

IWR-APT: Getting Started and FAQs

January 2017

Welcome to IWR-APT!

Congratulations on taking the first step to learn about IWR-APT and how it can help your project delivery team (PDT)! You are joining over 50 project delivery teams actively using APT. This document will explain what IWR-APT is, its benefits, and Frequently Asked Questions to get you started.

IWR-APT stands for **Assistance to Planning Teams**. IWR-APT is an online software tool at <http://iwr-apt.planUSACE.us>. APT helps project delivery teams (PDTs) create, edit, analyze and manage their study materials. APT encourages collaboration, transparency, accountability, consistency, quality products, and sharing lessons learned. Modules currently within APT include: **Risk Register, Decision Management Plan (DMP), Decision Log, Study Issue Checklist, and SMART Planning Deliverable Workflow**.

Most importantly, **APT belongs to you!** What does this mean? Unlike desktop software, APT is more nimble and flexible; therefore, we can quickly improve and/or modify modules as needed. While our team does its best to test all features prior to release of new features, software bugs still slip through from time to time. We will only add new features when our users ask for them or as guidance dictates modifications. This is a community-owned tool; as such it is all of our responsibility to report any issues or bugs, ask for new features, provide clarifications on help features, suggest improvements and keep APT relevant. Your APT development team keeps a list of ongoing improvements and continues to update APT based on priorities and funding. Email us at planningonline@usace.army.mil with your ideas, critiques, suggestions, issues and/or to report bug reports, and to provide additional feedback as needed. It is up to us to make APT work for all of us! Help us....so APT can help you!

Sincerely,

Your IWR-APT Team

How do I get access?

Most planners already have a username and login because the system shares this information from the Planner Database at <http://sme.planUSACE.us>. Go to this link and click request a reset if you have forgotten your password. If you are a planner and not in the system, then please contact your Planning Community of Practice Sub-CoP Division Lead to add you. If you are not a planner, please email planningonline@usace.army.mil.

What is my username and login? How do I reset my password?

Your username will always be your USACE email address. Your password is set by you. Go to <http://sme.planUSACE.us> and click on request a reset if you have forgotten your password.

How do I edit my password?

Login at <http://sme.planUSACE.us> and click on Manage and then choose a Sub-CoP to edit your password.

How do I add my Project to IWR-APT?

The following information should be emailed to planningonline@usace.army.mil to set up a new project.

Required Information	Example	Description
P2 Project Name	JACKSONVILLE HARBOR GRR, FL	This is the official P2 Project name that is used by Project Managers.
P2 Project Number	514658	This is a 6-digit number used in P2 for this study.
Primary Business Line	Deep Draft Navigation	Choose from the following business lines for your project. This should be the official authorized purpose: <ul style="list-style-type: none">• Coastal Storm Risk Management• Deep Draft Navigation• Ecosystem Restoration• Hydropower• Inland Navigation• Inland Flood Risk Management• Recreation• Small Boat Harbors• Water Management and Reallocation
Project Admin(s)	Jane Smith	This is typically your lead Plan Formulator and/or Project Manager or whomever they designate to add team members and start the workflow for the deliverables.
District	Jacksonville District	This is the assigned district for the study.
Division	SAD	This is the assigned division for the study.
Study Start Date	8/5/2012	This is the exact or estimated historical or current study start date that begins the 3-year SMART planning clock.

Study End Date	10/15/2015	This is the estimated date that the study is anticipated to be complete. This usually should be 3-years from the start date.
EROC code	K3	This is a code that corresponds to the district that is assigned the study and is usually the first two characters in a person's ACE-IT username.
Lat/Long, HUC(s) and/or Project Map	90.5565, -120.564 02010506, 02010507 Attach image of study area	Provide the lat/long coordinates for the study area or a 2-, 4-, 6- or 8-digit Hydrologic Unit Code(s) or send a picture of a map. Please convert degree, seconds, and minutes to decimal.

Optional Information	Example	Description
Alias Project Name(s)	Jax Harbor	This is one or more alias names that correspond to the same study. This may be its official name in other databases or what it is commonly referred to.
Team-Provided Project Name	Jax Harbor GRR	This is the name that the PDT refers to for the study and the preferred name.
CWIS Number	514698	This sometimes is the same number as the P2 number and relates to many historical projects.
P2 Program Name	East Coast Harbors	This is the official "Program Name" within P2 for the project. It is an overarching program with projects.
Asset Management ID(s)	AM464646848616	These numbers relate to asset management features within the study area.
OMBIL ID		This is a number that corresponds to the OMBIL Database. Not all projects have this number.
SMART Planning Milestones: 1: 2: 3: 4: 5:	1: 2/24/2016 2: 3/31/2016 3: 10/20/2016 4: 02/15/2017 5: 03/15/2018	These are the proposed dates for each of the SMART Planning Milestones.
CPN or Corps Project Notebook Number		This is a reference number that relates to Corps Project Notebook.

Who can and should use APT?

Anyone on your PDT, including reviewers and the vertical team, with the exception of non-CAC card holders have access to APT.

Who created IWR-APT and Why?

Going back to 2010, the Institute for Water Resources (IWR) held a planning workshop with planners from around the Corps to brainstorm a “next generation” planning tool. These planners had a lot of big ideas on how to create new tools to assist planners. After several years of refining ideas and with the rollout of Planning Modernization and SMART Planning, the idea for APT began to take shape. The team worked hard to continually create, test, fix until this new planning tool, now known as IWR-APT, was born. In September 2014, IWR, in cooperation with the Planning Community of Practice, launched the IWR-APT site. Since the initial rollout, the team has continued to pursue these big ideas in adding new modules like the most recent Study Issue Checklist and Deliverable Module. Likewise, your APT team will continue to improve and expand this tool to adapt and meet the needs of tomorrow.

What are some of the benefits of IWR-APT?

- Find, follow and learn from past and present SMART planning projects
- PDT is able to work collaboratively online to help each other and work toward a common goal
- Project dashboard to quickly see the latest status on each project
- Assurance that the “latest and greatest” document guides are already within each tool
- Modules create pre-formatted products for read-ahead materials and more
- “Just-in-time” training within module — for example, the Risk Register provides help features on what is expected for each input
- Consistency for our planning deliverables including the risk register, DMP, decision log, study issue checklist, SMART deliverables, and more
- Easily manage and find project resources to avoid re-creating them
- Vertical team and PDT transparency for online collaboration
- Several modules are integrated to enhance user experience and create more meaningful products (charts, graphs, etc. and the ability to summarize information as needed within the products (such as displaying related risks on the decision log or being able to filter risks from a summary chart)
- Ensure products, decisions and context are organized to not only help the PDT, but ensure consistency and smooth transitions of study knowledge to new team members
- Mobile friendly

What are the current modules available?

- **Risk Register:** Risk entries can be entered by anyone on the PDT using the online form that ensures that the user understands and properly enters a risk entry. Risk entries are summarized and displayed in filterable charts and tables. Outputs include pie and bar charts, summary tables, summary views, detailed views, and detailed views of each entry.

- **Decision Management Plan:** Users can use the online template to create their teams Decision Management Plan for each study milestone. The tool will produce a formatted pdf that ensures teams have all necessary component to this product. A dashboard shows all DMPs created, related risks to each DMP, and the date it was last updated.
- **Decision Log:** Users can enter decisions using the provided entry form to ensure that key pieces are included in this log. All entries are summarized on the decision log homepage. Related risk entries are viewable for each decision log item and users can upload a memo for each log item as needed. The decision log has multiple export options to view entries as a summary or one individually in detail.
- **Study Issue Checklist:** Users can fill out the required Study Issue Checklist from Appendix H of the Planning Guidance Notebook. The tool will output a pre-formatted pdf of the checklist.
- **Deliverables:** Users can upload read-aheads and other materials for each SMART Planning Milestone to share with the vertical team, track deliverables, and maintain the history and context of the study at each milestone. This module assists planners to track the deliverables required for each milestone as outlined in Planning Bulletin 2013-03.
- **Other:**
 - **Show Team:** Project Admins use this tool to manage the study team (including the vertical team). This running list of past and present team members and their roles on a study is also shared to the Planner Database under the Experience tab in one’s planning profile.
 - **Activity Log:** This is a running log of updates within the system for each study
 - **Comments:** The PDT can add comments to the study dashboard to record key communication points.
 - **Social Media Newsfeed:** Users can follow social media news associated with the study
 - **Planning Links:** Quick links to key planning tools and websites.
 - **URL Manager:** Maintain and manage project specific links within each project page for easy access. This is a good place to include a SharePoint project site if you have one.

What are the roles within the system?

All users can view any project at any given time. However, within a project there are multiple roles. Each person could have a different role on a different study. Below is a list of the system roles.

Role	View All Projects	Edit Projects	Upload Files	Replace Files	Team Member Management	Start Workflow	QC/QA Deliverables
Viewer	Y						
Team Member	Y	Y	Y				
Project Admin	Y	Y	Y	Y	Y	Y	
Reviewer (District)	Y	Y	Y				Y

Reviewer (Division)	Y	Y	Y				Y
Reviewer (RIT)	Y	Y	Y				Y
Reviewer (HQ)	Y	Y	Y				
Reviewer (RMO)	Y	Y	Y				<i>Coming Soon for Review Items</i>

Viewer: A Viewer is anyone that can view a project in APT. Anyone within the Planner’s Database is a Viewer and can access APT with their Planner Database username and password. Additionally, anyone with a CAC-card can be added as a Viewer in APT. Viewers can use the “Follow” feature to bookmark projects of interest. A Viewer doesn’t need to be added to a project, since everyone is a viewer.

Team Member: A Team Member is anyone on the Project Delivery Team (PDT) that may be contributing to the study. They are not assigned a quality assurance role. PDT members include environmental, economics, real estate, cultural resources, engineering, project management, operations, plan formulation, and others.

Project Admin: The Project Admin is typically the lead Plan Formulator and/or Project Manager. Often more than one Project Admin will be assigned. The Project Admin may add/manage team members and assign their APT roles (i.e. team member, reviewer, etc.). The Project Admin will manage the project in APT to ensure that proper items are uploaded under the Deliverables and Workflow Module.

Reviewer (District): A District Reviewer is anyone that will be responsible within the project’s District for reviewing the study for district quality control (DQC) and quality assurance. There may be multiple District Reviewers depending on the project and office, including but not limited to supervisors, chiefs, technical experts not directly serving on the PDT, and others. At a minimum, the Planning Chief for the District should be included as a District Reviewer in APT. The District Reviewer(s) will review the Deliverables and Workflow Module after the PDT completes this work to ensure quality assurance and that the necessary deliverables were provided.

Reviewer (Division): The Division Reviewer(s) are the lead reviewers at division or Major Subordinate Commands (MSC). More than one person is likely to fill this role. The Division Planning Chief should be included, at a minimum; additional reviewers may include the Division Economist, Environmental and/or Cultural Resources, Engineering, Operations, Real Estate, Office of Counsel, and others. These reviewers are responsible for ensuring all deliverables are complete and compliant for the Regional Integration Team (RIT).

Reviewer (RMO): The USACE organization charged with managing a review is designated as the Review Management Organization (RMO). Typically, the RMO will be applicable mission area Planning Center of Expertise. The RMO is responsible for reviewing and endorsing the study’s review plan, coordinating and

managing ATR, setting up ATR teams, coordinating Independent External Peer Review (IEPR), coordinating Type I IEPR exclusion requests, offering technical support to PDTs, and other duties as needed.

Can I provide access to my local sponsor or those outside of the Corps?

Unfortunately, APT is currently limited to CAC-card holders due to USACE IT standards. However, this doesn't stop many teams from pulling up their project within the tool at meetings with their stakeholders. Many PDTs will fill the risk register out together and export the various products to share with their stakeholders.

How can I request a demo, training, or find out opportunities to learn more about APT?

Please email us at planningonline@usace.army.mil

What else can I do with my username and password?

Your username and password will also provide you access to the following systems:

- **Planner Database** – <http://sme.planUSACE.us>
 - This database includes all the planners in the Planning Community of Practice. Every USACE planner has a profile with information on their expertise, ATR certification status, training, skills, interest and more. Users can search across the entire community or within each Sub-CoP to locate planners. Users can also run reports about the community to learn about the communities collective statistics.
- **Planning Assistance Library (PAL)**
 - PAL Internal – <http://library.planUSACE.us>
 - PAL External – <http://publibrary.planUSACE.us>
 - PAL is a mobile friendly internal and external resource library for planners; the library currently has over 6,000 items including project reports, guidance, IWR and HEC reports, models, presentations, webinars and more. The system is capable of holding any type of file for internal or external use. The library has a geospatial search to help users identify all files within their study areas or current location. The tool also offers full in-text search, and the ability to search by audience, business lines, cross-cutting topic, project, series and more. Internal users can favorite documents and save search results for repeat searches. The public site offers the ability to share items to social media or via email. The site is able to identify the user's location and files related to their current location by using their mobile device.
 - The library has an API at <http://api.planUSACE.us> for those wanting to connect this with existing tools or mapping systems.
 - We are currently looking for district admins to manage their district's library collection within the system. Please email us at planningonline@usace.army.mil if you would like to learn more.

How is the Planner Database, Planning Assistance Library (PAL), USACE Digital Library and IWR-APT connected?

- Finished items in IWR-APT should be added to PAL for each project. The Deliverables tool will encourage planners to take advantage of this function.
- The PAL and HECSA Digital Library (<http://cdm266001.cdmhost.com/>) is currently planned to be able to sync in the future to provide access to final documents in either system. This will enable both libraries to benefit from each other's collections and also leverage the different search mechanisms that they have.
- The internal PAL provides custom recommendations per user. These recommendations are based on what work the user has done in IWR-APT and the user's Planner Database.
- Within the Planner Database, one's profile will show which projects that they are working on within IWR-APT and their roles based on their assignment to a PDT in IWR-APT.