to stage 2 and 3 and the information within stage 1 will remain unchanged.

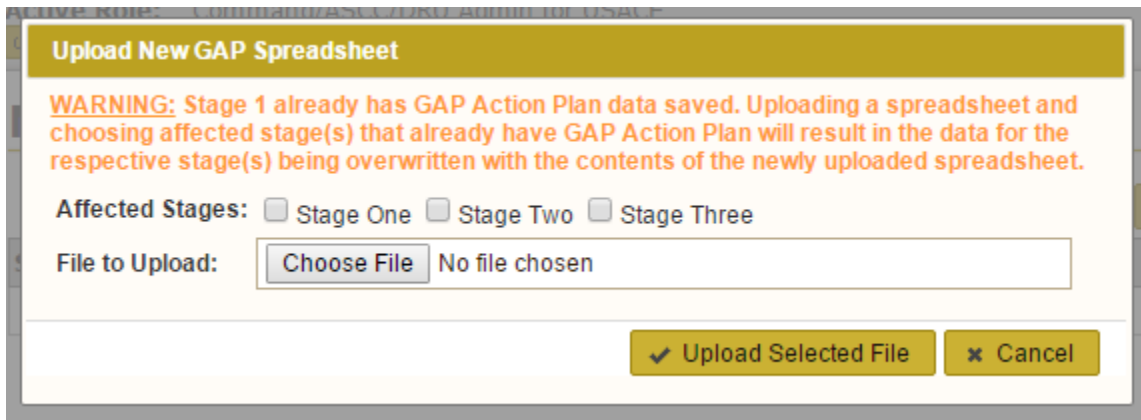


Figure 18: Warning message displayed within 'Upload New GAP Spreadsheet' modal

After choosing what stages should be affected by the upload, and choosing the spreadsheet itself that you want to upload, you can click the 'Upload Selected File' button. If the spreadsheet is properly formatted, you will see a success message like the one displayed in Figure 19 below.

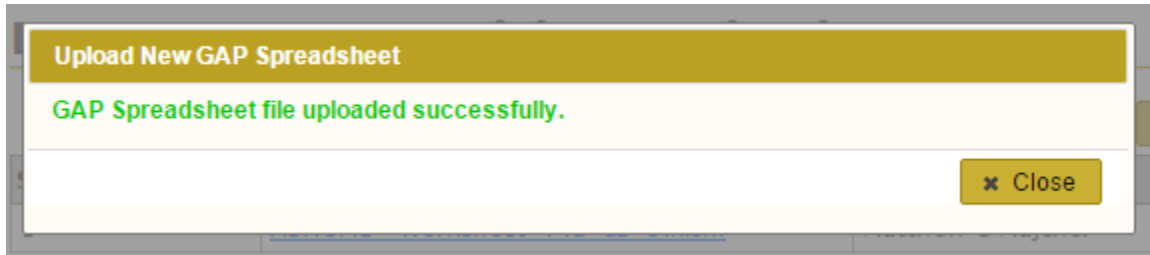


Figure 19: Message displayed when GAP spreadsheet uploaded successfully

If the spreadsheet upload fails, this is usually due to the spreadsheet being improperly formatted. Adding extra rows, columns, or changing the contents of cells other than those that fall under the 'Status' and 'COMMENTS' columns within the 'Gap Analysis' tab can result in the spreadsheet becoming improperly formatted. A message such as the one displayed in Figure 20 appears when an upload failure occurs. If you need help determining why a given spreadsheet is not uploading successfully, seek help from SMCX personnel.

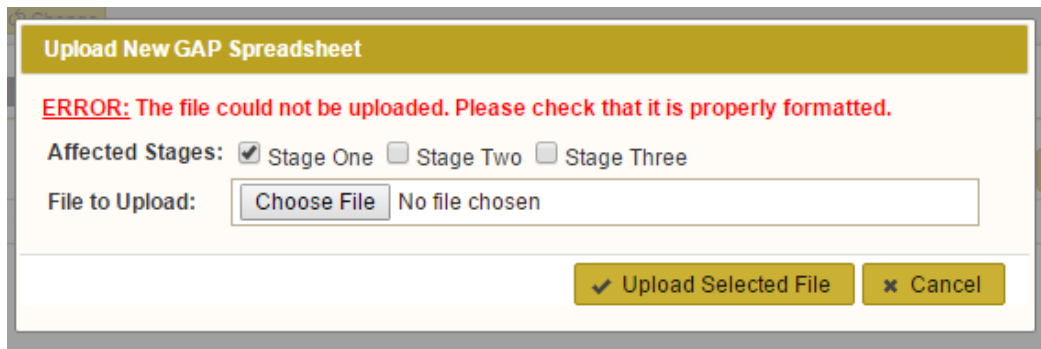


Figure 20: Error message displayed when GAP Spreadsheet upload fails

DRAFT

3.3 Reviewing Previous GAP Spreadsheet Uploads

After one or more GAP Spreadsheet uploads have taken place, a record of that activity will be displayed within the ‘Manage GAP Spreadsheet Uploads’ section in a table format. Each row in the table represents a single GAP Spreadsheet upload. The uploads are listed in chronological order with the newest uploads listed first. The columns of the table should be interpreted as follows:

- **Stages Affected** – Lists the stages (comma delimited if more than one) that were affected by a given GAP Spreadsheet upload.
- **File Name** – Lists the name of the file that was uploaded. The name also serves as a hyperlink that, when clicked, will allow you to download a copy of the spreadsheet.
- **Uploaded By** – The name of the user who uploaded the GAP Spreadsheet.
- **Uploaded On** – The Date and time when the spreadsheet was uploaded.

Manage GAP Spreadsheet Uploads



The screenshot shows a web interface for managing GAP spreadsheet uploads. At the top right, there is a yellow button labeled 'Upload New GAP Spreadsheet'. Below it is a table with four columns: 'Stages Affected', 'File Name', 'Uploaded By', and 'Uploaded On'. The table contains two rows of data.

Stages Affected	File Name	Uploaded By	Uploaded On
2,3	Another ASHOMS Worksheet.xlsxm	Matthew C Majcher	09/09/2016 08:36:01 AM
1	ASHOMS Worksheet v4a_db 3.xlsxm	Matthew C Majcher	09/09/2016 08:13:33 AM

Figure 21: Record of Previous GAP Upload Activity

4.0 Viewing/Editing the GAP Action Plan

You can access the GAP Action Plan by clicking the ‘View Edit Action Plan’ link from the Main Menu. This link will only appear after you have selected a site to manage. Refer to section 2.6 for more information on selecting a site to manage.

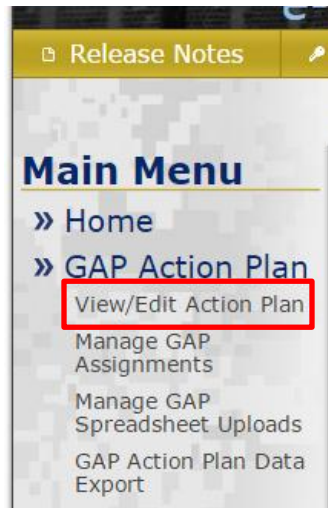


Figure 22: View/Edit GAP Action Plan Link

4.1 General Layout of the GAP Action Plan

The name of the site currently being managed is displayed the top of the GAP Action Plan in parentheses. Below this, a box entitled ‘View Customization / Filters’ is displayed. The options within the ‘View Customization / Filters’ box are described below:

- **Stage** – Only one stage of the GAP Action Plan is displayed at a time. This dropdown allows you to switch between the three stages
- **Status Rating** – Allows you to filter down your view to only GAP items that are currently assigned a specific status rating. The options for the status rating filter are ‘All’, ‘Unknown’, ‘No Action Taken’, ‘In Progress’, and ‘Complete.’
- **Additional Columns** – Allows you to toggle which columns within the main GAP Action Plan table should be displayed at any given time. How to interpret the information within these columns is discussed later in this section.
- **Other Options** – Contains a checkbox labeled ‘Only Show Items Assigned to Me.’ Checking this box will filter down your view to only include GAP items that have been explicitly assigned to you.

The GAP Action Plan is organized into Capability Objectives (CO’s). Each CO is displayed in a header with a gold background. On the right hand side of each CO header, a ‘Rating Totals’ reference is displayed. This reference indicates how many items under the given CO are marked with which status. For example, the number displayed above the grey background indicates the number of items whose status is currently ‘Unknown’ for the given CO.

GAP Action Plan (Buffalo District)

View Customization / Filters

Stage:

Status Rating:

Additional Columns: Crit. Description Crit. Purpose Comments Notes Files Target Comp. Date Last Upd. On

Other Options: Only Show Items Assigned to Me

Capability Objective 0.1: Leadership Engagement and Personnel/Soldier Participation					RATING TOTALS
ID	Item Description	Item Purpose	Status Rating	Notes	Actions
1	Written and signed SOH management system documents address the scope and complexity of hazards at the organization and incorporates all Army SOH management system elements (Leader Engagement and Personnel Involvement, Area of Responsibility / Worksite Analysis, Hazard Prevention and Control, and Safety and Health Training) and sub-elements of the program. If not, provide current status.	Ensure hazards in Army systems and facilities are identified and the risks associated with these hazards are properly managed.	No Action Taken	Matthew C Majcher (Sep 9, 2016 08:13:30 AM) Nulla euismod neque nec mauris molestie, vel sollicitudin erat euismod.	<input type="button" value="Attach File"/> <input type="button" value="Add Note"/> <input type="button" value="View Details"/> <input type="button" value="Edit Details"/>
2	The documented hazard reporting and control process addresses "Personnel Reports of Hazards" and can be done anonymously.	The organization established, implemented and maintains procedure(s) for ongoing hazard identification.	No Action Taken		<input type="button" value="Attach File"/> <input type="button" value="Add Note"/> <input type="button" value="View Details"/> <input type="button" value="Edit Details"/>
3	The organization's annual self-evaluation incorporate all aspects of the SOH program, including recommendations for	The organization conducts self-evaluation / audits of the SOH program	In Progress		<input type="button" value="Attach File"/> <input type="button" value="Add Note"/> <input type="button" value="View Details"/>

Figure 23: The main display of the GAP Action Plan

DRAFT

4.1.1 GAP Action Plan Columns

A breakdown of each of the columns that can be displayed within the GAP Action Plan follows. Note that columns marked with an asterisk (*) are optional and can be toggle on and off using the ‘Additional Columns’ options from the ‘View/Customization’ box at the top of the screen.

- **Criteria Description *** – The description of the criteria that the given GAP item belongs to. Remember that Criteria are broader than GAP items and span all three stages of the GAP Action Plan. This description is not stage-specific.
- **Criteria Purpose *** – The purposed of the criteria that the given GAP item belongs to. Remember that Criteria are broader than GAP items and span all three stages of the GAP Action Plan. This purpose is not stage-specific.
- **Item Description** – The description of the given GAP item. This description is stage-specific.
- **Item Purpose** – The purpose of the given GAP item. This purpose is stage-specific.
- **Comments *** – These are the comments from the ‘COMMENTS’ column of the GAP Spreadsheet that were imported. This column is only pertinent when a GAP Spreadsheet was uploaded for the selected site and the stage currently being viewed.
- **Status Rating** – Displays the current status rating of the given GAP item. Users with permission (either by role or by assignment) to work on the given Gap item may change the status using the dropdown in the center of cell. Changing an item’s status to be ‘Completed’ triggers a requirement to collect the corrective actions that were taken. More information on this is available from section 4.2.1 of this user guide.
- **Notes *** - Displays notes that have be attached to the given GAP item. Notes are attributed to the author and time stamped. Up to the most recent three notes are displayed in the ‘Notes’ column. More information on Notes is available later in this user guide.
- **Files *** - Lists information for any files that have been uploaded or cross-referenced by the given GAP item. For each file, the name of the file is displayed as a hyperlink that will trigger the download of the file when clicked. Additionally, each file’s description, file size, uploader, and timestamp are displayed as well. More information on files is available later in this user guide.
- **Target Completion Date *** - The date that has been identified as the goal for being able to mark a GAP item as complete.
- **Last Updated On *** - A date indicating when the last change was made to a given GAP item. This date takes into account status changes, notes, files, target completion date updates, etc.
- **Actions** – Contains either 1 or 4 buttons depending on whether or not the current user’s role and/or assignments grant them permission to edit the given GAP item. Buttons labeled ‘Attach File’, ‘Add Note’, ‘View Details’, and ‘Edit Details’ are displayed for users who have permission to edit a given GAP item. For users without said permission, only ‘View Details’ is displayed. More information on using these buttons is available in the next section of this user guide.

4.2 Actions Available from GAP Action Plan Main Display

4.2.1 Toggle Status Rating

Under the ‘Status Rating’ column, for each GAP Item, a drop down is displayed that allows users with permission to edit the given GAP item to change the status rating. Toggling this drop down saves the change immediately.

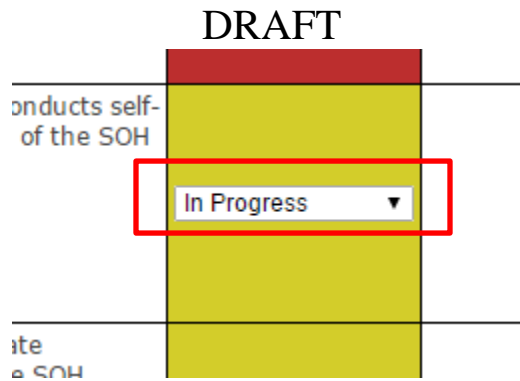


Figure 24: Toggle Status Rating Quick Action

A special case arises, however, when the status rating is changed to Complete/green. A modal entitled ‘Edit Corrective Actions Required to Complete Text’ is displayed. You must provide a description of the actions that were taken that justify marking this action as complete within the text box displayed in this modal.

If the justification was already written in the ‘COMMENTS’ of an uploaded GAP Spreadsheet, you may optionally click the ‘Copy from Comments’ button. This will copy text from the comments into the text box. You will be able to make any edits to that text before submitting your corrective actions. Note that the ‘Copy from Comments’ button is not displayed if no GAP Spreadsheet was uploaded for the current stage or if the comments box corresponding to the given GAP item was blank in the spreadsheet that was uploaded.

After preparing the corrective actions text, click the ‘Continue’ button to proceed and save. Clicking ‘Cancel’ will result in any corrective actions text you supplied being discarded and the GAP item reverting to its previous status (remember that corrective actions text is required to mark an item as complete).

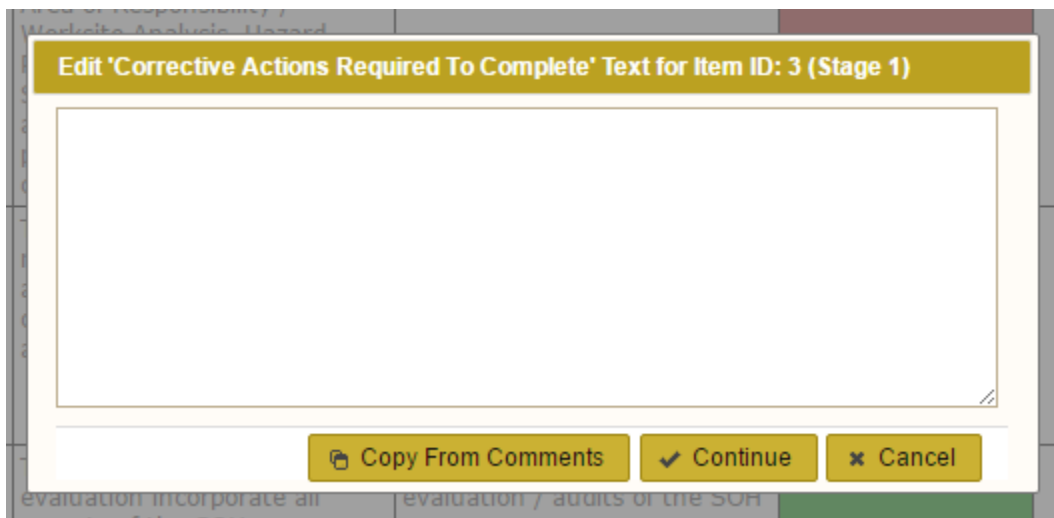


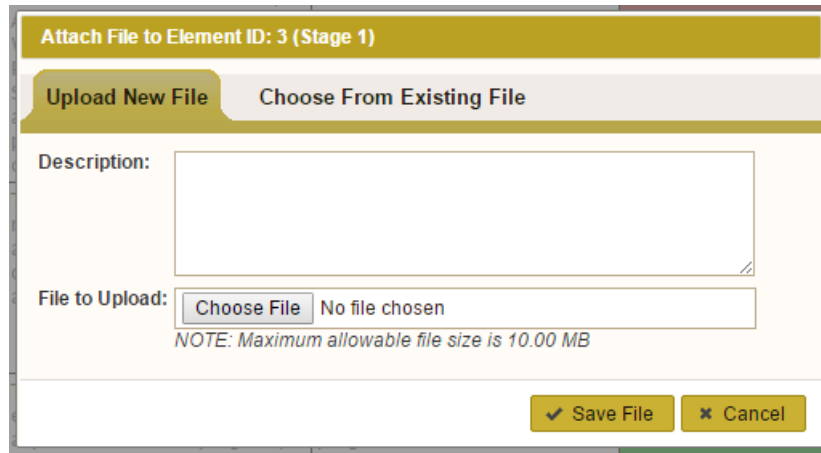
Figure 25: ‘Edit Corrective Actions Required to Complete’ Modal

4.2.2 Attach File

Under the ‘Actions’ column of the GAP Action Plan main display, a button for ‘Attach File’ is displayed for each GAP item that the currently logged in user has permission to edit. This button serves as a quick shortcut for either uploading a new file or cross-referencing a file uploaded to a different item to the given item as well.

DRAFT

Clicking the 'Attach File' button launches the 'Attach File to Element Modal' displayed in Figure 26 below. The modal is divided into two tabs: 'Upload New File' and 'Choose From Existing File'.



The screenshot shows a modal window titled "Attach File to Element ID: 3 (Stage 1)". It has two tabs: "Upload New File" (active) and "Choose From Existing File". Below the tabs is a "Description:" label followed by a text input field. Underneath is a "File to Upload:" label with a "Choose File" button and the text "No file chosen". A note below reads "NOTE: Maximum allowable file size is 10.00 MB". At the bottom right are "Save File" and "Cancel" buttons.

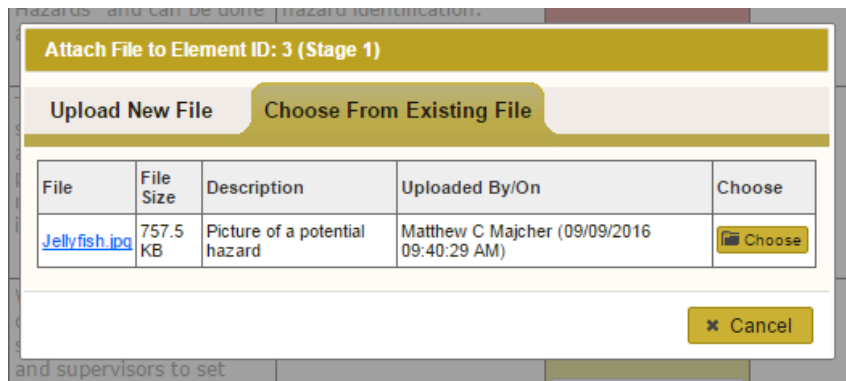
Figure 26: Attach File to Element Modal with 'Upload New File' tab active

To upload a new file:

1. Ensure that 'Upload New File' is the active tab
2. Provide a description of the file in the textbox labeled 'Description'
3. Click 'Choose File' and browse to the file on disk that you want to upload (*NOTE: The maximum file size for uploaded files within the ASOHMS Portal is 10MB*)
4. Click the 'Save' button

To cross-reference a file that was already uploaded for a different GAP item:

1. Ensure that 'Choose From Existing File' is the active tab
2. Locate the file you want to cross-reference from the list of files displayed.
 - a. Note that files will not be listed if they are already referenced by the given GAP item
 - b. Also note that a copy of any file in the list can be downloaded by clicking on its name
3. Once you've located the file you want to cross reference, click the 'Choose' button that corresponds to it



The screenshot shows the same modal window, but with the "Choose From Existing File" tab active. It displays a table of existing files. Below the table is a "Cancel" button.

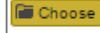
File	File Size	Description	Uploaded By/On	Choose
Jellyfish.jpg	757.5 KB	Picture of a potential hazard	Matthew C Majcher (09/09/2016 09:40:29 AM)	 Choose

Figure 27: Attach File to Element Modal with 'Choose From Existing File' tab active

After you have either uploaded a new file or cross-referenced an existing file, the corresponding gap item will be updated in the GAP Action Plan main display so that your changes are reflected immediately.

DRAFT

4.2.3 Add Note

Under the 'Actions' column of the GAP Action Plan main display, a button for 'Attach File' is displayed for each GAP item that the currently logged in user has permission to edit. This button serves as a quick shortcut to add a note to a GAP item.

Clicking the 'Add Note' button will display the 'Add Note to Item' modal. You need only type the text of your note into the textbox and click 'Save Note' when you are ready to save your note.

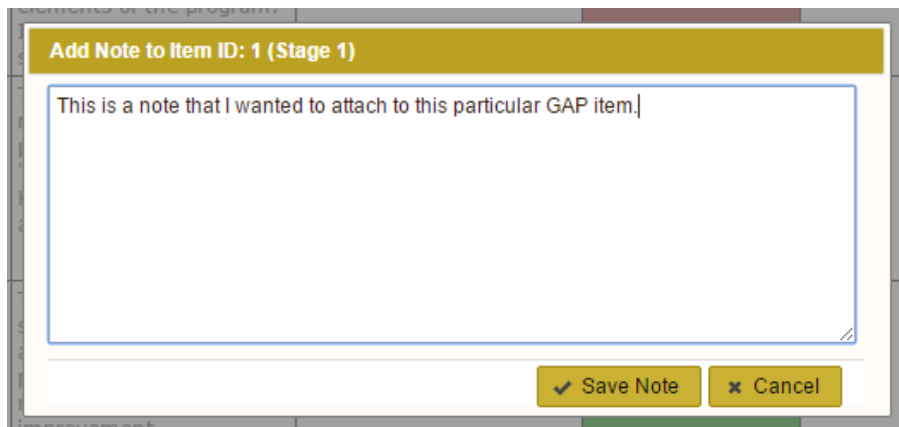


Figure 28: 'Add Note to Item' Modal

After your note has been saved, the corresponding GAP item will be updated in the GAP Action Plan main display so that your changes are reflected immediately.

4.2.4 View Details and Edit Details

Under the 'Actions' column of the GAP Action Plan main display, a button for 'Edit Details' is displayed for each GAP item that the currently logged in user has permission to edit. A button named 'View Details' is displayed for each and every GAP item regardless of a user's permission to edit those items or not. The 'View Details' and 'Edit Details' buttons both launch the same modal, but with one key difference: The 'Edit Details' button displays the modal in such a way that information can be edited, whereas 'View Details' is a read-only view. This user guide will use screenshots and examples from the 'Edit Details' mode. The View/Edit Details modal is divided into 5 tabs: 'Item Details', 'Notes', 'Files', 'Assignments', and 'History/Auditing'.

It is important to note for users of the 'Edit Details' version of this modal that any changes you make within any of the tabs of the modal are not permanently saved until the 'Save' button is clicked at the bottom of the modal. The 'Save' button can be seen at the bottom of Figure 29 below.

4.2.4.1 'Item Details' Tab

The 'Item Details' tab is active by default when the modal is first opened. This tab Shows overview information for the GAP item using the following fields:

- **GAP Item ID** – The unique identifier used to refer to this particular GAP item. It essentially combines the criteria number with the Stage number (e.g. '1 (Stage 1)').
- **Criteria Description** – The description of the criteria the given GAP item belongs to. Remember that Criteria are broader than GAP items and span all three stages of the GAP Action Plan. This description is not stage-specific.

DRAFT

- **Criteria Purpose** – The purpose of the criteria the given GAP item belongs to. Remember that Criteria are broader than GAP items and span all three stages of the GAP Action Plan. This purpose is not stage-specific.
- **Item Description** – The description of the given GAP item. This description is stage-specific.
- **Item Purpose** – The purpose of the given GAP item. This purpose is stage-specific.
- **Rating** – Displays the current status rating of the given GAP item. Users with permission (either by role or by assignment) to work on the given GAP item may change the status using a dropdown. Changing an item's status to be 'Completed' triggers a requirement to collect the corrective actions that were taken. More information on this is available from section 4.2.1 of this user guide.
- **Target Completion Date** - The date identified as the goal for being able to mark a GAP item as complete. This date can be changed if viewing the modal in 'Edit Details' mode.
- **Corrective Actions Required to Complete** – This field displayed the corrective actions text that is collected when an item's status rating is marked as Complete (green). This text can be changed if the item is already marked as complete and if you are viewing the modal in 'Edit Details' mode by clicking the 'Edit' button that is displayed inline at the end of the corrective actions text.
- **Comments (from Spreadsheet Import)** – These are the comments from the 'COMMENTS' column of the GAP Spreadsheet that were imported. This column is only pertinent when a GAP Spreadsheet was uploaded for the selected site and the stage currently being viewed.
- **Criteria Evaluation Method** - The evaluation method details of the criteria the given GAP item belongs to. Remember that Criteria are broader than GAP items and span all three stages of the GAP Action Plan. These evaluation method details are not stage-specific.
- **Criteria Policy Requirement** – The policy requirement details of the criteria the given GAP item belongs to. Remember that Criteria are broader than GAP items and span all three stages of the GAP Action Plan. These evaluation method details are not stage-specific.
- **Item Evaluation Method** – The evaluation method details of the given GAP item. This description is stage-specific.
- **Item Policy Requirement** - The policy requirement details of the given GAP item. This description is stage-specific.

Edit Details: GAP Item 1 (Stage 1)

Item Details | Notes | Files | Assignments | History / Auditing

GAP Item ID: 1 (Stage 1)

Criteria Description: All elements (Engaged Leaders and Personnel Involvement, Area Of Responsibility (AOR) / Worksite Analysis, Hazard Prevention and Control, and Safety and Health Training) and sub-elements of a basic safety and health program are included in a signed document.

Criteria Purpose: Alignment of all personnel in support of achieving organization's safety objectives.

Item Description: Written and signed SOH management system documents address the scope and complexity of hazards at the organization and incorporates all Army SOH management system elements (Leader Engagement and Personnel Involvement, Area of Responsibility / Worksite Analysis, Hazard Prevention and Control, and Safety and Health Training) and sub-elements of the program. If not, provide current status.

Item Purpose: Ensure hazards in Army systems and facilities are identified and the risks associated with these hazards are properly managed.

Rating: Complete

Target Completion Date:

Corrective Actions Required to Complete: These are my corrective actions that i took in order to justify marking this item's status rating as Complete (green). [Edit](#)

Comments (from Spreadsheet Import): Lorem ipsum dolor sit amet, consectetur adipiscing elit. Fusce vitae laoreet enim, in lacinia lacus. Praesent bibendum blandit lectus nec tempor. Integer in nulla vitae elit lobortis vulputate. In quis velit a lectus semper bibendum. Nulla euismod neque nec mauris molestie, vel sollicitudin erat euismod. Nunc a augue orci. Sed consectetur

Criteria Evaluation Method:
1. Review signed documentation that establishes safety policies for the following:
a. Commitment to implement and maintain the SMS
b. Commitment to continuously improve safety standards

Figure 29: View/Edit Details Modal – Item Details Tab

Edit Details: GAP Item 1 (Stage 1)

Item Details | Notes | Files | Assignments | History / Auditing

Criteria Evaluation Method:
1. Review signed documentation that establishes safety policies for the following:
a. Commitment to implement and maintain the SMS
b. Commitment to continuously improve safety standards
c. Commitment to manage safety risk
d. Commitment to comply with all applicable regulatory requirements
e. Commitment to encourage Personnel to report safety issues without fear of reprisal
f. Clear standards for acceptable / unacceptable behavior for all Personnel
g. Commitment to annually select SMART (Specific, Measureable, Attainable, Relevant, and timely) goals and objectives.
h. An effective trend analysis program where identified trends are used to make policy decisions.
i. Align with governing policies
j. Annual reviews of the safety policy documents

Criteria Policy Requirement: AR 385-10, Para 16-2

Item Evaluation Method:
1. Review of safety and health management system (Reg / SOP / SOG) signed documentation for the following:
a. Safety and health policy and objectives
b. Description of the scope of the safety and health management system
c. Description of the main elements of the safety and health management system and their interaction, and reference to related documents
d. Documents, including records, determined by the organization to be necessary to ensure the effective planning, operation and control of processes that relate to the management of its safety and health risks

Item Policy Requirement: AR 385-10, Para 9-4

Figure 30: View/Edit Details Modal – ‘Item Details’ Tab (scrolled down)

DRAFT

4.2.4.2 'Notes' Tab

The next tab available within the View/Edit Details modal is the 'Notes' tab. This tab displays all notes attached to the corresponding GAP item in chronological order with the newest at the top. If you are viewing the modal in 'Edit Details' mode you will be able to create new notes, edit existing notes, and delete notes from within the 'Notes' tab.

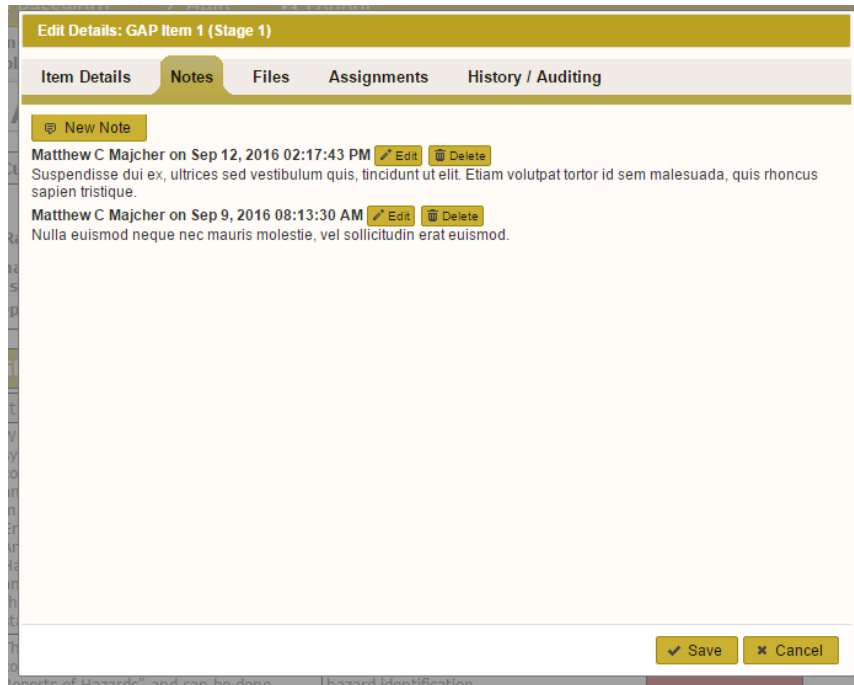


Figure 31: View/Edit Details Modal – 'Notes' Tab

Adding a new note is as simple as clicking the 'New Note' button at the top of the 'Notes' tab. You will simply need to type the text of your new note into the text box displayed and click 'Save Note' when finished.

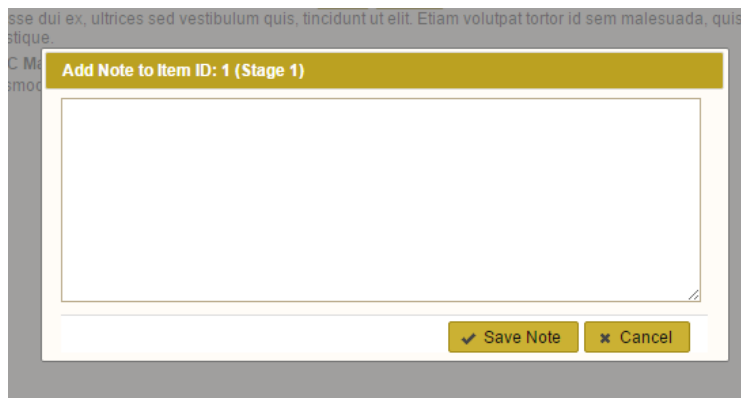


Figure 32: Adding a New Note

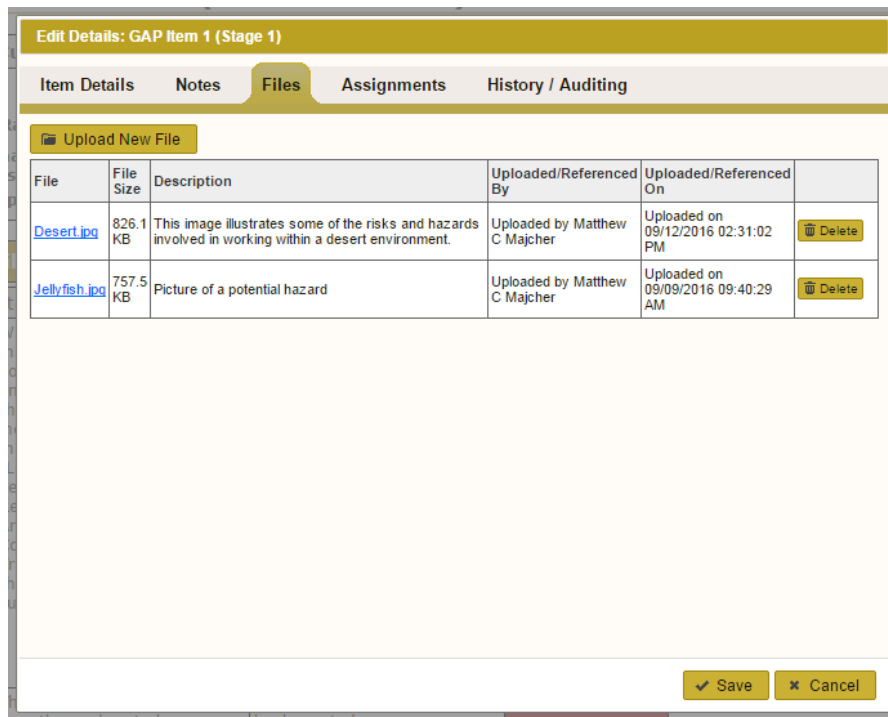
Editing a note is as simple as clicking the 'edit' button on a note that you wish to change. A text box similar to the one displayed in Figure 32 is displayed and it will have the text of the note already pre-loaded. You will simply have to make any edits as needed, and then click the 'Save Note' button when finished.

DRAFT

Deleting a note can be performed by clicking the ‘Delete’ button displayed next to the note that you would like to delete. You will be shown a confirmation prompt asking if you are sure you would like to delete the note. Click ‘Ok’ on the prompt to confirm your intent and ultimately delete the note.

4.2.4.3 ‘Files’ Tab

The next tab available within the View/Edit Details modal is the ‘Files’ tab. This tab displays all files that have been attached to the corresponding GAP item in chronological order with the newest at the top. If you are viewing the modal in ‘Edit Details’ mode, you will be able to upload new files and delete files from within the ‘Files’ tab.



File	File Size	Description	Uploaded/Referenced By	Uploaded/Referenced On	
Desert.jpg	826.1 KB	This image illustrates some of the risks and hazards involved in working within a desert environment.	Uploaded by Matthew C Majcher	Uploaded on 09/12/2016 02:31:02 PM	Delete
Jellyfish.jpg	757.5 KB	Picture of a potential hazard	Uploaded by Matthew C Majcher	Uploaded on 09/09/2016 09:40:29 AM	Delete

Figure 33: View/Edit Details Modal – ‘Files’ Tab

Uploading a new file or cross-referencing an existing file is initiated by clicking the ‘Upload New File’ button. A modal entitled ‘Attach File to Element’ is displayed over top the ‘View/Edit Details’ modal is displayed. This modal is identical to the one discussed previously in section 4.2.2, so please refer to that section for the full details on the mechanics of uploading new files and cross-referencing existing files.

4.2.4.4 ‘Assignments’ Tab

The ‘Assignments’ tab within the View/Edit Details modal allows you to review who is already assigned to a specific GAP Item. The list of assigned users is displayed alphabetically based on assignees’ last names. Additionally, the ‘Assignments’ tab will let you assign users to a specific GAP Item and delete user assignments for a specific GAP Item.

DRAFT

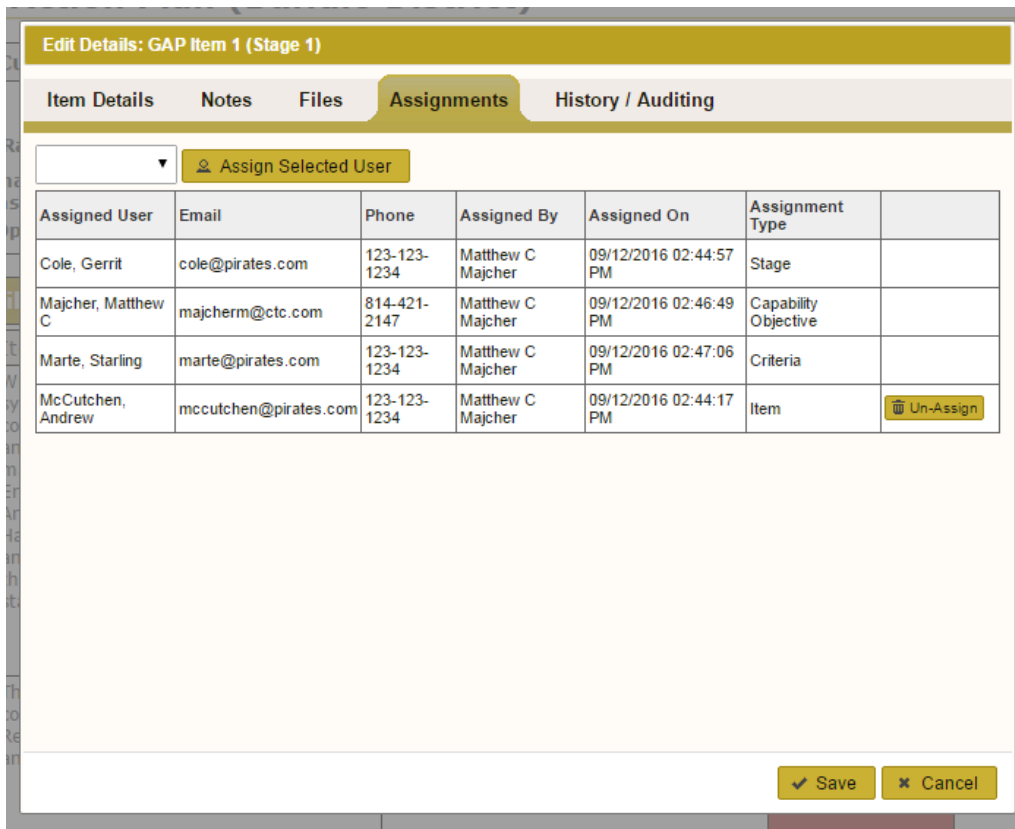


Figure 34: View/Edit Details Modal – ‘Assignments’ Tab

Assigning a new user to the corresponding GAP item is as simple as choosing their name from the dropdown list displayed above the list of assigned users. This dropdown will contain the names of any users deemed to be eligible for assignment who are not already assigned to this GAP item. You may simply select the name you would like to assign and click the ‘Assign Selected User’ button immediately to the right of the dropdown. Note that when a user assignment is saved, the user being assigned will receive an e-mail informing them of their new assignment.

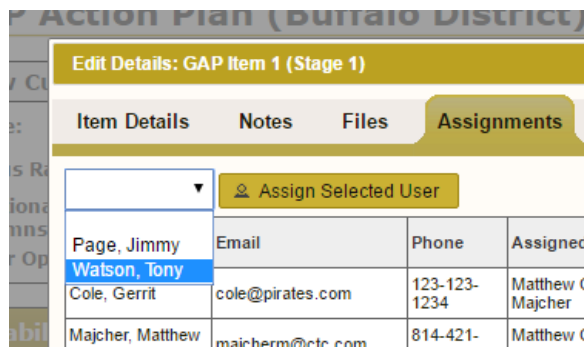


Figure 35: Choosing User to Assign to GAP Item

Users eligible to be assigned to GAP items within the GAP Action Plan are determined by the roles that users have. If a user has the role of Site User, Site Coordinator, District/Center/Site Location Admin, Division/MS/Region/Lab Admin, or Command/ASCC/DRU Admin for the specific site that user will be deemed eligible for assignments to be made to him/her.

DRAFT

There are four kinds of assignments that can be made within the ASOHMS Portal. The ‘Assignments’ tab within the View/Edit Details modal allows you to create the most specific type of assignment, known as ‘Item’ assignments. The other three assignments are ‘Criteria’, ‘Capability Objective’, and ‘Stage’. These three can be made using the ‘Manage GAP Assignments’ section of the ASOHMS Portal application discussed later in this user guide. The type of assignment that has resulted in a given user being assigned to the specific GAP item for which you are looking at the ‘Assignments’ tab within the View/Edit Details modal will be displayed under the ‘Assignment Type’ column.

Since the ‘Assignments’ tab is meant to be specific to a single GAP item, the only type assignment that can be deleted using this tab are ‘Item’ assignments. This is why, for example, in Figure 34 above; the only assignment with a ‘Un-Assign’ button available is the ‘Item’ type assignment. Un-assigning (deleting) an assignment is as simple as clicking the un-assign button and confirming your intent to delete the given assignment by clicking ‘Ok’ in the confirmation modal that displays afterwards.

4.2.4.5 ‘History/Auditing’ Tab

The fifth and final tab within the View/Edit Details modal is the ‘History/Auditing’ tab. This is a read-only tab for all users and displays a chronological list of all activity within the system as it pertains to the related GAP item. Changes related to status rating, target completion date, notes, files, assignments, corrective actions, and more are able to be tracked using this tab. Each activity is represented by a row within the main table and listed chronologically with the most recent activity listed at the top of the table.

Change On	Change By	Status Rating	Change Details
Sep 12, 2016 02:44:17 PM	Matthew C Majcher	<input checked="" type="checkbox"/> No Action Taken	Assigned Andrew McCutchen to this item.
Sep 12, 2016 02:31:02 PM	Matthew C Majcher	<input checked="" type="checkbox"/> No Action Taken	Uploaded a file named Desert.jpg (826.1 KB), it's description reads: "This image illustrates some of the risks and hazards involved in working within a desert environment."
Sep 9, 2016 09:40:29 AM	Matthew C Majcher	<input checked="" type="checkbox"/> No Action Taken	Uploaded a file named Jellyfish.jpg (757.5 KB), it's description reads: "Picture of a potential hazard"
Sep 9, 2016 08:13:30 AM	Matthew C Majcher	<input checked="" type="checkbox"/> No Action Taken	Changed status rating from Unknown to No Action Taken.
Sep 9, 2016 08:13:30 AM	Matthew C Majcher	<input type="checkbox"/> Unknown	Authored a new note to read: "Suspendisse dui ex, ultrices sed vestibulum quis, tincidunt ut elit. Etiam volutpat tortor id sem malesuada, quis rhoncus sapien tristique."
Sep 9, 2016 08:13:30 AM	Matthew C Majcher	<input type="checkbox"/> Unknown	Authored a new note to read: "Nulla euismod neque nec mauris molestie, vel sollicitudin erat euismod."

Figure 36: View/Edit Details Modal – ‘History/Auditing’ Tab

Note that you are able to filter down the activity table to only those activities performed by a single, specific user by using the dropdown that corresponds to the ‘Filter by User’ label above the activity table.

5.0 Managing GAP Action Plan Assignments

You can access the ‘Manage GAP Assignments’ section by clicking the ‘Manage GAP Assignments’ link from the Main Menu. This link will only appear after you have selected a site to manage. Refer to section 2.6 for more information on selecting a site to manage. Only Site Coordinators, District/Center/Site Location Admins, Division/MSC/Region/Lab Admins, Command/ASCC/DRU Admins, and System Admins have access to this section.

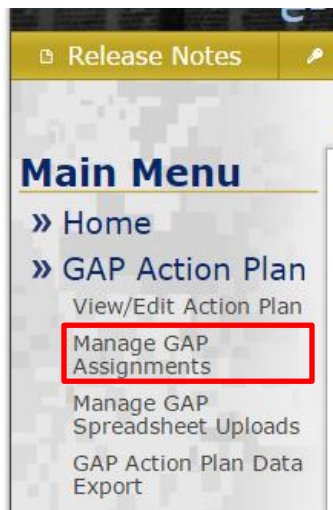


Figure 37: ‘Manage GAP Assignments’ Link

The ‘Manage GAP Assignments’ section displays the name of the site currently being managed in parentheses immediately to the right of the page title. This is meant to emphasize that assignments being made on this page pertain to only one specific site within the ASOHMS Portal.

Users who are eligible to be assigned portions of the GAP Action Plan for the site being managed are displayed in a table in the main display area of the section. For more information of assignment eligibility is determined, please see section 4.2.4.4 in this user guide. This table listed eligible users’ names, phone numbers, and email for quick reference. It also lists the portions of the GAP Action Plan a user has been assigned under 4 columns (one column for each assignment type):

- **Assigned Stages** – The broadest of all assignments, means that a user has been assigned ALL of the items within a given stage.
- **Assigned Capability Objectives** – The second-most broad of all assignments. These assignments mean that a user has been assigned all of the GAP items that are organized under a given capability objective. It is important to note that Capability Objective assignment transcend stages. So for example, if a user is assigned C.O. 0.1, that user will have the C.O. 0.1 GAP items assigned to them for stages 1, 2, and 3.
- **Assigned Criteria** – The third-most broad assignment type. The assignments mean that a user has been assigned all of the GAP Items (regardless of stage) that belong to the assigned criterion.
- **Assigned Items** - The most granular of all assignment types. ‘Item’ assignments only assign one stage-specific item within the GAP Action Plan per assignment.

DRAFT

Manage GAP Assignments (Buffalo District)

Name	Phone	Email	Assigned Stage(s)	Assigned Capability Objective(s)	Assigned Criteria(on)	Assigned Item(s)	
Cole, Gerrit	123-123-1234	cole@pirates.com	Stage 1				Edit Assignment(s)
Majcher, Matthew C	814-421-2147	majcher@ctc.com		CO 0.1			Edit Assignment(s)
Marte, Starling	123-123-1234	marte@pirates.com			CO 0.1 > Criteria 1		Edit Assignment(s)
McCutchen, Andrew	123-123-1234	mccutchen@pirates.com				Stage 1 > CO 0.1 > Item 1	Edit Assignment(s)
Page, Jimmy	123-123-1234	jimmypage@pirates.com					Edit Assignment(s)
Watson, Tony	814-123-1234	tony.watson@pirates.com					Edit Assignment(s)

Figure 38: The 'Manage GAP Assignments' Section

5.1 Editing Assignments within the 'Edit GAP Assignments' Modal

Clicking the 'Edit Assignment(s)' button that corresponds to a given user will open the 'Edit GAP Assignments' modal which allows you to add and remove stage, CO, criteria, and item assigns from that user. This modal has three tabs: 'Assignment(s) Overview', 'Criteria Reference', and 'Item Reference'. The first tab, 'Assignment(s) Overview', is active by default when the 'Edit GAP Assignments' modal is first opened.

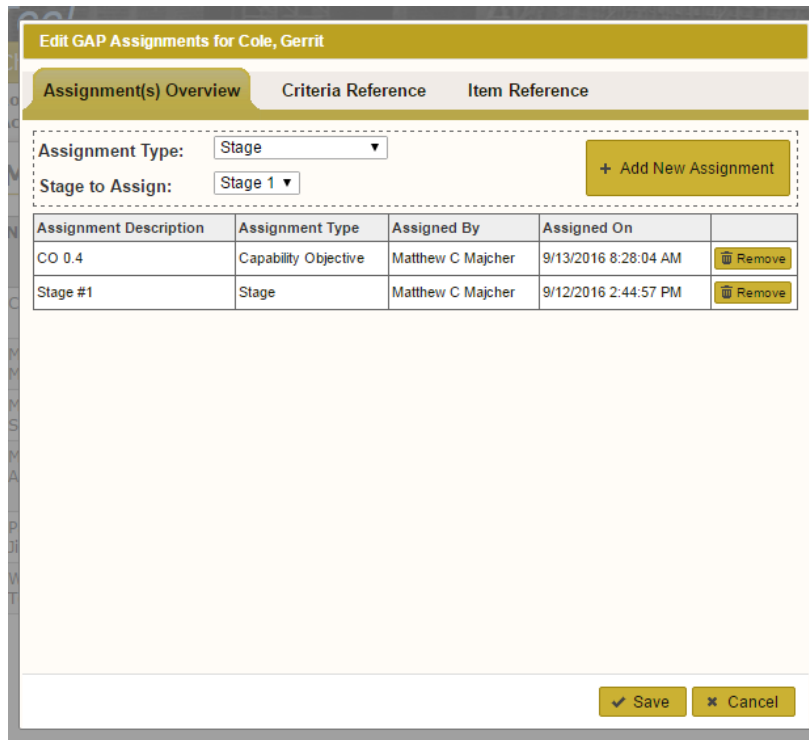


Figure 39: 'Edit GAP Assignments' Modal (with 'Assignment(s) Overview' tab active)

DRAFT

5.1.1 ‘Assignment(s) Overview’ Tab

At the top of the ‘Assignment(s) Overview’ tab is a section surrounded by a dashed border with dropdowns that allow you to make any kind of assignment. For instance, with the ‘Assignment Type’ dropdown set to ‘Stage’, you can the ‘Stage to Assign’ dropdown to select which of the three (3) stages you want to assign. Similarly, for example, with ‘Assignment Type’ set to ‘Capability Objective’, a second dropdown labeled ‘Capability Objective to Assign’ appears that allows you to choose the capability objective you want to assign. Criteria and Items can also be assigned in this way although the ‘Criteria Reference’ and ‘Item Reference’ tab offer a potentially easier way to make those types of assignments and are discussed in sections 5.1.2 and 5.1.3 of this user guide.

After selecting the assignment you want to make using the dropdowns within the dashed box, click the ‘Add New Assignment’ button aligned on the right side of the dashed box. This will add the new assignment into the assignments table displayed immediately beneath the dashed box. The assignments table has 5 columns; the first four ‘Assignment Description’, ‘Assignment Type’, ‘Assigned By’, and ‘Assigned On’ are relatively self-explanatory. The fifth column contains ‘Remove’ buttons that allow you to remove an assignment from a user.

It is important to note that any changes you make to a user’s assignments (additions and deletions) are not permanently saved until you click the ‘Save’ button at the bottom of the ‘Edit GAP Assignments’ modal.

5.1.2 ‘Criteria Reference’ Tab

The ‘Criteria Reference’ tab within the ‘Edit GAP Assignments’ modal is an alternate way to make criteria assignments that allows you to peruse the criteria descriptions and purposes of all the criteria while you are in the process of making assignment decisions. This tab has a dropdown labeled ‘Capability Objective’ at the top allowing you to choose the CO’s criteria you want to browse.

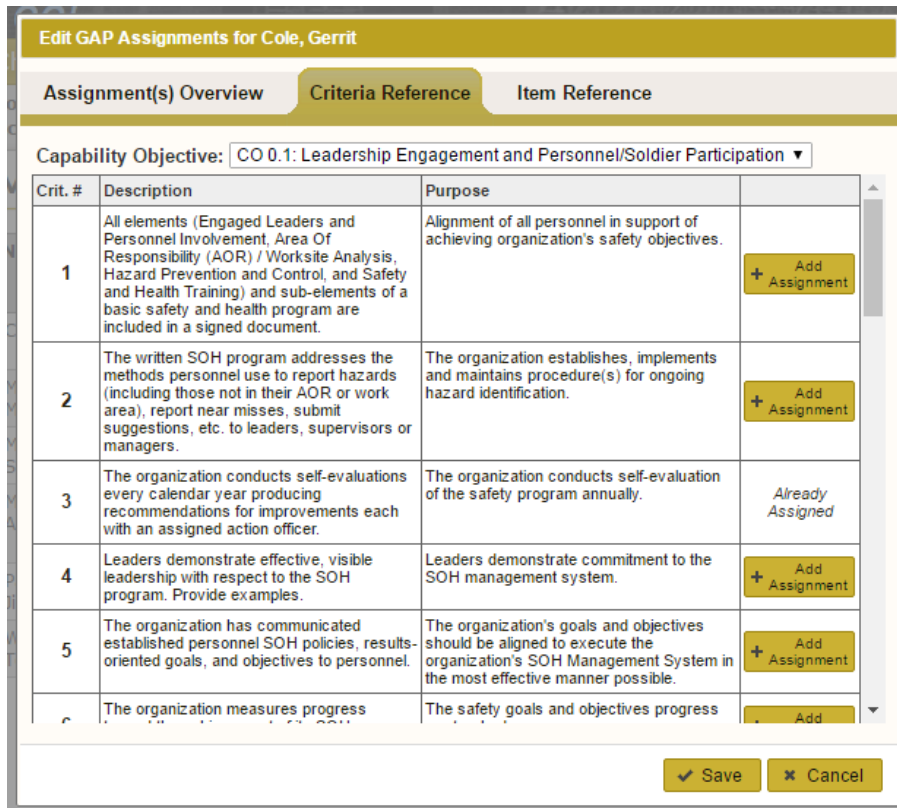


Figure 40: ‘Edit GAP Assignments’ Modal (with ‘Criteria Reference’ tab active)

DRAFT

Below the ‘Capability Objective’ filter, a table detailing all the criteria that correspond to the selected CO is displayed. This table includes the criterion number, description, and purpose for each criterion in the first 3 columns. In addition, a fourth column will display an ‘Add Assignment’ button that will allow you to assign that criterion to a given user in one click. Note that if a given criteria is already assigned to a given user, the text ‘Already Assigned’ will appear in italics in place of the ‘Add Assignment’ button.

Note that when you make an assignment using the ‘Criteria Reference’ tab, that it will appear in the ‘Assignment Overview’ tab in the assignments table as well. Also note that any assignments you add using the ‘Criteria Reference’ tab are not permanently saved until you click the ‘Save’ Button at the bottom of the ‘Edit GAP Assignments’ modal.

5.1.3 ‘Item Reference’ Tab

The ‘Item Reference’ tab within the ‘Edit GAP Assignments’ modal is an alternate way to make item assignments that allows you to peruse the criteria descriptions and purposes of all the items while you are in the process of making assignment decisions. This tab has dropdowns labeled ‘Stage’ and ‘Capability Objective’ at the top allowing you to filter your view of the GAP items.

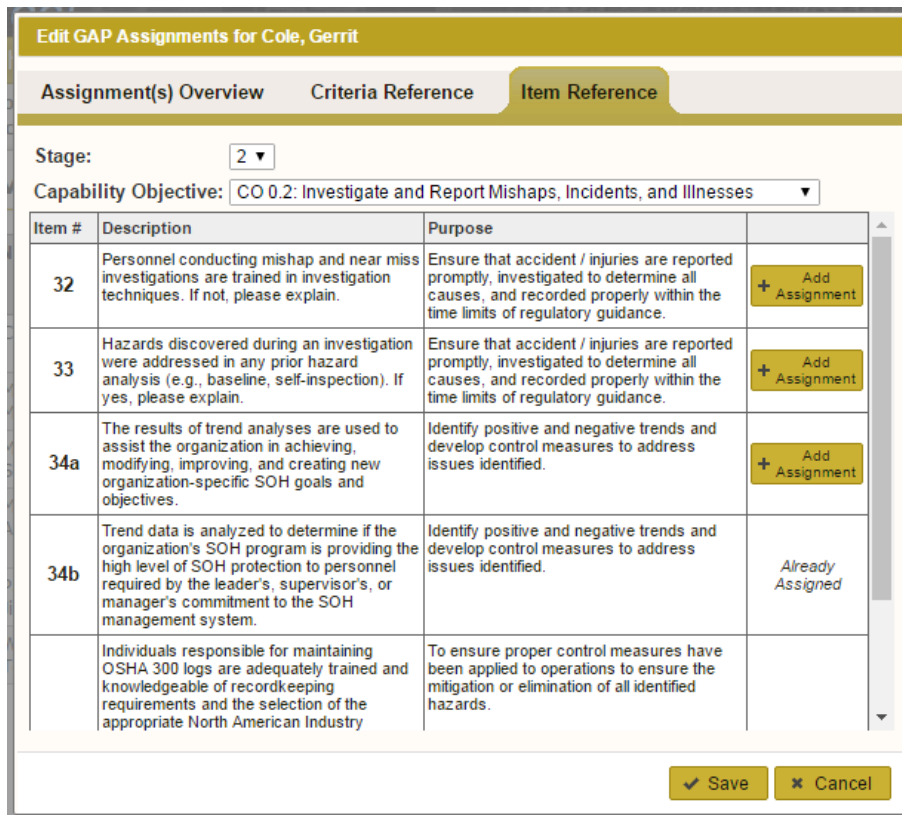


Figure 41: ‘Edit GAP Assignments’ Modal (with ‘Item Reference’ tab active)

Below the ‘Capability Objective’ filter, a table detailing all the items that correspond to the selected Stage and CO is displayed. This table includes the item number, description, and purpose for each item in the first 3 columns. There is also a fourth column that will display an ‘Add Assignment’ button that will allow you to assign that specific item to a given user in one click. Note that if a given item is already assigned to a given user, the text ‘Already Assigned’ will appear in italics in place of the ‘Add Assignment’ button.

DRAFT

Note that when you make an assignment using the 'Item Reference' tab, that it will appear in the 'Assignment Overview' tab in the assignments table as well. Also note that any assignments you add using the 'Item Reference' tab are not permanently saved until you click the 'Save' Button at the bottom of the 'Edit GAP Assignments' modal.

6.0 Exporting GAP Action Plan Data into a Spreadsheet

You can access the 'Manage GAP Action Plan Data' feature by clicking the 'GAP Action Plan Data Export' link from the Main Menu. This link will only appear after you have selected a site to manage. Refer to section 2.6 for more information on selecting a site to manage.



Figure 42: 'GAP Action Plan Data Export' Link

Clicking the 'GAP Action Plan Data Export' link will trigger your web browser to download a .csv (Comma Separated Values) file that is compatible with Microsoft Excel to your hard disk. The file will contain a dump of all of the data pertaining to the selected site's GAP Action Plan. This file can be used to generate your own custom reports and charts within Microsoft Excel.

7.0 Administration of Users and Roles

You can access the 'Manage Users and Roles' section by clicking the 'Manage Users and Roles' link from the Main Menu. Only District/Center/Site Location Admins, Division/MSC/Region/Lab Admins, Command/ASCC/DRU Admins, and System Admins have access to this section.

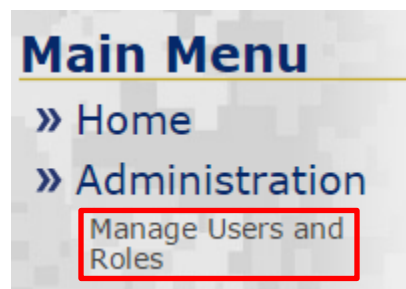


Figure 43: 'Manage Users and Roles' link

DRAFT

7.1 Manage Users and Roles View Customization and Filtering

At the top of the 'Manage Users and Roles' section a table named 'View Customization / Filters' is displayed. This table contains several dropdowns that allow you to custom tailor your view:

- **Approval Status** – Contains the options 'Approved' and 'Pending'. Switching to 'Pending' will display users who do not yet have a role assignment to them. The 'Pending' view is where you will see users listed who have self-registered and who are waiting for account approval. You can learn more about user approval later in this user guide.
- **Page Size** – Customizes the maximum number of users to be displayed per page
- **Level One *** – Corresponds to the 'Command/ASCC/DRU' level hierarchy items. This filter operates on the 'Hierarchy Assignment' of users to filter them down by a specific Command/ASCC/DRU.
- **Level Two *** - Corresponds to the 'Division/MSC/Region/Lab' level hierarchy items. This filter operates on the 'Hierarchy Assignment' of users to filter them down by a specific Division/MSC/Region/Lab.
- **Level Three *** - Corresponds to the 'District/Center/Site Location' level hierarchy items. This filter operates on the 'Hierarchy Assignment' of users to filter them down by a specific District/Center/Site Location.
- **Username** – Allows you to filter the list of users by name. This filter searches first and last name text.

***Note:** Filters listed above with an asterisk operate on the same hierarchy information collected in the self-registration screen discussed in section 2.1. 'Hierarchy Assignment' is also editable within the 'Manage Users and Roles' section and is discussed later in this user guide. Additionally, depending on your active user role these dropdowns may be locked to a specific hierarchy item (for example, in Figure 44, you can see that the active user role of the logged in user is Command/ASCC/DRU Admin for USACE. You will then notice that since the user is operating under a USACE-specific role, the 'Level One' filter is locked to 'USACE').

Logged in as: Matthew C Majcher (majcherm@ctc.com) Selected Site: (No site selected) [Choose](#)
 Active Role: Command/ASCC/DRU Admin for USACE [Change](#)

Manage Users and Roles

View Customization / Filters [Reset Filters](#)

Approval Status:

Page Size:

Level One:

Level Two:

Level Three:

Username:

[Prev](#) **1** [Next](#)
 Displaying results 1 to 6 out of 6

Name	Email	Roles	Hierarchy Assignment			
Cole, Gerrit	cole@pirates.com	Site Coordinator for Pittsburgh District Site User for Buffalo District	USACE > Great Lakes and Ohio River Division > Pittsburgh District	Edit	Edit Roles	Reset Password
Majcher, Matthew C	majcherm@ctc.com	System Admin Command/ASCC/DRU Admin for USACE District/Center/Site Location Admin for Pittsburgh District Site Coordinator for Pittsburgh District Site Coordinator for	USACE > Great Lakes and Ohio River Division > Pittsburgh District	Edit	Edit Roles	Reset Password

Figure 44: Manage Users and Roles Section

7.2 Users and Roles Main Display Table

The main display table for users and roles is displayed below the ‘View Customization / Filters’ table; with the first two columns displaying users’ names and email addresses and the third column entitled ‘Roles’ displaying a list of any role or roles currently assigned to a user. The fourth column, entitled ‘Hierarchy Assignment’ displays the location in the hierarchy that a given user belongs to. If this cell is empty for a given user, it indicates that the given user is considered jurisdiction/authority over the whole of the ASOHSM Portal hierarchy. The fifth column contains a button named ‘Edit’ for each user displayed, which allows you to edit general user information pertaining to a user such as the information collected during that user’s self-registration. The sixth column contains a button named ‘Edit Roles’ for each user displayed and allows you to add and remove roles for a user. Finally, the seventh column entitled ‘Reset Password’ allows you to trigger a password reset for a given user. An eighth column containing a Delete button is available for System Admin users only. The functionality tied to the buttons displayed within the main display table of the ‘Manage Users and Roles’ section is discussed in full in the coming sections of the user guide.

7.3 Scope of Users Available to Edit

Unless you are logged in as with the active role of System Administrator, you will only have access to a subset of the users within the ASOHMS Portal. This applies to both ‘Approved’ and ‘Pending’ users. The scope of which users are available for you to edit depends on two factors:

DRAFT

1. The hierarchy item associated to your active user role (for example this would be USACE if your active role is ‘Command/ACC/DRU Admin for USACE’)
2. The hierarchy assignment all users within the system are assigned. This hierarchy assignment originally comes from the self-registration form (discussed in section 2.1) and later can be edited within the ‘Edit User’ modal discussed later in this user guide.

Essentially, if your active user role is for the same hierarchy item or an ancestor of a hierarchy item as it relates to any given users ‘Hierarchy Assignment’, you will be able to see and edit that user within the ‘Manage Users and Roles’ section.

7.4 User Approval and Deactivation

When users self-register using the self-registration form discussed previously in this user guide within section 2.1 they do not immediately have the ability to log in to ASOHMS Portal. Rather, they are considered ‘Pending’ users and they will not have the ability to log in until they have been assigned at least one user role. Assignment of user roles is discussed in section 7.6 later in this user guide. You can use the ‘Approval Status’ filter displayed within the ‘View Customization / Filters’ box at the top of the ‘Manage Users and Roles’ section to view any pending users you have access to.

Users can also be deactivated (not to be confused with user deletion, which is discussed later in this user guide). A user is considered ‘deactivated’ and goes back to the ‘pending’ state when they no longer have any roles assigned to them. If a user needs their access temporarily suspended user deactivation is a good solution as it maintains all the information regarding that user. Deactivated users will not be able to login to the system until they have been granted at least one user role again.

7.5 Editing User Information

The ‘Edit’ button displayed next to each user in the main display table for users launches the ‘Edit User’ modal. The ‘Edit User’ modal allows you to edit the basic information about a user. Any information collected during self-registration (except for ‘Username/E-mail’ and ‘Password’) is editable within this modal.

DRAFT

Edit User

Required fields marked with asterisk (*)

First Name:*

Middle Initial:

Last Name:*

Phone Number:*

Username/Email:*

Supervisor Name:

Supervisor Email:

Command/ASCC/DRU (Level 1):

Division/MSR/Region/Lab (Level 2):

District/Center/Site Location (Level 3):

Figure 45: 'Edit User' Modal

As previously discussed in section 2.1, the 'Supervisor Name' and 'Supervisor Email' fields are used to carbon copy (CC) users' supervisors anytime they are assigned a portion of the GAP Action Plan.

The fields at the bottom of the modal entitled **Command/ASCC/DRU (Level 1)**, **Division/MSR/Region/Lab (Level 2)**, and **District/Center/Site Location (Level 3)** affect the hierarchy assignment of the user. The hierarchy assignment of users is very important as it is a determining factor as to which users are able to edit other users as described previously in section 7.3. Some of these fields may be locked depending on the active role of the currently logged in user. For example, in Figure 45 above, the **Command/ASCC/DRU (Level 1)** field is locked to 'USACE' because the active role of the current user is **Command/ASCC/DRU Admin for USACE**.

7.6 Editing User Roles

The 'Edit Roles' button displayed next to each user in the main display table for users launches the 'Edit Role(s)' modal. This modal will allow you to add and remove roles from a given user account. This modal contains a table that details all of the roles currently assigned to a given user. The table includes columns for 'Role Description', 'Assigned By', and 'Assigned On'.

DRAFT

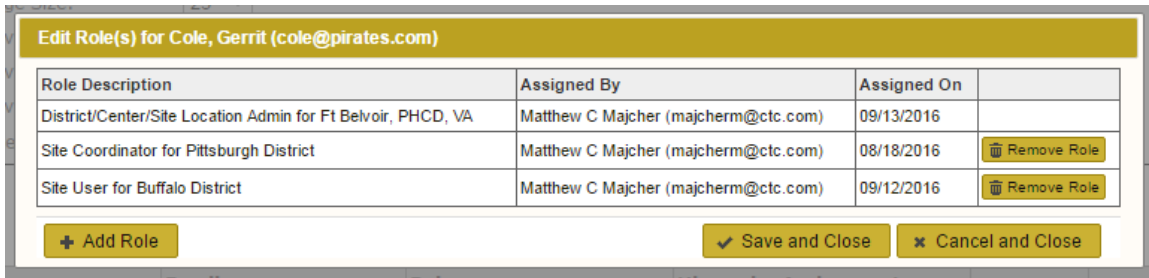


Figure 46: ‘Edit Role(s)’ Modal

A fourth and final column in the table within the ‘Edit Role(s)’ modal potentially contains buttons to remove a role from a user if your currently active role is considered to have scope over that particular role. The rules governing whether your active user role has scope over another user’s given user role(s) is determined by whether or not the hierarchy location attached to your active user role is an ancestor of the hierarchy item attached to another user’s user role. For example, in Figure 46 above, there is no ‘Remove Role’ button for role of ‘District/Center/Site Location Admin for Ft Belvoir, PHCD, VA’ because the logged in user has the current role of ‘Command/ASCC/DRU Admin for USACE’, and ‘Ft Belvoir, PHCD, VA’ is a MEDCOM site. There is a single exception to this rule for the role of System Admin. Only users with the current role of System Admin are able to remove the role of System Admin from other users (remember that the role of System Admin is hierarchy-independent).

Removing a role from a user is as simple as clicking the ‘Remove Role’ button corresponding to the role you want to remove. You will be shown a confirmation prompt asking if you are sure you would like to remove the role. Click ‘Ok’ on the prompt to confirm your intent and ultimately delete the role. Note that any removed roles will not be permanently removed from the database until the ‘Save and Close’ button at the bottom of the ‘Edit Role(s)’ modal is clicked.

Next, if you would like to add a role to a user’s account, click the ‘Add Role’ button displayed at the bottom-left of the ‘Edit Role(s)’ modal. This will launch the ‘Choose Role to Add’ modal.

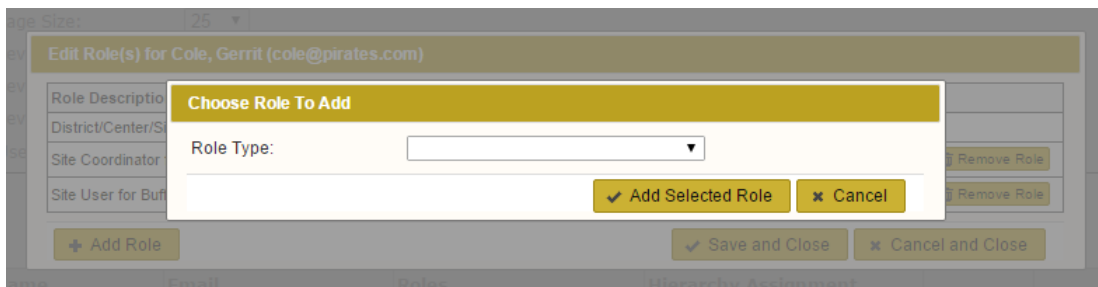


Figure 47: ‘Choose Role to Add’ Modal

The roles available for you to add to another user’s account depend on your active user role.

Roles Available to Add <input type="checkbox"/>	Site Observer	Site User	Site Coordinator	District/Center/Site Location Admin	Division/ MSC/ Region/ Lab Admin	Command/ASCC/DRU Admin	System Admin
Your Active User Role <input type="checkbox"/>							
System Admin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Command/ASCC/DRU Admin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

DRAFT

Division/MSC/Region/ Lab Admin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
District/Center/Site Location Admin	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	is		

Figure 48: Matrix Determining Which User Roles Can Be Added Based On Your Active User Role

The ‘Choose Role to Add’ modal will display a series of different drop down’s depending on the role you are trying to add to a user. For example, if you choose the role of ‘District/Center/Site Location’ admin to add to a user, dropdowns for Command/ASCC/DRU, Division/MSC/Region/Lab, and District/Center/Site Location will all be needed to allow you to drill down to the exact District/Center/Site Location that you want to associate with the role of ‘District/Center/Site Location Admin’. See Figure 49 below for an example of this.

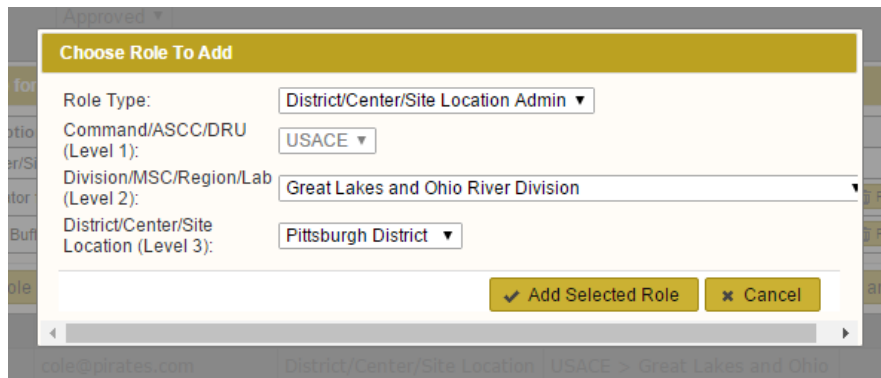


Figure 49: ‘Choose Role To Add’ Modal displays additional dropdowns depending on the ‘Role Type’ selected

If you choose to add the role of ‘Site Observer’, ‘Site User’, or ‘Site Coordinator’ to another user, an additional dropdown labeled ‘Organizational Type/Level’ will be displayed. As stated in section 1.1 in describing the hierarchy, every single item on the ASOHMS Portal hierarchy is considered a ‘Site’ and therefore can have ‘Site Observers. The ‘Organizational Type/Level’ dropdown allows the ASOHSM Portal to understand the type of hierarchy item to associate your new role to (e.g. Command/ASCC/DRU, Division/MSC/Region/Lab, or a District/Center/Site Location). After selecting an ‘Organizational Type/Level’, additional hierarchy-related dropdown(s) will be displayed to allow you to drill into the exact hierarchy item desired. See Figure 50 below for an example of this.

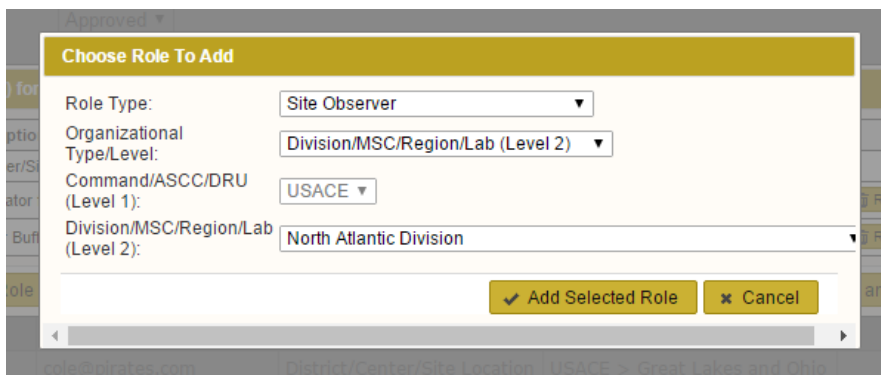


Figure 50: ‘Choose Role To Add’ Modal Allowing a User to Link the Role of ‘Site Observer’ to a Division/MSC/Region/Lab

DRAFT

When you are finished describing the role you want to add to another user, click the 'Add Selected Role' button at the bottom of the 'Choose Role to Add' modal. This will close the 'Choose Role to Add' modal and add the specified role into the main table at the center of the underlying 'Edit Role(s)' modal. Note that added roles are not permanently saved until you click the 'Save and Close' button at the bottom of the 'Edit Role(s)' modal.

7.7 Triggering a Password Reset For Another User

To reset the password for another user, a button entitled 'Reset Password' is displayed within the main table of the 'Manage Users and Roles' section. When you click the 'Reset Password' button for a given user, you will see a confirmation message such as the one in Figure 51 below. Click the 'Confirm' button to confirm your intent to reset the user's password.

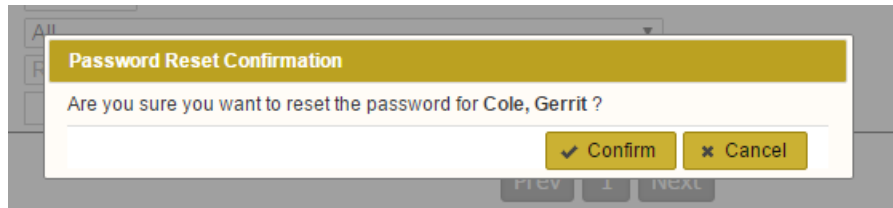


Figure 51: Password Reset Confirmation

7.7.1 Logging In After Password Reset

When a user's password has been triggered to be reset, the user will receive an e-mail containing a new one-time-use password. The user can use this new password to login to the application one time. Upon login, that user will be prompted to create a new password. Note that new passwords are required to contain at least 8 characters, 1 uppercase and 1 lowercase letter, and 1 special character.

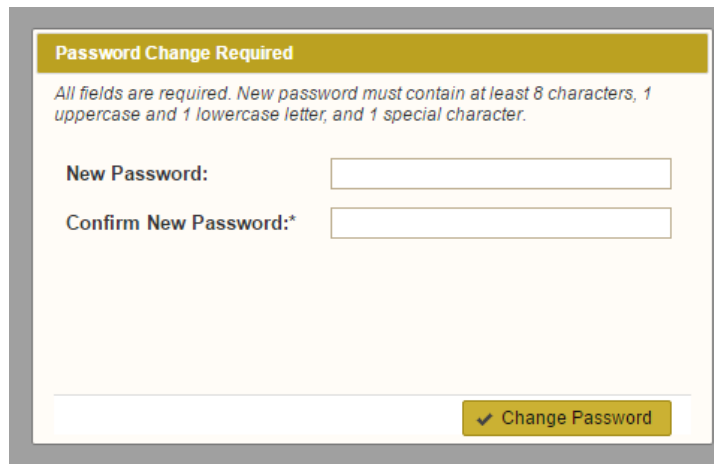


Figure 52: 'Password Change Required' Modal is Displayed to User After They Login During the Password Reset Process

DRAFT

8.0 View/Edit Total Case Incident Rate/Days Away, Restricted, Time Off (TCIR/DART) Data

You can access the 'View/Edit TCIR/DART Data' section by clicking the 'View /Edit TCIR/DART Data' link from the Resource section when viewing a site. Only District/Center/Site Location Admins, Division/MSC/Region/Lab Admins, Command/ASCC/DRU Admins, and System Admins have access to this section.

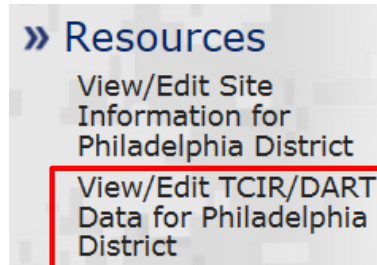


Figure 53: 'View/Edit TCIR/DART Data' Link

8.1 Adding BLS and TCIR/DART Data

8.1.1 Adding Bureau of Labor Statistics (BLS)

To add the BLS information click the 'Edit BLS Info' link.

View/Manage TCIR/DART Information for Philadelphia District

BLS NAICS Code: UNKNOWN BLS Average TCIR: UNKNOWN BLS Average DART: UNKNOWN [Edit BLS Info](#)

Figure 54: 'View/Edit TCIR/DART Data' Link

All fields are required on the BLS information dialog box. The embedded document below, 'USACE Establishments' details out the NAICS code information for USACE.



Figure 55: 'USACE Establishments NAICS' Document

For more NAICS information please visit:

<https://data.bls.gov/search/query/results?cx=013738036195919377644%3A6ih0hfrgl50&q=Table+1.+Incidence+rates+of+nonfatal+occupational+injuries+and+illnesses+by+industry+and+cast+types%2C+2015>

DRAFT

After all data has been entered click the “Save BLS information”

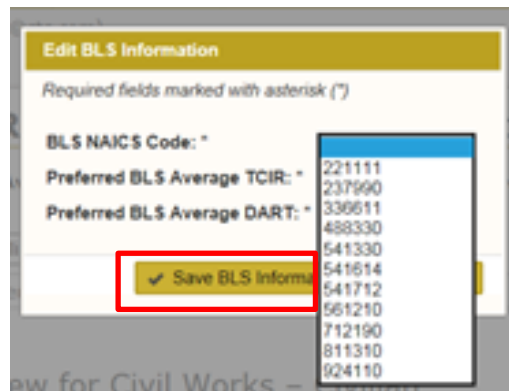


Figure 56: ‘BLS Information Dialog Box’

8.1.2 Adding TCIR/DART Information

After the BLS information is entered choose the category you wish to enter the the TCIR/DART information for then click the ‘Add TCIR/DART Information’ Link. The four categories you can enter data for include: Civil Works-Civilian, Civil Works – Contractor, Military Program – Civilian, and Military Program – Contractor.

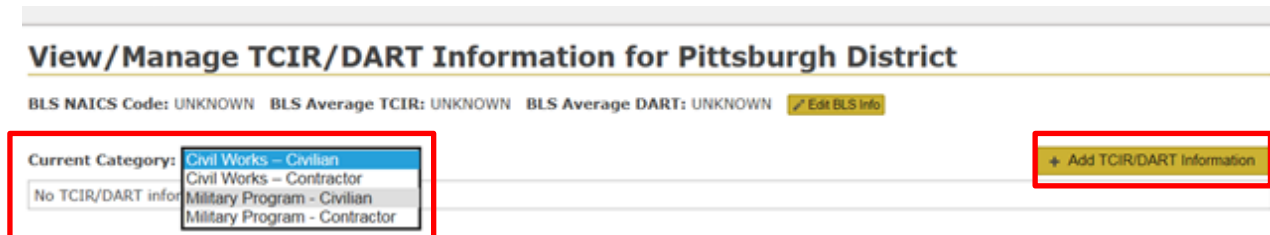


Figure 57: ‘Add TCIR/DART Information’ Link

This link will bring up the Add TCIR/DART dialog box to enter the information.

- All the fields are required (e.g. you can’t leave any blank)
- If value for ‘Total Cases with Days Away from Work’ is greater than 0, then user must provide a value of 1 or greater for at least one of the following fields:
 - Total Days Away
 - Total Days Restricted
 - Total Days Transferred
- If value for ‘Total Cases with Days Away from Work’ is 0, then the following three fields must all also be 0:
 - Total Days Away
 - Total Days Restricted
 - Total Days Transferred
- The value for ‘Total Cases with Days Away from Work’ must also be less than or equal to the value provided for ‘Total Cases’
- Each box contains a mouse over with more information on what is required for the entry



Figure 58: 'Add TCIR/DART Information' Dialog Box

8.2 Rate Calculations

The Rate Calculation box will display for which every category was chosen for the TCIR/DART information. The table is able to display either the 'Calendar Year' or the 'Fiscal Year'

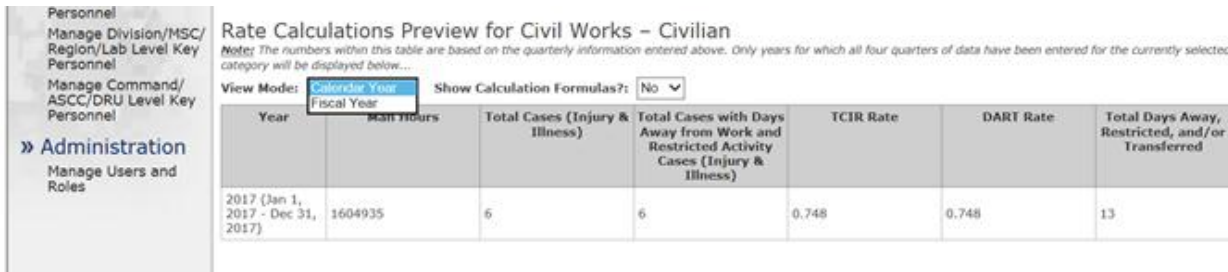


Figure 59: 'Rate Calculations Preview' Dialog Box

The Rate Calculation can also display the formula utilized to calculate the information for either the calendar year or the fiscal year.

Rate Calculations Preview for Civil Works - Civilian

Note: The numbers within this table are based on the quarterly information entered above. Only years for which all four quarters of data have been entered for the currently selected category will be displayed below...

View Mode: Show Calculation Formulas?:

Year	Man Hours	Total Cases (Injury & Illness)	Total Cases with Days Away from Work and Restricted Activity Cases (Injury & Illness)	TCIR Rate	DART Rate	Total Days Away, Restricted, and/or Transferred
2017 (Jan 1, 2017 - Dec 31, 2017)	123456(Q1) + 123456(Q2) + 123456(Q3) + 123456(Q4) = 1604935	1(Q1) + 3(Q2) + 1(Q3) + 1(Q4) = 6	1(Q1) + 3(Q2) + 1(Q3) + 1(Q4) = 6	(6 / 1604935) * 200000 = 0.748	(6 / 1604935) * 200000 = 0.748	4(Away) + 5 (Restricted) + 4 (Transferred) = 13

Figure 60: 'Rate Calculations with Formula'