
Defense Security Assistance Management System (DSAMS) Part II

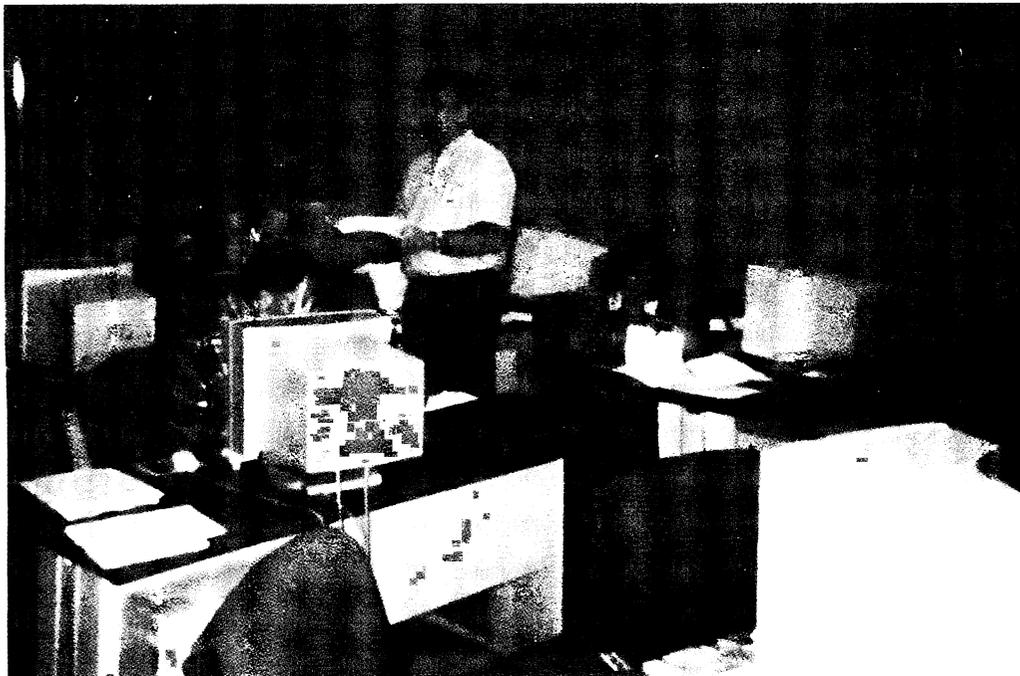
By

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The feature article of the summer issue of the DISAM Journal discussed the background and development methodology of the Defense Security Assistance Management System (DSAMS). This article continues the discussion of DSAMS with an update on development efforts during the summer and a look at some details of the actual software.

Multi-service Case Execution teams continue defining case execution requirements of the new system. Many execution process reviews will be complete by the end of 1998, but this effort will continue into next year as a single team integrates the various teams' work products. A second team will tackle the remaining processes needed for full Case Execution functionality.

The DSAMS team tested and deployed DSAMS Release 4 toward the end of the summer. This release updated the commercial off-the-shelf (COTS) software and was needed to ensure the DSAMS application would be Year 2000 (Y2K) compliant. Release 5 has additional case development capabilities and will be distributed this fall. Additional Navy and Air Force sites will begin using the Release 5 software during the winter and spring months. Army use of DSAMS will begin as soon as data conversion issues are resolved.



Army Super Users, PMO and contractor personnel discuss data conversion problems at DSADC

The Defense Security Cooperation Agency (DSCA, formerly DSAA) Program Management Office (PMO), Defense Security Assistance Development Center (DSADC), and contractor personnel worked throughout the summer with Army and Navy personnel to continue the

transition from existing case development systems to DSAMS. Army Super User testing teams converged several times during the summer to review the progress of data conversion from legacy systems to the DSAMS application. Much effort is required to "clean up" data in old systems, convert the data into the DSAMS environment, and then test the conversion effort to ensure that Army case writers can create amendments and modifications of previously implemented cases. The *good* news (if you are an Army case writer) is that the team identified a lot of complex data problems and everyone agreed that these problems needed to be corrected before converting Army users to DSAMS. Changeover to production use of DSAMS in the Army was delayed as a result. The *bad* news is that the team identified a lot of complex data problems, and this means additional work effort, time, and resources are needed to correct the problems. As the Fall Journal goes to press, a revised target date of early December 1998 has been proposed for Army conversion and is awaiting concurrence by all parties.

The DSAMS Customer Interface Group, composed of DSCA and Military Department representatives, has prepared a comprehensive briefing to FMS customers about DSAMS development. Liaison Officers at each International Logistics Control Office are scheduled to receive the briefing in November. An additional briefing session is planned for embassy personnel in Washington, D.C. This series of briefings also addresses the FMS customer interfaces to DSAMS, Supply Tracking and Repairable Return/Personal Computer 2 (STARR/PC2) deployment, the Training Management System (TMS), and International Security Assistance Network (ISAN).



**One of several information management
business area strategic planning sessions**

Momentum Builds

DSAMS case writing functionality is more comprehensive than any one of the three military department case writing systems it is replacing. There are also increased validations in DSAMS compared to the older applications, so it will require some change for everyone involved in the case writing process. Part of the challenge of fielding the new system is deciding how to deal with converted data that did not, or could not meet the DSAMS processing standards. As mentioned earlier, data errors or inconsistencies imported from the previous systems will have to be resolved by military department teams with a solid understanding of the case writing process,

the old system, and DSAMS. The conversion effort will have an additional beneficial result in that the conversion and testing teams gain new insights and experience into DSAMS to take back to their parent activities. The ultimate business benefit to FMS Implementing Agencies is a consistent data presentation to FMS customers as well as to geographically separated U.S. activities.

Despite the relatively early stage of DSAMS deployment, the new software is already being seen as an enabling tool for Security Cooperation business process changes. As part of the process of writing a new Strategic Plan, DSCA had several strategic planning sessions throughout the summer, including a Business Area Strategic Planning Session devoted to Information Operations. This session provided an opportunity for DSADC and DSCA personnel to meet and discuss how information technology can help improve customer service and satisfaction, while meeting business needs at reduced cost.



Customer Interface Group meets at DSCA headquarters

The section that follows is an edited version of Appendix 8 of the 18th edition of DISAM's *Management of Security Assistance* (the Green Book). The entire DISAM "Green Book" is also now available in electronic form as part of the Defense Acquisition *Deskbook*. In addition, the DSAMS Training Guide will soon be available through *Deskbook*.

DEFENSE SECURITY ASSISTANCE MANAGEMENT SYSTEM (DSAMS)

Introduction

Information Systems have become more important to Security Assistance in the last decade as computer-processing capabilities have expanded and processing costs have declined. This

article provides an overview of the Defense Security Assistance Management System (DSAMS), a centralized information system for Security Assistance. The Case Development Module (CDM), fielded in fiscal year 1998, is the first of several DSAMS modules that will be developed and implemented in the next several years.

The operational concept for DSAMS requires the migration and reuse of selected features of thirteen existing Security Assistance (SA) systems, customized software development, and integration of available commercial off-the-shelf (COTS) software. The resulting DSAMS software will be integrated into a single, standard system operating in a modern information technology infrastructure. Under DSAMS, SA services will be standardized, improved, streamlined, and optimized.

The information contained in this article was obtained from DSAMS Help and User documentation, input from the Defense Security Assistance Development Center (DSADC) staff, personnel at the Program Management Office (PMO) of the Defense Security Assistance Agency (DSCA), and DSAMS contract personnel. Since the DSAMS project design allows for frequent updates of both business rules and program functionality, some of the information in this article will be updated by actual DSAMS documentation. DSAMS documentation should be considered the most accurate reference.

DSAMS Purpose

The Defense Security Assistance Agency's goal with DSAMS is to achieve the Corporate Information Management (CIM) objectives for the DoD security assistance business area by replacing MILDEP-specific, functionally redundant legacy systems with a single DoD-wide security assistance management system used by all MILDEPs and DSCA. The consolidation of security assistance processing into one common system will provide several benefits, including:

- Reduction of system maintenance costs by consolidating the maintenance effort into one system;
- Establishment of standard business processes across all DoD security assistance organizations to the greatest extent possible;
- Provision of global visibility to security assistance cases to enable DoD to more effectively manage and plan security assistance efforts; and
- Modernization of the technology base for security assistance to take advantage of new technology in improving security assistance case management performance.

DSAMS will replace existing MILDEP-specific systems used for managing security assistance. These systems are:

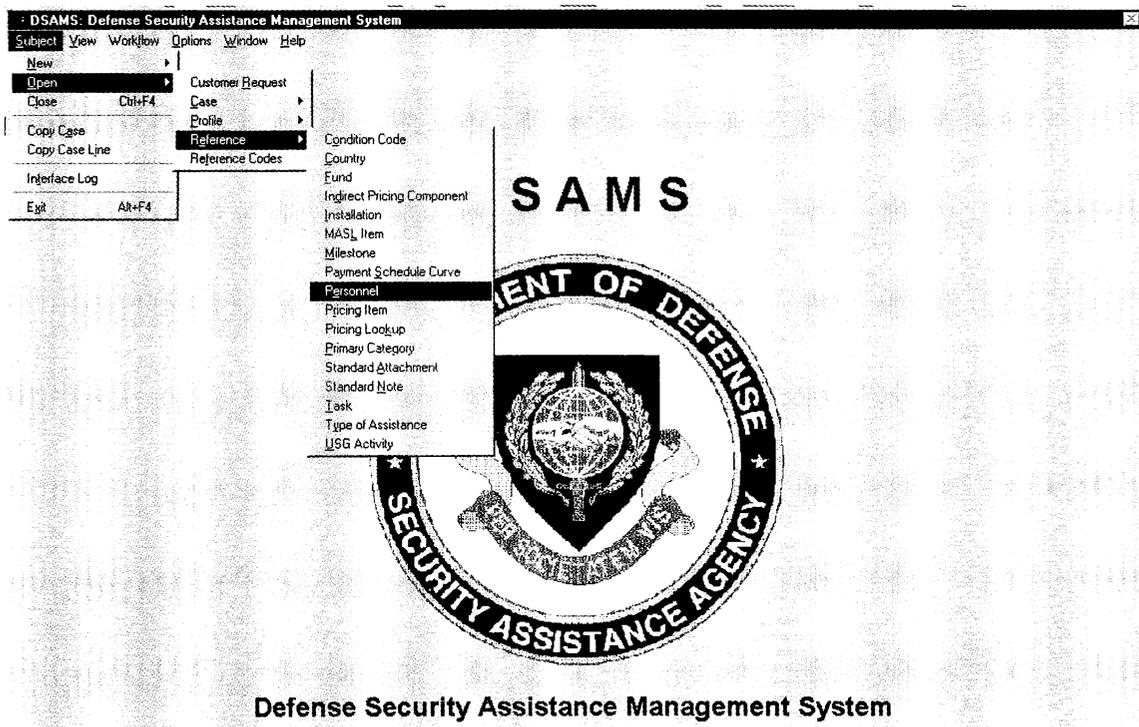
- The Navy's Management Information System for International Logistics (MISIL), Navy Security Assistance Data System (NSADS), and Student Training and Tracking Information System (STATIS);
- The Air Force's Security Assistance Management Information System (SAMIS), Case Management Control System (CMCS), and Training Control System (TRACS);
- The Army's Security Assistance Automation, Army (SA3, Centralized Integrated System for International Logistics (CISIL), Security Assistance Case Tracking System (SACTS), and Army Security Assistance Training Management System (ASATMS); and

- DSCA's 1000, 1200, and Foreign Military Financing (FMF) Credit systems.

DSAMS Design

DSAMS is a client-server application that permits users throughout the Security Assistance business enterprise to access a database set at the Defense Information Services Agency Megacenter at Tinker AFB, Oklahoma. Each user of the database set connects to a "Common" database that contains enterprise-wide reference information, such as Country Codes. MILDEP users also automatically connect to a service-specific database (Air Force, Army, or Navy) that contains the FMS cases for that military department.

As illustrated below, DSAMS has several "windows" with specific business functionality, and most windows are further subdivided into several "Tabs." The initial release of DSAMS had 60 windows based on 185 database tables. The CDM windows have 50 Tabbed Windows, which permit "subdividing" a window into more manageable chunks of information.



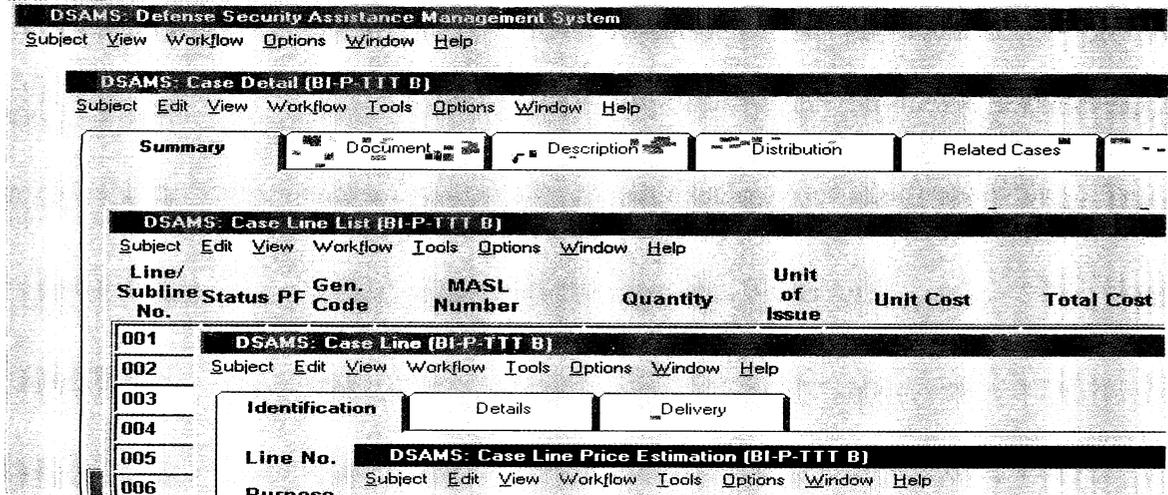
The major windows¹ of interest are:

- Customer Request
- Case Detail
- Case Line
- Case Subline
- Standard Notes
- Case Unique Notes

¹ Images of DSAMS screens used in this article were taken from the Version 3x environment and may not be the same as the version fielded at your activity.

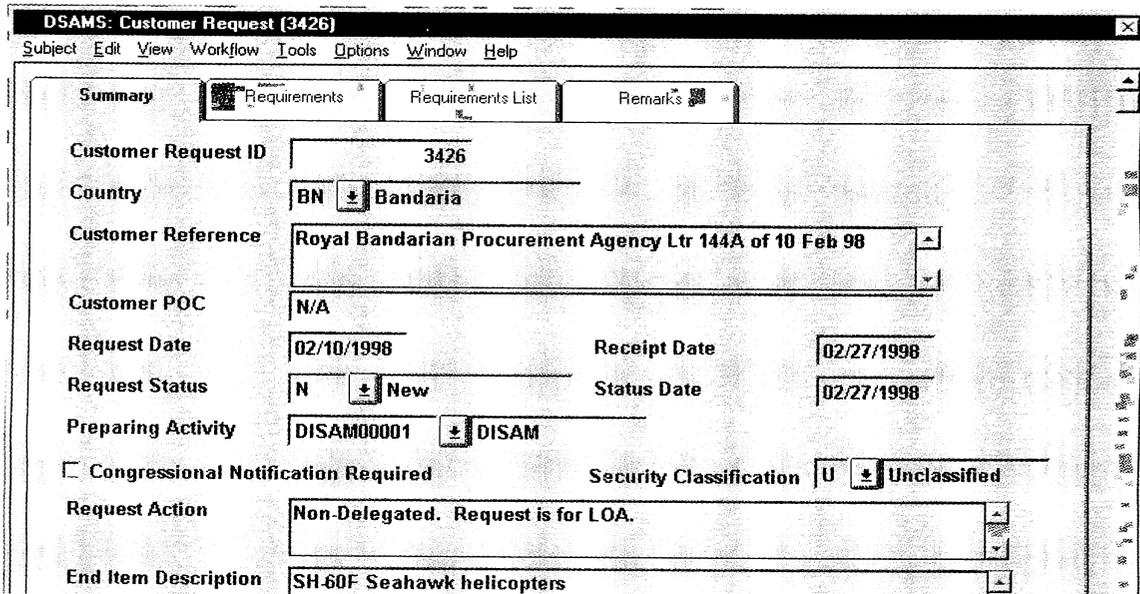
- Line Item Notes
- Case Line Price Estimation
- Payment Schedules

DSAMS users can have up to ten active windows open at once:



DSAMS contains a task workflow capability that is designed to speed up the movement of work between activities while maintaining enterprise-wide visibility of the tasks associated with a specific case.

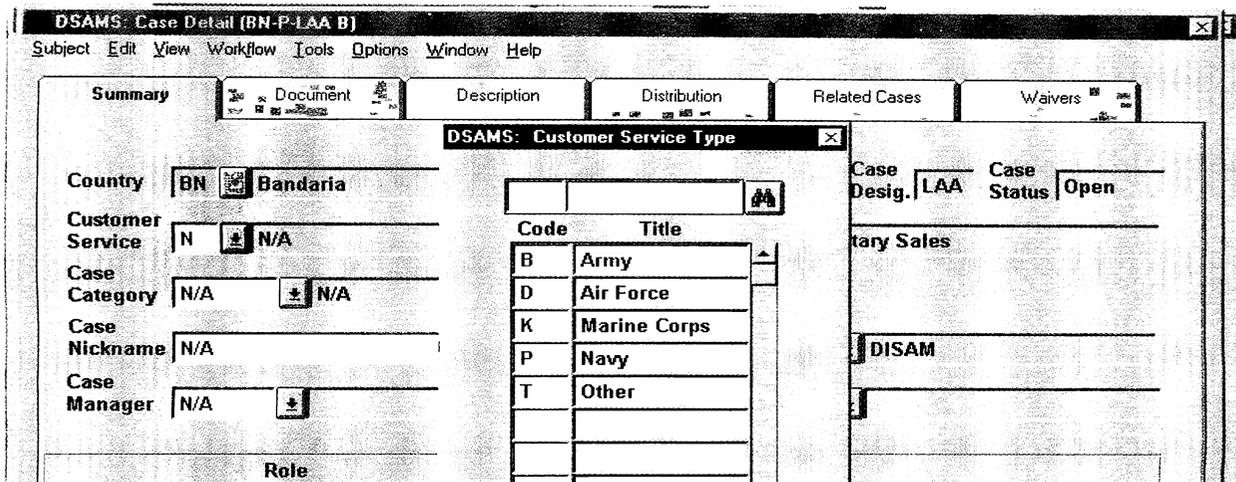
Customer Request



The customer request is normally a letter or message requesting Price & Availability (P&A) information or a purchase of defense articles or services. The customer request usually comes in the form of a Letter of Request (LOR). The LOR must specify the materiel and/or services desired, the name and address of the originator, and a reference number. It must also specify the

articles and services clearly and in detail. If the LOR does not specify all the requirements, the customer is asked to provide the missing information.

To develop a case in the DSAMS Case Development Module (CDM), customer request information is entered into the appropriate military department's database from the Customer Request Window. Once the customer request has been added, it can be edited or deleted. However, once a customer request is associated with a case, it can no longer be deleted. Any DSAMS user with the appropriate security role can view customer request information in DSAMS immediately after it is saved by the activity entering the data.



When a new case is created, the CDM user is prompted to identify the applicable customer request. Information that originally was entered in the Customer Request Window will be copied into the new case record.

Case Development

An FMS case is a contractual sales agreement between the USG and an eligible foreign country or international organization. It is documented by a Letter of Offer and Acceptance (LOA) which has been accepted by an authorized customer. A unique Foreign Military Sales (FMS) case identifier is assigned for the purpose of identification, accounting, and data processing for each offer. These basic FMS process tools and conventions are also used in DSAMS.

Similarly, an FMS case in DSAMS can be amended or modified. DSAMS will keep information for the case in general and for each specific version (basic case, amendment, or modification) of the case. An authorized DSAMS user can retrieve the current implemented version of the case and view the case "net" of all implemented amendments and modifications.

DSAMS can be used to task activities to provide support during the case development process. Case development progress can be tracked through the use of case milestones.

In addition to developing FMS cases, the CDM can also be used to develop Price and Availability (P&A) documents or Model Cases. A P&A is used when the customer wants a Rough Order of Magnitude (ROM) estimate of the cost and availability of an item or service. An LOA is not generated from a P&A request. Model Cases can be developed to provide several options to the customer. If the customer wants to review several LOAs with different options before deciding on exact configuration, several model cases can be developed in DSAMS. Once the customer determines which case model is acceptable, the model is converted to a case. A

sample DSAMS LOA is included following this article.

An FMS case version is created using the Case Detail Window. A case version can be the basic case, any amendment, or modification for the case. Each version is processed separately, and can be viewed separately. Case versions can be created manually, by copying information from another case (or model/P&A), or by using a profile. If the Copy Case Window is used to copy information from one case to another, the case, all line, pricing, related cases, attachment, and note information will be copied to the new case version. Profiles can be developed as templates for the development of cases and provide powerful “what if” capability by linking specific lines and quantities to a primary item of MDE. When one or more profiles is used to develop a case, the case, line, pricing, payment schedule, attachment, and note information are copied to the new case version. This is done in the Associate Profiles to Case Window.

When a case version is created in DSAMS, the version initiator and other people in the same office can update case information. No other activity will have update access to the case information. To allow other offices access to update the case information, a “Prepare Case” task must be assigned to that office. Once the task is assigned, the newly assigned office can update the case information, but the originating office will not be able to update the information. Once the assigned office has completed the task, then the originating office (typically the case manager) will again have update access to the case.

Case development progress is tracked for each case version by the case version status. When the case version is being developed, the status will be “Development”. While the case has a development status, most case version information can be updated. When the case version is signed by the military department, the case status is changed to “Proposed” (if the case version must be passed to DSCA for signature) or “Offered” (if the case version does not need DSCA signature). When the case version is forwarded to the customer, the status is updated to “Offered”. While in “Offered” status, Pen and ink changes can be made. If major changes become necessary, the status can be reverted back to “Development.” Once signed by the customer, the status is changed to “Accepted,” and Pen and ink changes can still be made. Upon receipt of the signed LOA and Initial Deposit, however, the status will be changed to “Implemented,” and no further pen and ink changes can be made to the basic case version.

When a case version is implemented, a separate case record is created (basic case) or updated (amendment or modification). This record is called the current implemented version, and will show the latest information for the case based on the previously implemented case versions. The current implemented version can be updated to show changes made after implementation. For instance, when a new person has been assigned as case manager, this record should be revised to reflect the change.

When signing an LOA, the customer annotates additional information that is critical for smooth execution of the case: the purchaser’s paying office, Freight Forwarder code, and Mark For code. Upon receipt of the signed LOA, the case manager can enter this information into DSAMS using the Case Customer Supplied Information Window.

A case status tracking report can be produced from the Case Summary Window. This window provides the latest net and total values for the case. It provides other financial information such as: Obligation Authority (OA), commitments, expenditures, etc. This window also identifies those case versions that are in some stage of preparation, but have not been implemented.

Line Development

DSAMS: Case Line (BN-P-LAA B)

Subject Edit View Workflow Tools Options Window Help

Identification Details Delivery

Line No.	001	<input type="checkbox"/> Used on LOI	Status	A	Added
Purpose	ST <input type="button" value="↓"/> Standard				<input type="checkbox"/> Marked as Deleted
Generic Code	A4S	MASL No.	15200000SH60F <input type="button" value="↓"/>	Major Defense Equipment	<input checked="" type="checkbox"/> Y
NSN	N/A	Other NSN	N/A		
MASL Description	HELICOPTER SH-60F				
Item Description	SH-60F Seahawk Helicopter <input type="button" value="↑"/> <input type="button" value="↓"/>				
Quantity	10	Unit of Issue	EA <input type="button" value="↓"/> Each		
Unit Cost	N/A	Total Cost			N/A

DSAMS: Defense Security Assistance Management System

Lines are used to group requirements within a case according to the Military Articles and Services List (MASL) categories for the purpose of improving reporting accountability. Lines can be broken down further into sublines, which identify specific items. A further way that requirements may be grouped is by delivery sets. When a requirement will be broken up into several shipments, each shipment can be identified as a delivery set, and priced and tracked separately. Summary information about the lines that have been created for a case version can be quickly be retrieved by calling out the Case Line List Window.

Lines can be created in three different ways:

- Manually;
- Copied from another case, model case, or price and availability; or
- By using one or more profiles.
- **Creating a line/subline manually** - The Case Line Window is used to create a line manually. A Case Subline Window is used to create sublines.
- **Copying a line/subline manually** - If there is a case, model, or price and availability that is similar to the line that the case writer wants to develop, a line/subline can be created by using the Copy Case Line Window. A specific line to copy can be selected, or a subline within a line can be selected to copy. If the line being copied has sublines, the sublines are copied also. Line, pricing, attachment, and note information from the copied line/subline will be copied to the desired case or subline. The case writer can then go to the Case Line Window or Case Subline

Window to make the desired changes to fit the current requirement.

- **Creating a line from a profile** - Profiles are created as templates used to develop cases. Each profile is developed to portray a certain type of support (i.e., weapon system sale, Foreign Military Sales Order I (FMSO I), maintenance, training, etc.). When creating a line, the case writer can apply a profile that most closely matches the support being provided on the line. When a profile is applied (associated) to a case, the lines, pricing, payment schedule, attachment, and note information in the profile will be copied to the case. Lines and sublines will be created for each line/subline in the profile. Once the case writer has applied the profile(s) to the case, he/she can go to the Case Line List Window to select those lines/sublines that are desired for the current case.

- When lines/sublines are developed for Special Defense Acquisition Fund (SDAF) cases, the SAMM requires preparation of a Financial Analysis Worksheet (FAW). The USAF also requires a FAW to be developed for weapon system sales cases. The Army requires that sufficient data to prepare the worksheet must be readily available on file for each case line item that contains one or more of the following:

1. Pricing based on supply from excess or non-excess stocks, when no replacement is required;
2. Nonrecurring RDT&E and /or production charges; or
3. A total value of \$14 million or more.

The required data for this document is entered in DSAMS using the FAW Justification Window. Once all of the required data has been entered, the FAW can be printed from the main DSAMS menu.

Line and subline information can be viewed several different ways. If a list of the lines/sublines that apply to a case or a case version is required, this information can be viewed in the Case Line List Window. Detailed information for a specific line or subline can be viewed in the Case line Window or the Case Subline Window. Summary financial information on a line can be obtained from the Case Line Summary Window.

Information on the latest implemented version of a line/sublines can be seen in any of these windows. When the basic case is implemented, a separate record is created to track the latest information on the implemented case. Whenever an amendment or modification is implemented for the case, this record is updated with the latest information for the lines/sublines. This information is available to DSAMS users by requesting Version type "I" when interrogating a line or subline.

DSAMS Pricing

Pricing in the CDM can be accomplished at line or subline levels for a case, model case, price and availability, or profile. A line or subline price can also be the sum of a list of items from a Supplemental Line Note. The Supplemental Line Note will print out as part of the LOA and it references the associated line. Pricing must be accomplished on the same level as the line (e.g., line or subline) in the Price Estimation Window.

DSAMS: Case Line Price Estimation (BN-P-LAA B)

Subject Edit View Workflow Tools Options Window Help

Primary Categories: Indirect Pricing Components IPC Cost Basis

Line/Subline No. 001 MASL No. 1520000SH60F Pending Recalculation

Quantity 10 Above the Line Unit Cost \$3,397,136.00 Above the Line Total Cost \$33,971,360

Effective Date 04/01/1998 Expiration Date

Primary Category

PC Code	Name	Above the Line Cost	Below the Line Cost	PC Total Cost	
340	Contract New Proc DC	\$3,397,136.00	\$101,914.08	\$3,499,050.08	Add
					Del

Primary Category 340 Contract New Proc DC

Description N/A

Base Quantity 1 Base Unit Price 2,500,000

Base Price Source

User Entered
 Supplemental Line Note
 Publication
 Civilian Personnel

Remaining Program Value N/A
 Budget Value N/A

Component Price Element CC Contract Cost Component Fund 8242 Direct Cite

All pricing components can be identified through or in the CDM Price Estimation Window. These components include the base cost and all additional (additive) charges that apply to providing the requirement. These additional charges are called Indirect Pricing Components.

There are two basic types of Indirect Pricing Components (IPC):

- **Above-the-Line Charges** - These charges are included, or “rolled up,” in the price of the item. The above-the-line charges and the base price are added together to get the net case value. Examples are inflation, excess material price reduction, civilian retirement costs, enlisted/officer benefits costs, Contract Administrative Surcharges (CAS), Nonrecurring Costs (NRC), Logistics Support Charge (LSC), etc.
- **Below-the-Line Charges** - These charges are applied to the net case value to determine the total case value. Examples are Packing, Crating, & Handling (PC&H), administrative charge, transportation charge, etc.

IPCs can be identified as a percentage or a set cost. For instance, PC&H is normally 3.5 percent of the value of an item up to \$50,000. Transportation charges are sometimes a percentage and sometimes a flat fee.

Primary Categories (PC):

DSAMS Primary Categories are created in each military department database to simplify the process of determining which IPCs should apply to a specific requirement. For example, a Primary Category is developed for a type of support that can be provided, such as: contractor

services, shipment from excess stock, shipments from procurement, etc. Each of the Primary Categories is linked to and will list the IPCs that normally apply to the type of support. When a requirement needs to be priced, one or more Primary Categories can be applied to the line or subline. The IPCs that have been associated with the Primary Categories will be listed in the Price Estimation Window - Indirect Pricing Components Tab. The person developing the price of the item can then review these IPCs to determine if they are applicable to the line or subline in question, and make a determination on whether the IPC values are applicable for the specific situation.

As mentioned above, more than one primary category can be applied to a line or subline.

- **Example 1** – A customer has requested 20 aircraft. The airframes will be provided from procurement, the jet engines will come from stock, and some of the aircraft's communications equipment will be provided from excess stock. Under the applicable financial management regulations, different sources may require different IPCs for the airframe, engines, and communications equipment separately. The Case Manager, however, needs to present a single line item price on the LOA. Each component will require application of a separate primary category, because the accessorial charges are not the same for each source. When all the cost values are entered, DSAMS will combine and roll up the base and accessorial above-the-line charges to provide a single line or subline unit cost.
- **Example 2** – Material provided under a blanket order case for spares will be coming from a mixture of stock and procurement. The original pricing estimate is that \$300,000 will come from stock and \$200,000 will come from procurement. Since each of these categories will have different IPCs, the price should be computed separately. This can be done by giving the value coming from stock a base percentage of 0.60 (60 percent of the line/subline value) and the value coming from procurement 0.40 (40 percent of the line/subline value). After each value has the appropriate IPC applied, the price components will be combined to reflect a single line/subline value.

Waivers can be applied to specific IPCs for a customer. If an IPC waiver applies to the entire country program, the waiver is indicated in the Country Window - Waivers Tab. If the waiver only applies to a specific case, the waiver is indicated in the Case Detail Window - Waivers Tab. When an IPC with a waiver is applied to a line/subline, DSAMS will also automatically apply the waiver. Manual changes (overrides) to IPCs can be made in the Price Estimation Window - Indirect Pricing Component Tab.

If a large list of items needs to be included in a line or subline, the Supplemental Line Note Window can be used to add these items to the case version. This list can be accessed from the Price Estimation Window. The sum of the values of the items on the list will be included in the base unit price so that IPCs can be associated with the items on the list. Separate lists are needed for each Primary Category and associated PCs that need to be applied.

Payment Schedules

Two types of payment schedules can be created in DSAMS for a case, a model case or a Price & Availability (P&A) document: an estimated payment schedule and a planned payment schedule. Most customers use an estimated payment schedule that is based on the normal quarterly payments as described in financial management regulations, and this is the default CDM payment schedule. If the customer has made an agreement with the U.S. government to make payments on a different basis, however, a planned payment schedule can be created to reflect the requirements. Both types of case payment schedules are created in the case's Payment Schedule Window. The payment schedule for amendments or modifications can be also revised in the applicable document's Payment Schedule Window.

DSAMS: Case Payment Schedule (BN-P-LAA B)

Subject Edit View Workflow Tools Options Window Help

Estimated Schedule | Estimated Schedule Parameters | Planned Schedule

Document Comments
N/A

Payment Curve
DODSTD01 | DOD STANDARD PAYMENT CURVE

Payment Schedule Level
 Case
 Line/Subline/Delivery Set

Total Case Value	\$34,990,501
Longest Lead Time	24
Estimated OED	11/01/1998
Curve Results Adjusted	<input type="checkbox"/>
Exclude Termination Liability	<input type="checkbox"/>
LOI Initial Deposit Date	
LOI Initial Deposit	N/A
LOA Initial Deposit	\$1,337,113

Payment Date	Quarterly Payment	Cumulative	Percent of Total	TL Percent
03/15/1999	\$2,103,337	\$3,440,450	6.01	35
06/15/1999	\$3,827,383	\$7,267,833	10.94	35
09/15/1999	\$6,137,605	\$13,405,438	17.54	32
12/15/1999	\$7,861,653	\$21,267,091	22.47	22
03/15/2000	\$7,447,881	\$28,714,972	21.29	7
06/15/2000	\$4,620,444	\$33,335,416	13.2	1

Balance: \$2,103,337 | Payment Date: 03/15/1999
 Over / Under: \$0 | Quarterly Payment: \$2,103,337

Calculation successful.

A user must have a security role that includes the Edit Case Payment Schedule function in order to prepare or modify a given payment schedule. A payment schedule can be created (by an authorized user) by the activity that created the case version, only if there are no "Prepare Case" workflow tasks with a status of "Pending." Another activity (other than the originating activity) can not prepare a payment schedule for the case version unless "Prepare Case" workflow task is assigned to them by the originating office/activity.

DSAMS provides the capability to create a payment schedule at the case level or at the line/subline/delivery set level. The payment schedule is created at the case level if it is going to be based on the longest lead-time of the case. If each line, subline, or delivery set needs to be treated differently, the payment schedule can be based on each of their respective lead times or periods of performance.

Payment Curves are stored in DSAMS to aid the user in preparing a payment schedule. A Payment Curve is a template that characterizes a specific type of support and its' delivery patterns. For instance, for most Foreign Military Sales Order II (FMSO II) cases, deliveries occur earlier in the case period compared to the normal blanket order equipment case. If the Payment Curve for a FMSO II case is selected, a payment schedule will be created that requires more funds early in the case period to cover early deliveries. Conversely, the Payment Curve for a blanket order equipment case requires more funds later in the case period.

DSAMS creates the payment schedule based on the payment curve selected, lead times or periods of performance, and the estimated offer expiration date. Termination Liability is included in the payment curve by default, unless DSAMS is instructed to ignore Termination Liability. The payment schedule can also be created or edited manually.

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- **Revised:** Revised date milestones are used to indicate that the milestone date for a planned date milestone is no longer valid. A revised date milestone provides a new milestone date. The revised date milestone does not revise information in the planned date milestone, but a new milestone is created to replace the planned milestone.
 - **Actual:** Actual date milestones are created when the milestone has occurred. The milestone date is the actual date of the milestone.

An advance notification to Congress milestone is created using the DSCA Advance Congressional Notification Window. The user can create a statutory notification to Congress milestone using the DSCA Statutory Congressional Notification Window. These windows will create the notification milestone and also the notification end date milestone.

A milestone can be created to reflect the assignment or completion of a task. This is done using the Task Definition Window. Once a task is assigned to an activity or person, the corresponding milestone will be created. Once a person identifies a task as completed the corresponding milestone will be created.

If a case version is updated from a pen & ink change reinstatement, restatement, or the implemented case record is updated; a milestone is created to document the update using the Milestone Comment Window. The explanation for the update is documented in this window.

Some milestones are created automatically without requiring the user to enter information in the milestone window. For instance, whenever the status of a case version is changed, a milestone will be created to indicate when the change in status occurred. These milestones can be viewed in the Case Milestone List Window.

Milestones are also used to ensure that certain actions take place during the case development process. Some milestones have prerequisite milestones that must occur prior to the creation of a milestone. If these milestones cannot be found for the case version, an error message will appear. Milestone validation takes place when the case version status is changed. Part of the validation is to ensure that certain milestones are created. This will ensure that all significant actions are accomplished prior to changing status.

Organization

A variety of customer-specific data is stored in DSAMS. There is also a record of the different U.S. activities involved with the security assistance program and where all users, their installations and activities are located. A user with the proper security role can create, revise, and view this information.

Every customer that the U.S. government supports under the security assistance program must be identified in DSAMS before a case can be developed for that customer. The customer and pertinent information on the customer is entered in DSAMS using the Country Window. The following information can be found or entered in this window:

- **Summary:** General customer information is provided. The country code and name is provided. Transportation information is provided to help in determining transportation rates. A user can determine if an advance congressional notification for a 36(b)-type case is required for a customer. Authorization to use the Defense Transportation System (DTS) and approval for dependable undertaking (information extracted from the SAMM, Table 600-1) are indicated in this window.

- **Waivers:** If the customer is eligible for waiver of any portion of Indirect Pricing Components (IPC), then the IPC waived and the amount waived is displayed in this window. The waivers identified here are for the country level only, and are to be applied to every case for the country. If a waiver applies to one case only, the waiver is identified in the Case Detail Window - Waivers Tab. The waiver information is used to help in the pricing of a requirement.

- **Restrictions:** Restrictions that apply to a customer are also identified. Identified restrictions will cause a warning message to appear when users try to enter customer request information into DSAMS. The message will warn that restrictions apply, and ask the user if she/he wants to continue processing the customer request. Users can identify the type of restriction, the date the restriction began, and when it will end.

- **Addresses:** Addresses of the customer are entered in the Country Window. These addresses are used for developing the Letter of Offer and Acceptance (LOA), amendments, and modifications. There are several different address types (shipping, mailing, billing), and default addresses can be indicated for users of each service database.

- **Personnel:** DSAMS users have the capability to identify people from the customer organization with whom they deal (phone number, fax number, and e-mail address).

Activities associated with the case development process are identified in DSAMS. If an activity is not a direct user of DSAMS, the activity does not have to be entered into DSAMS. However, if the activity's personnel need access to DSAMS the activity must be entered in DSAMS. This information is provided in the United States Government (USG) Activity Window. The following USG Activity information is available in DSAMS:

- **Summary:** General information about the USG activity can be found in the USG Activity Window such as the routing identifier code, office symbols, and if the office can prepare or sign cases. This information will be used to determine if people working in this activity can prepare or sign a case in DSAMS. The applicable U.S. government service is identified along with any senior reporting activity. If the activity is involved with the management of a customer's security assistance program, the applicable countries are indicated.

- **Addresses:** The address of the activity is provided along with the applicable installation. If the activity is in another country, that information can be provided. A fax number for the activity can also be provided. These addresses are used for developing the Letter of Offer and Acceptance (LOA), amendments, and modifications. The default address entered here is used to produce the "Signed Copy Distribution" note of the LOA. If no default address is indicated, the note will not be produced properly even if the activity is noted as authorized to sign a DSAMS case.

- **Personnel:** People that work in, or are associated with the U.S. government activity are identified in this window. Typical information included in this tab is the person's role in security assistance, phone number, e-mail address, and whether the person has authority to sign LOAs, amendments, and modifications.

Installations that are involved in the security assistance program are identified in DSAMS. They can be found using the Installation Window. Installations are required to indicate where a U.S. government activity is located.

Before a person can receive access to DSAMS, the following must occur:

- USG window used to establish a USG activity;
- Installation Window used to indicate the location of the USG activity;

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- Personnel window is used to enter the person in DSAMS. Information that is stored is the person's name, activity, job, phone number, and e-mail address. After this information is added in DSAMS, the user can be given access to DSAMS; and
 - The User Security Role window is used to tell DSAMS what the person's role is, so that it can determine the type of access the user can have in DSAMS.

Profiles

Profiles are templates for developing cases, model cases, and Price & Availability (P&A) documents. Profiles can be created for different types of support provided to the customer (Foreign Military Sales Order I & II cases, repair and return cases, weapon system sales cases, etc.) or to meet other military department needs. A case can be quickly established with basic information for developing the case from a profile, and then can be modified to match the requestor's specific requirements.

Profiles can be saved with the following information:

- Case
- Line/Subline
- Pricing information
- Payment Schedule
- Line Item Notes

A profile can be created manually or case information can be copied into a profile. Manual profiles are created in the Profile Window. Information can be copied from an existing case to a profile using the Create Profile from Case Window.

When a profile is created manually, the basic profile information (name, description, etc.) is entered in the Profile Window. Lines are added to the basic profile in the Profile Line Window. The profile author will enter generic information that pertains to the type of line being created. The pricing relationship that the line may have with the prime item (primary requirement for the profile) can also be established. For instance, the line value could be computed as a percentage of the prime item's unit or extended price. If it cannot be computed as a percentage, it can be identified as a fixed unit price or a fixed extended price. If there are sublines to a line, they can be created using the Profile Subline Window. The Profile Subline Window works the same as the Profile Line Window.

Profile lines or sublines can be priced in the Profile Price Estimation Window. The profile creator can add primary categories and Indirect Pricing Components (IPC) that apply to the line or subline. If the prime item relationship is fixed, pricing information can be entered the same way as for a normal line (Exceptions: No quantity is entered for the line/subline requirement, and the base quantity and unit price for the primary category are optional instead of required.). If the prime item relationship is unit or extended percentage, primary categories and IPCs can be entered; but most other information will be left blank. When the profile is associated to a case, the other information will be entered by the user or calculated based on the prime item.

Notes are added to a profile line using the Profile Line Item Note Window. Case and

Standard notes cannot be associated to a profile, nor can Remarks or Attachments be associated to a profile (they are intended to be case specific).

If a profile is created from case information, a payment schedule can be associated to the profile. The profile payment schedule will be a derivative of the case being used to create the profile. Specific date information will not be copied. Information that will be applied to the profile will be payment curve information (duration, payment percentages per payment, and termination liability applied per month). This information can not be viewed or edited after it is copied to the profile. The user will not be able to add any payment schedule information manually.

Other profile information (beside payment schedule) can be edited after the profile has been created. This can be done manually, or profile information can be updated from a case if the case was originally created from the profile. Profile managers update a profile with information from a case using the Update Profile from Case Window. The information from the case will overlay the appropriate profile information.

Profile information can be viewed using the windows mentioned previously, or the user can view a list of the lines/sublines for a profile. This is done in the Profile Line List Window. Users can view all notes for a profile using the Profile Note List Window.

Codes and Reference Data

Reference data and codes are used throughout DSAMS to provide additional information for a case, line, payment schedule, etc. These codes are maintained in one of two databases. If the code is used by all services, the code is kept in a common database. If the code is unique to a military department, it is kept in that service's database, and can only be used by that service.

Interface with Legacy Systems

Information will be passed back and forth from the Defense Security Assistance Management System (DSAMS) and the legacy systems. The systems that will be interacting with DSAMS are the Defense Security Assistance Agency (DSCA) 1200 system, the Air Force Case Management Control System (CMCS), the Army's Centralized Integrated System for International Logistics (CISIL), and the Navy's Management Information System for International Logistics (MISIL).

Documents and Reports

Several types of documents and reports can be printed using DSAMS. Listed below are the documents and reports that are currently available. More reports will be made available at a later time.

- Letter of Offer and Acceptance (LOA)
- Amendment to an LOA
- Modification to an LOA
- Line Financial Analysis Worksheet
- Subline Financial Analysis Worksheet
- Current Implemented Case Report

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- Case Workflow Audit Report
 - Document Tracking Report
 - Case Remarks Report
 - Case Line History Report

The LOA, amendment, modification, model LOA, and P&A document can be printed as a draft or in final form. The draft will provide the information only, and will not have all of the borders and emblems that are required on the final product and is date/time stamped with the word "draft." The final product will be in the form required for sending to the customer.

Over 80 Management Reports are also available. These reports were created to fill recurring report requirements defined by users of the military departments and DSCA. Reports can be produced at any time. In addition, specialized queries or reports can be created through the Ad Hoc Query capability in DSAMS. Information about Management Reports will be produced and distributed by a separate document.

More Information

More information about the DSAMS project is available from the DSAMS Program Management Office (PMO) in DSCA, the Defense Security Assistance Development Center (DSADC) in Mechanicsburg, PA, or by contacting DISAM. Readers may also learn about DSAMS from material posted on the DSAMS web page, <http://dsams.DSCA.osd.mil>.

About the Author

LCDR Nels E. Berdahl, SC, USN, is an Assistant Professor in DISAM's Directorate of Management Studies, and has been involved in the DSAMS project since shortly after reporting to DISAM in August 1996. The article above was written based on his experience as a participant in DSAMS testing and also developing and conducting DSAMS training. He is part of a much larger team effort by the military departments, DSADC, and DSCA to develop and field DSAMS. You can contact LCDR Berdahl at DSN 785-5850 or (937) 255-5850 or by email to nberdahl@disam.wpafb.af.mil.