cASM

Contingency Acquisition Support Model

Planning

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1 Planning Summary

The Planning module is a web-based tool used to plan and support crisis action, training, exercise and contingency contracting.

2 Planning Module - Home Page

Planning Module – Home Page allows a user access and visibility to all Plans within the assigned COCOM(s). The Home Page is the first page accessed upon entering the Planning Module (see **Figure 1**). The Plan List displays all plans within the user's assigned Combatant Commands (COCOM(s).

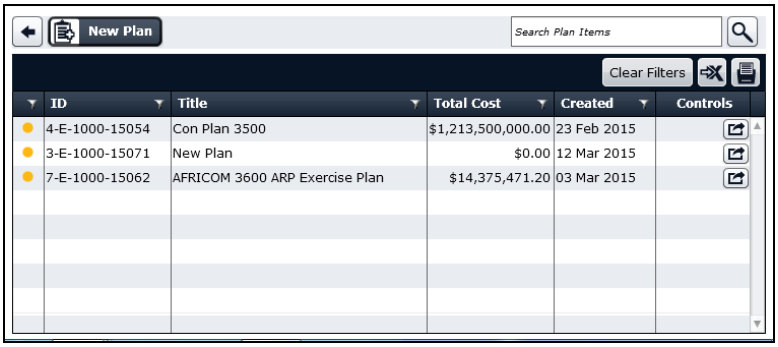


Figure 1: Home Page

2.1 cASM Icons

Workflow Icons

- In Work
- Under Review
- Pending Approval
- Approved

Action Icons

- Dashboard
- Home
- Start a New Plan
- Start Search
- Print Summary
- Export file to Excel
- Print Summary
- Clear Filters

Control Icons

- Plan Tracking
- Clone
- Edit
- Remove
- Assign Plans to Staffing Structures

Note: Moving the mouse over the status icons displays the most recent status for the individual plans.

Link to the cASM EDU site: https://edu.tqsapps.com/casmportal_EDU/

Link to the cASM production site: https://www.casm.csd.disa.mil/casmportal/

2.1.1 Dashboard and Home

The Dashboard icon allows access back to the Dashboard. When not on the Home Page, the Home icon replaces the Dashboard icon and allows a user to navigate back to the Planning Home Page.

2.1.2 Start a New Plan

To start a new Plan, select New Plan (see **Figure 2**).

Figure 2: New Plan

Create a New Plan by completing the required fields (see **Figure 3**):

1. Use the drop downs to select the COCOM and Plan Type.
2. Complete the Plan Title and Description fields.
3. Set the Primary Location by completing one or more of the available fields: Name, Code, or GeoLoc.
4. Select the Component(s) for the Plan by selecting all applicable checkboxes.
5. Select **Continue** to save the new Plan.

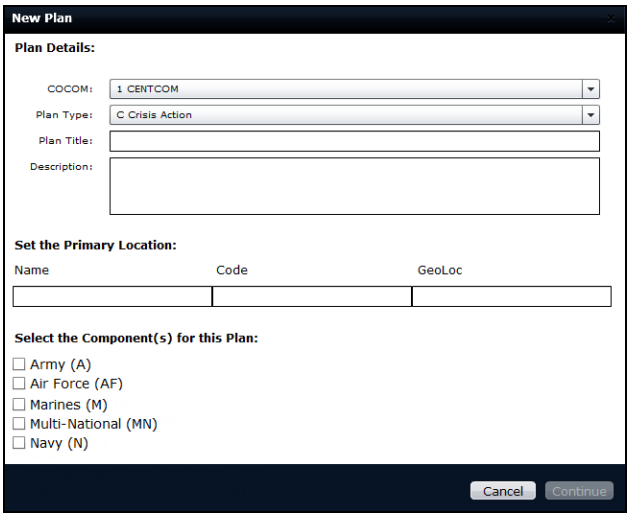


Figure 3: New Plan Requirements

2.1.3 Search

Search option retrieves Items already associated with a Plan. To search Plan Items, enter item data, and select **Start Search**.

2.1.3.1 Planning Search Manager

Planning Search Manager displays all items associated with the search criteria. Users can clone and filter Items displayed (see **Figure** 4).

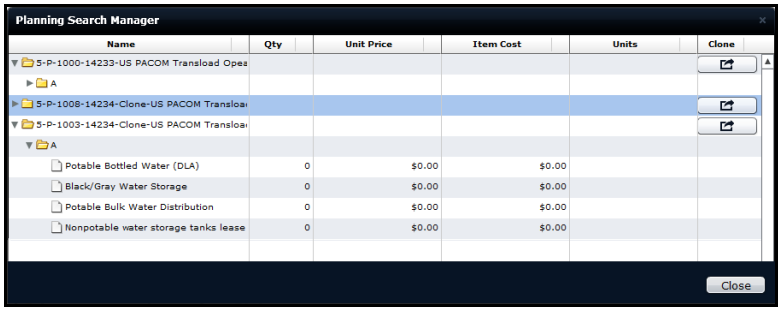


Figure 4: Search Manager

2.1.4 Column Filters

Column headings may be used to filter data. When a column filter is in use, the filter icon will display in red. Multiple filters may be used simultaneously; however, columns may only be sorted one at a time.

2.1.5 Clear Filters

Clear Filters removes all selected column filters.

2.1.6 Export Plan Data to Excel

To export Plan data to Microsoft ®Excel, select the **Export data to Excel File** button and then **Save**.

2.1.7 Print Summary

Print Summary allows a User to print all Plans listed on the Home Page, select **Print Summary** and **Print**.

2.1.8 Plan ID

The Plan ID is a unique identifier for the Plan that contains the following information: COCOM Reference, Plan Type Reference, Event Reference Number, and the Julian creation date of the Plan (see **Figure 5**).

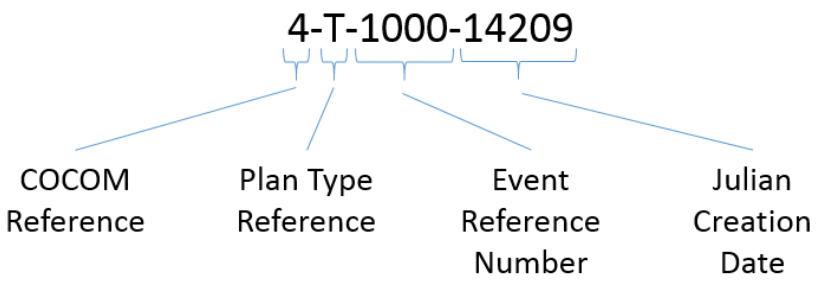


Figure 5: Plan ID Data

2.1.9 Assign Staffing Structures to Plan

When approved a Plan may be assigned to one or more staffing structures to be used in the Requirements Module. To assign staffing structure(s), select the **Assign staffing Structures to Plan**, add staffing structure(s) by checking those desired, and **Save** (see **Figure 6**).

Figure 6: Staffing Structure Assignments

Note: Staffing Structures are a group of users and cost thresholds that identify a workflow in the Requirements Module.

2.1.10 Plan Tracking

Plan Tracking allows a user to trace a cloned Plan back to the original Plan(s). Plans list in the order cloned (see **Figure 7**).

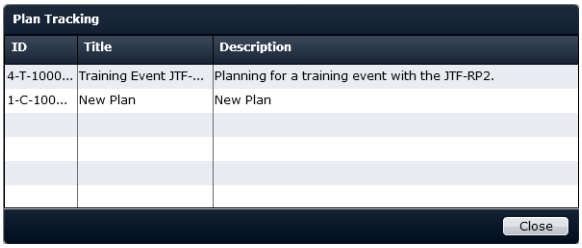


Figure 7: Plan Tracking

2.1.11 Clone this Plan

Clone this Plan allows a Plan to be duplicated; all data from the original plan is included in a new Plan.
Select, **Clone this Plan**, edit the Plan ID, Title, and Description, then **Save**.

3 Plan Overview

Plan Overview summarizes the overall Phase, Population and Approvals for a Plan (see **Figure 8**).

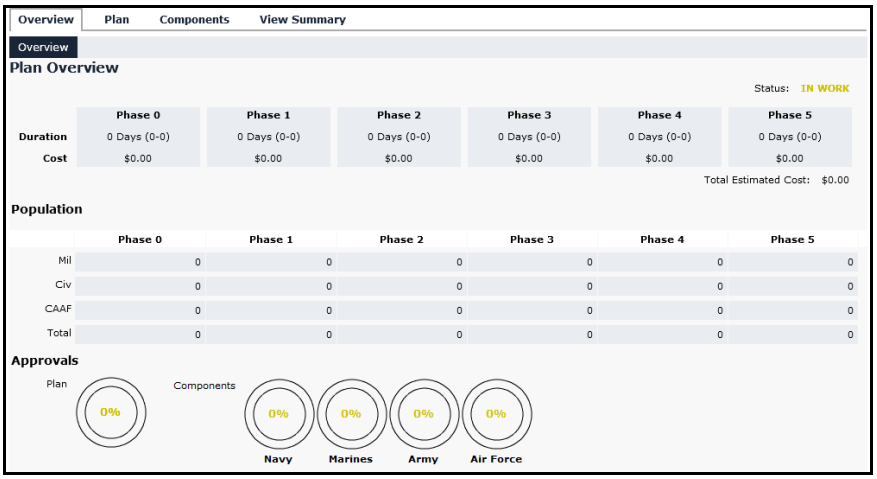


Figure 8: Overview

4 Plan

4.1 Details

Details display the details of the selected plan. A user may modify the **Plan Title** and **Description,** then **Save Details**.

Phasing Duration (in Days) is the number of days within a phase period. To assign duration periods within a Plan, enter the number of days for each Phase and select **Save Phasing**. Select **Reset Phasing** to restore the Phasing data to the values last saved (see **Figure 9**).

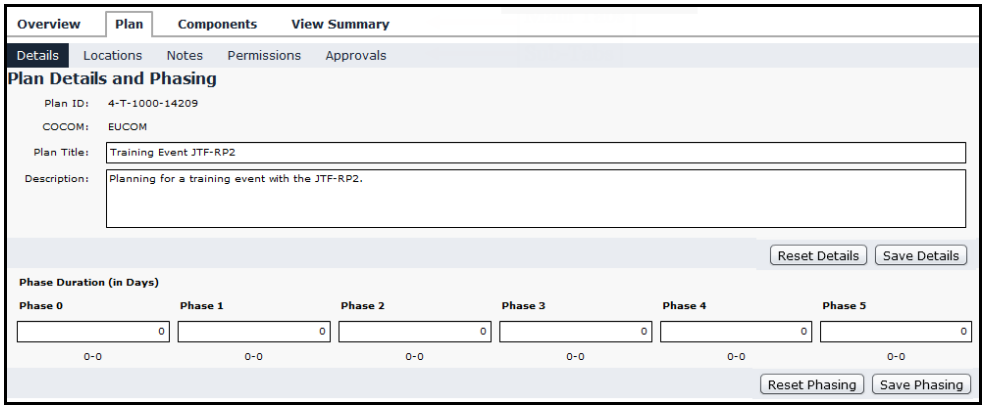


Figure 9: Plan Details

4.2 Locations

To edit or remove a Primary and Secondary location select **Edit** or **Remove**. To add a Secondary Location select **Add Location**.

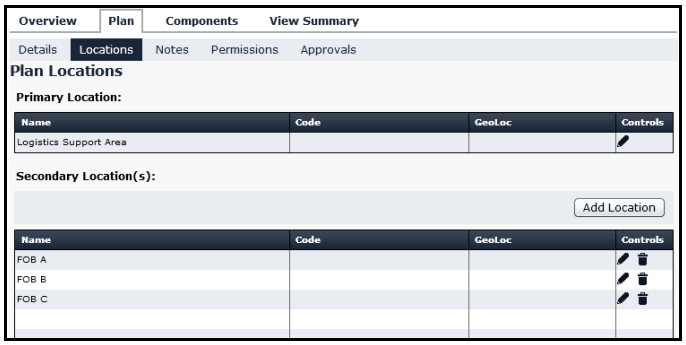


Figure 10: Plan Locations

4.3 Notes

Plan Notes displays all notes associated with the Plan. A user may add a note by selecting **Add Note**. To view a note, double click on the note (see **Figure 11**).

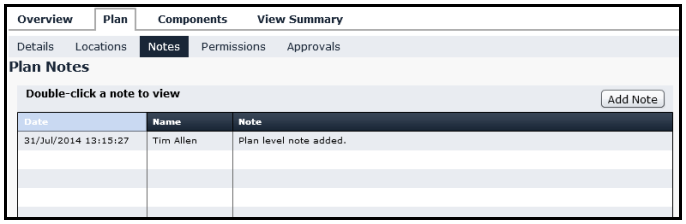


Figure 11: Plan Notes

Note: Notes are read-only.

4.4 Permissions

Permissions allow a user to manage permissions at a Plan level and assign users as Editors, Reviewers and Approvers. Select the name under **Not Assigned**, and click on the right arrow to **Assign** the user. To remove an assigned user, select the name under **Assigned** and click the left arrow to place the name into the **Not Assigned** area, then **Save** (see **Figure 12**).

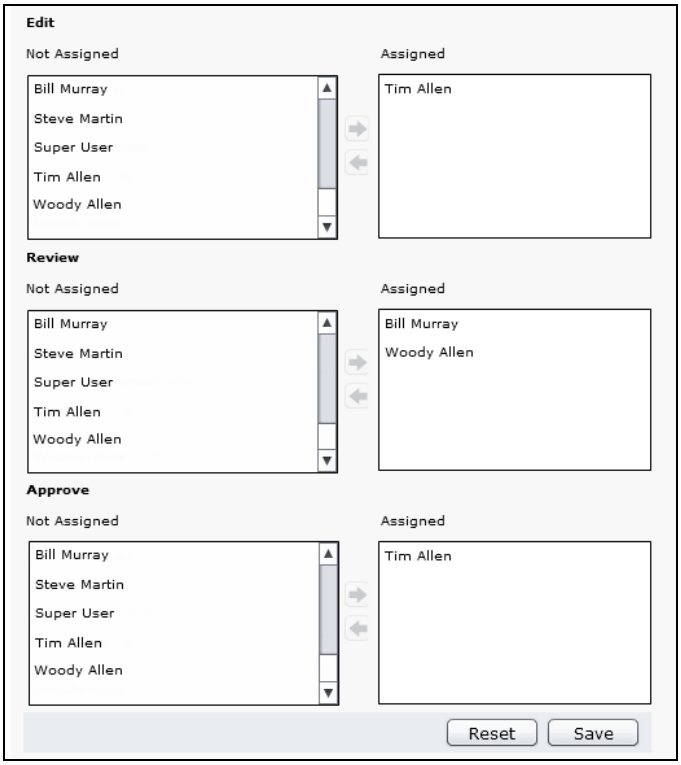


Figure 12: Plan Permissions

4.5 Approvals

Approvals provide the user a Final Review and Reviewer Status.

4.5.1 Final Review

Final Review shows the Plan Status, displays Warnings and Errors found in the Plan. Warnings do not stop a user from proceeding; Errors do. A User is informed where to correct each Error.

4.5.2 Reviewer Status

Reviewer Status displays a list of the user(s) assigned as reviewers and includes the current review status for each and the date the latest review activity occurred (see **Figure 13**).

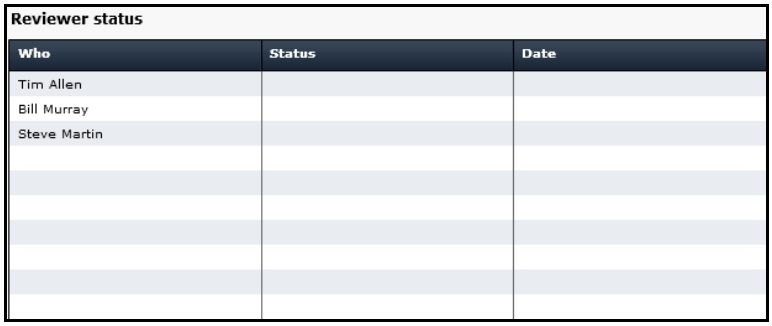


Figure 13: Reviewer Status

4.5.3 Change Plan Status

Editors, Reviewers, and Approvers perform separate actions as described below:

Editors – place the Plan into Review.
Reviewers – Accept or Reject a Plan that is Under Review.
Approvers – Approve or UnApprove a Plan that has been accepted.

4.5.3.1 Review

Only Editors may place a Plan into the Under Review status. Only a single Editor needs to perform this status change. To place a Plan under Review, select **Review** (see **Figure 14**).

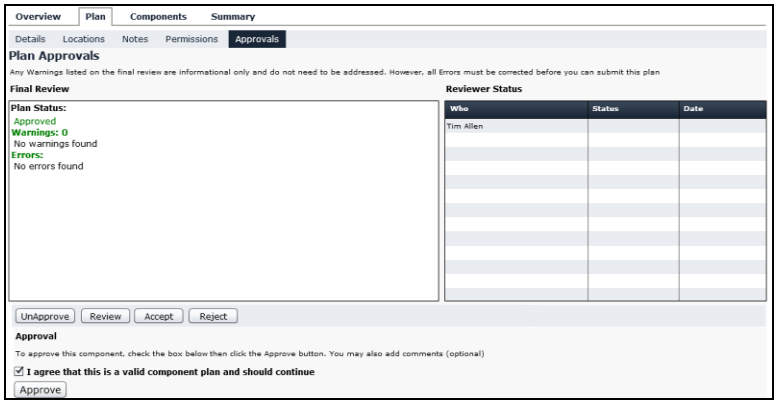


Figure 14: Change Plan Status

4.5.3.2 Accept

Once a Plan is Under Review, Reviewers have the ability to review and accept the Plan. Multiple Reviewers may be assigned to review a single Plan; all Reviewers must accept the Plan before the approval process can start. To accept a plan, select **Accept** (see **Figure 15**).

Figure 15: Review – Accept

4.5.3.3 Reject

In order for a Reviewer to reject a Plan, select **Reject**. A note is required when rejecting a plan.

4.5.3.4 Approve

Approve allows users the ability to approve the assigned Plan. Multiple users may be assigned to approve a Plan. Not all assigned approvers must approve a Plan. If one approver approves the assigned Plan, the approval process is complete. To approve a plan, select **Approve** (see **Figure 16**).

Figure 16: Approve

Note: All Components must be approved before reviewing and approving a Plan.

4.5.3.5 UnApprove

Once a Plan is approved, an approver has the option to UnApprove by selecting **UnApprove** (see **Figure 17**).

Figure 17: UnApprove

5 Components List

Components List displays all Components included within a Plan (see **Figure 18**).

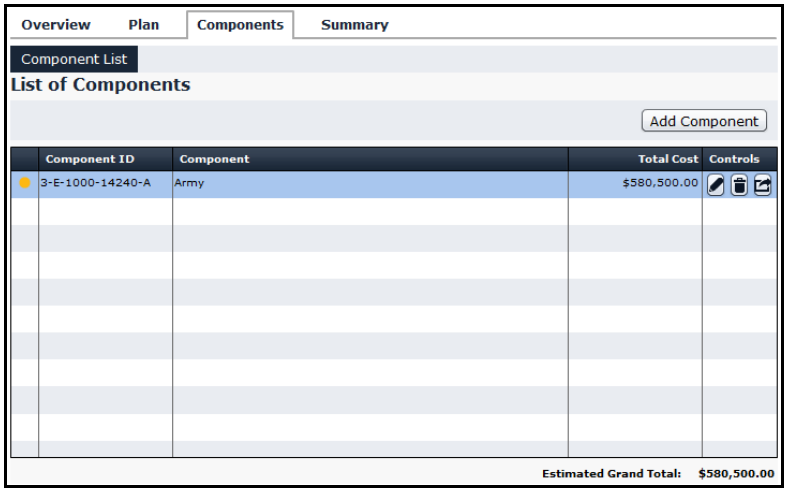


Figure 18: Component List

5.1 Add Component

To add additional Components select **Add**, choose the component from the drop down select items, then **Save** (see **Figure 19**).

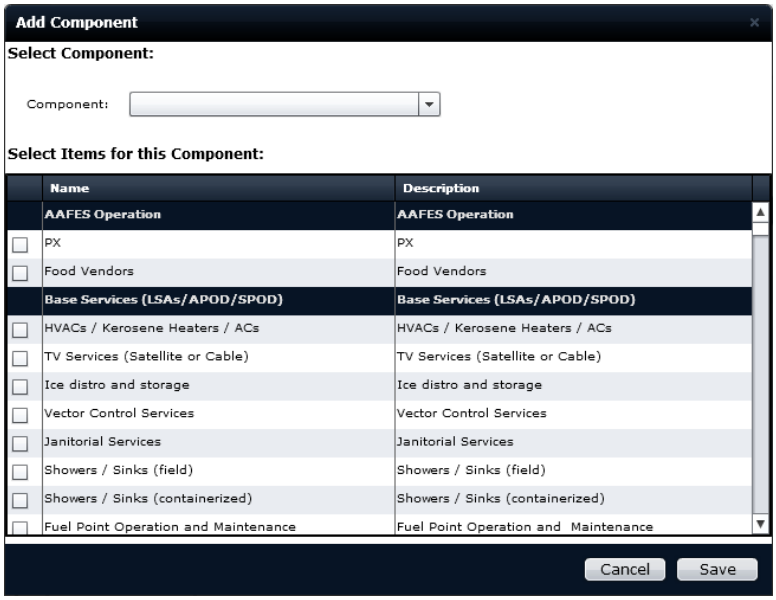


Figure 19: Add Component

5.2 Clone Component

To clone a Component select **Clone**, select a Component from the **Assign Component** drop down, then **Save** (see **Figure 20**).

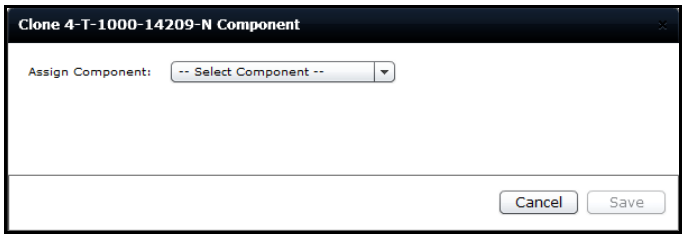


Figure 20: Clone Component

5.3 Remove Component

To remove a Component, select **Remove**.

5.4 Edit Component

Editing a Component allows the user access to Component details (i.e., Population, Items, Notes, Permissions, and Approvals). To Edit a Component, double click the Component or select **Edit**.

5.4.1 Component Population

Component Population allows the user to enter the number of Military and Civilian personnel for each location by Phase. Complete the information in the table and select **Save** (see **Figure 21**).

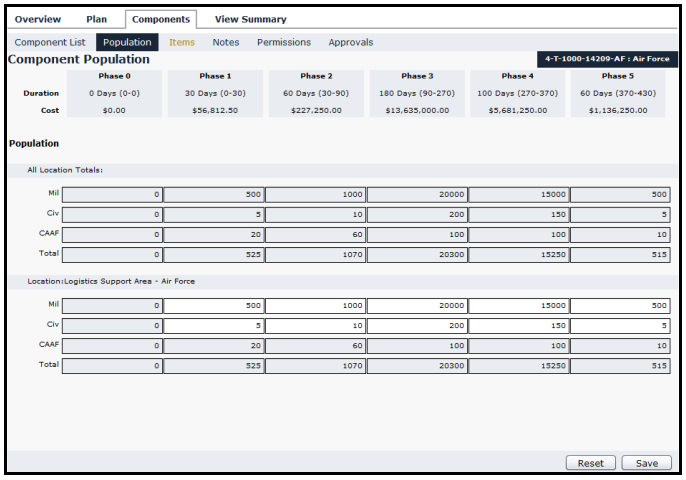


Figure 21: Component Population

5.4.2 Items

Displays all items included within a Component.

5.4.2.1 Add Items

Add Items allows the user to add items to a Component. Selecting Add Item will display a list of items that may be added to a Component. Choose one or more items and select **Add** (see **Figure 22**).

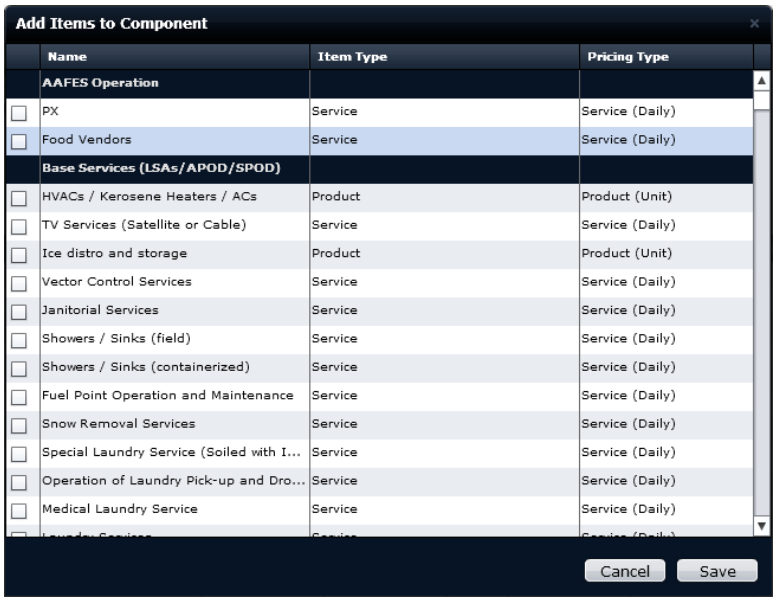


Figure 22: Add Items to Component

5.4.3 Remove Item

To remove an Item from a Component, select the Item and then **Remove.**

5.4.4 Edit Item

Editing an item allows the user access to item details. To edit an item, double click the item or select **Edit** (see **Figure 23**).

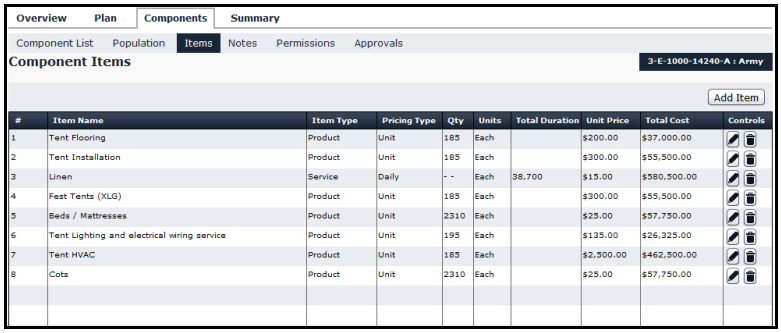


Figure 23: Component Items

5.4.4.1 Item Details

Items Details allows a user to enter items details. All fields with a red asterisk (i.e., *), are required (see **Figure 24**).

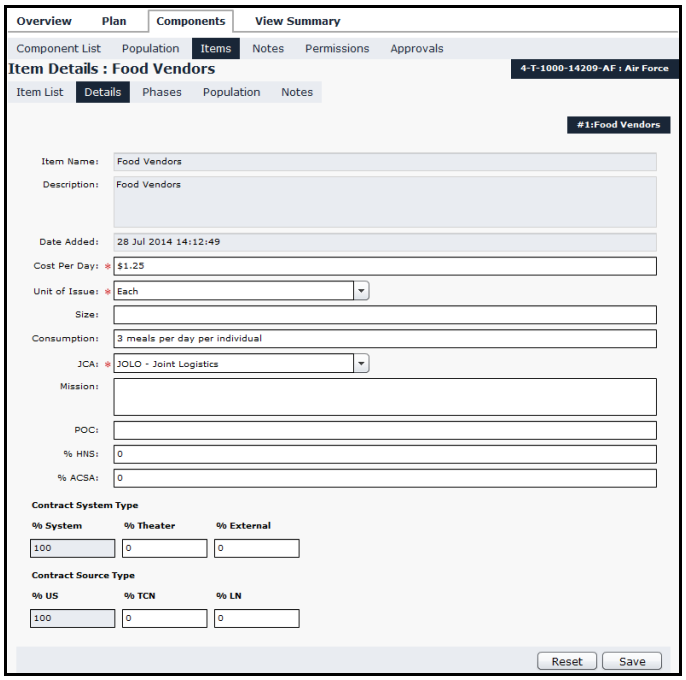


Figure 24: Item Details

5.4.4.2 Phases

Phase allows a user to enter the quantity of an item by Phase, Duration, and Location. Delivery of an item is defined by 'n+', which is the number of days from the start of the phase. Complete the information in the table and select **Save** (see **Figure 25**).

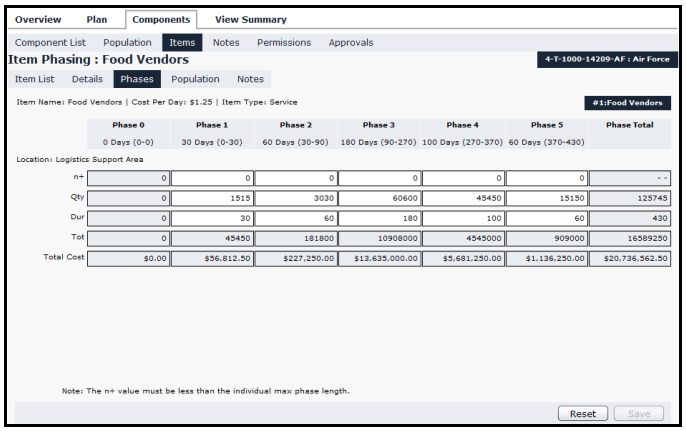


Figure 25: Phases

5.4.5 Population

Population allows a user to enter the number of Contractors Authorized to Accompany the Force (CAAF) by phase and location (see **Figure 26**).

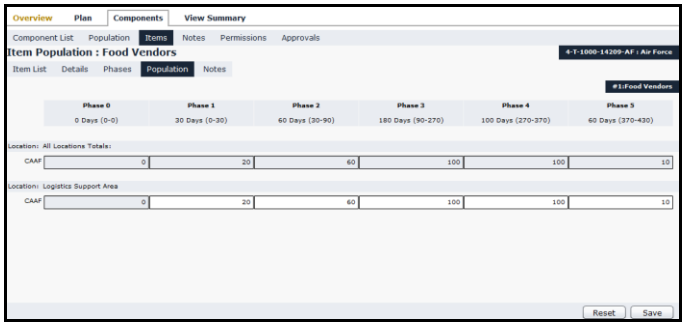


Figure 26: Population

5.4.5.1 Item Notes

Item Notes displays all notes associated with an Item. To add a note select **Add Note** then **Save** (see **Figure 27**).

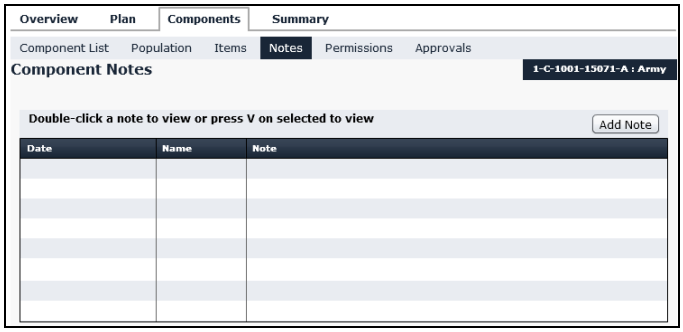


Figure 27: Item Notes

5.5 Component Notes

Component Notes displays all notes associated with a Component. To add a note select **Add Note** then **Save** (see **Figure 28**).

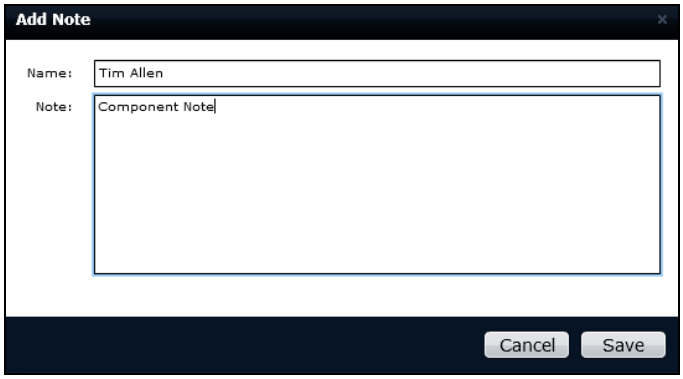


Figure 28: Add a Note

5.6 Permissions

Permissions allow a user to manage permissions at a Component level and assign users as Editors, Reviewers and Approvers. Select the name under **Not Assigned**, and click on the right arrow to **Assign** a user. To remove an assigned user, select the name under **Assigned** and click the left arrow to place the name into the **Not Assigned** area, then **Save** (see **Figure 29**).

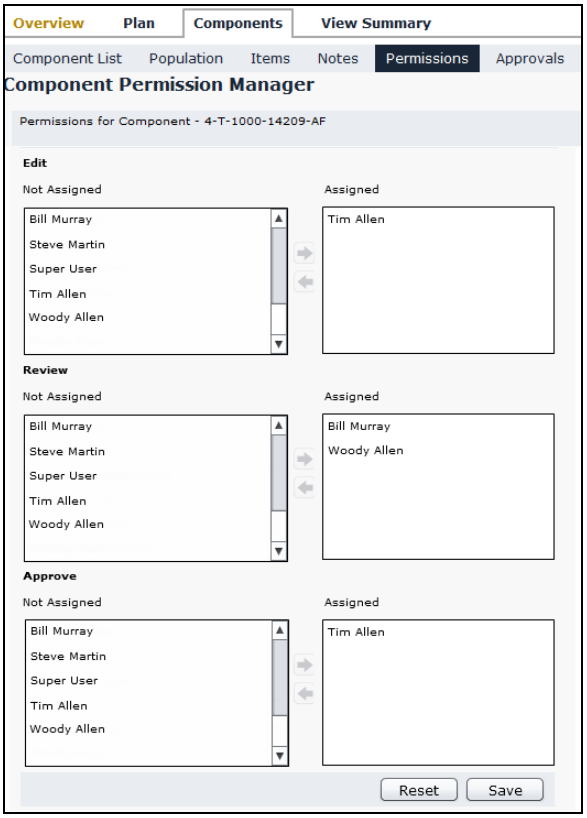


Figure 29: Component Permissions Manager

5.7 Approvals

Component Approvals provide the user a Final Review and Reviewer Status.

5.7.1 Final Review

Final Review shows the Component Status and displays Warnings and Errors found in the Plan. Warnings do not stop a user from proceeding; Errors do. A User is informed where to correct each Error.

5.7.2 Reviewer Status

Reviewer Status displays a list of the user(s) assigned as reviewers and includes the current review status for each and the date the latest review activity occurred (see **Figure 30**).

Reviewer status

Who	Status	Date
Tim Allen		
Bill Murray		
Steve Martin		

Figure 30: Reviewer Status

5.7.3 Change Plan Status

Editors, Reviewers, and Approvers perform separate actions as described below:

Editors – place the Component into Review.
Reviewers – Accept or Reject a Component that is Under Review.
Approvers – Approve or UnApprove a Component that has been accepted.

5.7.3.1 Review

Only Editors may place a Component into Under Review status. Only a single Editor needs to perform this status change. To place a Component under Review, select **Review** (see **Figure 31**).

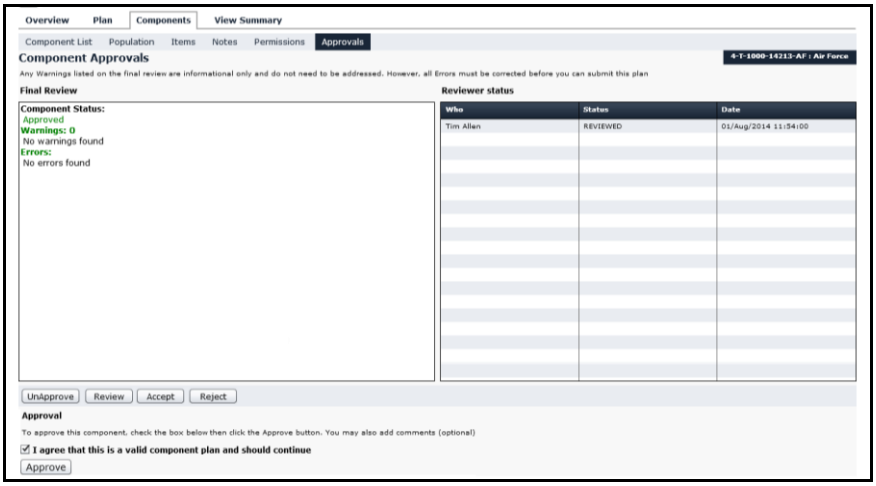


Figure 31: Change Plan Status

5.7.3.2 Accept

Once a Component is Under Review, Reviewers have the ability to review and accept the Component. Multiple Reviewers may be assigned to review a single Component; all Reviewers must accept the Component before the approval process can start. To accept a component select **Accept** (see **Figure 32**).

Figure 32: Review – Accept

5.7.3.3 Reject

In order for a Reviewer to reject a Component, select **Reject**. A note is required when rejecting a Component.

5.7.3.4 Approve

Approve allows a user the ability to approve the assigned Components. Multiple users may be assigned to approve a Component. Not all assigned approvers must approve a Component. If one approver approves the assigned Component, the approval process is complete. To approve, select **Approve** (see **Figure 33**).

Plan Title	Grand Total
Custodial Services	$612,900.00

Component ID	Component	Total Cost
5MO1-M	Marine	$0.00
5MO1-A	Army	$0.00
5MO1-AF	Air Force	$612,900.00

Approve

Figure 33: Approve

5.7.3.5 UnApprove

Once a Component is approved, an approver has the option to UnApprove by selecting **UnApprove** (see **Figure 34**).

Plan Title	Grand Total
Custodial Services	$612,900.00

Component ID	Component	Total Cost
5MO1-M	Marine	$0.00
5MO1-A	Army	$0.00
5MO1-AF	Air Force	$612,900.00

UnApprove

Figure 34: UnApprove

6 Summary

6.1 Cost Summary

Cost Summary displays a summary of all data associated with a Plan by phase periods. To display the data, select Location, Category, or Component from the drop down and then select **Apply**. A user may export or print the Cost Summary. To export, select **Export data to Excel file**. To print, select **Print** (see **Figure 35**).

Overview | Plan | Components | View Summary

Summary

Plan Summary

Component / Apply	Unit	Phase 0			Phase 1			Phase 2			Phase 3			Phase 4			Phase 5			Total	
		qty	0 days	cost	qty	30 days	cost	qty	60 days	cost	qty	180 days	cost	qty	100 days	cost	qty	60 days	cost	qty	cost
Marines				$0.00			$3,000.00			$3,000.00			$3,000.00			$3,000.00			$3,000.00		$15,000.00
Linen	Each			$0.00	150		$3,000.00	150		$3,000.00	150		$3,000.00	150		$3,000.00	150		$3,000.00	750	$15,000.00
Army				$0.00			$162,000.00			$324,000.00			$1,944,000.00			$1,080,000.00			$324,000.00		$3,834,000.00
Porta Potties and Service	Each			$0.00	600		$162,000.00	1200		$324,000.00	7200		$1,944,000.00	4000		$1,080,000.00	1200		$324,000.00	14200	$3,834,000.00
Air Force				$0.00			$56,812.50			$227,250.00			$13,635,000.00			$5,681,250.00			$1,136,250.00		$20,736,562.50
Food Vendors	Fluid ...			$0.00	45450		$56,812.50	181800		$227,250.00	10908000		$13,635,000.00	4545000		$5,681,250.00	909000		$1,136,250.00	16589250	$20,736,562.50
Navy				$0.00			$22,500.00			$51,900.00			$86,100.00			$8,700.00			$5,700.00		$174,900.00
Hydraulic Excavator (Small)	Each			$0.00	40		$14,400.00	120		$43,200.00	180		$64,800.00			$0.00			$0.00	340	$122,400.00
Lift pumps lease	Each			$0.00	100		$3,000.00	100		$3,000.00	100		$3,000.00	100		$3,000.00	100		$3,000.00	500	$15,000.00
Plate compactor	Each			$0.00	60		$3,600.00	90		$5,400.00	180		$10,800.00	90		$5,400.00			$0.00	420	$25,200.00
Soil Compactors	Each			$0.00	30		$1,200.00			$0.00	180		$7,200.00			$0.00	60		$2,400.00	270	$10,800.00
Submersible Pumps (insert Size) lease	Each			$0.00	5		$300.00	5		$300.00	5		$300.00	5		$300.00	5		$300.00	25	$1,500.00
Total				$0.00			$244,312.50			$606,150.00			$15,668,100.00			$6,772,950.00			$1,468,950.00		$24,760,462.50

Export to Excel | Print

Figure 35: Cost Summary

6.2 CAAF Summary

CAAF Summary displays a summary of all CAAF data associated with a plan by phase periods. Select CAAF Summary and use the filters to modify the displayed report. A user may export or print the CAAF Summary. To export, select **Export data to Excel file**. To print, select **Print** (see **Figure 36**).

Overview Plan Components Summary

Cost Summary CAAF Summary

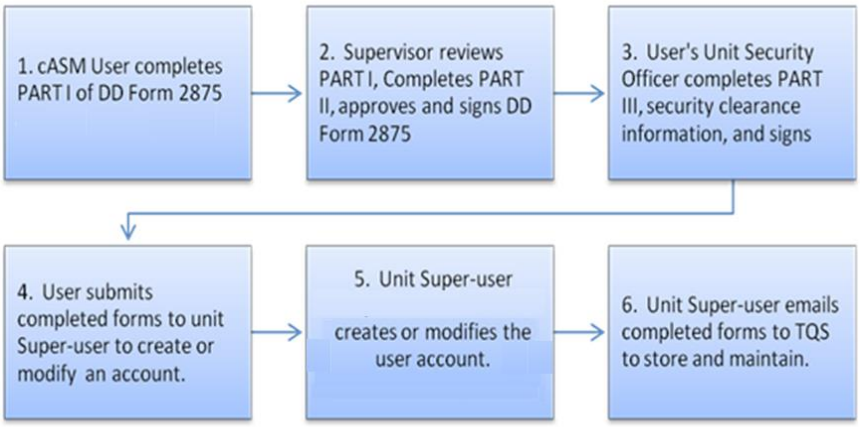
CAAF Summary

Clear Filters

Component	Location	Item	JCA	Phase 0	Phase 1	Phase 2	Phase 3	Phase 4	Phase 5	Total
				0 days caaf	120 days caa	120 days caa	120 days caa	120 days caa	90 days caaf	caaf
Army	LSA	Showers / Sinks (containerized)	JOLO	0	20	30	40	50	20	160
Army	FOB A	Showers / Sinks (containerized)	JOLO	0	50	50	50	20	20	190
Army	FOB B	Showers / Sinks (containerized)	JOLO	0	2	2	2	2	1	9
Army	LSA	Showers / Sinks (field)		0	0	0	0	0	0	0
Army	FOB A	Showers / Sinks (field)		0	0	0	0	0	0	0
Army	FOB B	Showers / Sinks (field)		0	0	0	0	0	0	0

Figure 36: CAAF Summary

Appendix A – cASM DD Form 2875 Process



Instructions

Step 1: cASM user completes DD Form 2875 PART I requesting a new account or modification to an existing account, signs and sends to the user's supervisor.

Step 2: cASM user's supervisor completes DD Form 2875 PART II, signs and sends it to the unit Security Officer.

Block 13 Put one or more of the following statements in Block 13:

Personal Info (Required)

Justification for cASM Access
User DODACC
Unit
Unit Identification Code (UIC)
Branch of Service

Block 27 Select one or more of the following statements in Block 27:

Access to the following Modules:

Planning
Requirements
Reports

Access to Staffing Structure:

(Name of Staffing Structure insert here)

Access to COCOM:

(Name of COCOM insert here)

cASM Role: (select only one Role)

Requirements Generator

Resource Manager
Contracting Officer
Approver

Step 3: cASM user's security officer completes PART III, signs, and returns the forms to the user.

Step 4: cASM user provides the completed and signed forms to the unit's cASM Super-user.

Step 5: The Super-user emails the completed form to TQS at TSC@TQSINC.com who will forward the request to the cASM PMO for collection and storage of the approved 2875.

Appendix B – 508 Keyboard Functions

This document describes the keyboard functions that navigate throughout the Planning Module. The basic keys are described below.

- Spacebar/Enter will activate the highlighted item
- Tab key navigates through the application
- The up, down, left and right arrow keys navigate through fields to set focus
    - Ctrl + down arrow - Open any drop-down list
- Page Up / Page Down - Switches months inside the date selection panel, (i.e., RDD date)

When a Plan is highlighted on the home page, press:

C - Clone Plan

(*) key from the Number Key Pad – is used to open all folder levels (i.e. Search Manager)

(+) – open single level

(-) – close single level

Appendix C – Acronyms

Term	Definition
ACSA	Acquisition and Cross-Servicing Agreement
CAAF	Contractors Authorized to Accompany the Force
CAC	Common Access Card
cASM	Contingency Acquisition Support Model
CIV	Civilian
COCOM	Combatant Command
DD	Defense Department
DLA	Defense Logistics Agency
FTE	Full Time Equivalent
HNS	Host Nation Support
ID	Identification or Identifier
JCA	Joint Capability Area
JRE	JAVA Runtime Environment
LN	Local Nationals
MIL	Military
MN	Multi-National
PIN	Personal Identification Number
POC	Point Of Contact
PRDS	Purchase Request Data Standard
QTY	Quantity
RP	Requirements Package
SIBR	Small Business Innovation Research program
SPS	Standard Procurement System
TCN	Third Country National
UIC	Unit Identification Code
US	United States