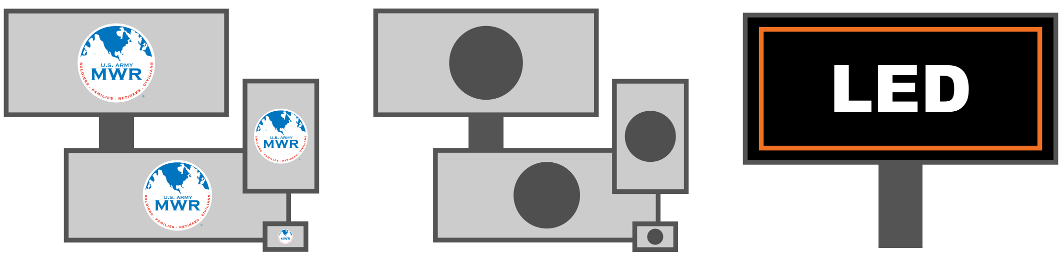


FORT EISENHOWER MWR

AUTOMATED REQUEST FORM SYSTEM (ARFS)

USER MANUAL

OCTOBER 2023

Contents

Preface

p-1. History

The Automated Request Form System (or AFRS) was created by the Fort Eisenhower Family and Morale, Welfare and Recreation (Fort Eisenhower MWR) Marketing Department to streamline the marketing request process. It was initially launched in September 2015. Prior to this system, Fort Eisenhower MWR received PDF forms from MWR Program/Activity Managers via email or fax, and then manually added each task to a third-party Project Management System (PMS). This took a lot of time and, with multiple entry points, it was easy to miss a request. With ARFS, those problems are solved! Here are some of the advantages:

- Paperless
- Easy to view the status of a request
- Nothing falls through the cracks since the database is live and updates in real time.
- All tasks are automated including assigning people and due dates.

p-2. How it Works (Short Summary)

An MWR Program/Activity Manager creates a project, fills out a marketing request and submits it to the marketing department. Next the marketing department reviews the request and, if there are no changes, approves the request. Upon approval, the request data is automatically assigned to the appropriate staff, scheduled according to the selected due dates, and subtasks are added to tasks that require multiple steps. Once the project is completed, an invoice is created in ARFS, notifying the manager that their materials are ready for pickup.

p-3. Intended Audience

This guide will explain in detail all functions of ARFS for the different user types (standard users, approving program managers, admin users and system administrators). Because this guide is intended to explain all aspects of the system, not all pages will be applicable to all users. For this reason, this guide has been separated into three parts:

1. **Standard Users and Approving Managers** - Typically MWR Program/Activity Managers and Staff responsible for planning projects and submitting requests.
2. **Admin Users** - Typically Marketing staff who will be approving request forms, completing tasks and creating estimates and invoices.
3. **System Administrator** - This user will be responsible for creating the rules for each user role, item and task generated by the system.

1

Guide for Standard Users and Approving Managers

1-1. Registration

New users may go to the registration page (https://mwrarfs/registration), add their credentials and select the programs they're associated with from the list provided.

There is an option on the registration page for Non-MWR to accommodate accounts for approved Non-MWR customers such as the Garrison office.

When a user registers, the Project Manager in the MWR Marketing Office (i.e., Marketing Project Manager) is notified via email and the user is reviewed and considered for approval.

Once approved, the registered user will receive an email letting them know that their account has been approved. Approved users will have access to all projects and requests assigned to their selected programs.

1-2. Settings

The settings page is accessed by clicking on the username that appears at the top right of the page when logged in, or by clicking on the "Settings" link on the navigation menu. This page allows the user to change their account details such as name and phone number. Assigned programs can also be changed. At the bottom of the settings page is a section to change password.

Some settings can only be selected by the Marketing Project Manager. One of these settings is to assign alternate contacts to all of the user's email notifications. If the user would like to request an alternate contact be added to their email notifications, they would need to contact the Marketing Project Manager so that those selections can be made on their behalf.

1-3. Dashboard Page Explained

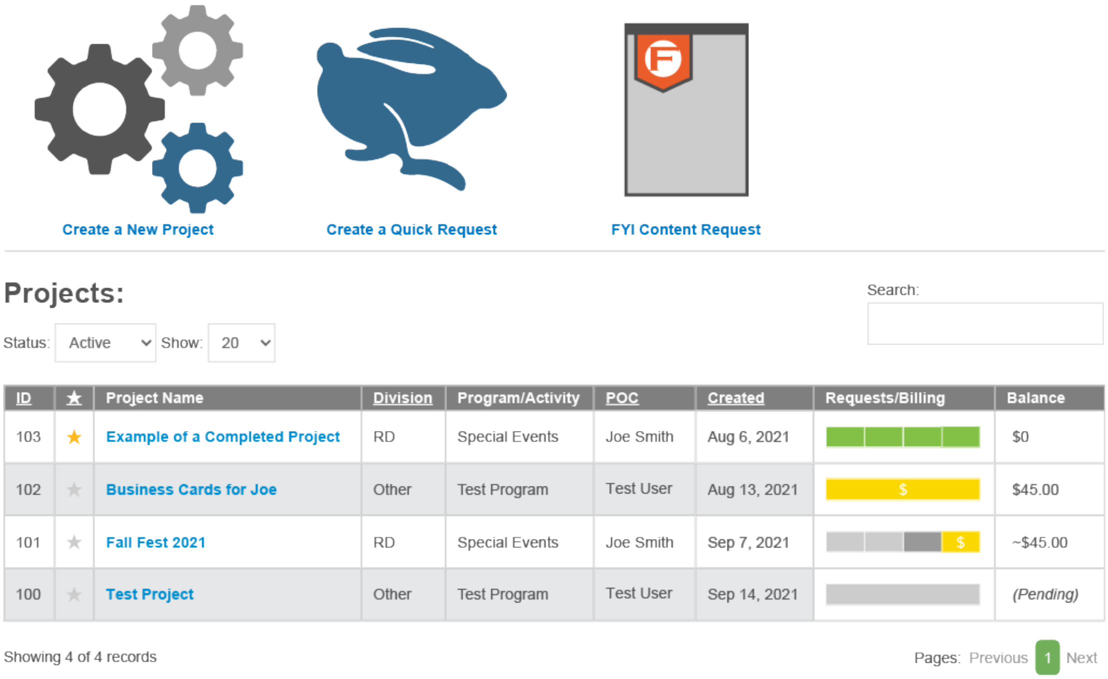
The Dashboard page is the first page a user will see upon signing in (see figure 1-3a). This page contains a table of active projects that are assigned to the programs that apply to the current user. The "Requests/Billing" column displays colored blocks and symbols representing the different states a request or billing item can be in. The amount of blocks represents the amount of requests and billing items linked to the project. A billing item (invoice or estimate), may show as a separate box if not associated with a specific request; otherwise, the status of the request will include its billing status. By clicking on the colored blocks, a pop-up key will appear explaining the different statuses (see figure 1-3b).

The "Balance" column at the end of each row will show the remaining balance for any pending invoices. If unpaid invoices exist that were created prior to October 2021, they will include a yellow icon ($) instead of a dollar amount. For full billing details, users can visit project summary page to access the invoices for individual requests (see figure 1-3c for more details).

This table is searchable and sortable, making it easy to find specific projects. The requests and billing items appear in order of progress. If the table is sorted by the Request/Billing column, it will show the most pressing projects first, starting with Expired or Outdated requests, followed by Pending Estimate Requests, then Pending Manager Approval and then Saved requests.

Users can also set projects as "Favorite" by clicking the "Star" icon on the table. Favorites are unique to each user and are listed at the top of the table by default.

To view any archived projects, simply click the "Status" drop-down menu located at the top left of the table and choose "Archived". For more details on archived projects, see section 1-8.



ID	★	Project Name	Division	Program/Activity	POC	Created	Requests/Billing	Balance
103	★	Example of a Completed Project	RD	Special Events	Joe Smith	Aug 6, 2021		$0
102	★	Business Cards for Joe	Other	Test Program	Test User	Aug 13, 2021	$	$45.00
101	★	Fall Fest 2021	RD	Special Events	Joe Smith	Sep 7, 2021	$	~$45.00
100	★	Test Project	Other	Test Program	Test User	Sep 14, 2021		(Pending)

Figure 1-3a. Dashboard Page

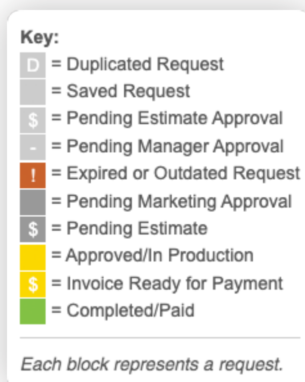


Figure 1-3b. Request Status Key

	No requests or invoices.	$45.00	Has requests or invoices, and all are billed and pending payment. As partial payments are received, amount will go down.
N/A	Has requests, but all are completed with no charge.	$0	Has requests or invoices, and all are paid.
(Pending)	Has requests or invoices, but no invoices are submitted for payment yet.	$	Has requests or invoices, but all pending payment are from older ARFS version (prior to October 2021) so no value can be calculated.
~$45.00	Has requests or invoices, but only partially billed. Other requests are not yet completed.	$625.00 + $	Has requests or invoices, but some pending payments are from older ARFS version (prior to October 2021) and others are new, so only the newer ones can be calculated.

Figure 1-3c. Balance Details

1-4. Defining a Project

Before creating a new project, it's a good idea to keep in mind what constitutes a project. Some things to keep in mind:

- A project name must be unique, concise and descriptive.
- Remember that the project name that is given is what will appear on the internal ARFS calendar (see 1-14 for calendar details).
- A project can have multiple marketing requests, but the general details as far as the assigned Program/Activity, project/event date, target audience and support options should remain the same for the entire project. If these details differ, consider creating different projects.
- A large project will typically include a form of analysis such as an After Action Report (AAR). To take full advantage of this analysis, avoid projects that span multiple years so that there's time set aside to make changes to ongoing initiatives. A project should typically be planned out within a calendar or fiscal year.
- Choose wisely before selecting the Quick Request option. This option is for projects that aren't events, don't need support from other programs and can stands alone with no connection to other projects (see 1-11 for more details on Quick Requests).

1-5. Creating a Project

To create a project, click the "Create a New Project" button on the Dashboard page. The project summary page will show and an in-browser window will appear with the project form (see figure 1-5a). The Point of Contact (POC) details are automatically filled with the details for the current user, but can be changed if the POC is different. All required fields are identified with a red asterisk (*). Some of the optional fields may become required if certain selections are made on the form; for instance, adding a project to the Internal ARFS Calendar (MWR Calendar Scrub) will require a project/event date, location, target audience, projected number of attendees and project description.

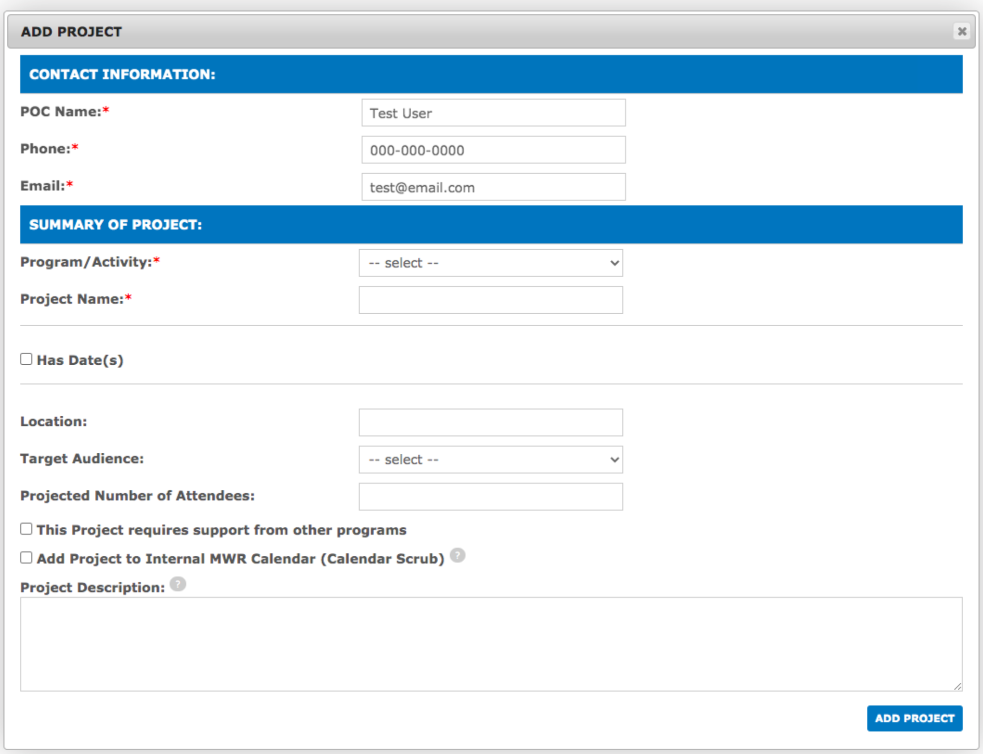


Figure 1-5a. Project Form

The project description at the bottom of the form is where the user will explain the project as if they were talking directly to their target audience. Typically, this is what will appear on the marketing materials. This is not a place for marketing material instructions – those notes should be reserved for the "Special Instructions" section of the marketing request forms.

For details on the Project/Event Dates and support options fields of this form, please see the following sections: 1-6 & 1-7.

Once the project form is completed, press the “Add Project” button. The Project Summary will be shown (see figure 1-5b). This is the central location for managing a project. From here, users can edit a project, print the Project Tracking Checklist (if support is needed), view a list of requests for the project and create new requests.

Project information can be changed at any time by pressing the “Edit Project” button as long as the project hasn’t been archived (for details on archiving, see section 1-8). Any previously submitted marketing request forms will not be affected, but any request forms approved after the change will include the updated information in the External PMS’s project overview.

Additional notes on projects:

- A project can be created as early as the user would like. No work is completed on the part of the Marketing Department until a marketing request is submitted for the project.
- There can be a different POC for the project and the individual requests, but the project POC will be included on all important email correspondence.

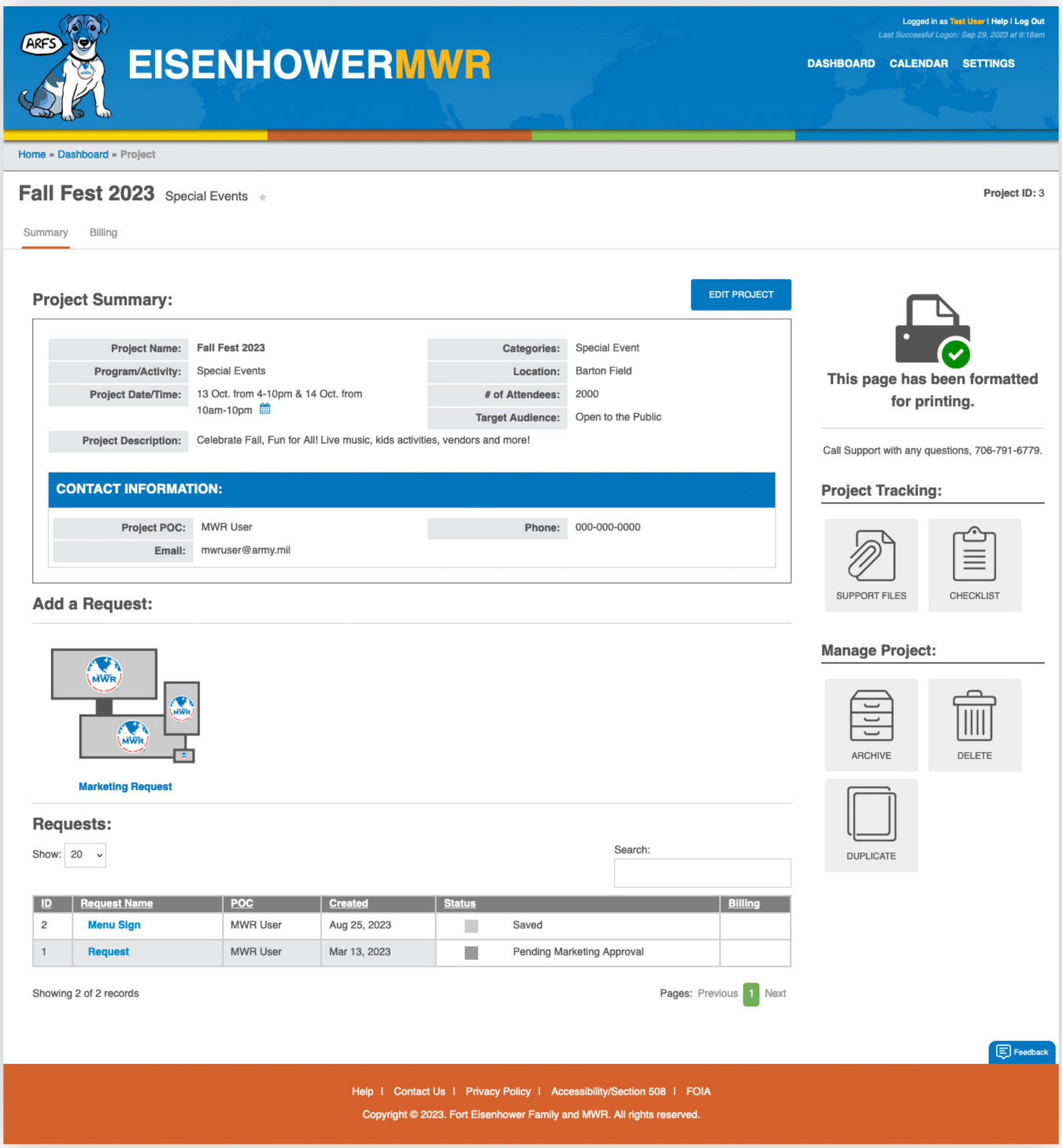


Figure 1-5b. Project Summary

The following two sections will explain some of the project form options in more detail.

1-6. Project/Event Date(s)

If the project has a specific date and time, it can be entered in the date section of the Edit Project form, which is revealed by checking the "Has Date(s)" checkbox (see figure 1-6a). The date section allows you to create one or multiple date groups, each with their own repeating options to fit any date-scheduling situation. The date information entered is used to populate the Internal ARFS Calendar as well as determine the suggested General Due Date for marketing requests.

Date Groups:

The benefit of having separate date groups is that it allows the user to set a separate starting date for each repeating option. In addition, a "Date Group Label" may be added to a group to differentiate it from other dates (see figure 1-6b for example). This date group label will appear on the Internal ARFS Calendar appended to the project name for each date that belongs in this group (see 1-14 for more details on the Internal ARFS Calendar).

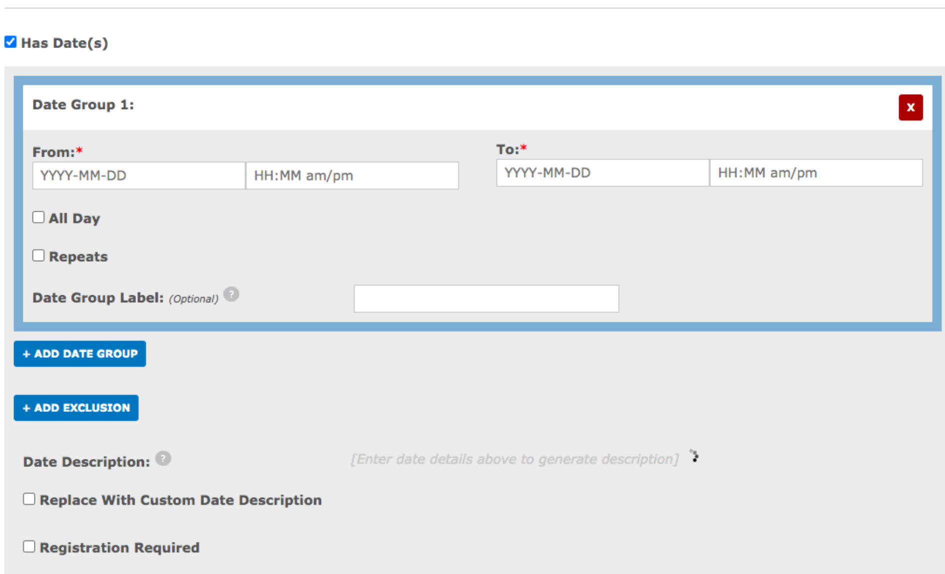


Figure 1-6a. Project Form: Has Date(s)

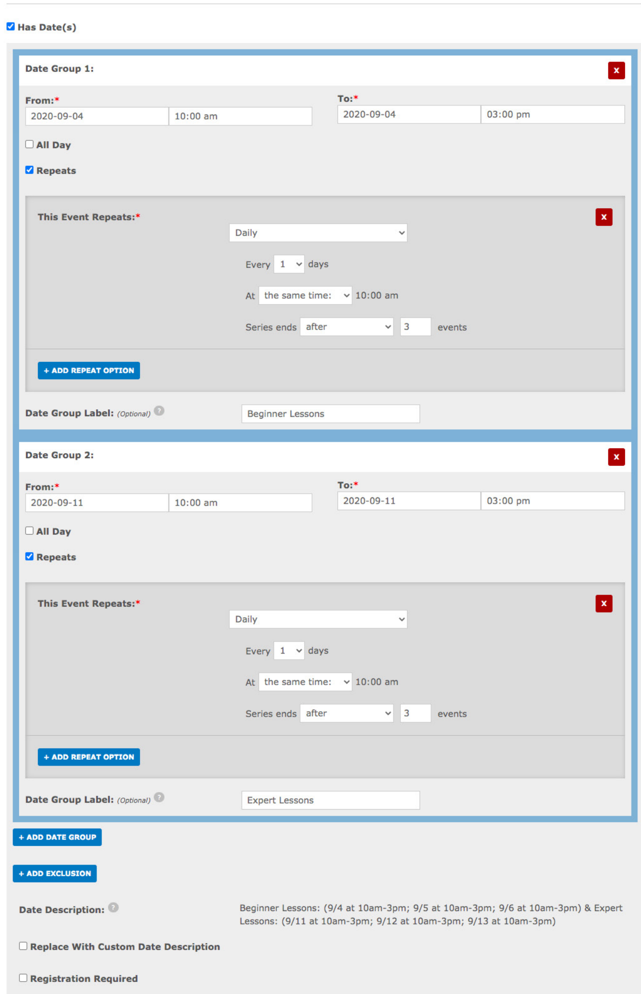


Figure 1-6b. Project Form: Date Group Example

Repeating Dates:

If there are multiple instances of the event, check the “Repeats” checkbox within a date group to reveal additional fields to set the repeat options (see figure 1-6b). To begin selecting repeat options, press the “Add Repeat Options” button. Repeat options can be identified by the following frequencies: Daily, Weekly, Monthly, Yearly or Once. Multiple different repeat options can be added to identify each date within a date group. If there are exclusions to the repeating dates, those can be added by clicking the “Add Exclusion” button under the date group boxes. By fine-tuning the event dates accurately, they will be mapped out on the Internal ARFS Calendar and can be used for other useful features still in development (see 1-14 for more details).

Date Description:

The Edit Project form will provide a generated date description based on the date selections made (see figure 1-6c). If the date description appears light gray with the loading icon next to it, that indicates that there are some fields that are missing from the date form that will need to be completed before the date description can be generated. The system will try to do it’s best to summarize the date information provided; however, if the user prefers to manually type the date description, that can be done by checking the “Replace With Custom Date Description” checkbox and filing in the “Date Description” field.

Figure 1-6c. Project Form: Date Description

Registration Deadlines:

Below the Date Description section, there is a checkbox that allows adding a registration deadline to the project. By setting a registration deadline, the General Due Date that's determined for each marketing request will use the registration deadline as a reference point instead of its normal reference point of the next project/event date. This ensures that all necessary marketing materials will be produced in time to advertise prior to the established registration deadline.

Not all projects that require registration are the same; some may have one registration deadline, some may have registration deadlines for each individual date in a multi-date project, and some others may require various deadlines that don't fit a particular pattern. The registration deadline options can be customized to fit any of these situations.

To set a registration deadline, check the "Registration Required" checkbox on the Edit Project window. This will expand a section to choose how often registration deadlines will occur:

- Once
- On A Set Time Before Each Date
- On Various Custom Dates

Once:

This option is pretty self-explanatory; by choosing this option the user will be given a single date selection box to choose the registration deadline.

Figure 1-6d. Registration Deadline – Option 1

On A Set Time Before Each Date:

This option allows the user to set a pattern that will be used to determine a registration deadline for each individual project/event date. The first box can be any numerical value to represent the quantity of whatever is selected in the second box. The second box sets the type of pattern such as Business Days (which only include weekdays and exclude federal holidays), Days, Weeks, Months, Mondays, Tuesdays, etc. So for example, if an event happens on the 15th of each month and requires registration two weeks before the event, then choose "2" in the first box and then "Weeks" in the second box.

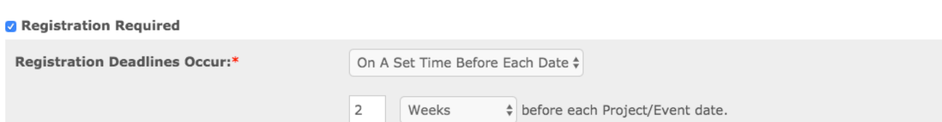


Figure 1-6e. Registration Deadline – Option 2

On Various Custom Dates:

In some cases, the user may not be able to set multiple registration deadlines on a specific pattern. For these cases, use the third option – to set various custom dates. Simply press the "+ Add Registration Deadline" button for each date required.

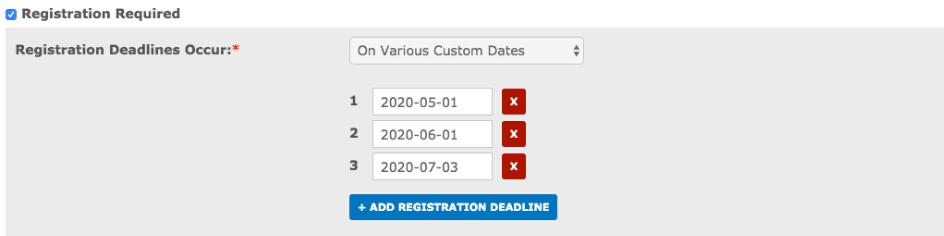


Figure 1-6f. Registration Deadline – Option 3

If multiple registration deadlines have been selected either by setting a pattern or manually entering the custom deadline dates, the system will automatically determine the General Due Date for the marketing requests based upon the nearest registration deadline to the day the request is created.

Additional notes on project/event dates:

- If adding a project to the Internal ARFS Calendar (MWR Calendar Scrub), always be sure to check the entry by clicking the calendar icon next to the date on the Project Summary to make sure it's showing correctly.
- If a repeating event is scheduled to end "Never", the system will map it out to a maximum of 3 years.

1-7. Support Options

For some projects, additional support may be needed by other programs. Some examples of support include:

- External support (Non-MWR) from other services on the installation (e.g., DPTMS, Military Police, etc.)
- A Gate Access memo if expecting a large number of attendees (required if expecting over 350 attendees).
- A Gate Pass for any off-post participants such as sponsors or vendors.
- A Risk Assessment, which requires a DD Form 2977 (required if expecting over 300 attendees).
- Food/Beverage clearance if any food or drinks are provided.
- Sponsorship support.
- Volunteer support.

For these projects requiring support, select the checkbox labeled "This project requires support from other programs" on the project form. This will expand a checklist of support options to choose from (see figure 1-7a). By making these selections, the support options will display on the Internal ARFS calendar. They will also be added to the user's task list, which can be viewed by selecting the "Checklist" button under "Project Tracking" on the Project Summary page. In the current version of ARFS (as of October 2023), this checklist is not interactive, but does update dynamically as changes are made to the project. An interactive task list is in development for future versions of ARFS. This checklist acts as a guide for planning and tracking a project, and includes all key tasks along with due dates and who is responsible for each task.

Specific instructions and details related to these support options are defined in the DFMWR Program and Calendar Tracking SOP (Ref.1).

Figure 1-7a. Support Options on Project Form

1-8. Archiving/Deleting a Project

User's are responsible for managing their projects, including archiving them when they are completed and no longer needed on the list of active projects, as well as deleting them if they are no longer needed. Archiving and deleting projects can help clean up the list of projects on the Dashboard page so it's easier to view projects that need attention.

These functions can be found on the Project Summary page on the sidebar under "Manage Project" (see figure 1-8a). There are a few requirements to perform these functions which will be covered here:

Archiving:
In order to archive a project, the entire project must be complete, including all invoices paid. If the "Archive" button is pressed when there are requests that haven't been completed, a warning message will appear that says "The request [REQUEST ID] is not ready to be archived because it has not been completed". If the project is archived successfully, a message will appear that says "Archive was successful with X Requests and X Project archived" (X representing the number of requests and projects archived).

When viewing the project summary page for an archived project, the top of the summary page will include a yellow bar with a red "Activate Project" button (see figure 1-8b). When this button is pressed, the system will reactivate the project, allowing the user to make changes to the project information and submit additional requests. While a project is archived, the user will still have the ability to duplicate the project (for details on duplicating projects, see section 1-9).

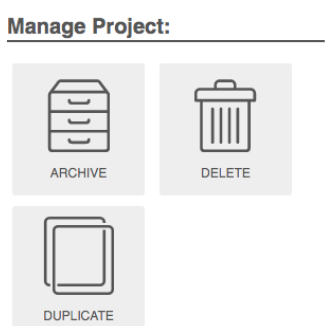


Figure 1-8a. Project Summary Sidebar: Manage Project Options

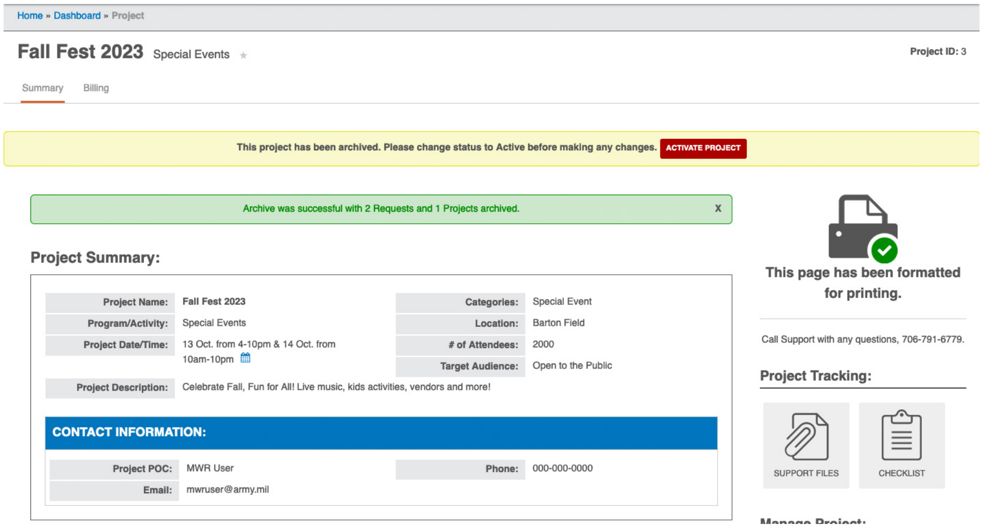


Figure 1-8b. Archived Project Summary Page/Archive Successful

Deleting:
Occasionally, a user may want to delete a project and all associated requests for various reasons. To delete a project, select the "Delete" button on the sidebar of the Project Summary page. This will open an in-browser window with a warning message and a section to provide an option reason for deleting the project (see figure 1-8c). The text entered in this text area will be included in an email that is sent to all POCs connected to the project and its associated requests.

In order to delete a project, there must be no active requests that are pending approval and no requests that have already been approved. If a delete is attempted when there are active requests, a warning message will appear with instructions on what can be done to fully remove the project.

If a project is deleted by mistake, users may contact the assigned Marketing Project Manager to request it be brought back to an active status. Please note that after 30 days, projects that have been deleted will be cleared from the system and will no longer be available for reactivation.

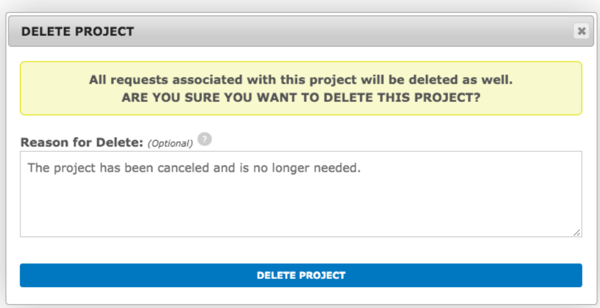


Figure 1-8c. Delete Project In-Browser Window

1-9. Duplicating Projects and Requests

Users have the ability to duplicate an entire project or individual requests within a project. This function is helpful when creating a project that is very similar to one that has already been created.

Duplicating a Project:
To duplicate a project, navigate to the project's summary page, and press the "Duplicate" button on the sidebar under "Manage Project". A "Duplicate Project" in-browser window will appear with the option to select which requests to include in the duplication (see figure 1-9a). This allows users to exclude any requests that may not be necessary for

all versions of this project. For convenience, there is a "Select All" button on the right that will automatically select all requests listed. Once the selections have been made, press "Duplicate Project".

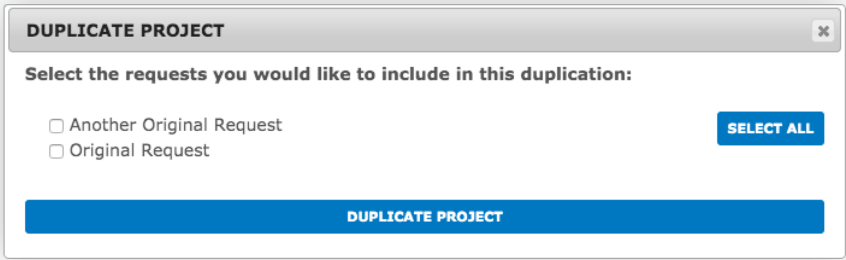


Figure 1-9a. Duplicate Project In-Browser Window

ARFS will copy all components of the project and requests with some exceptions (see list of exclusions at the bottom of this section). The user will be forwarded to the Project Summary page of the newly duplicated project. This page is easily identified by the yellow banner at the top that says "This is a duplicated project. Please edit to include all necessary changes from original." (see figure 1-9b).

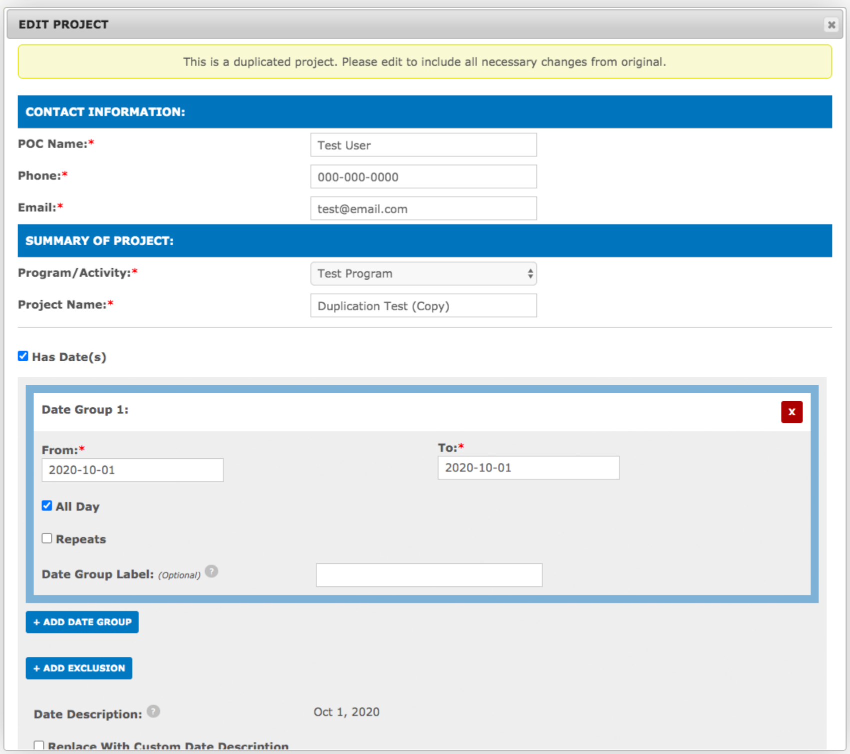


Figure 1-9b. Edit Project In-Browser Window for Duplicated Project

And just like the banner says, this is where a user will change the project date to the new one, update the project name – which by default is the old project name with the text "(Copy)" after it – and any other details needing changes. Once changes have been made, click the "Update Project" button and close the "Edit Project" in-browser window. This will take the project out of the "Duplicated" status and it will become an active project.

The requests at the bottom of the Project Summary page will have a status of "Duplicated" (see figure 1-9c). In order to activate these request, the user will need to go into each one and make the necessary changes to them.

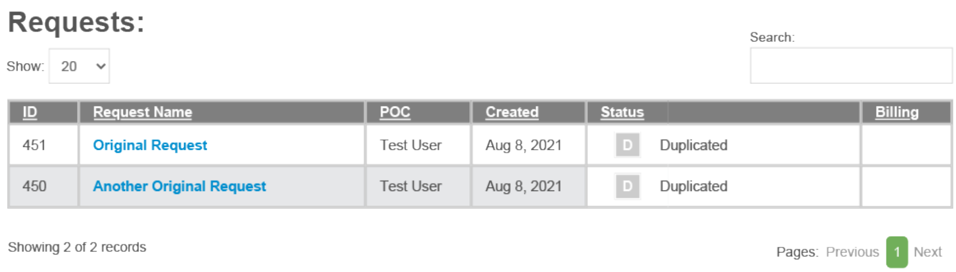


Figure 1-9c. Duplicated Requests List

Click on a duplicated request to access the Marketing Request form. There will be a yellow banner at the top of the page identifying this as a duplicated request (see figure 1-9d). Make any necessary adjustments and choose one of the save or submit options at the bottom of the page to change this request from a "Duplicated" status to an active request.

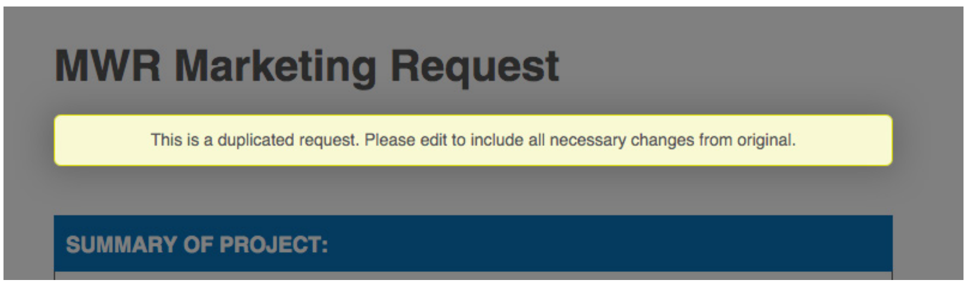


Figure 1-9d. Duplicated Request Banner

Duplicating a Request:
To duplicate a request within a project, navigate to the Project Summary page that contains the request to be duplicated. Under the requests list at the bottom, hover over the name of the request. A duplicate button will appear to the right of the name (see figure 1-9e). Click this button.

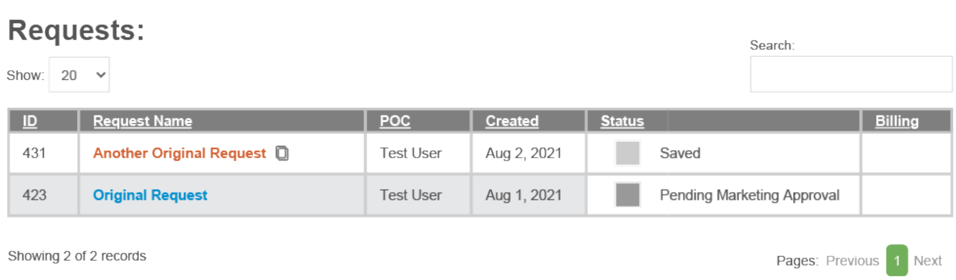


Figure 1-9e. Duplicated Request Button (To the right of Request Name)

A confirmation message will appear. If the correct request name is shown, click "Duplicate Request". The duplicated request will appear at the top of the list with the text "(Copy)" appended to the request name and a status of "Duplicated". Simply click on the new request to make any necessary changes (see figure 1-9f).

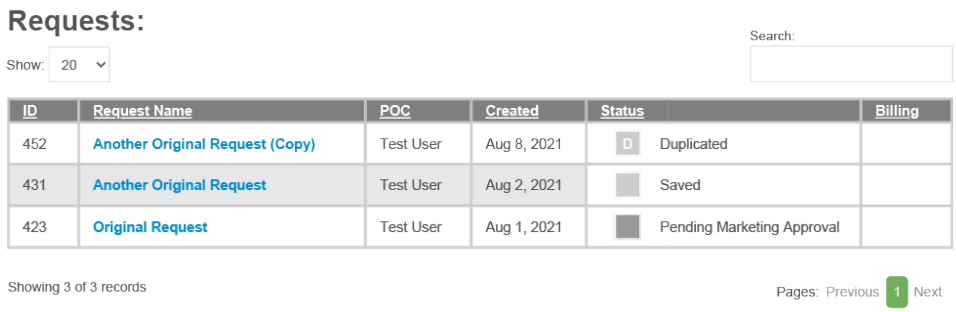


Figure 1-9f. Duplicated Request within a Project

Some parts of a project or request are excluded in the duplication process. Those exclusions are listed below:

Exclusions for Duplicated Projects:

- The date that the project was created will reset. Since the Projects list on the Dashboard displays projects in order of the date they were created, by resetting this date the duplicated project will appear at the top of the list.

Exclusions for Duplicated Requests:

- The General Due Date will return to the default so that it will fit better with the new project date.
- The date that the request was created will reset. Since the Requests list on the Project Summary page displays requests in order of the date they were created, by resetting this date the duplicated request will appear at the top of the list.
- Attachments are not preserved in a duplication. This is to prevent multiple requests from sharing the same files; if they are deleted from one, they will all lose them.

1-10. Creating a Request

New requests can be created by clicking the "Marketing Request" button under the "Add a Request" section on the Project Summary page (see figure 1-10a). Alternatively, they can be created using the "Quick Request" button on the Dashboard page (for details on Quick Requests, see section 1-11).

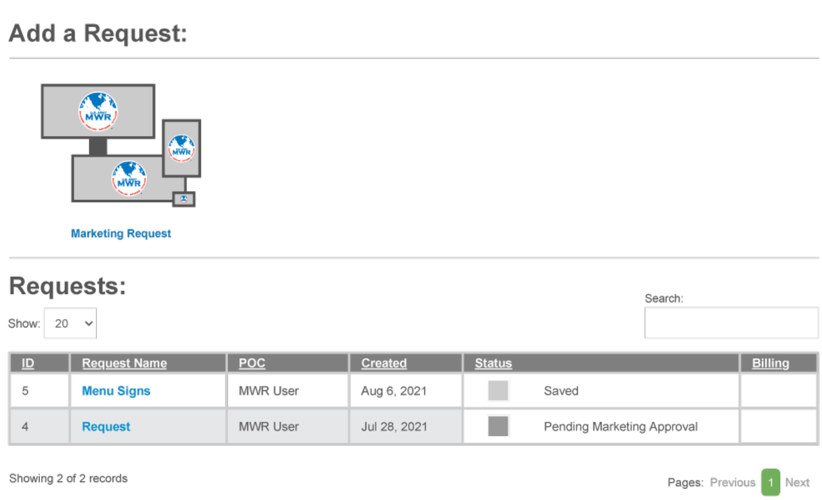


Figure 1-10a. Add a Request from Project Summary Page

Summary of Project Section:

At the top of the Marketing Request page, the "Summary of Project" section will be automatically filled in based on the project it belongs to (see figure 1-10b).

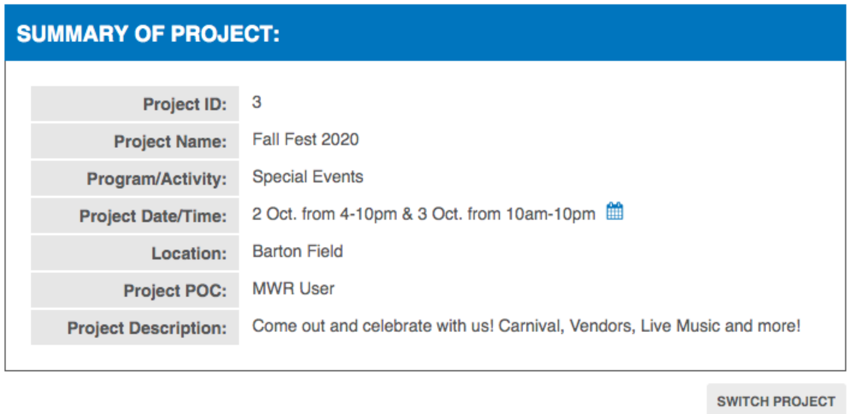


Figure 1-10b. Summary of Project on Request Form Page

If the “Switch Project” button is pressed, the user will be given the option to select an alternative project for this request. This is handy if a user created a request for one project but later decided to move it to another. Users also have the option to “Add New Quick Project” from this section (see figure 1-10c).

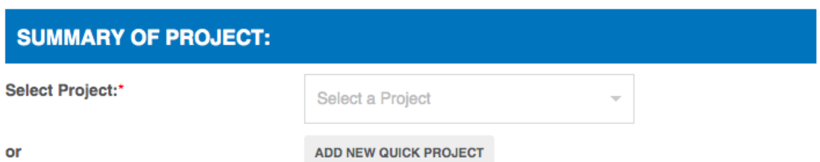


Figure 1-10c. Alternate Project Selection on Request Form Page

The next section under the “Summary of Project” is the “Contact Information” section (see figure 1-10d). By default, the POC details will be the same as the Project POC; however, this can be edited.

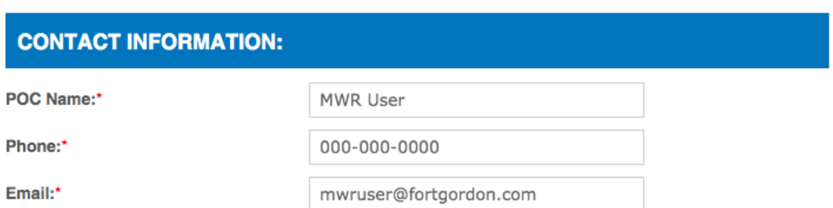


Figure 1-10d. Contact Information Section of Request Form Page

Requested Items Section:
Following the “Contact Information” section is a section for the “Request Name”, “General Due Date” and a full list of requestable items. This is where the user can begin making selections of materials and services needed for this request (see figure 1-10e).

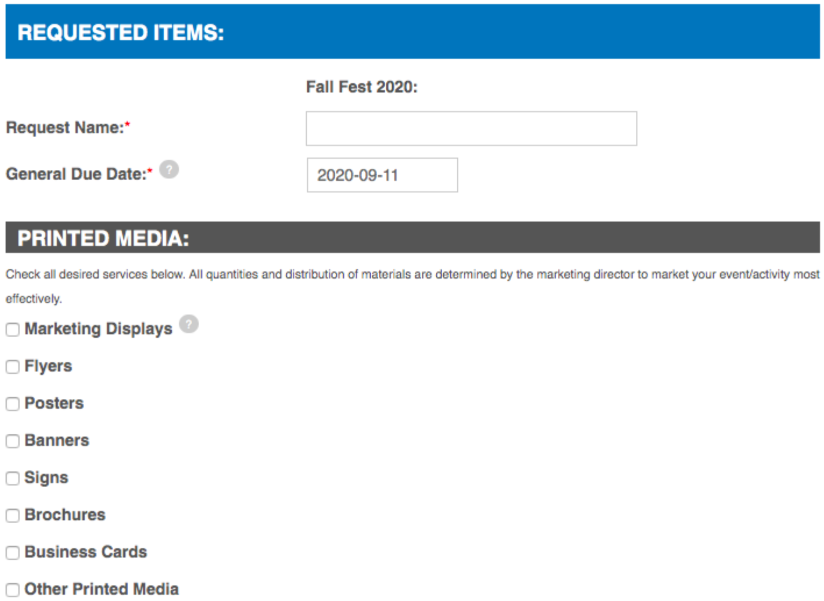


Figure 1-10e. Requestable Items Section on Request Form Page

When a request is referred to in ARFS, the project name will always precede it (e.g., “Fall Fest 2020: Menu Signs”). This is why the project name is shown directly above the “Request Name” field.

When choosing a Request Name, consider the following:

- A request name can only be used once per project.
- The request name should not be the same as the project name – it should be a concise description of what is being requested.
- If this request is the main request for a project, then the request name “Request” may be used. By using this reserved name, ARFS will recognize it as the main request and in all situations that it’s referred to, it will exclude the request name and only display the project name (e.g., “Fall Fest 2020”).

The next field is for the General Due Date. This is the date that the marketing items should be completed by. The default for projects without a set date is 22 business days from the requesting date. For projects with a set date, the default is 3 weeks prior to the projects start date (or 5 weeks in the case of special events). This date can be adjusted and will be the default due date for the requested marketing items.

Requestable Item Additional Options:
Once an item is selected, a few icons will appear to the right as the user hovers over the selected item name. Some additional options may appear as well for certain items such as quantity and size options (see figure 1-10f).

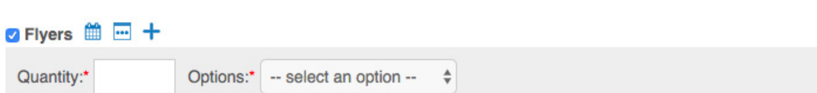


Figure 1-10f. Item Additional Options on Request Form Page

The calendar icon () is to set a Custom Due Date to this item, the ellipsis box icon () is to add Additional Details to this item and the plus icon () will Add an Additional Item, which can also have it’s own Custom Due Date and Additional Details if needed.

For a practical example of these features in action, see figure 1-10g below. As you can see, the initial Flyers item has a set due date that is earlier than the General Due Date that’s set for the request.

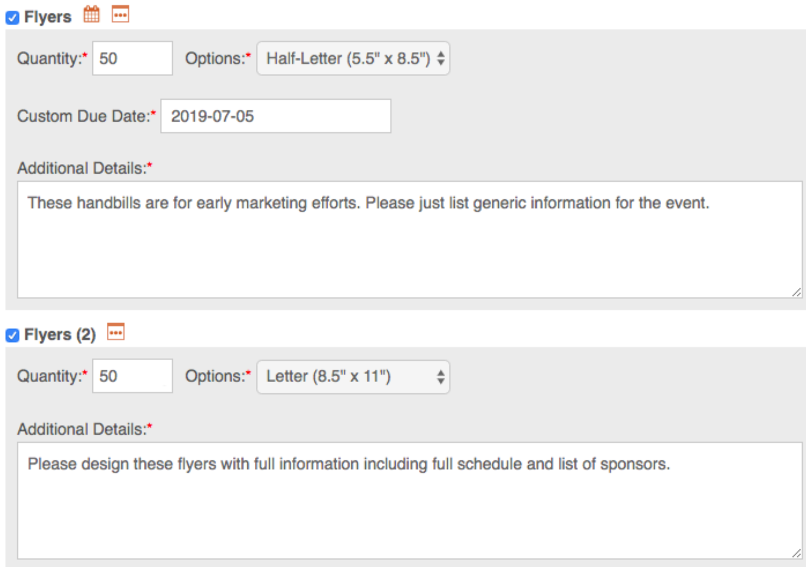


Figure 1-10g. Example of Item Options on Request Form Page

To remove an added item, press the red trashcan icon ( ) that appears when hovering over the item name, or simply uncheck the item.

To remove a Custom Due Date or Additional Details section, simply click the orange icon that corresponds with the section you wish to remove and it will be deleted.

When using these additional options for items, please keep the following in mind:

- When using the "Add an Additional Item" feature, make sure that the separation makes sense. Each separate item will generate a new set of tasks for the Marketing Office to complete. So for example, if there is a request for directional signs and the user needs 20 signs where 10 point left and 10 point right, it would be better to list it all under one item with the quantity set to 20 and then explain this separation in the "Additional Details" box for the item.

- When adding "Additional Details", please note that whatever is added should only apply to the item it's listed under. If there are instructions that apply to more than on item, they should be listed in the "Special Instructions" section at the bottom of the form. When the form is approved and submitted to Marketing's project management system, the "Additional Details" will appear on the task for that particular item only.

- Please note that some items do not include the Custom Due Date option such as Marketing Displays, Briefing Slides and FYI Magazine Ad. This is because these items have pre-scheduled dates, or are scheduled depending on availability in the case of Marketing Displays, and therefore cannot be requested on a specific date.

Finalizing the Request Form:
Once the marketing request form is complete, a standard user can either choose "Save For Later" or "Submit to Approving Manager". By pressing "Save for Later", the user will have the option of returning to the request form with all of the selections and attachments saved. This is handy if the request is only partially completed due to missing information or pending approval. Once the "Save for Later" button is pressed, the user is presented with a link to return to the request form; also, an email with the link will be send to the email entered on the request form. By pressing "Submit to Approving Manager", the assigned Approving Manager for the selected program will receive an email with instructions on reviewing the request for approval. The Approving Manager can also see the full list of requests that are pending their approval by going to the dashboard and clicking the "View Pending Manager Approval" button above the Projects list (see figure 1-10h).

Figure 1-10h. View Pending Manager Approval on Dashboard Page

If the Approving Manager approves of the request, they can choose the “Submit to Marketing” button at the bottom of the form. Once the “Submit to Marketing” button is pressed, the user will be presented with a summary of their request and an automatic email alert will be sent to the Marketing Office notifying them that the request is pending approval.

Timeline from Submission to Approval:
Once the Approving Manager approves a request, as long as there are no issues such as missing information, it should be approved by Marketing within 1-2 business days. The due dates that are assigned to the marketing staff’s tasks are based of the date the request was approved by the Approving Manager and sent to Marketing (referred to as the submission date), so even if it takes a few days for Marketing to approve, that doesn’t change the time to complete the tasks.

Timeline to Complete Requestable Items:
The timeline for requestable items varies by the type of item. For example, if a request is submitted to add an event to the Online MWR Calendar, the due date to complete this task is 10 business days after the submission date (no sooner than 90 business days from the projects first date for requests that are sent far in advance). The first task to design the header image for the event post is due two days before this due date, so users should be hearing from the designer before that date.

General Due Date Tasks:
For general marketing materials like flyers, banners, signs, plasmas and LEDs; the due date is set to 3 weeks before the projects first date (or 5 weeks prior for projects under the “Special Events” program). This is what is represented by the General Due Date on the request form. For these tasks, the design task is due 3 business days before this General Due Date with a start-date of 10 business days prior. The production task is due 1 business day before the due date. So if the Online MWR Calendar item was not checked, then the soonest you would hear from the designer would be about a week or two prior to the General Due Date.

Late Requests and Rush Fees:
If a request is submitted late, the due dates would be condensed, but as long as there is no “Rush” status appearing on the request, then the timeline can be expected to match the above details.

A rush status is identified by a yellow banner at the top of the request form (see figure 1-10i). By clicking the “Details” button, a breakdown of the rush fees will be shown.

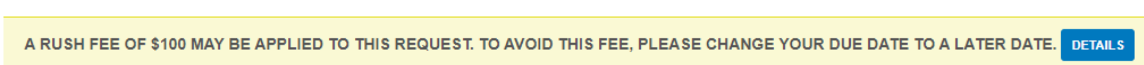


Figure 1-10i. Rush Fee Notification Banner on Request Form Page

Canceling a Submission for Marketing Approval:
After a request has been submitted for Marketing approval, it is still possible to cancel the submission. This might be necessary if a mistake is found after pressing “Submit to Marketing”. In order to cancel a submission to Marketing, go to the Summary page for the submitted request. The red “Cancel” button will appear on the sidebar of this page. After pressing the “Cancel” button, a confirmation message will appear that says “Are you sure you want to cancel this submission? This will change the status back to a saved request.” To confirm, press “OK”. The user will then be able to navigate to the request form page and make changes before resubmitting.

Additional notes on Request Forms:

- Separate invoices will be sent for the individual requests for a project. This is to support the feature that allows users to set their own due dates for requested items. By applying invoices to each request, the Marketing Office is able to provide materials in a timely manner without waiting for all requests to be completed.
- The Marketing Project Manager has the right to remove any items that are not approved or to add items that may be more beneficial to the project requested.

1-11. Quick Requests

Quick Requests are projects that are not events, do not need support from other programs and can stands alone with no connection to other projects. Examples would include requests for business cards, facility needs such as window graphics and signs, etc.

To create a Quick Request, click the “Create a Quick Request” button on the Dashboard page. This will open the Marketing Request page. At the top of the page, complete the “Summary of Project” section (see figure 1-11a).

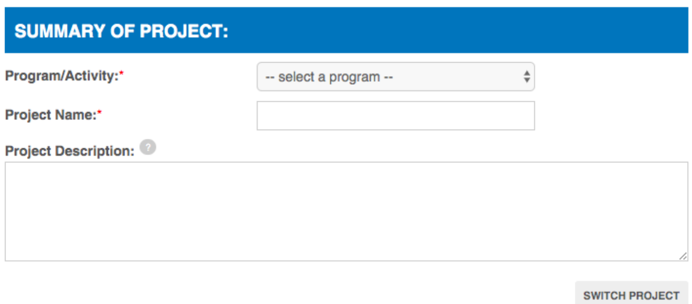


Figure 1-11a. Summary of Project for Quick Request

Before a program is selected, there is a block of text below the “Requested Items” section that says “Please select a Project or Program to load requestable items.” (see figure 1-11b). The items do not appear until the program is selected because of a feature that allows custom items for some specific programs. Once the program is selected, all requestable items that apply to that program will appear.

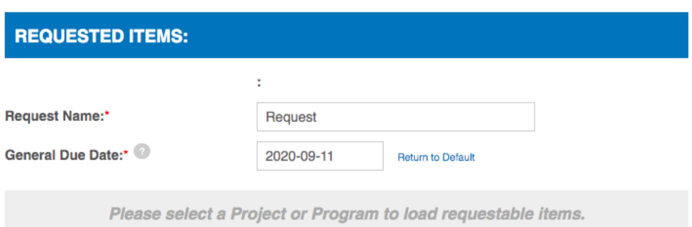


Figure 1-11b. Requested Items Section Before Program Selection

By default, the request name for a Quick Request is “Request”. This is to prevent a redundant project and request name. Users may also use the request name “Request” for the main marketing request for a larger Project (see “Requested Items Section” under section 1-10). This request name can only be used once per project, so any additional requests would need to include more specific request names.

The next field is for the General Due Date. This is the date that the marketing items should be completed by. The default for projects without a set date is 22 business days from the requesting date. For projects with a set date, the default is 3 weeks prior to the projects start date (or 5 weeks in the case of special events). This date can be adjusted and will be the default due date for the requested marketing items.

If it is decided after a Quick Request is created that additional requests will be needed for this project, it is very simple to use the Quick Request as a full project. Simply find the project on the Dashboard and select it. The user will be taken to the Project Summary page where the project details can be expanded upon and more requests can be added.

1-12. Deleting a Request

When viewing a saved request, there is an option at the bottom of the form to "Delete Saved Request". This option may be useful if a request was created but was later deemed unnecessary. Once the request is deleted, it will still be in a recycled state for 30 days before it is completely removed from the system. If a request is deleted by mistake, the user must contact the Marketing Office within this time-frame to have it reactivated.

1-13. Estimates and Invoices

Requesting an Estimate:
When creating a Marketing Request, there is an option to select "Request Estimate" at the bottom of the form. By selecting this option, a user is asking the Marketing Office to provide an estimated cost for the requested items before completing any work. Once the request is received by Marketing, they will provide an estimate in a timely manner and then return the request back to the user for approval of the price.

Approving an Estimate:
After receiving the requested estimate from the Marketing Office, the user has two choices. If the price is acceptable, the estimate can be approved by going to the request's summary page and pressing the "Approve Estimate" button on the sidebar (NOTE: this button will only appear if no changes have been made to the returned request). Alternatively, estimates can be approved from the "Billing" tab of the project's summary page – from here, simply click the icon in the "Status" column next to the estimate you wish to approve and choose "Approve Estimate". If some changes are needed to the request before submitting back to Marketing, the user can make those changes as they would for a saved request and then submit it to the proper channels for approval.

Receiving an Invoice:
Once a request has been completed by the Marketing Office, they will create an invoice and append it to the request in ARFS. This will generate an email notification to the POC of the request as well as their Approving Manager and any alternate contacts along with instructions on making the payment at the Marketing Office.

Unassigned Billing for a Project:
In some cases, an estimate or invoice may be created for a project but may not be associated with any request forms. In these instances, there will be a separate box along with the request boxes on the Dashboard page that represents this billing item. Additionally, on the project summary page, below the list of requests, there will be a blue button that says "See Additional Billing Items" which links to the "Billing" tab. There, the user will find the relevant billing information.

1-14. Internal ARFS Calendar

The Internal ARFS Calendar is a helpful resource for planning and scheduling events. It acts as a central place for users to identify possible conflicting dates with other events, and provides the DFMWR office with a full spreadsheet of upcoming dates and their support options (see figure 1-14a).

By default, the calendar displays events for a full year starting at today's date. This can be adjusted by setting the start and end date range and pressing "Submit". By clicking the "Display Options" button, options will be revealed that will change the way the information is formatted (see figure 1-14b). The table is also searchable and sortable, and can be viewed by a specific MWR Division.

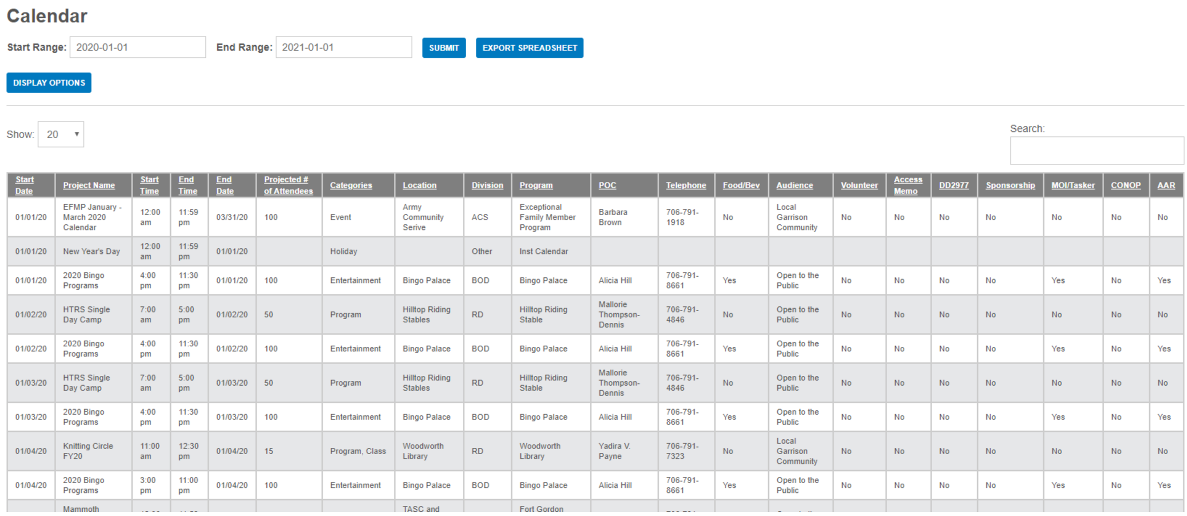


Figure 1-14a. Internal ARFS Calendar: Default View

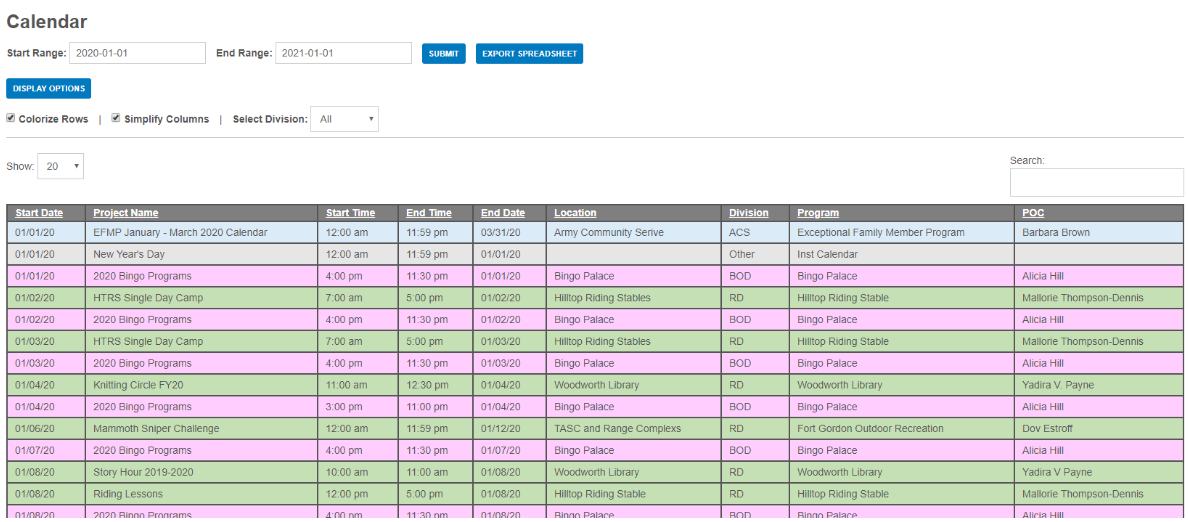


Figure 1-14b. Internal ARFS Calendar: Colorized and Simplified View

Additional notes on the Internal ARFS Calendar:

- The project name that appears on each calendar listing is determined by the settings for that project. If a project name doesn't apply for each listing, consider summarizing the project name to something more inclusive, or consider creating separate projects.

1-16. Help & Feedback

A link to the Help page is located at the top right of the website next to the "Log Out" button as well as on the footer of the web page. This is where helpful guides and tutorials are found. There is also a Feedback link at the bottom right of every page which leads to a feedback form.

2

Guide for Admin Users

2-1. Managing Users

Admin users are responsible for managing users in ARFS. This includes approving new accounts. As registration forms are submitted, the admin who is assigned as the Marketing Project Manager will receive an email notification letting them know that an account is pending approval. The full list of pending accounts can be seen on the Users page (see figure 2-1a). Additionally, there will be a notification message on the Review page letting them know that there are pending user accounts. From the Users page, the pending account can be selected, directing the admin to the Settings page with the pending user's details, and any changes the admin deems necessary can be made. The admin must verify that the user is an authorized user of the system. Once the user has been verified, the admin can change the Status field to the appropriate selection for this user (Admin, Approving Manager, Standard User or Non-MWR user). Once the "Update Details" button is pressed, the system will see that the user is no longer pending and will send an email to them notifying them of their approved account status.

In addition to the standard account details, the admin can also view and assign alternate contacts for each user. The "Alternate Contacts" list is a checklist containing the name of each user in ARFS. If the user would like to request an alternate contact be added to their email notifications, they would need to contact the assigned Marketing Project Manager so that those selections can be made on their behalf.


Edit Users

Search:

Show: 20

ID	Name	Email	Phone	Last Logon	Status
8	Justa Test	justa.test@mail.mil	000-000-0000	2020-06-04 12:40:22	pending
5	ACS User (ACS)	acs.user@mail.mil	000-000-0004	2020-02-04 15:43:12	mwrLimited
4	CYS User (CYS)	cys.user@mail.mil	000-000-0003	2020-02-05 13:25:10	mwrLimited
3	MWR User	mwr.user@mail.mil	000-000-0002	2020-05-14 08:10:30	mwrUser
1	Ima Admin	ima.admin@mail.mil	000-000-0001	2020-02-04 20:41:30	admin
6	Non-MWR User	non.mwr@mail.mil	000-000-0005	2020-02-02 11:46:45	nonMWR

Showing 6 of 6 records

Pages: Previous 1 Next

Figure 2-1a. Users Page

Further down on the Users page is a table listing all of the roles for this ARFS instance. The roles section is maintained primarily by the System Administrator (for details, see 3-5).

2-2. Managing Programs/Activities

The Programs/Activities page is where the full list of programs and activities are created and managed. From this page, admin users can update the following:

- The program/activity's name
- Change it's status to "Active" or "Disabled"
- Select the assigned Approving Manager
- Choose the Division, Category and Subcategory
- Select default users for each of the roles
- Connect to a program/activity in the Project Management System

Whatever changes are made here will be reflected in all areas of ARFS that display the program/activity list.

2-3. Reviewing Requests

The default page for an Admin user is the Review page. This page includes a list of request submissions, and admin tools (see figure 2-3a). The sidebar on the Admin Review page includes a few handy tools for managing requests. The first is a button labeled “Outdated Requests” (for details on this feature, see 2-6). The second button is labeled “Archive Old Requests”. When pressed, this button will search the projects database for all projects that are older than 18 months with all requests completed, and will mark them as “Archived”.

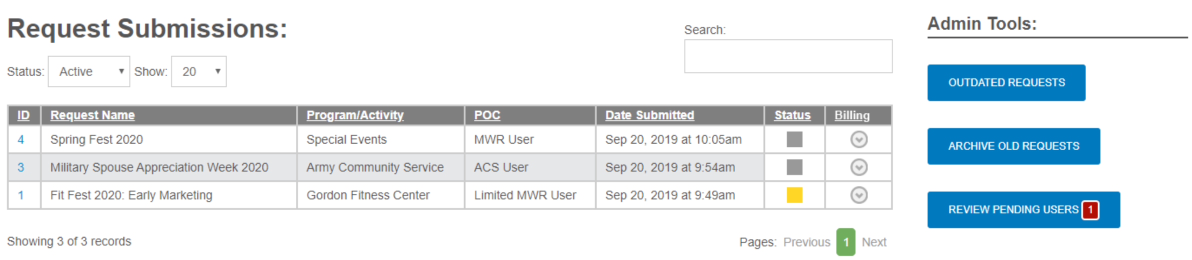


Figure 2-3a. Admin Review Page

From the Request Submissions table, the status of each request can be identified by the status color block. The color system is the same as the one used on the Dashboard page (see figure 1-3b for reference). Next to the Status column is the Invoice column. This is where invoices can be appended to requests once the request has been completed.

To review and approve a request, click on the request ID number. This will open the request on the Marketing Request form page. From here, the request can be reviewed and altered as needed. There are also some fields for requestable items that include Admin-Only options that will need to be completed before the request is approved. At the bottom of the form, there are a few options:

- There is the “Approve” button, which will send the request to the project management system and automatically generate all associated tasks for Marketing to complete the request.
- There is also an “Update” button, which will save the current state of the request, but will not be submitted yet.
- And at the bottom of the form there is a button labeled “Return request to POC” (see 2-4 for more details on this feature).

2-4. Returning Requests

Occasionally, for various reasons, a request will need to be returned to the POC. To do this, an Admin user will need to click the “Return Request to POC” button at the bottom of the Marketing Request page. By clicking this button, a small form will be revealed (see figure 2-4a). On this form, the Admin will enter a message to the POC explaining why the request is being returned. Once the “Return” button is pressed, an email will be send to the POC letting them know that they will need to resubmit the request in order for Marketing to approve it.

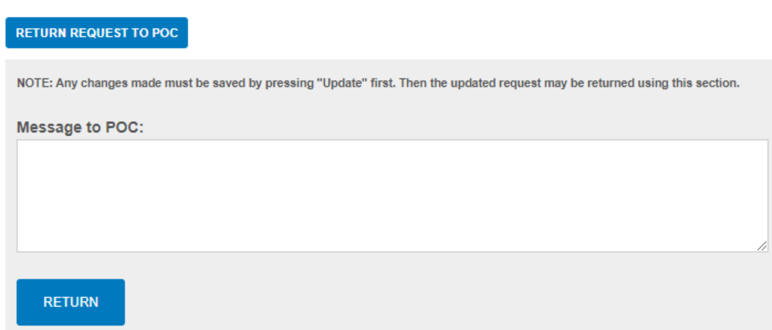


Figure 2-4a. Return Request to POC Form

2-5. Viewing Estimate Requests

When an Admin goes to the Marketing Request page for the estimate request, a banner will be displayed at the top letting them know that an estimate is requested (see figure 2-5a). By clicking the "Billing Tab" link in this banner, the Admin will be taken to the project's billing section where an estimate can be assigned (see 2-7 for more details on creating estimates and invoices).

Figure 2-5a. Estimate Notification Banner on Request Form Page

2-6. Managing Outdated/Expired Requests

On the Admin Review page sidebar is a button labeled "Outdated Requests". Selecting this button will open an in-browser window with a list of all projects that are either expired (beyond their scheduled project dates) or have been sitting for over four weeks with no activity (see figure 2-6a). A notification can be sent to the POCs of these requests by clicking the checkbox next to each request name and pressing "Notify POC". Once they're notified, they will have a limited time to take action, otherwise their request will be deleted.

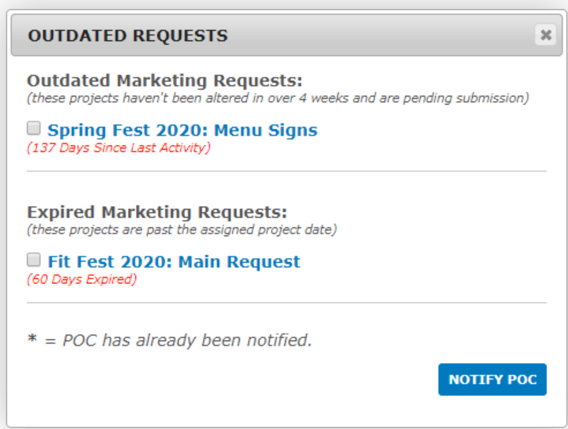


Figure 2-6a. Outdated/Expired Requests In-Browser Window

2-7. Create Invoices & Estimates

Invoices and estimates can be added to a project in several locations. The first is through the Invoice Console which can be accessed by clicking the icon with the "Billing" column on the Review page, or the icon within the "Status" column on the Project page's Billing tab. The second method is to click either the "Add Invoice" or "Add Estimate" button on the Project page's Billing tab (see 2-9 for details).

2-8. Invoices Console

The Invoice Console is an in-browser window that displays the specific billing options available for a specific billing item or request. See figure 2-8a for a list of all available functions. For a request with no previous estimate or invoice, the Admin can either create an estimate or invoice, or choose the alternative "Mark as Complete with No Charge" option. There is also a checkbox at the bottom of the form that applies to the last two buttons that says "Notify POC". By default this is checked, but may be unchecked if no email notification is required.

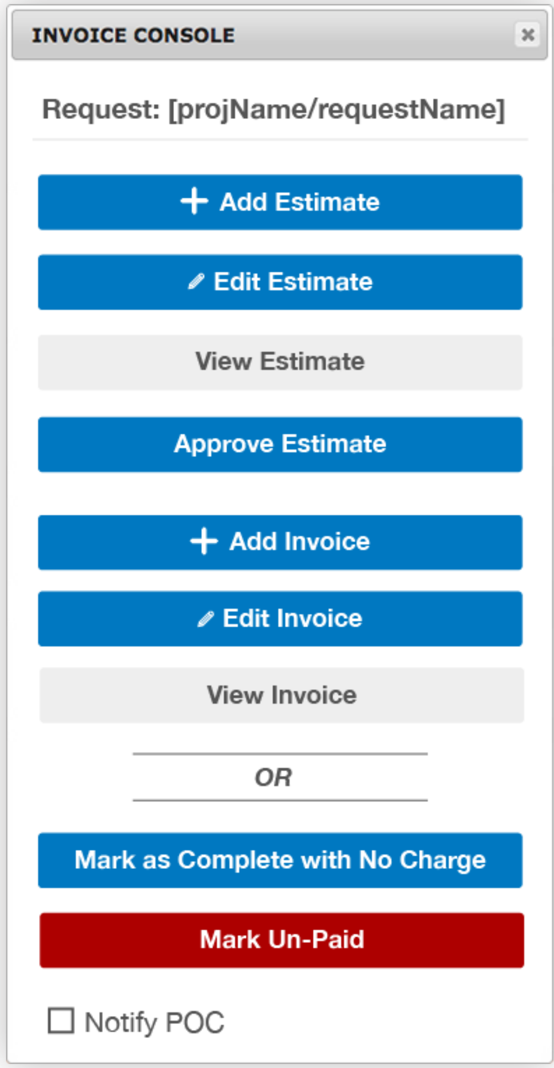


Figure 2-8a. Invoice Console In-Browser Window: All Functions

2-9. Project Billing Tab

On the Project Summary page, there is a "Billing" tab that displays all billing details for the project (see figure 2-9a). At the very top is a button to add an invoice or an estimate. Below that is a table of all billing items. These items may or may not be associated with a request form or multiple request forms. Only billing items that have been submitted for payment will be visible to non-Admin users. Clicking the icon in the "Status" column will display the Invoice Console with options related to this billing item. This is also an alternate place for MWR Users to approve an estimate using the "Approve Estimate" button on the Invoice Console.

The table at the bottom of the page lists all of the UnBilled Requests associated with this project. This acts as a checklist to make sure all requested items are accounted for. Clicking the icon in the "Billing" column will display the Invoice Console with any available options that apply to this request.

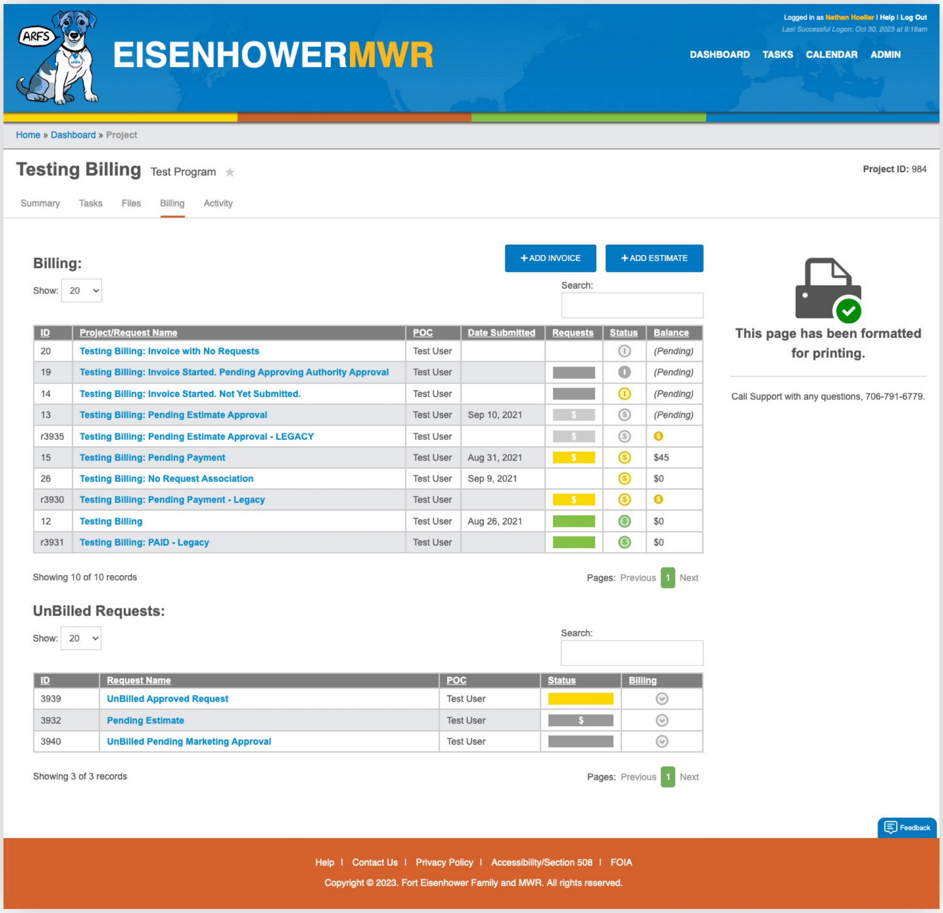


Figure 2-9a. Project Page's Billing Tab

2-10. Billing Form

NOTE: The Billing form was added in ARFS version 4 (October 2021), and is still in it's Beta phase. Once all features are completed, an in-depth guide to all features will be added to this guide.

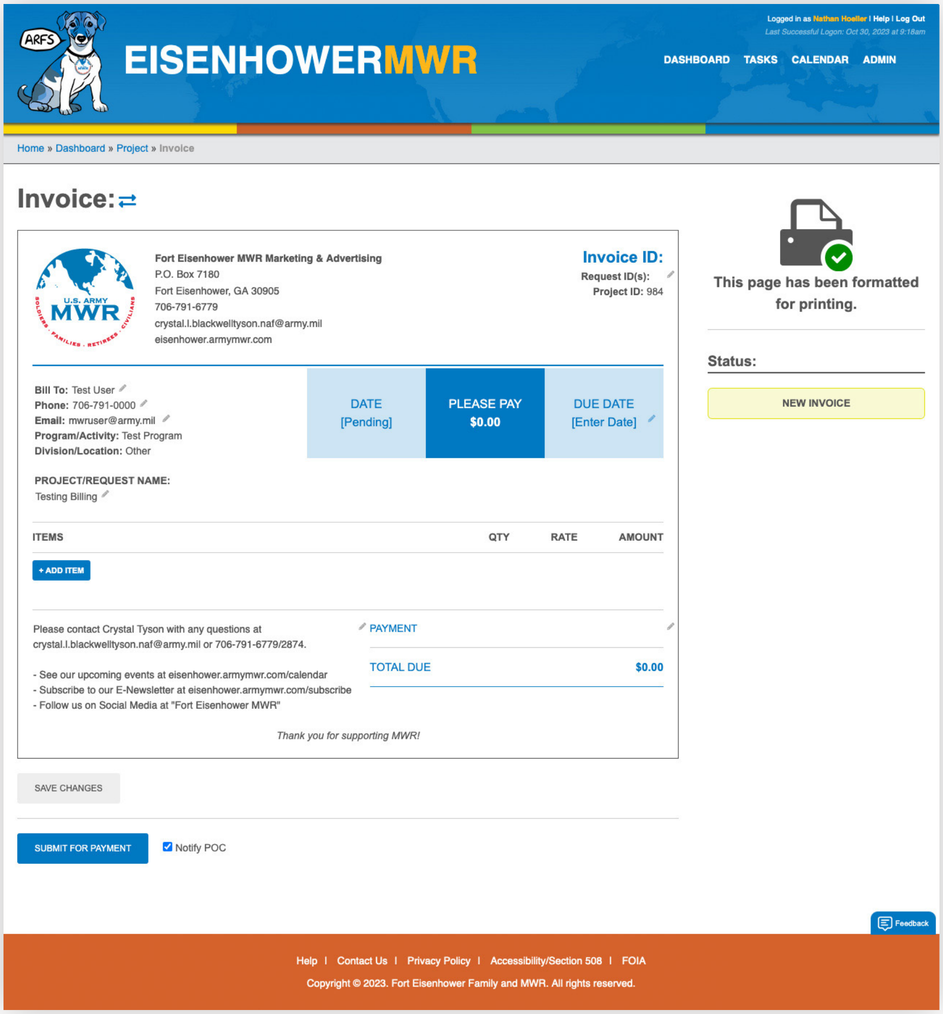


Figure 2-10a. Billing Form Page: New Invoice

3

Guide for System Administrators

3-1. Defining System Settings

The ARFS system has been developed with the option of expanding the system to other MWRs. Because of this, there are options that can be set for specific ARFS instances in the ARFS Settings Database. Those options include:

- **Garrison Name** (e.g., "Fort Eisenhower")
- **Garrison Header Name** (e.g., "EISENHOWER") – This is the text that appears at the top left of the screen before "MWR"
- **Home Page URL** (e.g., "https://eisenhower.armymwr.com")
- **General Support Number** – This is typically the MWR Marketing Project Manager's number
- **Default Timezone**
- **An assigned Non-MWR Program ID** – This is an optional field to enter the program ID for the Non-MWR program for a Garrison. If an ARFS instance doesn't require this, it can be left blank. Non-MWR projects allow Non-MWR users to register to the system and make requests with limited options (not including support options and some specific items which can be determined in the Items section (see 3-6 for details)
- **Notification Settings** – This is an associative array of names and emails used for the email notification system. By default it includes a "General" address (typically BCC'ed on all emails, a "From" address and a "Project Manager" address.
- **Third-Party Settings** – This last column is also an associative array. This one includes a list of the available 3rd-party services and whether they are active or not. Currently, the only service available is Google Recaptcha.

3-2. Options for Pricing Calculations

ARFS has features in place to support adding prices to individual requestable items. This area is still under development as of this issue (October 2023), but many of the components are in place and will be explained here and in section 3-3.

For items that fall under the "Printed Media" category, there are typically physical materials involved that can be equated. By adding material details to ARFS, along with their various options, they can be assigned to requestable items. This lays the groundwork for the end-result of providing automatic estimates as a user is completing a Marketing Request form.

3-3. Materials Database

The Materials page contains a list of all materials used for producing physical marketing materials, along with their prices and options (see figure 3-3a). Some of these options include:

- Number of printable sides
- Other materials that can be applied to this material (e.g., adhesive vinyl applied to an aluminum sign)
- Whether it is priced per square foot (PSF) or per unit
- What the cost is – this should be Marketing's cost so that it can be used as a reference when determining the separate prices for MWR and Non-MWR customers.

Edit Materials

ADD NEW MATERIAL

ID	Material	Cost	Category	Status
1	Gloss Overlaminant	0.366 *(psf)*	Wide Format	active
2	Magnet	1.43 *(psf)*	Wide Format	active
3	13oz Gloss Banner	0.164 *(psf)*	Wide Format	active
4	4mil White Gloss Vinyl (Clear Adhesive)	0.23 *(psf)*	Wide Format	active
5	Window Perf	2.752 *(psf)*	Wide Format	active
6	8oz Polyester Canvas	0.37 *(psf)*	Wide Format	active
7	Gloss Poster	0.234 *(psf)*	Wide Format	active
8	G-Flex Plus Vinyl for T-Shirts	2.25 *(psf)*	Wide Format	active
9	5mm Alumacorr	4.36 *(psf)*	Wide Format	active
10	.040 Aluminum	2.69 *(psf)*	Wide Format	active
11	4mm Coroplast	0.47 *(psf)*	Wide Format	active

Figure 3-3a. Materials List

Each material can be selected and altered through the "Edit Materials" form (see figure 3-3b). By selecting "This material accepts applicable materials", a box will appear with the option to choose the "Applicable Sides" (either None, One or Both). A checklist of "Applicable Links" will also appear with a list of other materials that have the "Can this material be applied to other materials?" option set to "Yes". Almost any combination can be made amongst the materials based on their settings. For more details on how these materials are associated with items, see section 3-6.

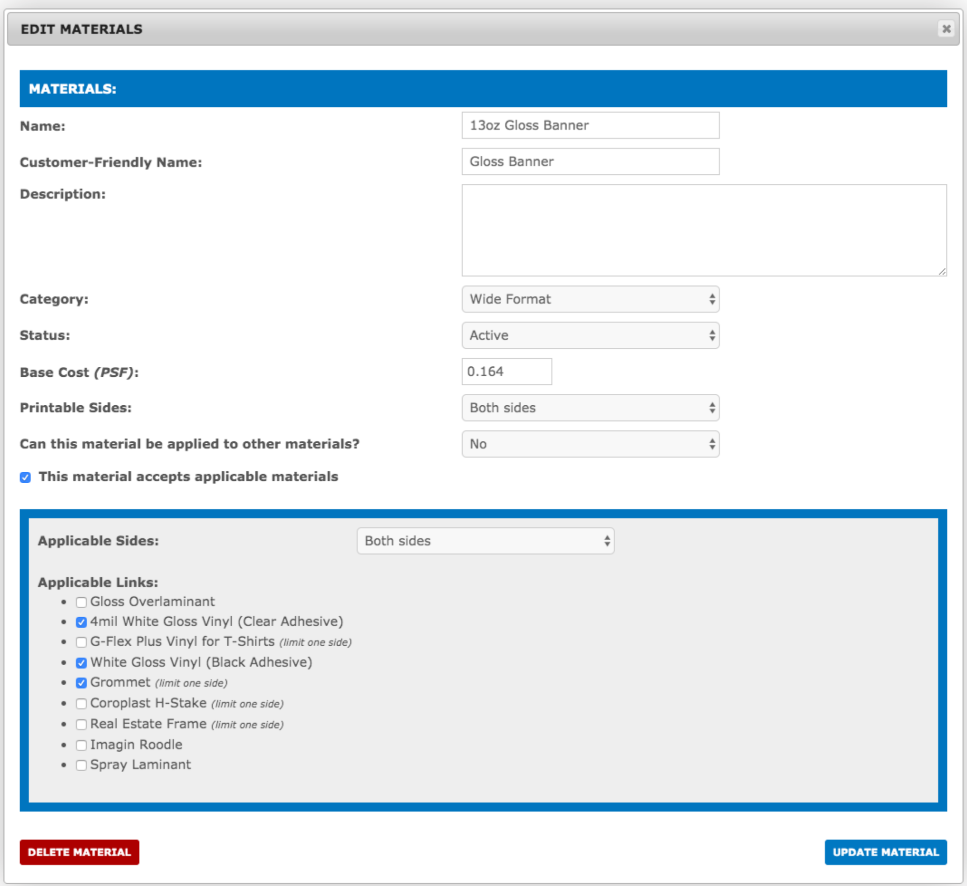


Figure 3-3b. Materials Form

3-4. Due Dates

Due dates are determined in ARFS based on several factors:

- The reference date – This can be the Submission Date, Approval Date, General Due Date, Project's First Date or Project's Last Date.
- How many business days from the reference date – defined by a positive number for days after and a negative number for days before. NOTE: Holidays are programed in ARFS and will be excluded from the business day count.
- For more complex dates, such as the second Friday of the month prior to the Project's First Date, these are hard-coded in a Requests Due Date Generator script and referenced by a unique identifier.

These due dates can be assigned for each individual task that applies to an item (for details on Tasks, see 3-9).

General Due Date:
The default General Due Date that appears on the request form is based on Fort Eisenhower MWR's personal preference to advertise events 22 business days prior to the Project's First Date. This value can be adjusted for individual ARFS instances if necessary.

Rush Fee Dates:
Rush fees for Fort Eisenhower MWR have been determined as the following:

- 0-2 Days Notice – $100 or 500% fee*
- 3-5 Days Notice – $75 or 375% fee*
- 6-9 Days Notice – $50 or 250% fee*
- 10-12 Days Notice – $25 or 125% fee*

* Whichever is lowest

These ranges can be adjusted for individual ARFS instances if necessary.

3-5. User Roles

At the bottom of the Users page, there is a table of Roles added to ARFS (see figure 3-5a). These roles are used for assigning task for requested items (see 3-9 for more details on Tasks)

Edit Roles

ADD NEW ROLE

ID	Role	Default	Status
1	Designer	Jenifer Chrisman (305)	active
2	Printer	Dante Burgos (304)	active
3	SubPrinter	*(NONE)*	active
4	Web Editor	Nathan Hoeller (1)	active
5	Content Uploader	Jasmine Franklin (250)	active
6	Sponsorship Coordinator	Cathy Shaw (146)	active
7	Print Publication Scheduler	Heather Addis (39)	active
8	Printed Material Orderer	Nathan Hoeller (1)	active
9	Item Approver	Heather Addis (39)	active
10	Project Manager	Crystal Tyson (14)	active
11	Project POC	*(NONE)*	active
12	Item POC	*(NONE)*	active
13	Requesting POC	*(NONE)*	active
14	Approving Manager	*(NONE)*	active

Figure 3-5a. Roles List

Each role can be edited by clicking on it's corresponding ID. This opens the "Edit Roles" in-browser window (see figure 3-5b). From here, a "Role Default" can be selected and assigned users can be checked from a full list of all ARFS users. These selections will create the list of possible selections for defaults assigned per program/activity. This is useful if, for example, programs/activities have different assigned Designers or Printers. A task can be assigned to the "Designer" role, and then will assign the appropriate user by looking first at the program/activity for the request for a user. If none are selected, it will look for the default user for the overall role.

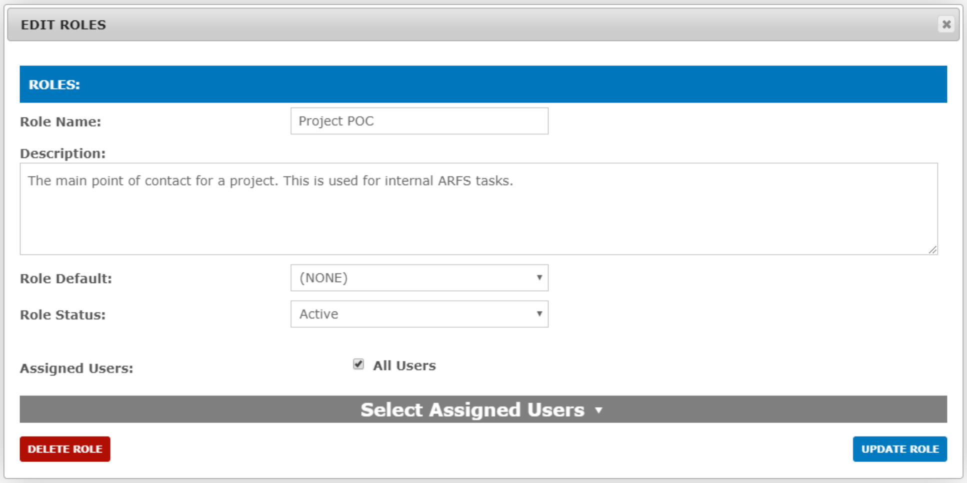
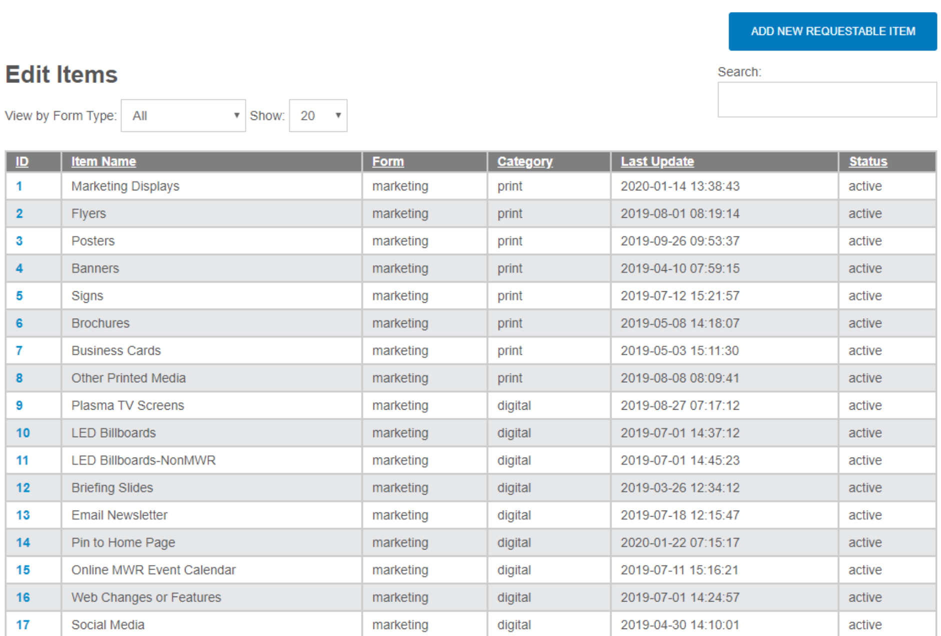


Figure 3-5b. Edit Roles In-Browser Window

3-6. Requestable Items

The requestable items that appear on the Marketing Request form, as well as the support options on the Project form are defined on the Items page (see figure 3-6a).



ID	Item Name	Form	Category	Last Update	Status
1	Marketing Displays	marketing	print	2020-01-14 13:38:43	active
2	Flyers	marketing	print	2019-08-01 08:19:14	active
3	Posters	marketing	print	2019-09-26 09:53:37	active
4	Banners	marketing	print	2019-04-10 07:59:15	active
5	Signs	marketing	print	2019-07-12 15:21:57	active
6	Brochures	marketing	print	2019-05-08 14:18:07	active
7	Business Cards	marketing	print	2019-05-03 15:11:30	active
8	Other Printed Media	marketing	print	2019-08-08 08:09:41	active
9	Plasma TV Screens	marketing	digital	2019-08-27 07:17:12	active
10	LED Billboards	marketing	digital	2019-07-01 14:37:12	active
11	LED Billboards-NonMWR	marketing	digital	2019-07-01 14:45:23	active
12	Briefing Slides	marketing	digital	2019-03-26 12:34:12	active
13	Email Newsletter	marketing	digital	2019-07-18 12:15:47	active
14	Pin to Home Page	marketing	digital	2020-01-22 07:15:17	active
15	Online MWR Event Calendar	marketing	digital	2019-07-11 15:16:21	active
16	Web Changes or Features	marketing	digital	2019-07-01 14:24:57	active
17	Social Media	marketing	digital	2019-04-30 14:10:01	active

Figure 3-6a. Items Page

To add an item, press the “Add New Requestable Item” button above the table. The form will appear in an in-browser window (see figure 3-6b). To edit an existing item, select the corresponding ID next to the item name.

This form can seem overwhelming at first, but once understood, it serves as a very powerful tool for managing items and the way they work within ARFS.

In this section (3-6), the focus will be on the “Items Settings” portion of the form. For the additional portions, see sections 3-7, 3-8 and 3-9).

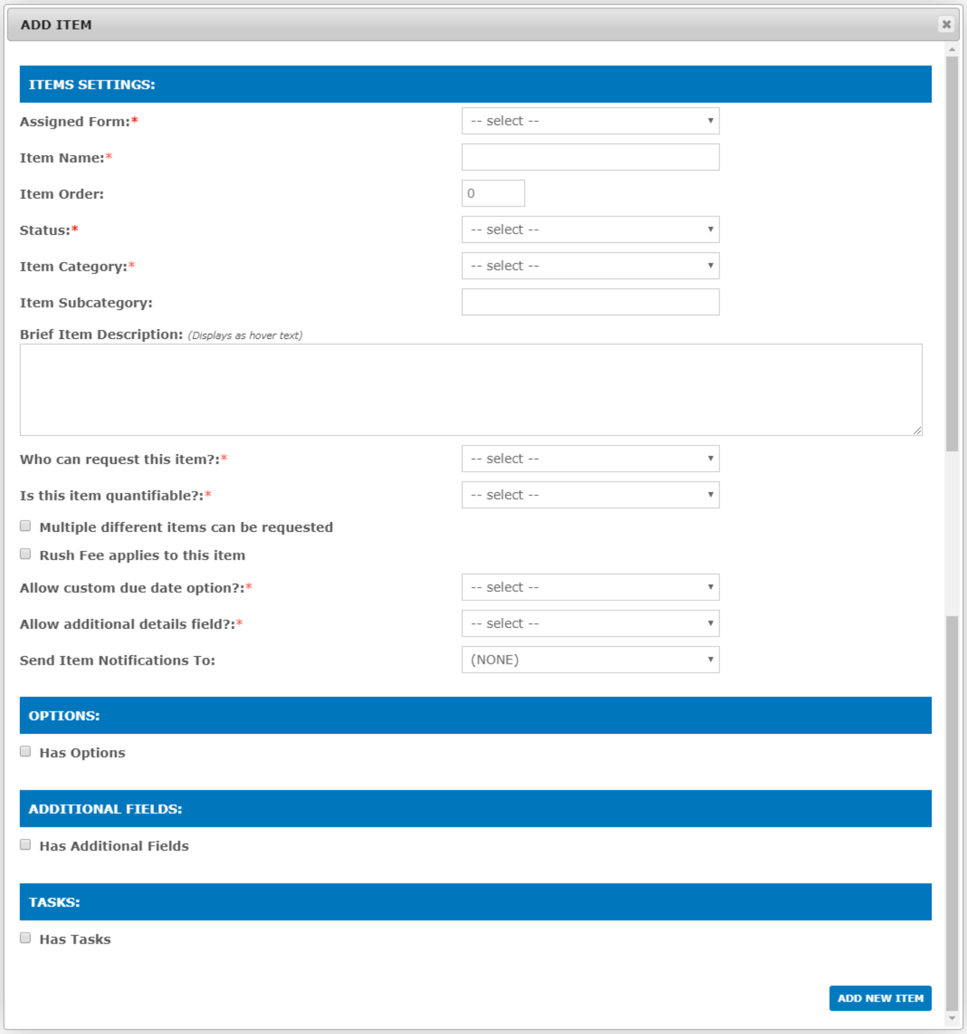


Figure 3-6b. Add New Items Form

Items Settings:
This portion of the form defines where and how the item will appear.

For the first field, the “Assigned Form” is selected (Options include “Project Support” and “Marketing”). NOTE: These assigned forms are currently hard-coded into this ARFS instance, but there are plans to expand this in later versions to allow the creation of custom parent and child forms).

The “Item Name” is the text that will appear next to the checkbox on the assigned form.

The “Item Order” allows the System Administrator to break out of the default alphabetical order for items.

The “Status” field can be set to “Active” or “Disabled”. If “Disabled” it will be removed from the form and will be ignored if included on any pending forms.

The “Item Category” is another field that has been hard-coded for this ARFS Instance. The categories determine where the item lists will appear on the Marketing Request form (Options include “Printed Media”, “Digital Media”, “Printed Ads”, “Miscellaneous Services“ and “Support Services”.

The “Item Subcategory” can be used to group similar items together. For example, Fort Eisenhower has several requestable items that fit under the “Website” subcategory, such as “Online MWR Event Calendar”, “Web Changes or Features”, “Web Form” and “Pin to Home Page” (see figure 3-6c).

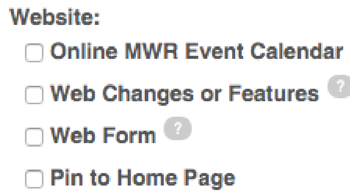


Figure 3-6c. Items Subcategory Group Example

The next field is for the “Brief Item Description”. The text that’s entered here will be displayed as an information pop-up that appears when the gray question-mark circle icon is clicked next to the item. If no text is entered, no icon will appear.

For the “Who can request this item?” option, you can choose one of the following:

- All Users
- Only Non-MWR users
- Admin Users, Approving Managers and Standard MWR Users
- Only Admin Users
- Admin Users, Approving Managers and Standard MWR Users, but options are Admin only
- Only Specific Programs (choose below)

Most selections are self-explanatory, but the last selection triggers another area within the form that allows you to select individual programs/activities that this item applies to. When that program/activity is selected on the form, these items will appear.

Next on the form is the “Is this item quantifiable?” option. This can either be “No”, “Yes, and the quantity is fluid” or “Yes, and the quantity is fixed”. An example of a fluid quantity item would be flyers or posters in which the user can request any number of their choice. A fixed quantity item would be, for example, an order of business cards where the quantity options are limited to specific amounts. If the fluid quantity option is selected, a “Quantity” field will appear when this item is checked on the form.

The “Multiple different items can be requested” checkbox allows the “Add an Additional Item” plus icon (+) to appear for this item. For more details on this feature, see Requestable Item Additional Options under section 1-10.

The “Rush Fee applies to this item” checkbox will determine if a rush fee is applied to a request. If no items are selected with this item checked, then the request will be exempt from any rush fees.

The “Allow custom due date option?” selection has three options, “No”, “Yes, for all users” or “Yes, for Admin users only”. This option will allow the “Custom Due Date” calendar icon () to appear for this item. For more details on this feature, see Requestable Item Additional Options under section 1-10.

The “Allow additional details field?” selection has three options, “No”, “Yes, for all users” or “Yes, for Admin users only”. This option will allow the “Add Additional Details” ellipsis box icon () to appear for this item. For more details on this feature, see Requestable Item Additional Options under section 1-10.

The final item on this form is “Send Item Notifications To” and includes a selection for all members of the “Item POC” role. By selecting a user for this item, the selected POC will be notified anytime this item is requested. They will receive an additional notification if the item is removed from a form that it was previously included on. This allows some POC’s who are responsible for requestable items to easily track which projects and request require their associated item. An example of this is the “Volunteer Support” item; by notifying the POC for volunteer coordination, they can begin planning early, and it adds an extra layer of awareness so it's not left solely on the original requesting user to notify the Volunteer Coordinator.

3-7. Options

Each item can include options, which are additional selections to determine what the user wants to request. For example, flyers could have a "Handbill", "Letter", and "Custom Size" option.

Custom Size:
There is a feature hard-coded in the Options section that will generate a custom height and width field on the form if there is an Option called "Custom Size" and it is selected.

Adding Options:
To add options, click the "Has Options" checkbox, and then press the "+ Option" button. This will create an options box with various settings that can be applied (see figure 3-7a). If an option is no longer needed, the red X button can be pressed to remove the option.

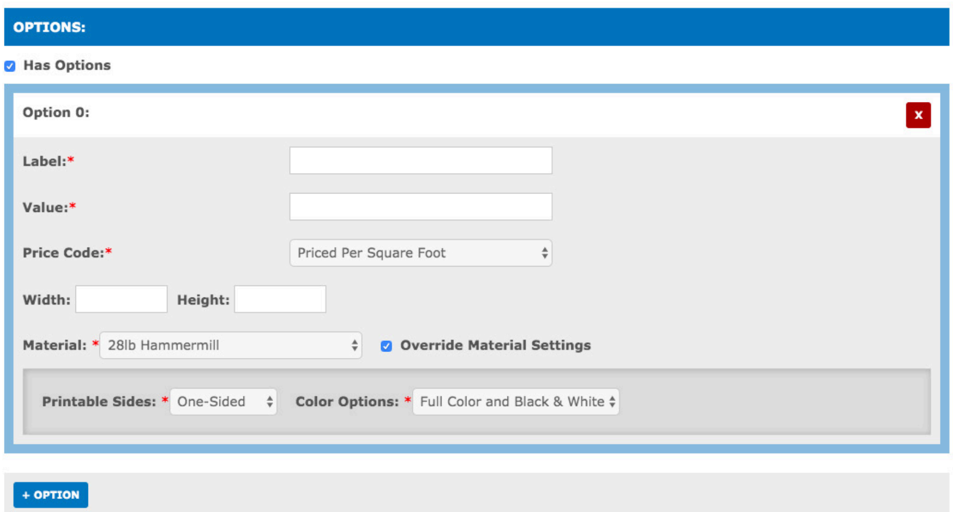


Figure 3-7a. Options Form

This form includes a "Label" and "Value" field, which will typically be the same. The Label defines the text that will appear in the option selection and the Value will be the text that's recorded in the database.

The "Price Code" selection includes the following options:

- **No Cost** – This option does not include any additional fields.
- **Priced Per Item** – When this option is selected, a "Width", "Height" and Price field appear.
- **Priced Per Square Foot** – When this option is selected, a "Width" and "Height" field appear as well as a "Material" selection. This is connected to the Materials database explained in section 3-3. There is also an option to override material settings if the previously defined rules don't apply. For example, the "Marketing Displays" item is printed on the same paper as the "Flyers" item, but the "Marketing Displays" can only be one-sided since they're displayed on a board.
- **Cost Exists, But Not Calculable** – This option was added for selections that don't connect to an exact value, such as the option "Whatever Marketing Recommends" for sign material.

3-8. Additional Fields

The Additional Fields section can provide a variety of field types, to include:

- **Selection Menu** – Allows additional options to be added to each selection menu.
- **Graphical Selection Menu** – Allows additional options to be added to each selection menu with a field to upload a graphic for each. This gives the user a visual representation of the options they're choosing.
- **Text Input** – Allows a small text field.
- **Large Text Area** – Allows a much larger text field for extended information.
- **Info Box** – This option provided additional information about the selected item when it is checked.
- **Date** – This provides a date selector field.
- **Checklist** - This option will allow the System Administrator to include a list of checklist options. Each generated checklist will include a "Select All" button for convenience.

All of these fields can be set to appear if a specific option is selected by choosing those options in the "Which options trigger this field?" section. By choosing none of the options, the field will appear for all by default. All additional fields can also be set as "Required" if necessary.

To add an Additional Field, check the "Has Additional Fields" checkbox and press the "+ Additional Fields" button. An Additional Fields box will appear (see figure 3-8a). Once the field type is selected, the associated fields will display.

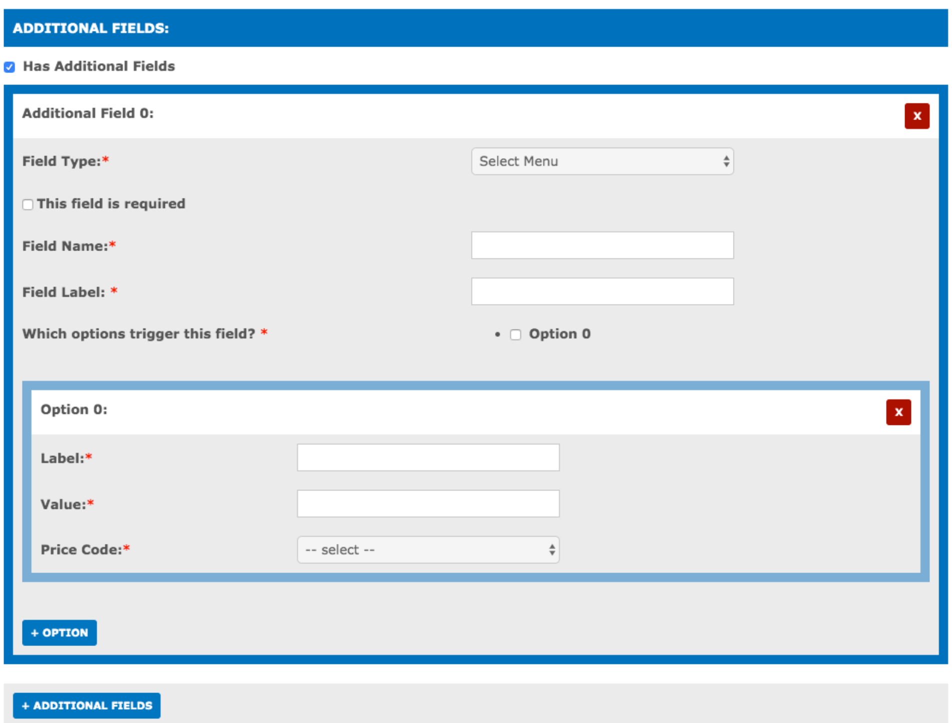


Figure 3-8a. Additional Fields Form

3-9. Tasks

Each item has associated tasks to provide instruction for completing the request. To add a task, check the "Has Tasks" checkbox and press the "+ Task" button. The Tasks box will appear (see figure 3-9a).

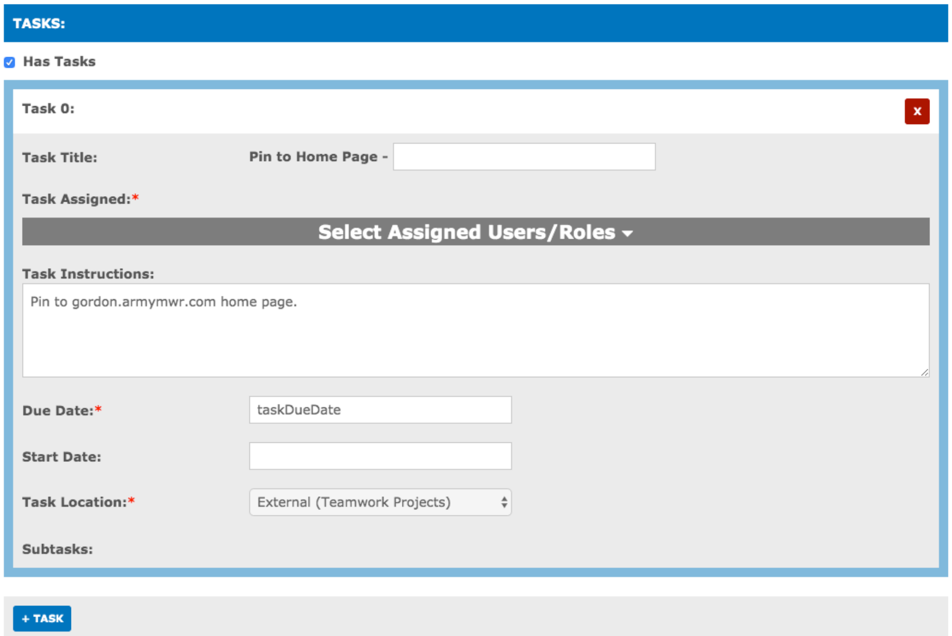


Figure 3-9a. Tasks Form

For the "Task Title", the item name will be displayed next to the text input. In some situations, the item name also serves as the task title such as "Pin to Home Page". For some other tasks, a specific title may be necessary, for example, the "Flyers" task could have a "Flyers - Design" task and a "Flyers - Print" task.

The next section is a checklist to select the users/roles that should be assigned this task. Here the System Administrator can select by role or specific staff member. Roles will assign based on default or selected staff member for the requesting program (see figure 3-9b).

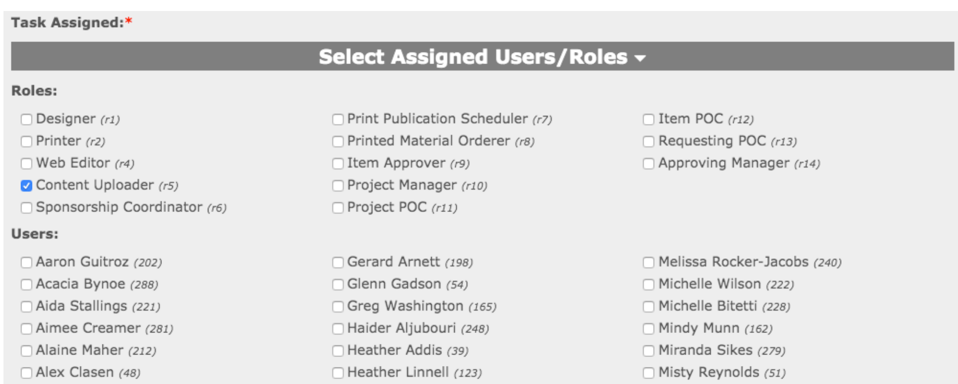


Figure 3-9b. Tasks Form: Select Assigned Users/Roles List

After the assigned user checklist is the "Task Instructions". This is where you can provide instructions that are specific to this task. NOTE: Any other details about the request recorded in the Project Summary or Special Instructions will already be included with these instructions when the tasks are generated.

Next is the "Due Date" field. This field, in the current version of ARFS (October 2023) allows hard-coded due date identifiers as well as numerical values. The numbers use the General Due Date for the request by default. Positive numbers represent business days after the General Due Date, and negative numbers represent business days before.

The "Start Date" field works very similar to the Due Date field where it accepts due date identifiers and numbers. This date provides and additional option when viewing tasks and is handy for those tasks that require more advanced notice.

The “Task Location” selection field includes two options: “All (Internal)” and “Marketing Only (External)”. The “Marketing Only” option lets ARFS know to show this task to only Marketing Staff once the request is approved by Marketing. The “All” option provides Project POCs with the ability to see their own tasklists when requesting support options. This will eventually replace the PDF version of the Project Tracking Checklist as explained in section 1-7 once the feature has been implemented (as of October 2023, still in development).

4

Glossary

4-1. Acronyms

- API - Application Programming Interface
- ARFS - Automated Request Form System
- BCC – Blind Carbon Copy
- DFMWR - Directorate of Family and Morale, Welfare and Recreation
- DPTMS - Directorate of Plans, Training, Mobilization and Security
- MWR - Morale, Welfare and Recreation
- POC - Point of Contact
- PMS - Project Management System
- SOP - Standard Operation Procedures

4-2. Terms

General Due Date:
This is the date that is entered on the marketing request form and is defined as the date that marketing materials are requested by. This applies mainly to printed materials for pick-up. By default, this is set to 3 weeks from the Project/Event Date. Users can still manually adjust this date per applicable item on the request form using the “Add a Custom Due Date” feature.

In-Browser Window
This is the term used to describe an overlaying section of the web page that appears similar to a pop-up, but exists as a part of the page it appears on. These windows are typically used for forms and additional features.

Internal ARFS Calendar
The list of events on display within the ARFS system. This page is accessed by clicking the “Calendar” link on the header of any page on the site, or by going to https://mwrarfs/calendar. This list includes all project dates that have been selected to appear on the Internal ARFS Calendar. For more details on this item, see section 1-14.

Marketing Project Manager:
The MWR Marketing staff member responsible for managing user accounts, programs and requests.

Non-MWR
Refers to an authorized user who is not associated with MWR, but has the ability to use ARFS in a limited way to request marketing materials.

Submission Date:
This is the date that the request is sent to Marketing for approval. Several of the due dates for marketing tasks are determined by this date.

4-3. References

1. DFMWR SOP Program and Calendar Tracking (5 JAN 2018)
2. DD Form 2977 - Deliberate Risk Assessment Worksheet