

# INCOSE Outreach Alliance Relationship Management System (ARMS) User's Guide June 2021



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## Foreword

The document is the Outreach ARMS User's Guide for the Outreach Alliance Relationship Management Systems (ARMS).

The main body of the document is how to use the document for Relationship Managers, the Outreach Leadership, and the INCOSE President and President-Elect.

## Document Change History

The following table identifies each version or issue of this document and provides a description of the purpose or reason for the change. Performing a document comparison between any two versions of this document can identify detailed change differences.

Version	Date	Comment
0.1	03 Jun 2021	Initial draft user's guide

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## **1.0 Scope**

### **1.1 Purpose**

Using the Outreach Policies and Procedures, this document is a user's guide for the INCOSE Relationship Managers, Outreach Leadership Team, and INCOSE Leadership to use on the Outreach Alliance Relationship Management System (ARMS) tool.

This is applicable to the Outreach Industry, Domain, and Professional Society agreements.

### **1.2 Objectives**

The material in this document will be used to train INCOSE Alliance Agreement Relationship Managers, the Outreach Leadership, and the INCOSE Leadership.

## 2.0 Definitions

### 2.1 Outreach

“Outreach” is defined as the set of undertakings to foster and promote systems engineering and INCOSE in the selected industry. These undertakings can be identified, coordinated, and supported by the Outreach Leadership Team, while the actual performance is distributed among the members, and to a large extent, are carried out by the Ambassadors and Relationship Managers during professional organization meetings and workshops. Specifically, establishing alliance agreements and Memoranda of Understanding (MOUs) / Memoranda of Agreement (MOAs) with relevant alliances are governed by Policy OUT-101.

### 2.2 INCOSE Ambassador

An INCOSE ambassador is a member of INCOSE, representing the interest of INCOSE to different groups and entities and at non-INCOSE events. The ambassador will promote INCOSE and seek to enhance growth, collaboration, influence and/or achievement of INCOSE's mission. The ambassador will be versed in the values streams and strategic objectives of INCOSE and will endeavor to build on these foundations with all external partners. (From OUT-103)

### 2.3 INCOSE <specific> Ambassador

For an ambassador identified for a specific role or group, this type of ambassador fulfills the obligations of an INCOSE ambassador as defined under the Definition of an INCOSE Ambassador with the additional focus on the specific role or group as identified. (From OUT-103)

For example,

- An Industry Ambassador will focus on representing INCOSE to different Industry groups and entities and at Industry related non-INCOSE events.
- A Domain Ambassador will focus on representing INCOSE to different domains at Industry related non-INCOSE events.
- A Membership Ambassador will represent INCOSE at events and meetings, and be able to discuss the benefits and value of being an INCOSE member.

### 2.4 Relationship Manager (RM)

A Relationship Manager is an Outreach Ambassador that focuses on the relationship between INCOSE and the Alliance organization. They are responsible for keeping information on the status of the relationship up-to-date in the Outreach Alliance Relationship Management System (ARMS).

## **2.5 Memorandum of Understanding (MOU)**

A Memorandum of Understanding (MOU) is a non-binding agreement between two or more parties outlining very broad concepts of mutual understanding, goals, and general plans. An MOU is often the first stage in the formation of a Memorandum of Agreement (MOA) or a more formal contract.

## **2.6 Memorandum of Agreement (MOA)**

A Memorandum of Agreement (MOA) is a non-binding agreement between two or more parties describing the terms, conditions, and specific details of an agreement, including each party's requirements, roles, responsibilities, and actions so that their goals may be accomplished. An MOA may lead to the formation of a formal contract among the parties.

## **2.7 Outreach Alliance Relationship Management System (ARMS)**

Please see Appendix B.1.1 to review the definitions used in Outreach ARMS.

## **3.0 Responsibilities**

The following are the responsibilities for this document.

### **3.1 Responsible R**

The Responsible R is the Director for Outreach.

### **3.2 Accountable A**

The Accountable A is the President-Elect

### **3.3 Consulted C**

The Consulted C's are:

- Technical Director
- Services Director
- Sector Directors
- Director for Marketing and Communications
- Chief Information Officer
- Associate Director for Events

### **3.4 Informed I**

The Informed I's are:

- President
- Secretary
- Treasurer
- Director for Academic Matters
- Associate Director for Certification
- Associate Director for Publications
- Associate Director for Education & Training
- Associate Director for Diversity, Equity, and Inclusion
- Chief of Staff / Operations Manager

## 4.0 Creating a New Agreements

This section presents an overview of the related reference documents, submitting an alliance agreement request, potential alliance discussions, and approved alliance agreements.

### 4.1 Reviewing References.

Before starting using the Outreach Alliance Reference Management Systems (ARMS), it is highly recommended to review the INCOSE Outreach documentation:

- OUT-100: Outreach Principles
- OUT-101: Guidelines for the Formation and Approval of Alliances, MOUs, and MOAs
- OUT-103: Ambassadors and Relationship Managers
- OUT-PROC-01: Creating & Maintaining an Alliance Agreement
- OUT-TEMP-01: Memorandum of Understanding (MOU) Template

All are available via the Outreach Welcome Portal available at (1)

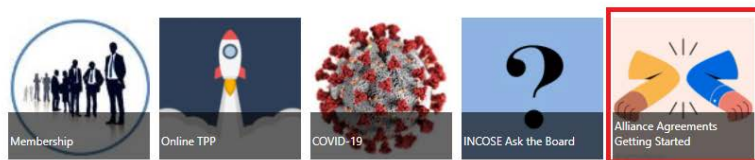
<https://app.smartsheet.com/b/publish?EQBCT=ca94952e8fdb4c75bf03bc5b2bcffbbb>, and (2)

Connect Home Page (<https://connect.incose.org/Pages/Home.aspx>). On the Connect Home Page, it is in the “Groups and Initiatives” section in the 5<sup>th</sup> folder from the left titled, “Alliance Agreements Getting Started” (see the red rectangle in Figure 4-1).

### INCOSE Governance and Policy Management



### Groups and Initiatives



**Figure 4-1: Outreach Welcome Portal Access**

The Outreach documentation is available in the “Reference Material” section at the bottom of the left column on the Outreach Welcome Portal (Figure 4-2).

## Reference Materials

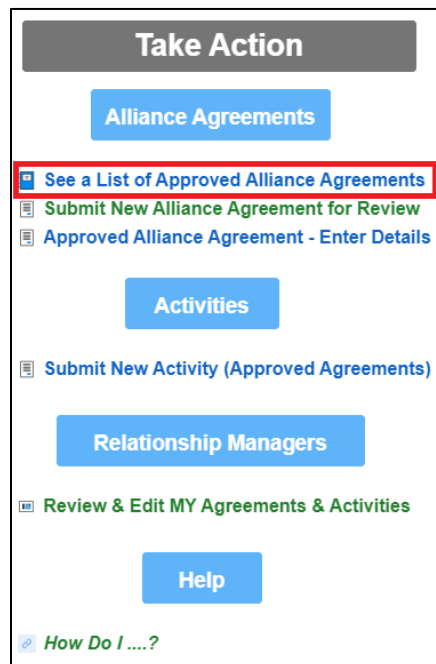
- [OUT-100 Policy - Outreach Principles](#)
- [OUT-101 Policy - Alliance Guidelines](#)
- [OUT-102 Policy - IOB Charter](#)
- [OUT-103 Policy - Ambassadors](#)
- [ARMS Definitions](#)
- [Activity Reference List](#)
- [Outreach Team List](#)
- [ARMS Automations](#)
- [System Diagrams - Reference Only](#)

**Figure 4-2: Welcome Portal – Reference Materials**

Additionally, a review of the Relationship Manager duties are provided in Appendix A of this document, and an overview of all the sheets, forms, reports, dashboards, and automations in Outreach ARMS is provided in Appendix B.

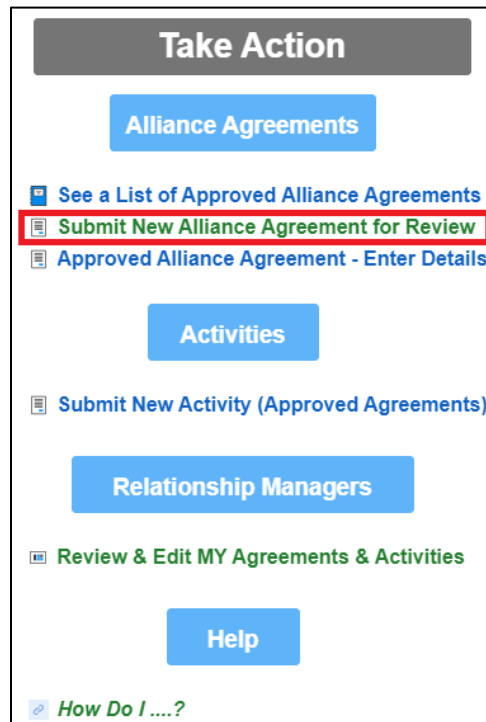
### 4.2 Requesting a New Alliance.

After the references are reviewed, if you want to see a listing of INCOSE's current alliances, you can click the "See a List of the Approved Alliance Agreements" link in the Alliance Agreement portion of the Take Action section at the top of the left column (see red rectangle in Figure 4-3).



**Figure 4-3: Take Action – List of Approved Alliance Agreements**

When you are ready to submit a New Alliance Agreement request, go to the Welcome Portal, Take Action section, and the “Submit New Alliance Agreement for Review” link (red rectangle in Figure 4-4).



**Figure 4-4: Take Action – Submitting a New Alliance Agreement**

When you do, the “New OUTREACH Alliance Agreement” form will open (Figure 4-5, Appendix or App B.2.1). You do not have to be the Relationship Manager to request a new alliance. Any INCOSE member can request one. The Relationship Manager should be assigned before the agreement is signed by the alliance and INCOSE.

All entries with a red asterisk (\*) are required entries. The submitter will enter their name, their email, the alliance’s acronym, and the alliance’s name. Next, the “Intent to Collaborate” information from OUT-101 Guidelines for the Formation and Approval of Alliances, MOUs, and MOAs, will be entered (the “Intent to Collaborate” information from OUT-101 is provided for reference).

Next, the type of agreement will be entered. If the alliance will be managed by the INCOSE Outreach Team, then MOU (Memorandum of Understanding) will be selected. If a relationship between INCOSE Central and an INCOSE Chapter, then MOA (Memorandum of Agreement) will be selected. All certification alliances will use MOA. If the alliance is initiating the agreement, then that is an Organization Agreement. If a standards agreements, select Standards Development Agreement. If you are not sure, select TBD.



The form is titled "New INCOSE Outreach Alliance Agreement" and includes a sub-header "Use this form to submit for a possible new Outreach Alliance Agreement for review." The form contains several sections: "Submitter Name" (First and Last), "Submitter Email", "Alliance Acronym", "Alliance Organization Name", "Intent to Collaborate Comments" (with a detailed instruction on what to include), "Agreement Type" (with radio button options: Membership, Membership Letter, MOA, MOU, Organization Agreement, Other, Standards Development Agreement, TBD), "Alliance Contact Name" (with a note to provide first and last name), "Alliance Contact Email" (with a note to provide email address), "File Upload" (with a note to upload agreement or supporting documents and a dashed box for file upload), and a "Submit" button at the bottom.

**INCOSE**

## New INCOSE Outreach Alliance Agreement

Use this form to submit for a possible new Outreach Alliance Agreement for review.

**Submitter Name \***  
First and Last

**Submitter Email \***

**Alliance Acronym \***

**Alliance Organization Name \***

**"Intent to Collaborate" Comments \***  
What are the anticipated mutual benefits of the proposed agreement and activities? Include as many of the "Intent to Collaborate" items from policy OUT-101: (1) Proposed collaboration description, (2) Justification, (3) Objectives satisfied, (4) Anticipated joint activities / products, (5) Dependencies, risks, and issues, (6) Anticipated schedule, (7) Relationship to existing / planned products / activities, and (8) Names of INCOSE / Alliance Relationship Managers (RMs).

**Agreement Type \***  
What type of agreement do you suggest between INCOSE and this Alliance organization?

☐ Membership  
☐ Membership Letter  
☐ MOA  
☐ MOU  
☐ Organization Agreement  
☐ Other  
☐ Standards Development Agreement  
☐ TBD

**Alliance Contact Name**  
If you have identified a contact, provide first and last name.

**Alliance Contact Email**  
If you have identified a contact, provide their email address.

**File Upload**  
Upload Agreement, or supporting documents and communications.

Drag and drop files here or [browse files](#)

☐ Send me a copy of my responses

**Submit**

**Figure 4-5: New Alliance Agreement Form**

In the Alliance contact name and email is known, they can be entered. If any files are needed to be attached, there is a capability to upload a file.

The submitter can check a box if they want a copy of their responses, and then they can click the submit button.

When the submit button is clicked, the information is automatically entered in the Outreach Alliance Agreement Portfolio sheet (App B.1.7) and an email is sent to the Outreach ARMS Manager to present to the Outreach Leadership Team.

### **4.3 Potential Alliance Discussions.**

When the Outreach ARMS Manager learns of the potential new alliance, they to the Outreach Leadership Team and the appropriate part of the INCOSE Leadership (e.g., Technical Operations for a relationship with a working group) to start internal discussions on the possibilities.

If it is determined to not have a relationship with the potential alliance, the Outreach ARMS Manager will enter a “Declined” status in the Approval Status column of the Outreach Alliance Agreement Portfolio sheet (App B.1.7). This will automatically send a “declined” email to the submitter (App B.5.1.1).

If it is determined to try and obtain a relationship with the potential alliance, the Outreach ARMS Manager will enter an “Approved” status in the Approval Status column of the Outreach Alliance Agreement Portfolio sheet (App B.1.7). This will automatically send an “approved” email to the submitter, and if known, info the Relationship Manager and INCOSE Sponsor (App B.5.1.1).

After the request is approved, two things will occur. First, if not already identified, the Outreach Leadership Team will work with the appropriate INCOSE Leadership to find a Relationship Manager and Sponsor. When identified, the Outreach ARMS Manager will enter their names in the Outreach Alliance Agreement Portfolio sheet (App B.1.7). The Relationship Manager should be identified before signing the alliance agreement.

Second, the Outreach Leadership Team and appropriate INCOSE Leadership Team will meet with the alliance to discuss the relationship and to start working on the alliance agreement. The main body of the OUT-TEMP-01 is fairly standard, but much of the discussions will be on which activities the alliance and INCOSE would like to collaborate. Some potential activities are provided in Figure 4-6: Activity Reference List (App B.1.2.1). The information is provided in 4 columns:

- Activity Category
- Activity Type
- Activity Description
- INCOSE Leadership responsible for the activity within INCOSE

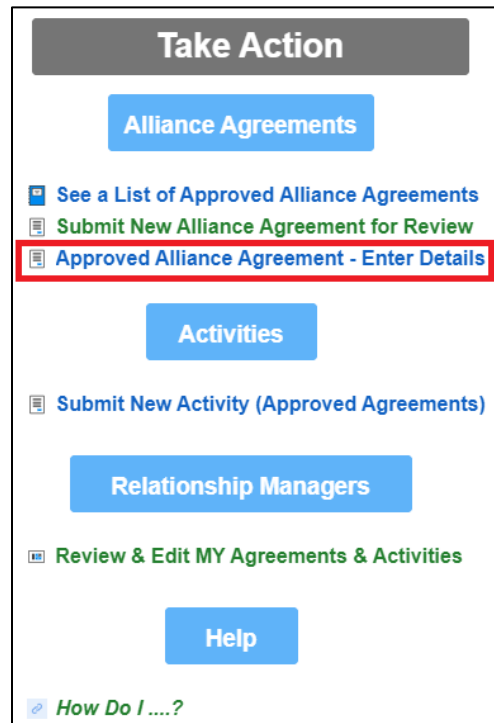
Outreach Alliance Relationship Management  
System (ARMS) User's Guide  
Version 0.1, June 2021

CATEGORY	TYPE	DESCRIPTION	INCOSE LEADERSHIP
Events	<b>Joint Events</b>	<i>Joint Events</i>	Events, Associate Director Services, Deputy Services, Director
Events	<b>Other Events</b>	<i>Support Specific Focus Events of Other Organization</i>	Events, Associate Director Services, Deputy Services, Director
Process Methods & Tools	<b>Develop Tools</b>	<i>Jointly Develop New Process, Methods, Guidance, Tools</i>	PMC Chair Tech Ops, Deputy Tech Ops, Director
Process Methods & Tools	<b>MBSE</b>	<i>Participate in the Model Based Systems Engineering (MBSE) Project</i>	Tech Ops, Deputy Tech Ops, Director
Professional Development	<b>Professional Development</b>	<i>Collaborate Developing SE Professional Development Capability</i>	Education & Training, Associate Director Professional Development Portal, Project Manager Services, Deputy Services, Director
Professional Development	<b>SE Competency Framework</b>	<i>Develop Discipline &amp; Domain-Specific Extensions to SE Competency Framework</i>	Competency Working Group, Chairs Tech Ops, Deputy Tech Ops, Director
Publications	<b>Joint Papers</b>	<i>Develop Joint Articles, Papers, and Presentations</i>	Publications, Associate Director Services, Deputy Services, Director Tech Ops, Deputy Tech Ops, Director
Publications	<b>SE Handbook</b>	<i>Develop Extensions to the SE Handbook and SE Vision 2025</i>	Publications, Associate Director SE Handbook, Lead Tech Ops, Deputy Tech Ops, Director
Publications	<b>SE Vision</b>	<i>Updates to the SE Vision</i>	President-Elect SE Vision, Lead
Publications	<b>Webpage / Products</b>	<i>Host Webpage, Post Documents, Develop Products</i>	Chief Information Officer Services, Deputy Services, Director Tech Ops, Deputy Tech Ops, Director
Standards	<b>Standards</b>	<i>Support International Standards</i>	Standards, Lead Tech Ops, Deputy Tech Ops, Director
Tech Ops	<b>FuSE</b>	<i>Participate in FuSE Initiative</i>	FuSE Initiative Leads President-Elect
Tech Ops	<b>Joint Working Group</b>	<i>Joint Cross Organizational Working Group</i>	Tech Ops, Deputy Tech Ops, Director
Other	<b>Related Professional Area</b>	<i>Joint Approach Interfacing in Related Professional Areas</i>	Outreach, Director

**Figure 4-6: Activity Reference List**

## 4.4 Approved Alliance Agreements

When the agreement has been signed by both the alliance and INCOSE, the Relationship Manager will go to the Welcome Portal and click the “Approved Alliance Agreement – Enter Details” link in the Take Action section in the left column (red rectangle in Figure 4-7).



**Figure 4-7: Take Action – Approved Alliance Agreement Entering Details**

When the Relationship Manager does this, the “Existing Alliance – Agreement Update Form” (Figures 4-8 & 4-9, App B.2.2) opens. The entries with a red asterisk (\*) are required entries. The Relationship Manager will enter the following information:

- Alliance Agreement Data Section – Alliance acronym, alliance organization name, agreement type (membership, membership letter, MOA, MOU, organization agreement, standards development agreement, other), agreement execution date, agreement expiration date (review the duration in the agreement), and a link to the agreement on Sharepoint (the Admin Office will upload to the Connect Home Page).
- Key Contacts Section – Relationship Manager name, INCOSE Sponsor Name, Outreach Team Manager, alliance contact name, alliance contact email.
- Status Update Section – Alliance agreement status (Agreement Executed), “Intent to Collaborate” Comments (if any updates), and file upload (if any).
- Check the box if a copy of the responses is requested and click the submit button.

The information will automatically be entered in the Outreach Alliance Agreement Portfolio sheet (App B.1.7). The alliance agreement is in the active status. The Relationship Manager will provide updates on joint activities per section 5 and maintenance of the alliance agreement in section 6.

**INCOSE**

### Existing Alliance - Agreement Update Form

Use this form to input alliance-related project information for alliance agreements that the "Intent to Collaborate" from policy OUT-101 has already been approved.

---

#### Alliance Agreement Data

**Alliance Acronym \***

**Alliance Organization Name \***

**Agreement Type \***  
What type of agreement is/will be executed between INCOSE and this Alliance organization?

Select or enter value ▼

**Agreement Execution Date \***

**Agreement Expiration Date \***

**Link to Agreement on Sharepoint**

---

#### Key Contacts

**INCOSE Relationship Manager \***

Select or enter value ▼

**INCOSE Alliance Agreement Sponsor \***

Select or enter value ▼

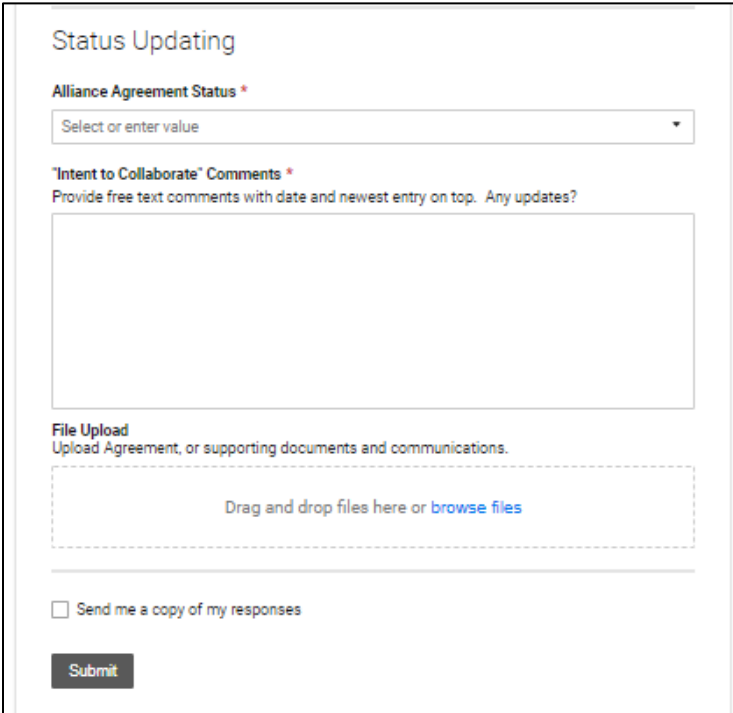
**Outreach Team Manager \***

Select or enter value ▼

**Alliance Contact Name**

**Alliance Contact Email**

**Figure 4-8: Existing Alliance – Agreement Update Form (Top)**



The form is titled "Status Updating" and contains the following sections:

- Alliance Agreement Status \***: A dropdown menu with the placeholder text "Select or enter value".
- "Intent to Collaborate" Comments \***: A section with the instruction "Provide free text comments with date and newest entry on top. Any updates?". Below this is a large, empty text area.
- File Upload**: A section with the instruction "Upload Agreement, or supporting documents and communications." Below this is a dashed rectangular box containing the text "Drag and drop files here or [browse files](#)".
- ☐ Send me a copy of my responses
- Submit**: A dark button with white text.

**Figure 4-9: Existing Alliance – Agreement Update Form (Bottom)**

## 5.0 Alliance Activity Updates

This section provides information on activity entries and updates, and activity automatic alerts.

### 5.1 Alliance Activity Initial Entries and Updates

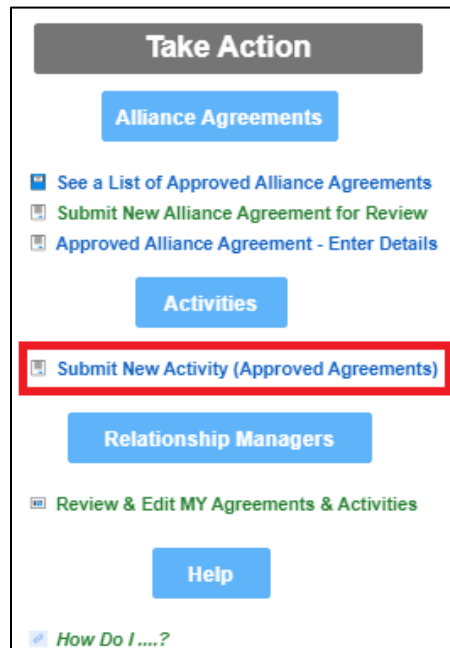
Working with the alliance contact, anytime a status changes on any activity type, the Relationship Manager will Outreach Alliance Activity Entry Form (App B.2.3). The Activity Types are provided again in the Activity Reference List (Figure 5-1).

CATEGORY	TYPE	DESCRIPTION	INCOSE LEADERSHIP
Events	<b>Joint Events</b>	<i>Joint Events</i>	Events, Associate Director Services, Deputy Services, Director
Events	<b>Other Events</b>	<i>Support Specific Focus Events of Other Organization</i>	Events, Associate Director Services, Deputy Services, Director
Process Methods & Tools	<b>Develop Tools</b>	<i>Jointly Develop New Process, Methods, Guidance, Tools</i>	PMC Chair Tech Ops, Deputy Tech Ops, Director
Process Methods & Tools	<b>MBSE</b>	<i>Participate in the Model Based Systems Engineering (MBSE) Project</i>	Tech Ops, Deputy Tech Ops, Director
Professional Development	<b>Professional Development</b>	<i>Collaborate Developing SE Professional Development Capability</i>	Education & Training, Associate Director Professional Development Portal, Project Manager Services, Deputy Services, Director
Professional Development	<b>SE Competency Framework</b>	<i>Develop Discipline &amp; Domain-Specific Extensions to SE Competency Framework</i>	Competency Working Group, Chairs Tech Ops, Deputy Tech Ops, Director
Publications	<b>Joint Papers</b>	<i>Develop Joint Articles, Papers, and Presentations</i>	Publications, Associate Director Services, Deputy Services, Director Tech Ops, Deputy Tech Ops, Director
Publications	<b>SE Handbook</b>	<i>Develop Extensions to the SE Handbook and SE Vision 2025</i>	Publications, Associate Director SE Handbook, Lead Tech Ops, Deputy Tech Ops, Director
Publications	<b>SE Vision</b>	<i>Updates to the SE Vision</i>	President-Elect SE Vision, Lead
Publications	<b>Webpage / Products</b>	<i>Host Webpage, Post Documents, Develop Products</i>	Chief Information Officer Services, Deputy Services, Director Tech Ops, Deputy Tech Ops, Director
Standards	<b>Standards</b>	<i>Support International Standards</i>	Standards, Lead Tech Ops, Deputy Tech Ops, Director
Tech Ops	<b>FuSE</b>	<i>Participate in FuSE Initiative</i>	FuSE Initiative Leads President-Elect
Tech Ops	<b>Joint Working Group</b>	<i>Joint Cross Organizational Working Group</i>	Tech Ops, Deputy Tech Ops, Director
Other	<b>Related Professional Area</b>	<i>Joint Approach Interfacing in Related Professional Areas</i>	Outreach, Director

**Figure 5-1: Activity Types in the Activity Reference List.**

The available activity statuses are Not Started, Started, In Progress – Update, In Progress – HELP, Complete, Cancelled, and HOLD.

The Outreach Alliance Activity Entry Form is available through the “Submit New Activity (Approved Alliance)” link in the Take Action section at the top of the left column on the Welcome Portal (red rectangle in Figure 5-2).



**Figure 5-2: Take Action – New Activity Submission**

When the “Submit New Activity (Approved Alliance)” Form (App B.2.3).

In the form, a red asterisk (\*) are for required entries. In the top half of the form (Figure 5-3), the Relationship Manager enters the alliance acronym, alliance partner organization, relationship manager, sponsor, Outreach manager, activity type (2<sup>nd</sup> column of Figure 5-1), activity status, activity description, and activity comments.

If the activity type is either Joint Event or Other Event, the bottom half of the “New Activity” Form that opens is shown in Figure 5-4. The Relationship Manager enters the following:

- Up to 3 key dates and a description about those dates.
- MARCOM Coordination Status (yes / no if coordinated with MARCOM).
- (Specific) Coordination Status (with MARCOM)
  - 5 options: N/A, Initial Contact – Needed, Initial Contact – Made, Follow-up Contact – Needed, and Follow-up Contact – Made)
- Partner Advertising (on INCOSE website – yes or no)
- INCOSE Advertising (on Alliance website – yes or no)
- INCOSE Discount (at Partner events, \$ and % of registration fee)
- Partner Discount (at INCOSE events, \$ and % of registration fee)
- Ability to upload a file.
- Check a box if want to receive a copy of their responses.
- Click the submit button.



When the submit button is clicked, the information is automatically added to the Outreach Alliance Agreement Activity Log (App B.1.8).

**Alliance Acronym \***  
Enter the Alliance's acronym.

**Alliance Partner Organization \***  
Enter the Name of the Organization.

**INCOSE Relationship Manager \***  
Enter the name for INCOSE's Relationship Manager.

**INCOSE Sponsor \***

**Outreach Manager \***

**Activity Type \***

**Activity Status \***  
How's this activity going?

**Activity Description \***

**Activity Comments**

**Figure 5-3: New Activity Form (Top Half)**

For all non-event activities, the bottom half of the form will not include the MARCOM Coordination Status, (Specific) Coordination Status, Advertising, or Discount entries.

The screenshot displays the bottom half of the 'New Activity Form'. It contains several input fields and checkboxes. At the top, there are three 'Key Date' sections, each with a date picker and a description field. Below these is a 'MARCOM Coordination Status' dropdown menu. The 'Coordination 1 Status' dropdown is set to '1. Initial Contact - needed'. The 'Partner Advertising' section has a checkbox for 'Alliance Partner was given advertising consideration at INCOSE events'. The 'INCOSE Advertising' section has a checkbox for 'INCOSE was given advertising consideration at Partner events'. There are four discount fields: 'INCOSE Discount (%)', 'INCOSE Discount (\$)', 'Partner Discount (%)', and 'Partner Discount (\$)', each with a text input field. A 'File Upload' section includes a dashed box for dragging files and a 'browse files' link. At the bottom, there is a checkbox for 'Send me a copy of my responses' and a blue 'Submit' button.

**Figure 5-4: New Activity Form (Bottom Half – Events)**

## 5.2 Activity Automatic Alerts

There are seven automatic alerts associated with activity entries (App B.5.2).

### 5.2.1 Activity Status Alerts

There are ARMS group emails created to email the respective INCOSE Leadership based on the activity type (see the INCOSE Leadership column in Figure 5-1 to see the group membership per the activity type). Five of the activity alerts are related to the activity status entered (Started, In Progress – Update, In Progress – HELP, Completion, Cancellation, and HOLD). Emails are sent to the members in the respective ARMS group email and the respective Outreach Manager with some basic information (e.g., status changed) and stating if they want more information to contact the Relationship Manager.

*This document contains INCOSE Proprietary Information.*

### **5.2.2 Other Activity Related Alerts**

There are two different alerts.

First, there is a Monthly Activity Update Request. For all activities started except those with a status of Completed, Cancelled, or HOLD, an email is sent to the Relationship Manager on the 10<sup>th</sup> of the month requesting an update.

Second, there is an Activity Red Flag Alert email. It is sent to the Outreach Manager and INCOSE Sponsor when the Relationship Manager checks the At Risk Flag or changes the activity status to In Progress – Help! The Relationship Manager is asking for help.

## 6.0 Maintaining and Renewing the Alliance Agreement

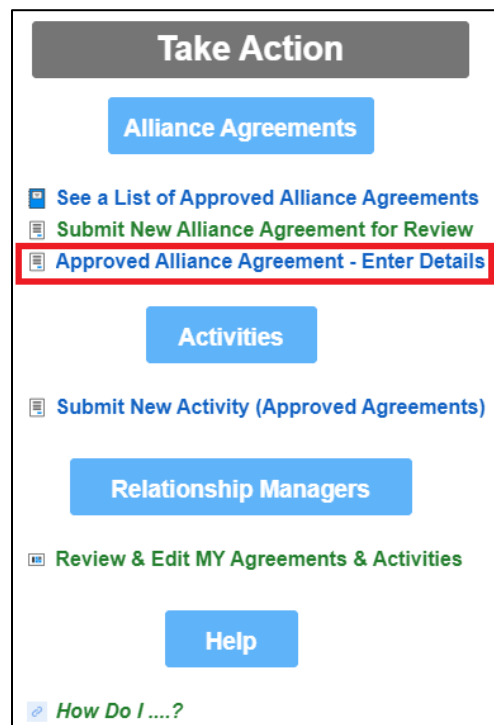
This section provides information on maintaining the alliance agreement, the alliance agreement automated alerts, and renewing the alliance agreement.

### 6.1 Maintaining the Alliance Agreement

There are two ways a Relationship Manager can update the information on the alliance agreement in the Outreach Alliance Agreement Portfolio sheet (App B.1.7).

#### 6.1.1 Updating with the Alliance Agreement Update Form

The Relationship Manager can update the alliance agreement status using the “Approved Alliance Agreement – Enter Details” form available on the Welcome Portal (red rectangle in Figure 6-1).



**Figure 6-1: Take Action – New Activity Submission**

When the link is clicked, the “Existing Alliance – Agreement Update” Form will open. This form was discussed in detail in Section 4.4, Approved Alliance Agreements. The Relationship Manager will enter any updates to the agreement.

**INCOSE**

### Existing Alliance - Agreement Update Form

Use this form to input alliance-related project information for alliance agreements that the "Intent to Collaborate" from policy OUT-101 has already been approved.

---

#### Alliance Agreement Data

**Alliance Acronym \***

**Alliance Organization Name \***

**Agreement Type \***  
What type of agreement is/will be executed between INCOSE and this Alliance organization?

Select or enter value ▼

**Agreement Execution Date \***

**Agreement Expiration Date \***

**Link to Agreement on Sharepoint**

---

#### Key Contacts

**INCOSE Relationship Manager \***

Select or enter value ▼

**INCOSE Alliance Agreement Sponsor \***

Select or enter value ▼

**Outreach Team Manager \***

Select or enter value ▼

**Alliance Contact Name**

**Alliance Contact Email**

**Figure 6-2: Existing Alliance – Agreement Update Form (Top)**

The form is titled "Status Updating". It contains the following sections:

- Alliance Agreement Status \***: A dropdown menu with the placeholder text "Select or enter value".
- 'Intent to Collaborate' Comments \***: A text area with the instruction "Provide free text comments with date and newest entry on top. Any updates?".
- File Upload**: A section with the instruction "Upload Agreement, or supporting documents and communications." and a dashed box containing the text "Drag and drop files here or [browse files](#)".
- ☐ **Send me a copy of my responses**
- Submit**: A button at the bottom.

**Figure 6-3: Existing Alliance – Agreement Update Form (Bottom)**

### **6.1.2 Updating with the My Alliance and Activities Dashboard**

The Relationship Manager can also update the alliance agreement status using the “My Alliance Agreement & Activities” dashboard available on the top right-side of the Welcome Portal (red rectangle in Figure 6-4).




**Figure 6-4: Accessing the My Alliance & Activities Dashboard**

When that link is clicked, the dashboard will open (Figure 6-5). To ensure the correct information is displayed, SmartSheet checks for the current user (i.e., submitter, Relationship Manager) by comparing to the SmartSheet log in.

The My Alliance Agreements & Activities dashboard consists of 5 reports – 3 for alliance agreements and 2 for activities. The alliance agreement reports are for My Alliance Agreement Contacts, My Submitted Alliance Agreements, and My Approved Alliance Agreements. The alliance activity reports are My Activities and My Activity Dates.

**INCOSE Outreach ARMS**  
Alliance Relationship Management System

Welcome  
Roll-Up  
My Dash  
Manager  
Leader



### MY ALLIANCE AGREEMENTS & ACTIVITIES

**My Alliance Agreement Contacts**

Report - My Alliance Contacts

Alliance Acronym	Alliance Organization Name	Agreement Type	Agreement Status	Months Remaining	Alliance Contact Name	Alliance Contact Email	INCOSE Sponsor	Manager
MORS	Military Operations Research Society	MOU	Agreement Executed	11	Simon Goerger	simon.r.goerger@erd.c.d		Outreach ARMS Mana

**My Submitted Alliance Agreements**

Report - My Submitted Alliance Agreements

Approval Status	Alliance Acronym	Alliance Organization Name	Agreement Type	Submitter Name	Submitter Email	"Intent to Collaborate" Comments
Submitted	TEST	The Engineer Systems Training	MOU	Kirk Michealson	kirk.michealson@incose	Wants to work with INCOSE Professional Development
Submitted	NEW	New Existing Wondor	MOU	Kirk Michealson	Kirk Michealson	They want to work with INCOSE

**My Approved Alliance Agreements**

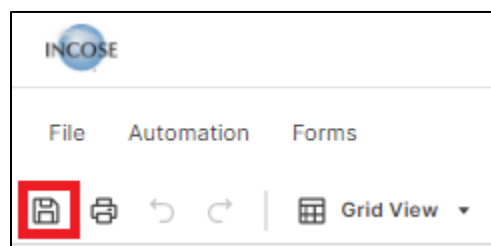
Report - My Approved Alliance Agreements

Alliance Acronym	Alliance Organization Name	Agreement Status	Agreement Type	Agreement Execution Date	Agreement Expiration Date	Months Remaining	Link to Agreement On Sharepoint	Days Since Last Update	45-Day Update Flag	At Ris
MORS	Military Operations Research Society	Agreement Executed	MOU	04/24/19	04/23/22	11	<a href="#">MORS-INCOSE</a>	1		

**Figure 6-5: My Alliance Agreements & Activities Dashboard**

To update the information, the Relationship Manager clicks the respective report, and the report fully opens to allow updates to be entered. When the updates are entered in the reports, the appropriate Outreach Alliance Agreement Portfolio sheet (App B.1.7) or the Outreach Alliance Agreement Activity Log sheet (App B.1.8) will be automatically updated.

When in a report (or sheet), ensure the information is saved. That can be done by going to the top left portion of the report (or sheet) and clicking the computer disc / save button (red square in Figure 6-6). To ensure no information is lost, recommend saving often.



**Figure 6-6: Saving Entered Information**

## **6.2 Alliance Agreement Automatic Alerts**

There are six automatic alerts associated with activity entries (App B.5.1).

### **6.2.1 Regular Alliance Agreement Alerts**

There are three regular alliance agreement alerts.

- Outreach Alliance Agreement Approval Request Alert – When an individual submits for a potential alliance agreement and the agreement Approval Status is “submitted,” an email is sent to the Outreach Manager.
- Monthly Alliance Agreement Update Request Alert – On the 10<sup>th</sup> of every month when the Approval Status is “Approved” and the Agreement Status is NOT “Closed,” an email is sent to the Relationship Manager asking for an update.
- New Assigned Relationship Manager Alert – When the INCOSE Relationship Manager, an email is sent to the new Relationship Manager, the INCOSE Sponsor, and the Outreach Manager.

### **6.2.2 “Heads Up” Alliance Agreement Alerts**

There are three “heads up” agreement alerts.

- 45-Day Alert – When there has not been an update within 45 days and the Agreement Status is Approved to Explore, In Progress – OK, In Progress – Help!, Agreement Executed, Renewal Under Investigation, and HOLD, an email is sent to the Relationship Manager (info the INCOSE Sponsor) asking for an update.
- Pending Alliance Agreement Expiration Alert – Based on the Months Remaining, when the Agreement Status is NOT Expired and there are 6, 5, 4, 3, 2, and 1 month remaining before expiration, an email is sent to the Relationship Manager, the INCOSE Sponsor, and the Outreach Manager. Emails will be sent monthly until the agreement is renewed or closed.
- Alliance Agreement At Risk Alert – When the At Risk flag is checked or the Activity Status selected is “In Progress – HELP!” and the Agreement Status is NOT Expired or Closed, an email is sent to the Relationship Manager, INCOSE Sponsor, and Outreach Manager – the Relationship Manager is asking for help!

## **6.3 Renewing the Alliance Agreement**

When the agreement is nearing expiration, the Relationship Manager or the Outreach Manager will change the Agreement Status to “Renewal Under Evaluation.” Then, the tasks in Section 4.3 Potential Alliance Discussions start again. In addition to those tasks, internally additional items should be discussed: what worked, what didn't work, what should be changed, do we need a new Relationship Manager, etc.

If INCOSE decides not to renew the agreement, the Relationship Manager or the outreach Manager will change the Agreement Status to “Expired” on the expiration date. If both the alliance and INCOSE agree to renew the agreement, when the alliance agreement is signed by both sides, the Relationship Manager will follow the tasks in Section 4.4, Approved Alliance Agreements.



## 7.0 Outreach ARMS Dashboards

There are five dashboards with summary information from Outreach ARMS depending on what level of access an individual has. An overview of the five dashboards is provided in this section.

To access the five dashboards, on the top left side of the Welcome Portal, there are links to the five dashboards (red rectangle in Figure 7-1): Welcome Portal, Roll-Up Dashboard, My Dashboard, Outreach Manager Dashboard, and Leader Dashboard.

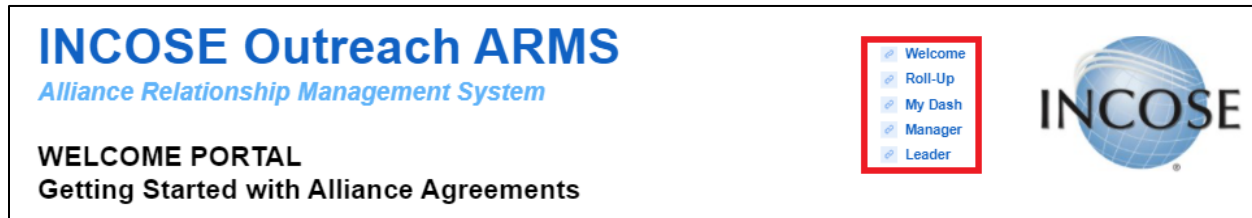


Figure 7-1: Accessing the 5 Outreach ARMS Dashboards

### 7.1 Welcome Portal Dashboard Overview

Any INCOSE member can access the Outreach Welcome Portal through the Connect Home Page. On the Connect Home Page, it is in the “Groups and Initiatives” section in the 5<sup>th</sup> folder from the left titled, “Alliance Agreements Getting Started” (see the red rectangle in Figure 7-2).

#### INCOSE Governance and Policy Management



#### Groups and Initiatives



Figure 7-2: Outreach Welcome Portal Access

When the “Alliance Agreements Getting Started” folder is clicked, the Welcome Portal will open (Figure 7-3).

**INCOSE Outreach ARMS**  
*Alliance Relationship Management System*

**WELCOME PORTAL**  
Getting Started with Alliance Agreements

**Take Action**

- [Alliance Agreements](#)
- [See a List of Approved Alliance Agreements](#)
- [Submit New Alliance Agreement for Review](#)
- [Approved Alliance Agreement - Enter Details](#)
- Activities**
- [Submit New Activity \(Approved Agreements\)](#)
- Relationship Managers**
- [Review & Edit MY Agreements & Activities](#)
- Help**
- [How Do I ....?](#)

**Reference Materials**

- [OUT-100 Policy - Outreach Principles](#)
- [OUT-101 Policy - Alliance Guidelines](#)
- [OUT-102 Policy - JOB Charter](#)
- [OUT-103 Policy - Ambassadors](#)
- [ARMs Definitions](#)
- [Activity Reference List](#)
- [Outreach Team List](#)
- [ARMs Automations](#)
- [System Diagrams - Reference Only](#)

**Purpose**

OUT-100: Outreach Principles – February 1, 2021

Outreach has been identified by INCOSE leadership as a key element that contributes to the Principles, Values and Strategic Objectives of the organization.

The objective of INCOSE Outreach is to identify these areas of overlapping best practice, interpret them for our membership, and promote complementary INCOSE knowledge externally. Through the formation of Alliances, the state of best practice may be improved through joint promotion and joint work programs. Alliances are formalized through the formation of written agreements.

Alliances and their more formal written agreements (MOUs and MOAs) are intended to be expressions of current mutual benefit to both organizations; to this end, they should have a fixed duration and auto-renewal should be avoided.

**Feedback**

**INCOSE Outreach ARMS Feedback**

Comments? Questions? Trouble? Issues? Please let us know!

**Rate Outreach ARMS Today \***

Overall, how are you feeling about this system today?

☐ 1. Terrible

☐ 2. Not Acceptable

☐ 3. Acceptable

☐ 4. Pretty Good

☐ 5. Fantastic

**Feedback \***

What are your specific comments about why Outreach ARMS is good or bad?

**Contact You About This?**

Your contact information will not be used for any other purpose than to contact you about this feedback.

☐

**File Upload**

If you can take a screenshot of the error message or other problem, please do so and attach it here.

Drag and drop files here or [browse files](#)

☐ Send me a copy of my responses

**Submit**

**Contact**

Welcome to the INCOSE Outreach Alliance Relationship Management System.

**CONTACTS**

**DIRECTOR of OUTREACH**

[Dr. Julie Taylor](#)  
[outreach\\_director@incose.net](mailto:outreach_director@incose.net)

**ARMs GROUP MANAGER**

[Kirk Mitcheelson](#)  
[outreach\\_arms\\_manager@incose.net](mailto:outreach_arms_manager@incose.net)

**ARMs TECHNICAL SUPPORT**

[Molly Kovacs](#)  
[molly.kovacs@incose.net](mailto:molly.kovacs@incose.net)

**Figure 7-3: Outreach ARMS Welcome Portal**

There are five sections on the Welcome Portal: Take Action, Reference Materials, Purpose, Contact, and Feedback.

In the Take Action section, the links in the Alliance Agreements, Activities, and Relationship Managers sub-sections have previously been discussed in this User's Guide. For the Help or "How Do I ...? Sub-section, there are seven Frequently Asked Questions (FAQs) and their answers:

- How do I propose a new Outreach Alliance for consideration by the Director?
- How does Outreach identify Alliances that are coming up for renewal?
- How do I update My active Alliance Agreements and Activities? (Monthly Update Form Option)
- How do I update My active Alliance Agreements and Activities? (Self-Serve Access Option)
- How do I raise a flag on Alliance Agreements or Activities that need My Outreach Manager or Sponsor Support?
- How do I see an overview of all Alliances that I am involved in?
- How do I see an overview of all Submitted Alliance Agreements?

The Reference Material section provides easy access to this document, the associate Outreach policies and procedures, and the reference sheets used in Outreach ARMS.

The Purpose section provides the purpose of INCOSE Outreach from policy OUT-100 Outreach Principles.

The Contact section provides contact information for the INCOSE Director of Outreach, the Outreach ARMS Manager, and ARMS Technical Support.

Finally the Feedback section. Here this is an opportunity for any user to provide feedback on the following (\* is for required information, no \* is optional information):

- \*Rate Outreach ARMS Today (terrible, not acceptable, acceptable, pretty good, fantastic)
- \*Feedback (specific comments on why good or bad)
- Contact You About This? (checkbox; if checked then asks for contact info)
  - Your name and email
- (Ability to) Upload a File
- Checkbox to send submitter a copy of the responses.

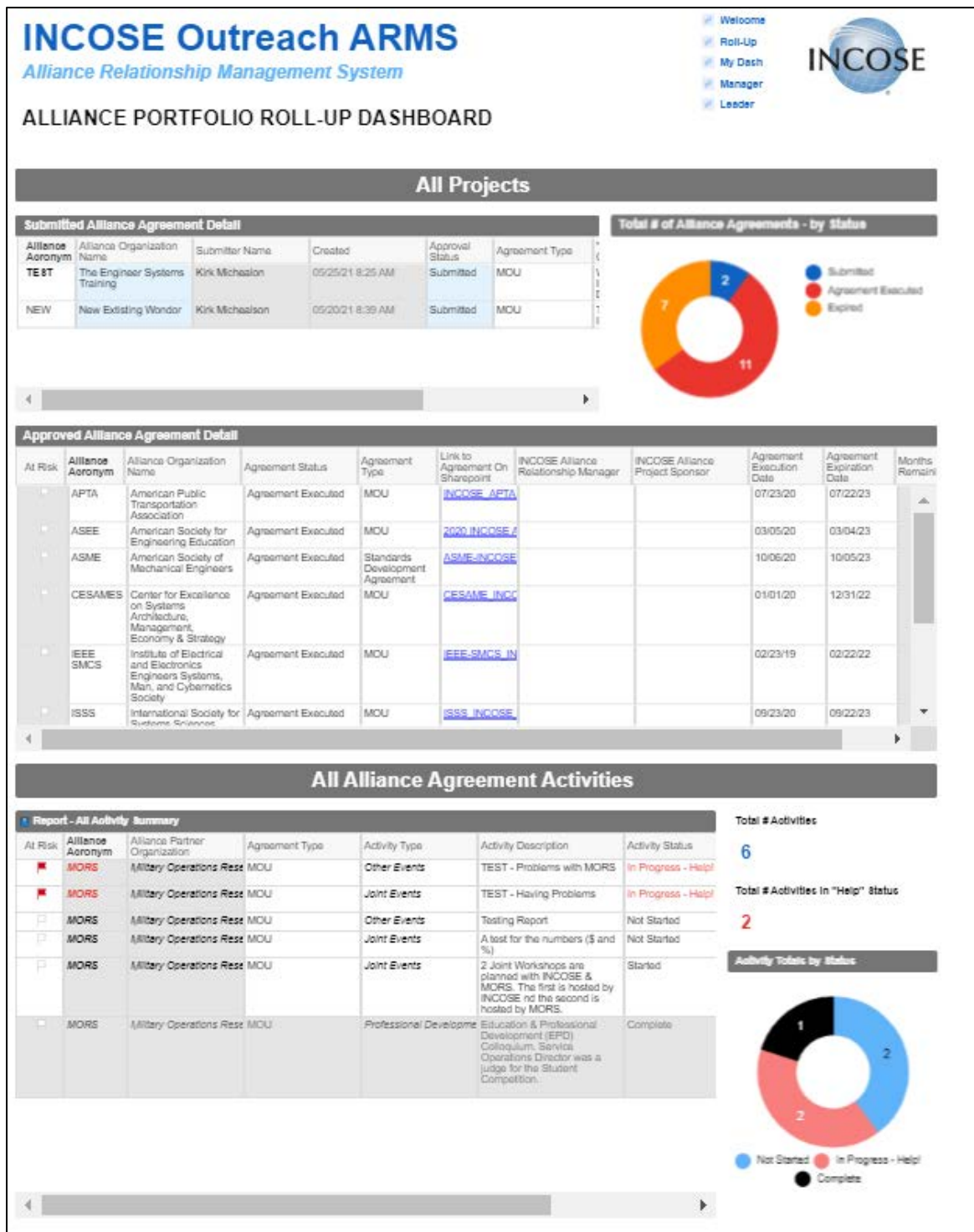
## 7.2 Roll-Up Dashboard Overview

The Roll-Up Dashboard is an overall summary. It has reports, data, and charts for both alliance agreements and activities.

1. Alliance Agreements
  - Submitted Alliance Agreement Detail Report (for submitted alliance agreements)
  - Total Number of Alliance Agreements Chart by activity (Submitted, Agreement Executed, and Expired).
  - Approved Alliance Agreement Detail Report
2. Activities
  - All Activity Summary Report
  - Current Numbers for "Total Activities" and "Total Activities with "Help" Status."

Outreach Alliance Relationship Management  
System (ARMS) User's Guide  
Version 0.1, June 2021

- Activity Totals by Status – Not Started, Started, In Progress – Update, In Progress – Help!, Completed, Cancelled, and HOLD.



**Figure 7-4: Roll-Up Dashboard**

## 7.3 My Alliance Agreements & Activities Dashboard Overview

This dashboard is for Relationship Managers and has sections for Alliance Agreements and Activities. This dashboard is discussed in Section 6.1.2, Updating with the My Alliance and Activities Dashboard.

**INCOSE Outreach ARMS**  
Alliance Relationship Management System

MY ALLIANCE AGREEMENTS & ACTIVITIES

Welcome  
Roll-Up  
My Dash  
Manager  
Leader

**My Alliance Agreement Contacts**

Report - My Alliance Contacts

Alliance Acronym	Alliance Organization Name	Agreement Type	Agreement Status	Months Remaining	Alliance Contact Name	Alliance Contact Email	INCOSE Sponsor	Manager
MORS	Military Operations Research Society	MOU	Agreement Executed	11	Simon Goerger	simon.r.goerger@jdrdc.d		Outreach ARMS Mana

**My Submitted Alliance Agreements**

Report - My Submitted Alliance Agreements

Approval Status	Alliance Acronym	Alliance Organization Name	Agreement Type	Submitter Name	Submitter Email	"Intent to Collaborate" Comments
Submitted	TEST	The Engineer Systems Training	MOU	Kirk Michaelson	kirk.michaelson@incose	Wants to work with INCOSE Professional Development
Submitted	NEW	New Existing Vendor	MOU	Kirk Michaelson	Kirk Michaelson	They want to work with INCOSE

**My Approved Alliance Agreements**

Report - My Approved Alliance Agreements

Alliance Acronym	Alliance Organization Name	Agreement Status	Agreement Type	Agreement Execution Date	Agreement Expiration Date	Months Remaining	Link to Agreement On Sharepoint	Days Since Last Update	45-Day Update Flag	At Ris
MORS	Military Operations Research Society	Agreement Executed	MOU	04/24/19	04/23/22	11	<a href="#">MORS-INCOSE 1</a>	1		

**My Activities**

Report - My Activities

Alliance Acronym	Alliance Partner Organization	Activity Type	Activity Status	Activity Description	Activity Comments	MARCOM Coordination Status	Coordination
MORS	Military Operations Rese	Other Events	In Progress - Help!	TEST - Problems with MORS	TEST - Problems with MORS		1. ▲
MORS	Military Operations Rese	Joint Events	In Progress - Help!	TEST - Having Problems	TEST - Having Problems		1. ▲
MORS	Military Operations Rese	Other Events	Not Started	Testing Report			1. ▲
MORS	Military Operations Rese	Joint Events	Not Started	A test for the numbers (\$ and %)	Test of numbers		1. ▲
MORS	Military Operations Rese	Joint Events	Started	2 Joint Workshops are planned with INCOSE & MORS. The first is hosted by INCOSE and the second	Planning has just started.	Not Started	1. ▼

Report - My Activity Dates

Alliance Acronym	Alliance Partner Organization	Activity Type	Activity Status	Activity Description	Activity Comments	Key Date 1	Key Date 1 Description	Key Date 2
MORS	Military Operations Rese	Joint Events	Not Started	A test for the numbers (\$ and %)	Test of numbers			
MORS	Military Operations Rese	Joint Events	Started	2 Joint Workshops are planned with INCOSE	Planning has just started.	19-Jul-2021	INCOSE Hosted Workshop	14-Sep-2

Figure 7-5: My Alliance Agreements & Activities Dashboard

The Relationship Manager can click the reports to enter updates.

## 7.4 Manager Dashboard Overview

The Manager Dashboard is for the Outreach Leadership to determine an overall overview of the Outreach status.

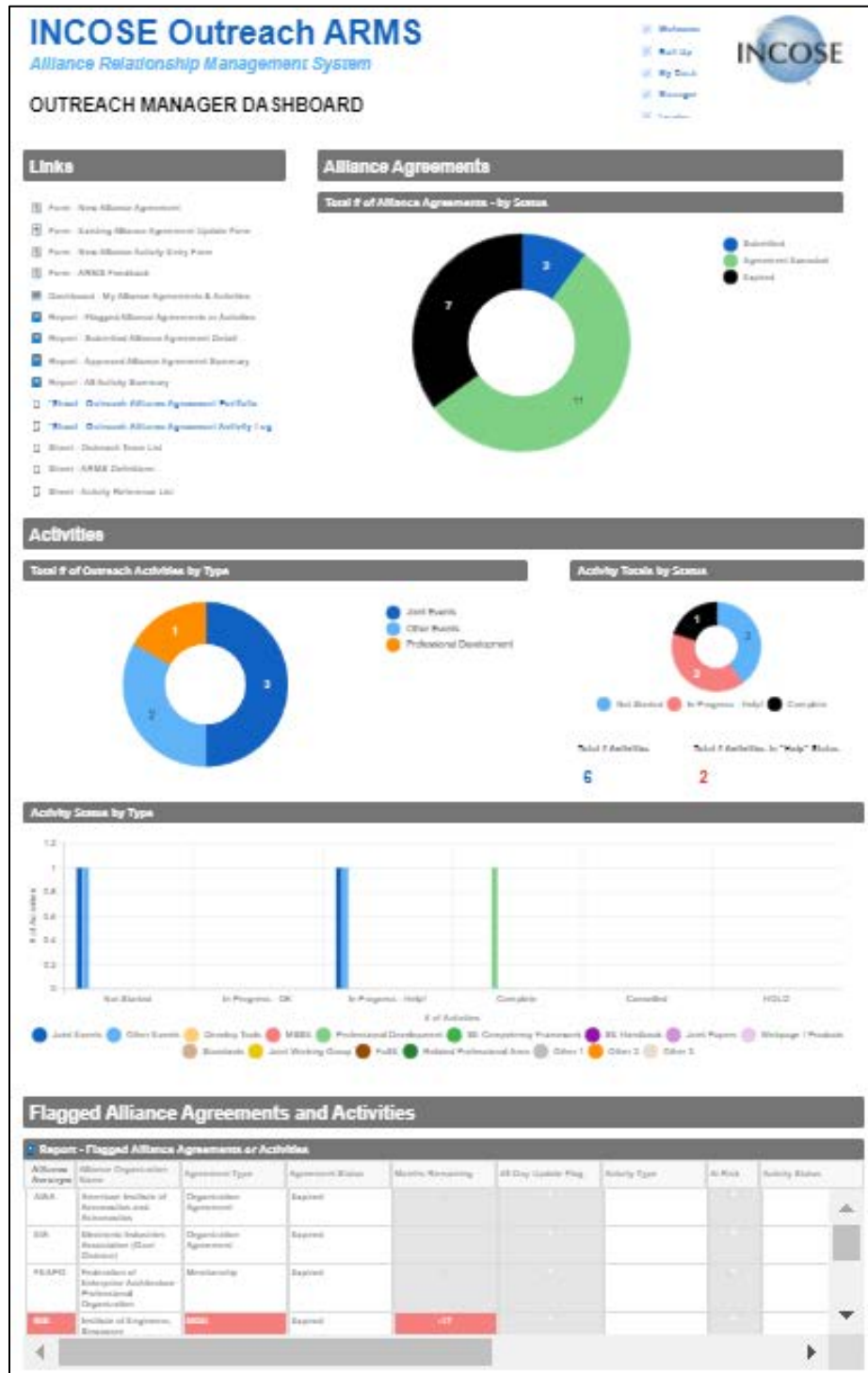


Figure 7-6: Manager Dashboard



There are four sections on the Manager Dashboard.

1. Links – These are links to the forms, sheets, reports, and dashboards within Outreach ARMS.
2. Alliance Agreements
  - A chart of the total number of alliance agreements by status (submitted, agreement executed, and expired).
3. Activities
  - Total Number of Outreach Activities by Type chart
  - Activity Totals by Status (Not Started, Started, In Progress – Update, In Progress – Help, Completed, Cancelled, and HOLD).
  - Current Numbers for “Total Activities” and “Total Activities with “Help” Status.”
  - Activity Status by Activity Type column chart (horizontal labels are the activity statuses and the column colors are the activity types).
4. Flagged Alliance Agreements and Activities
  - Flagged Alliance Agreement and Activity Report (double-clicked to open the full report).

## **7.5 Leadership Dashboard Overview**

This dashboard is for the INCOSE Leadership (President and President-Elect). Other INCOSE Leaders can be granted access upon request to the Director of Outreach. The information provided is overall for all alliance agreements and activities. There are three sections.

1. Links – These are links to selected forms, sheets, and reports within Outreach ARMS.
2. Alliance Agreements
  - A chart of the total number of alliance agreements by status (submitted, agreement executed, and expired).
  - Current Numbers for “Total Agreements” and “Total Agreements with “Help” Status.”
  - Flagged Alliance Agreements and Activities Report (double-click to open the full report).
  - Leader Alliance Agreement Summary Report (double-click to open the full report).
3. Activities
  - Activity Totals by Status (Not Started, Started, In Progress – Update, In Progress – Help, Completed, Cancelled, and HOLD).
  - Current Numbers for “Total Activities” and “Total Activities with “Help” Status.”
  - Activity Status by Activity Type column chart (horizontal labels are the activity statuses and the column colors are the activity types).
  - Leader Activity Summary Report (double-click to open full report).

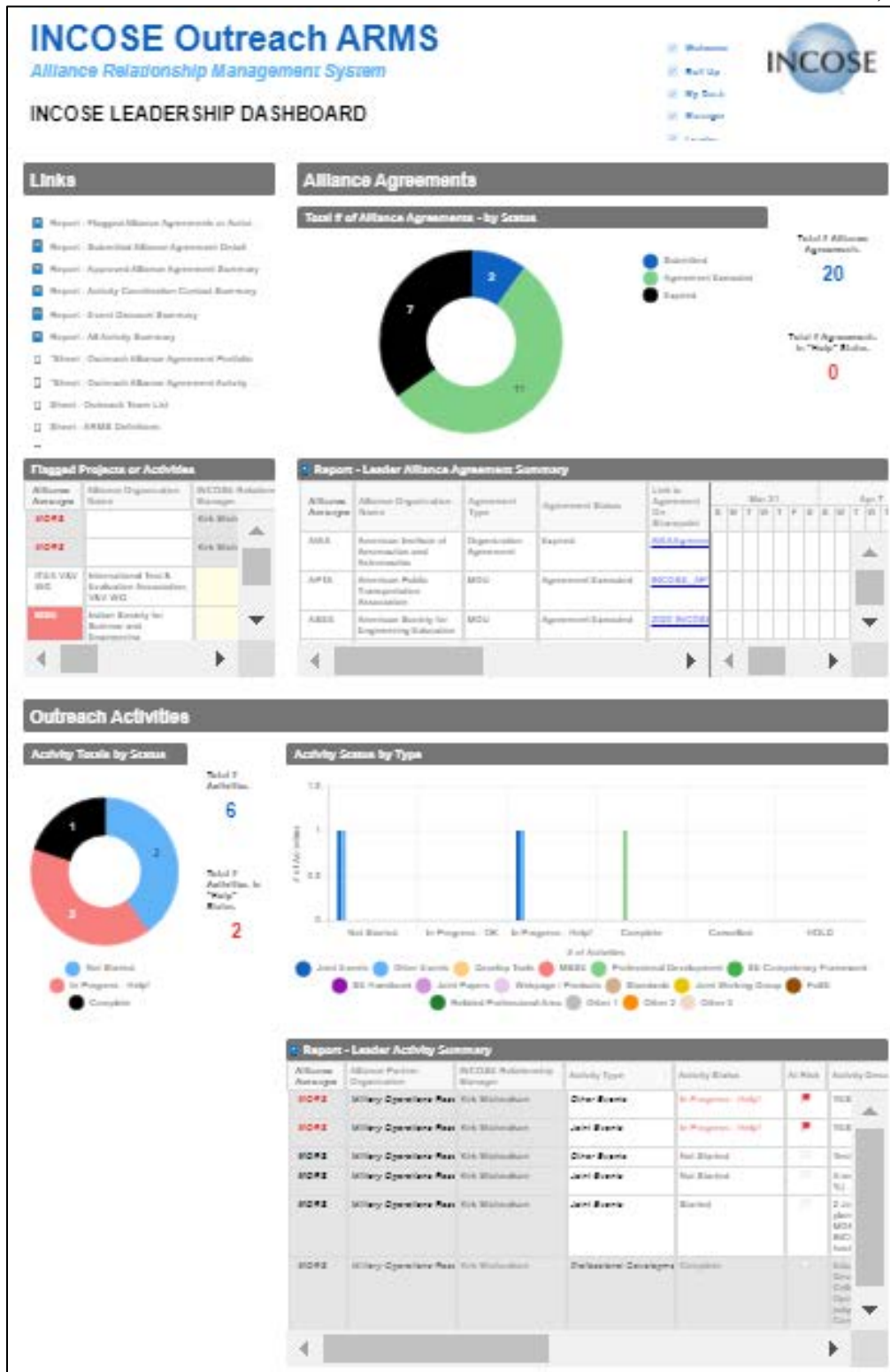


Figure 7-7: Leadership Dashboard



## **Appendix A – Relationship Manager General Information**

(From OUT-103 – **To Be Updated when OUT-103 is updated**) Relationship Managers are senior INCOSE members who are very knowledgeable on INCOSE matters and can represent the organization in a manner, and using vocabulary, that are sensitive to geographical and industry domain culture.

### **A.1 Relationship Manager Role and Responsibilities**

Relationship Managers shall meet specific international growth or industrial domain objectives. They are charged to fulfill four primary objectives:

1. Understand the needs of the systems engineering community in the nominated country, geographical sector, professional association or industrial domain. This includes identifying the profile of domain usage, key competencies and valuable insights of the target community, and opportunities for joint work products, events and exchanges.
2. Communicate the value of INCOSE, and interpretations of its products and principles, to the target community in its own vocabulary.
3. Facilitate additional exchanges of insight between INCOSE interested parties and the target community on the views, domain challenges and usage / language of such stakeholders.
4. To support the identification of new chapters, encourage establishment of industry-oriented working groups and, where appropriate, build alliances for collaboration with INCOSE.

### **A.2 INCOSE Leadership Responsibilities to Support Relationship Managers**

The INCOSE leadership have the responsibility to support Relationship Managers. These responsibilities, nominally discharged by the Director for Outreach, include:

- To identify potential candidates within the specific sector, country, or industry who have the organizational capability to establish, strengthen and broaden collaborations and Alliances, working with or on behalf of INCOSE. Approved candidates shall receive business cards and appropriate communication materials to support them in their activities.
- To facilitate access to INCOSE products, provide INCOSE promotional materials and other support (including planning and budgeting) to these candidates in support for their role and responsibilities.
- To guide Relationship Managers in the external promotion of INCOSE's Products and Technical Services, including Events, Training and the Systems Engineering Certification programs; encourage mutual participation and broadening of content as appropriate.
- To provide an open and receptive audience for the Relationship Manager's interpretations of the target community's needs, insights and values.
- To ensure that the rest of the INCOSE leadership are regularly updated on outreach activities, outcomes and key messages. In addition, to make recommendations about how to proceed and follow-up with contacts made in various organizations.

### **A.3 Delegated Authority**

Relationship Managers have the right to represent INCOSE worldwide; interact with engineering or policy groups or associations in government, industry and academia; and explain what INCOSE has to offer to industry, academia, governments, and individuals. To this end, Relationship Managers are expected to keep themselves generally informed about INCOSE bylaws, policies and initiatives.

Relationship Managers cannot commit INCOSE legally or financially. They should bring such questions to the the Director for Outreach, for the ultimate attention of the Executive Committee.

### **A.4 Reporting and Communications**

The Relationship Managers report to the respective Assistant Director for Outreach (Industry / Domain or Professional Society). Ambassadors to industrial domains, industry associations or professional bodies should also liaise with the relevant INCOSE Working Group Chair(s).

As the potential for starting a new industry-oriented working group grows, Ambassadors shall work with the Technical Director to transfer responsibility for startup. In all cases, Ambassadors should become members of the Industrial Outreach Board (IOB), and report to the IOB Chair. The IOB provides an opportunity to share experiences and practices with other Ambassadors.

### **A.5 Terms of Service**

Relationship Managers are appointed by the President, at the recommendation of the Director for Outreach, for a period of two (2) years. They can be reappointed. There is no limit in principle to the number of Relationship Managers, but the number should be kept to what is necessary and manageable.

## **Appendix B – Outreach ARMS Overview**

### **B.1 Outreach Alliance Relationship Management Systems (ARMS)**

The Outreach Alliance Relationship Management System (ARMS) was created to track INCOSE agreements with other alliances. In ARMS, there are forms, sheets, reports, dashboards, and automations for Relationship Managers to enter information pertinent to their alliance and for the Outreach Leadership, President, and President-Elect to be able to review status of each alliance.

This appendix could be a “pull-out section” to have available while reviewing the User's Guide main body. Outreach ARMS is available through the Welcome Portal dashboard (<https://app.smartsheet.com/b/publish?EQBCT=ca94952e8fdb4c75bf03bc5b2bcffbbb>).

### **B.1 Sheets**

Sheets are created to provide information. There are 8 different sheets.

#### **B.1.1 ARMS Definitions**

This sheet provides the definitions for information used in Outreach ARMS. The definitions are organized into 5 groups:

- Alliance Types – Membership, Membership Letter, MOA, MOU, Organization Agreement, and Standards Development Agreement.
- ARMS System Terms – Alliance, Activity, and Agreement.
- Outreach Groups – Admin, Ambassador / Relationship Manager, Manager, and Leadership.
- Outreach Roles – Ambassador, Relationship Manager, Sponsor, Outreach Manager, Director of Outreach, and Outreach ARMS Manager.
- User Interface List – INCOSE Leadership Dashboard, My Alliances & Activities Portal, Outreach Manager Dashboard, Outreach Welcome Portal, and Portfolio Roll-up Dashboard.

Outreach Alliance Relationship Management  
System (ARMS) User's Guide  
Version 0.1, June 2021

TERM	DEFINITION
<b>Alliance Types</b>	
Membership	<i>Organizational membership application approval with another organization.</i>
Membership Letter	<i>Approval letter for an organizational membership with another organization.</i>
MOA	<i>A Memorandum of Understanding (MOU) is a non-binding agreement between two or more parties outlining very broad concepts of mutual understanding, goals, and general plans. An MOU is often the first stage in the formation of a Memorandum of Agreement (MOA) or a more formal contract.</i>
MOU	<i>A Memorandum of Agreement (MOA) is a non-binding agreement between two or more parties describing the terms, conditions, and specific details of an agreement, including each party's requirements, roles, responsibilities, and actions so that their goals may be accomplished. An MOA may lead to the formation of a formal contract among the parties.</i>
Organization Agreement	<i>Other organization (i.e., non-INCOSSE) alliance agreement.</i>
Standards Development Agreement	<i>An agreement for two organizations to collaborate in developing standards.</i>
<b>ARMS System Terms</b>	
Alliance	<i>An organization which INCOSSE has an agreement.</i>
Activity	<i>An individual Addendum A goal, one of multiple approved categories.</i>
Agreement	<i>A collection of Activities for one organization united under a single, time-limited Project, formalized by an Alliance Agreement.</i>
<b>Outreach Groups</b>	
<b>(Smartsheet Account Access)</b>	
Admin	<i>"Admin" access</i>
Ambassador / Relationship Manager	<i>"Edit - No Sharing"</i>
Leader	<i>"View Only" or "Edit" , depending on content</i>
Manager	<i>Outreach ARMS Manager - "Admin" access or "Edit" access, depending on content</i>
<b>Outreach Roles</b>	
<b>(Outreach Program Operation)</b>	
Ambassador	<i>An INCOSSE ambassador is a member of INCOSSE, representing the interest of INCOSSE to different groups and entities and at non-INCOSSE events. The ambassador will promote INCOSSE and seek to enhance growth, collaboration, influence and/or achievement of INCOSSE's mission. The ambassador will be versed in the values streams and strategic objectives of INCOSSE and will endeavor to build on these foundations with all external partners.</i>
Relationship Manager	<i>There is one Relationship Manager assigned for each alliance. They are INCOSSE Ambassadors first, and second, they maintain the relationship between INCOSSE and an alliance per the alliance agreement. They will be the communicator with the alliance, as well as with the Outreach &amp; INCOSSE Leadership. They are responsible for keeping the alliance agreement status up-to-date with entries at least every 30 days.</i>
Sponsor	<i>INCOSSE Leader assigned to support a specific Alliance Agreement and to support the designated Relationship Manager in their execution of the Agreement Activities. Normally the INCOSSE manager of the Relationship Manager. For example, if a Working Group Chair is the Relationship Manager, then the Technical Director is the Sponsor.</i>
Outreach Manager	<i>There are 4 Assistant Directors of Outreach: (1) Industry &amp; Domain Outreach, (2) Professional Societies, (3) Operations (Training &amp; Finance), and (4) EWLSE Operations. They will be responsible for all alliance agreements within their area of responsibility.</i>
Director Of Outreach	<i>The Director of Outreach is overall responsible and accountable for the INCOSSE Outreach Program and information in the Outreach ARMS.</i>
Outreach ARMS Manager	<i>The individual supporting the Outreach Leadership Team by monitoring and maintaining Outreach ARMS.</i>
<b>User Interface List</b>	
<b>(Smartsheet Portals &amp; Dashboards)</b>	
INCOSSE Leader Dashboard	<i>Portfolio-level summary metrics, flagged projects and activities</i>
My Alliances & Activities Portal	<i>Self-serve editing for Ambassadors, Managers, Sponsors</i>
Outreach Manager Dashboard	<i>Flagged alliances and activities, manager reference materials, portfolio metrics</i>
Outreach Welcome Portal	<i>Welcome, purpose, key links, user reference materials, feedback form</i>
Portfolio Roll-Up Dashboard	<i>Lists of all active alliances and activities</i>

**Figure B-1: Outreach ARMS Definitions**

## **B.1.2 Activity Reference List**

This lists potential activities that may be included in Addendum A of the Alliance Agreement. There is the option to add 3 others. Here is the information provided in the columns:

- Activity Category – Activity types are grouped into categories.
- Activity Types – Specific types of activities
- Activity Description – A more detailed description of the specific types of activities
- Role – This provides all the INCOSE Board positions that should be notified when changes to the Alliance Agreement and / or Activity occur.
- Contact – These are group emails created for ARMS with the INCOSE positions listed in the Role column as members of the group.

### ***B.1.2.1 Activity Types and Respective INCOSE Leadership***

The following is a list of each of the Activity Types in Outreach ARMS and the respective INCOSE Leadership that will be notified with Activity Automatic Alerts.

CATEGORY	TYPE	DESCRIPTION	INCOSE LEADERSHIP
Events	<b>Joint Events</b>	<i>Joint Events</i>	Events, Associate Director Services, Deputy Services, Director
Events	<b>Other Events</b>	<i>Support Specific Focus Events of Other Organization</i>	Events, Associate Director Services, Deputy Services, Director
Process Methods & Tools	<b>Develop Tools</b>	<i>Jointly Develop New Process, Methods, Guidance, Tools</i>	PMC Chair Tech Ops, Deputy Tech Ops, Director
Process Methods & Tools	<b>MBSE</b>	<i>Participate in the Model Based Systems Engineering (MBSE) Project</i>	Tech Ops, Deputy Tech Ops, Director
Professional Development	<b>Professional Development</b>	<i>Collaborate Developing SE Professional Development Capability</i>	Education & Training, Associate Director Professional Development Portal, Project Manager Services, Deputy Services, Director
Professional Development	<b>SE Competency Framework</b>	<i>Develop Discipline &amp; Domain-Specific Extensions to SE Competency Framework</i>	Competency Working Group, Chairs Tech Ops, Deputy Tech Ops, Director
Publications	<b>Joint Papers</b>	<i>Develop Joint Articles, Papers, and Presentations</i>	Publications, Associate Director Services, Deputy Services, Director Tech Ops, Deputy Tech Ops, Director
Publications	<b>SE Handbook</b>	<i>Develop Extensions to the SE Handbook and SE Vision 2025</i>	Publications, Associate Director SE Handbook, Lead Tech Ops, Deputy Tech Ops, Director
Publications	<b>SE Vision</b>	<i>Updates to the SE Vision</i>	President-Elect SE Vision, Lead
Publications	<b>Webpage / Products</b>	<i>Host Webpage, Post Documents, Develop Products</i>	Chief Information Officer Services, Deputy Services, Director Tech Ops, Deputy Tech Ops, Director
Standards	<b>Standards</b>	<i>Support International Standards</i>	Standards, Lead Tech Ops, Deputy Tech Ops, Director
Tech Ops	<b>FuSE</b>	<i>Participate in FuSE Initiative</i>	FuSE Initiative Leads President-Elect
Tech Ops	<b>Joint Working Group</b>	<i>Joint Cross Organizational Working Group</i>	Tech Ops, Deputy Tech Ops, Director
Other	<b>Related Professional Area</b>	<i>Joint Approach Interfacing in Related Professional Areas</i>	Outreach, Director

**Figure B-2: Activities and Respective INCOSE Leadership**

*This document contains INCOSE Proprietary Information.*

### **B.1.3 ARMS Automations**

This is a listing of the automations built in ARMS to alert individuals on changes and potential issues. An automation consists of three parts: trigger, condition, and email for the alert. This sheet provides information on:

- Title
- Trigger
- Action
- Related Sheet
- Forms Link
- Comments (if any)

### **B.1.4 ARMS Feedback**

When feedback is submitted, the information in the ARMS Feedback Form (Appendix B.2.4) is populated in this sheet. The associated columns are: feedback, contact you about this (checked if yes), your name, your email, rating, response, and specific feedback.

### **B.1.5 Outreach Team List**

This sheet provides name, SmartSheet outreach group, role, INCOSE email for SmartSheet access, location, SmartSheet account status, and SmartSheet contact. The Outreach Team is organized into Outreach Managers, Relationship Managers, INCOSE Leadership, and Technical Support.

### **B.1.6 Outreach ARMS User Help**

There are two User Help Sheets – one for the basic user (available via the Welcome Portal) and one for Outreach Managers. These sheets contain information for how to do tasks in Outreach ARMS.

### **B.1.7 Outreach Alliance Agreement Portfolio**

This sheet contains information provided from the New Alliance Agreement Form (Appendix B.2.1) and the Existing Alliance Agreement Update Form (Appendix B.2.2). Each row is for a different alliance. The columns contain the following information.

- |                                       |  |
|---------------------------------------|--|
| • Alliance Acronym (primary ID)       | • Alliance Contact Name                    |
| • Alliance Organization Name          | • Alliance Contact Email                   |
| • INCOSE Relationship Manager         | • Intent to Collaborate Comments           |
| • INCOSE Sponsor                      | • Link to Agreement on Sharepoint          |
| • Agreement Type                      | • At Risk (if help requested)              |
| • Agreement Status                    | • Approval Status                          |
| • Agreement Execution Date            | • Submitter Name                           |
| • Agreement Expiration Date           | • Submitter Email                          |
| • Months Remaining                    | • Data Type (Alliance/Project or Activity) |
| • Days Since Last Update              | • Created (date) / Created By              |
| • 45-Day Flag Update (if not updated) | • Modified (date) / Modified By            |

### **B.1.8 Outreach Alliance Agreement Activity Log**

This sheet contains information from the New Alliance Activity Entry Form (Appendix B.2.3). Each row is for a different activity from any alliance. The columns contain the following information:

- Alliance Acronym (primary ID)
- Alliance Organization Name
- INCOSE Relationship Manager
- Agreement Type
- Activity Type
- Activity Description
- Activity Comments
- Activity Status
- At Risk (if help requested)
- Key Date 1 & Description
- Key Date 2 & Description
- Key Date 3 & Description
- Coordination Contact (ARMS group)
- MARCOM Coordination Status (Y/N)
- (Specific) Coordination Status
- Coordination Contact (ARMS group)
- Partner / INCOSE Advertising
- Partner / INCOSE Discounts (\$ and %)
- INCOSE Sponsor
- Outreach Manager
- Outreach Manager Email
- Data Type (Alliance/Project or Activity)
- Modified (date) / Modified By
- Created (date) / Created By

## **B.2 Forms**

Data is inputted via forms to populate the Outreach Alliance Agreement Portfolio sheet (Appendix B.1.7), the Outreach Alliance Agreement Activity Log sheet (Appendix B.1.8), the ARMS Feedback sheet (Appendix B.1.4), all of the Reports, all of the dashboards.

### **B.2.1 New INCOSE Outreach Alliance Agreement Form**

This is the form to enter information for a potential agreement with an alliance and any INCOSE Member can provide the information. It is available via the Outreach Welcome Portal (<https://app.smartsheet.com/b/publish?EQBCT=ca94952e8fdb4c75bf03bc5b2bcffbbb>).

The information entered in the form (\* is for required information, no \* is optional information):

- \*Submitter Name and \*Email
- \*Alliance Acronym and \*Alliance Organization Name
- \*Intent to Collaborate Comments (the information requested from OUT-101 is provided)
- \*Agreement Type (Membership, Membership Letter, MOA, MOU, Organization Agreement, Standards Development Agreement, TBD)
- Alliance Contact Name & Email
- (Ability to) Upload a File
- Checkbox to send submitter a copy of the responses.

If required information is not provided, the submitter will receive an error message.

With these inputs, the Outreach Leadership will determine if possibility should be approved. If so, discussions start with the Outreach Leadership, INCOSE Leadership, and Alliance Leadership & Contacts.



### **B.2.2 Existing Alliance Agreement Update Form**

The INCOSE Relationship Manager must be identified by the time the alliance agreement is signed by both INCOSE and the Alliance. This form is used to enter the appropriate information from the signed Alliance Agreement. It is available via the Outreach Welcome Portal (<https://app.smartsheet.com/b/publish?EQBCT=ca94952e8fdb4c75bf03bc5b2bcffbbb>).

The information entered in the form (\* is for required information, no \* is optional information):

- Alliance Agreement Data
  - \*Alliance Acronym and \*Alliance Organization Name
  - \*Agreement Type (Membership, Membership Letter, MOA, MOU, Organization Agreement, Standards Development Agreement, TBD)
  - \*Agreement Execution Date and \*Expiration Date
  - Link to Agreement on Sharepoint (coordinate with the Operations Manager)
- Key Contacts
  - \*INCOSE Relationship Manager
  - \*INCOSE Alliance Agreement Sponsor
  - \*Outreach Team Manager (pull-down menu of the Outreach Leadership Team)
  - Alliance Contract Name and Email
- Status Updating (at least every 30 days)
  - \*Agreement Status (Approved to Explore, Agreement Executed, In Progress – OK, In Progress – Help!, HOLD, Renewal Under Evaluation, Expired, and Closed)
  - \*Intent to Collaborate Comments (any updates)
  - (Ability to) Upload a File
- Checkbox to send submitter a copy of the responses.

### **B.2.3 INCOSE Outreach Alliance Activity Entry Form**

This is the form to enter information on joint activities between INCOSE and the Alliance. The Relationship Manager will complete the form. It is available via the Outreach Welcome Portal (<https://app.smartsheet.com/b/publish?EQBCT=ca94952e8fdb4c75bf03bc5b2bcffbbb>).

The information entered in the form (\* is for required information, no \* is optional information):

- \*Alliance Acronym and \*Alliance Organization Name
- \*INCOSE Relationship Manager and \*INCOSE Sponsor
- \*Outreach Manager (pull-down menu of the Outreach Leadership Team)
- \*Activity Type (from the Activity Reference List, appendix B.1.2)

The following fields open when the Activity Type is selected:

- \*Activity Status
  - Not started, started, In Progress – Update, In Progress – Help!, Complete, Cancelled, and HOLD.
  - When the form is submitted, based on the activity status, an automated alert email is sent to the respective INCOSE Leadership.
- Key Dates 1 – 3 and Description (can enter up to 3 key dates)



For Joint Events and Other Events, the following fields also become available:

- MARCOM Coordination Status (Yes or No)
- (Specific) Coordination Status (pull-down menu with options)
- Partner / INCOSE Advertising (Yes or No)
- Partner / INCOSE Discount (on registration fees, \$ and %)
- (Ability to) Upload a File
- Checkbox to send submitter a copy of the responses.

### **B.2.4 ARMS Feedback Form**

Anyone can submit a feedback form. The results are inputted on the ARMS Feedback sheet (Appendix B.1.4). It is available via the Outreach Welcome Portal (<https://app.smartsheet.com/b/publish?EQBCT=ca94952e8fdb4c75bf03bc5b2bcffbbb>).

The information entered in the form (\* is for required information, no \* is optional information):

- \*Rate Outreach ARMS Today (terrible, not acceptable, acceptable, pretty good, fantastic)
- \*Feedback (specific comments on why good or bad)
- Contact You About This? (checkbox; if checked then asks for contact info)
  - Your name and email
- (Ability to) Upload a File
- Checkbox to send submitter a copy of the responses.

## **B.3 Reports**

Reports summarize the data from the Outreach Alliance Agreement Portfolio sheet (Appendix B.1.7) and Outreach Alliance Agreement Activity Log sheet (Appendix B.1.8). Data is organized for Alliance Agreement and Activity information based on the dashboards they are used on, for example:

- INCOSE Leadership – Reports available through the Leadership Dashboard.
- Outreach Leadership – Reports available through the Manager Dashboard.
- Relationship Manager – Reports available through the My Alliance Agreements & Activities Dashboard.
- General – Reports available through the Roll-up Dashboard.

The reports will include what conditions have to be met and what information is provided.

### **B.3.1 Alliance Agreement and Activity Reports**

These reports are used with the Manager and Roll-up Dashboards.

#### ***B.3.1.1 Submitted Alliance Agreement Details Report***

(1) Conditions Met –

- Approval Status is “submitted” AND
- Agreement Status is NOT “expired.”

(2) Information Available –

- Alliance Acronym, Alliance Organization Name, Submitter Name, Date / Time Submitted, Approval Status, Agreement Type, OUT-101 “Intent to Collaborate” Comments, and Link to Outreach Alliance Agreement Portfolio Sheet.

***B.3.1.2 Approved Alliance Agreement Summary Report***

(1) Conditions Met –

- Agreement Status is “Agreement Executed” or “In Progress – OK.”

(2) Information Available –

- Alliance Acronym, Alliance Organization Name, Agreement Status, Agreement Type, Link to the Agreement on Sharepoint, INCOSE Relationship Manager, INCOSE Sponsor, Execution Date, Expiration Date, and Months Remaining.

***B.3.1.3 All Activity Summary Report***

(1) Conditions Met – No specific conditions

(2) Information Available –

- At Risk (if Activity Status is In Progress – Help!), Alliance Acronym, Alliance Organization Name, Agreement Type, Activity Type, Activity Description, Activity Status, Activity Comments, and link to Outreach Alliance Agreement Activity Log sheet.

***B.3.1.4 Activity Coordination Contact Summary Report***

(1) Conditions Met –

- Coordination Status is not blank OR
- Coordination Status is “Initial Contact – Made,” Follow-Up Contact – “Made,” or “N/A.”

(2) Information Available –

- Alliance Acronym, Alliance Organization Name, INCOSE Relationship Manager, INCOSE Sponsor, Activity Type, Activity Status, Activity Description, Activity Comments, Coordination Contact (ARMS group email), Coordination Status, MARCOM Coordination Status, INCOSE Advertising, and Partner Advertising.

***B.3.1.5 Activity Event Discount Summary Report***

(1) Conditions Met –

- Activity Type – “Joint Event” OR
- Activity Type – “Other Event”

(2) Information Available –

- Alliance Acronym, Alliance Organization Name, INCOSE Relationship Manager, Activity Type, Activity Status, Activity Description, Activity Comments, INCOSE Discount (\$ and %), Partner Discount (\$ and %), Key Date 1 and Description, and Key Date 2 and Description.

### ***B.3.1.5 Flagged Alliance Agreement or Activities Report***

(1) Conditions Met –

(a) Alliance Agreements –

- Agreement Status is “Expired,” “HOLD,” “In Progress – Help!”, or “Renewal Under Evaluation” OR
- 45-Day Updates is checked (no update in last 45 days) OR
- Months Remaining is less than 2 months.

(b) Activities –

- At Risk is checked (help asked for) OR
- Activity Status is “Cancelled,” “Hold,” or “In Progress – Help!”

(2) Information Available –

- Alliance Acronym, Alliance Organization Name, Agreement Type, Agreement Status, Months Remaining, 45-Day Update, Activity Type, At Risk, Activity Status, Activity Description, Activity Comments, and link to respective Outreach Alliance Agreement Portfolio sheet or Outreach Alliance Agreement Activity Log sheet.

### **B.3.2 “My” Reports for My Alliance Agreements & Activities**

These reports are used for the Relationship Manager in their My Alliance Agreements & Activities Dashboard. One of the conditions for each of these reports is SmartSheet checks for the current user (i.e., Submitter, INCOSE Relationship Manager) by comparing to their SmartSheet log in.

#### ***B.3.2.1 My Submitted Alliance Agreements***

(1) Conditions Met –

- Current User AND
- Approval Status is “Submitted” or “Denied.”

(2) Information Available –

- Approval Status, Alliance Acronym, Alliance Organization Name, Agreement Type, Submitter Name, Submitter Email, and OUT-101 “Intent to Collaborate” Comments.

#### ***B.3.2.2 My Approved Alliance Agreements Report***

(1) Conditions Met –

- Current User AND
- Approval Status “Approved.”

(2) Information Available –

- Alliance Acronym, Alliance Organization Name, Agreement Status, Agreement Type, Agreement Execution Date, Agreement Expiration Date, Months Remaining, Link to Agreement on Sharepoint, Days Since Last Update, 45-Day Update Flag, At Risk Flag, INCOSE Relationship Manager, INCOSE Sponsor, and Submitter.

### ***B.3.2.3 My Alliance Contacts Report***

- (1) Conditions Met –
  - Current User AND
  - Approval Status is “Approved.”
- (2) Information Available –
  - Alliance Acronym, Alliance Organization Name, Agreement Type, Agreement Status, Months Remaining, Alliance Contact Name, Alliance Contact Email, INCOSE Sponsor, and Outreach Manager.

### ***B.3.2.4 My Activities Report***

- (1) Conditions Met –
  - Current User OR
  - Activity Status is not blank.
- (2) Information Available –
  - Alliance Acronym, Alliance Organization Name, Activity Type, Activity Status, Activity Description, Activity Comments, MARCOM Coordination Status, (Specific) Coordination Status, and Coordination Contact (ARMS group email).

### ***B.3.2.5 My Activity Dates Report***

- (1) Conditions Met –
  - Current User
- (2) Information Available –
  - Alliance Acronym, Alliance Organization Name, Activity Type, Activity Status, Activity Description, Activity Comments, and Key Dates 1 – 3 & Descriptions.

## **B.3.3 Leadership Reports for the Leadership Dashboard**

These reports are used with the Leadership Dashboard.

### ***B.3.3.1 Leadership Alliance Agreement Summary Report***

- (1) Conditions Met –
  - Agreement Status is not blank.
- (2) Information Available –
  - Alliance Acronym, Alliance Organization Name, Agreement Type, Agreement Status, Link to Agreement on Sharepoint, Agreement Execution Date, Agreement Expiration Date, Months Remaining, INCOSE Relationship Manager, and INCOSE Sponsor.

### ***B.3.3.2 Leadership Activity Summary Report***

- (1) Conditions Met – None
- (2) Information Available –
  - Alliance Acronym, Alliance Organization Name, INCOSE Relationship Manager, Activity Type, Activity Status, At Risk, Activity Description, Activity Comments, MARCOM Coordination Status, (Specific) Coordination Status, INCOSE Advertising, and Partner Advertising.

### ***B.3.3.3 Leadership Flagged Agreements or Activities Report***

(1) Conditions Met –

(a) Alliance Agreements –

- Agreement Status is “Expired,” “HOLD,” “In Progress – Help!”, or “Renewal Under Evaluation” OR
- 45-Day Updates is checked (no update in last 45 days) OR
- Months Remaining is less than 2 months.

(b) Activities –

- At Risk is checked (help asked for) OR
- Activity Status is “Cancelled,” “Hold,” or “In Progress – Help!”

(2) Information Available –

- Alliance Acronym, Alliance Organization Name, INCOSE Relationship Manager, INCOSE Sponsor, Agreement Type, Agreement Status, Months Remaining, 45-Day Update Flag, Activity Type, Activity Status, Activity Description, Activity Comments, At Risk Flag, and Data Type.

## **B.4 Dashboards**

Dashboards provide current information on alliance agreements through reports and also provide links to various sheets, forms, and reports. There are five dashboards:

- (1) Welcome Portal – for any member to access
- (2) Roll-up – an overall summary
- (3) My Alliance Agreements & Activities – specific for each Relationship Manager
- (4) Outreach Manager – for the Outreach Leadership Team
- (5) Leadership – for the President and President-Elect

The top of all dashboards is similar:

- Left-hand side (2/3s across):
  - Top: INCOSE Outreach ARMS
  - Middle: Alliance Relationship Management System
  - Bottom: Dashboard Name
- Right-hand side (1/3 across):
  - Left: Links to all 5 Dashboards (links active based on access)
  - Right: INCOSE Logo

### **B.4.1 Outreach Welcome Portal Dashboard**

This is the dashboard for getting started with Outreach Alliance Agreements. It is available on the Connect Home page for members, in the Groups and Initiatives section, the 5<sup>th</sup> folder over, “Alliance Agreements Getting Started.”

On the “WELCOME PORTAL: Getting Started with Alliance Agreements” Portal, there are 5 sections:

1. Take Action – This section contains links to sheets, forms, reports, and dashboards in Outreach ARMS.
  - a. Alliance Agreements
    - Approved Alliance Agreement Summary Report (listing)

- Submitting a New Alliance Agreement Form
- Approved Alliance Agreement – Enter Details (after agreement approved)
- b. Activities
  - Submit a New Activity Form (for approved alliance agreements)
- c. Dashboards
  - Review & Edit MY Agreements & Activities (goes to My Alliance & Activities Dashboard)
- d. Other
  - How Do I ...? Sheet – Some Frequently Answered Questions (FAQs) and answers
  - Submit Feedback on ARMS Form
- 2. Purpose – This section provides the purpose of INCOSE Outreach from policy OUT-100 Outreach Principles.
- 3. Feedback – This section is the Outreach ARMS Feedback Form to provide feedback.
- 4. Contact – This section provides the name and email for key Outreach ARMS personnel.
  - Director of Outreach
  - ARMS Group Manager
  - ARMS Technical Support
- 5. Reference Materials – This section provides links to various references.
  - Outreach ARMS User's Guide (this document)
  - Outreach Policies
  - ARMS Definition Sheet (definitions for terms used in ARMS)
  - Activity Reference List (a list of agreement activities and the respective INCOSE Leadership that should be informed when activities are in progress).
  - Outreach Team List (leadership, Relationship Managers, and technical support).
  - ARMS Automations Sheet (the listing of the automatic email alerts).
  - System Diagrams (for ARMS for the Outreach Leadership).

### **B.4.2 Outreach Roll-Up Dashboard**

This is an overall or rollup dashboard. There are two sections: (1) Alliance Agreements and (2) Activities.

1. Alliance Agreements
  - Submitted Alliance Agreement Detail Report (for submitted alliance agreements)
  - Total Number of Alliance Agreements Chart by activity (Submitted, Agreement Executed, and Expired).
  - Approved Alliance Agreement Detail Report
2. Activities
  - All Activity Summary Report
  - Current Numbers for “Total Activities” and “Total Activities with “Help” Status.”
  - Activity Totals by Status – Not Started, Started, In Progress – Update, In Progress – Help!, Completed, Cancelled, and HOLD.

### **B.4.3 Outreach My Alliance Agreements & Activities Dashboard**

This dashboard is for Relationship Managers and has sections for Alliance Agreements and Activities.

1. Alliance Agreements
  - My Alliance Agreement Contacts Report
  - My Submitted Alliance Agreements Report
  - My Approved Alliance Agreements Report
2. Activities
  - My Activities Report
  - My Activity Dates Report

### **B.4.4 Outreach Manager Dashboard**

This dashboard is for the Outreach Leadership Team. The information provided is overall for all alliance agreements and activities. There are four sections.

5. Links – These are links to the forms, sheets, reports, and dashboards within Outreach ARMS.
6. Alliance Agreements
  - A chart of the total number of alliance agreements by status (submitted, agreement executed, and expired).
7. Activities
  - Total Number of Outreach Activities by Type chart
  - Activity Totals by Status (Not Started, Started, In Progress – Update, In Progress – Help, Completed, Cancelled, and HOLD).
  - Current Numbers for “Total Activities” and “Total Activities with “Help” Status.”
  - Activity Status by Activity Type column chart (horizontal labels are the activity statuses and the column colors are the activity types).
8. Flagged Alliance Agreements and Activities
  - Flagged Alliance Agreement and Activity Report (double-clicked to open the full report).

### **B.4.5 Outreach Leadership Dashboard**

This dashboard is for the INCOSE Leadership (President and President-Elect). The information provided is overall for all alliance agreements and activities. There are three sections.

4. Links – These are links to selected forms, sheets, and reports within Outreach ARMS.
5. Alliance Agreements
  - A chart of the total number of alliance agreements by status (submitted, agreement executed, and expired).
  - Current Numbers for “Total Agreements” and “Total Agreements with “Help” Status.”
  - Flagged Alliance Agreements and Activities Report (double-click to open the full report).
  - Leader Alliance Agreement Summary Report (double-click to open the full report).
6. Activities
  - Activity Totals by Status (Not Started, Started, In Progress – Update, In Progress – Help, Completed, Cancelled, and HOLD).
  - Current Numbers for “Total Activities” and “Total Activities with “Help” Status.”

- Activity Status by Activity Type column chart (horizontal labels are the activity statuses and the column colors are the activity types).
- Leader Activity Summary Report (double-click to open full report).

## **B.5 Automations**

These are automatic email alerts created based on conditions in the data. There are triggers, conditions, and emails for each alert.

### **B.5.1 Alliance Agreement Automations**

These are automatic email alerts based on changes / updates for alliance agreements in Outreach ARMS.

#### ***B.5.1.1 Outreach Alliance Agreement Approval Request Alert***

- (1) Condition(s) Met – Approval Status of “Submitted”
- (2) Email Sent to – Outreach Manager, triggers follow-on emails
  - (a) If “Declined” – Sends to Submitter
  - (b) If “Approved” – Sends to Submitter (info Relationship Manager, Sponsor) requesting additional information.

#### ***B.5.1.2 Monthly Alliance Agreement Update Request Alert***

- (1) Trigger – on the 10<sup>th</sup> of each month
- (2) Condition(s) Met –
  - Approval Status – “Approved” AND
  - Agreement Status – All but “Closed.”
- (3) Email Sent to – INCOSE Relationship Manager
- (4) Provides Basic Information – Request for update

#### ***B.5.1.3 45-Day Alert***

- (1) Condition(s) Met –
  - 45 days since last update AND
  - Agreement Status – Approved to Explore, In Progress – OK, In Progress – Help!, Agreement Executed, Renewal Under Investigation, and HOLD.
- (2) Email Sent to – INCOSE Relationship Manager (info's Outreach Manager).
- (3) Provides Basic Information – Request's update to their MY Alliance Agreement and Activities Dashboard.

#### ***B.5.1.4 New Assigned Alliance Relationship Manager Alert***

- (1) Condition(s) Met –
  - INCOSE Relationship Manager – changes
- (2) Email Sent to – Relationship Manager, Sponsor, and Outreach Manager



#### ***B.5.1.5 Pending Alliance Agreement Expiration Alert***

- (1) Trigger – 6, 5, 4, 3, 2, or 1 Months Remaining (to Expiration Date)
- (2) Condition(s) Met –
  - Agreement Status – NOT Expired
- (3) Email Sent to – Relationship Manager, Sponsor, and Outreach Manager
- (4) Provides Basic Information – Alert to discuss if would like to renew.

#### ***B.5.1.6 Alliance Agreement At Risk Alert***

- (1) Trigger – At Risk Flag checked (when In Progress – Help! is selected for status).
- (2) Condition(s) Met –
  - Activity Status – “In Progress – Help!” AND
  - Agreement Status – NOT Expired or Closed
- (3) Email Sent to – Relationship Manager, Sponsor, and Outreach Manager.

### **B.5.2 Activity Automations**

These are automatic email alerts based on changes / updates for activities in Outreach ARMS. Emails are sent to the respective ARMS group emails (INCOSE Leadership) based on the Activity Type.

#### ***B.5.2.1 New Activity Alerts***

- (1) Condition(s) Met –
  - Activity Status – “Started”
- (2) Email Sent to – ARMS Group Email and Outreach Manager.
- (3) Provides Basic Information – on the activity (Activity Description, Activity Comments, and Key Dates / Descriptions – as available).
- (4) Requests Contact for More Information – Relationship Manager

#### ***B.5.2.2 Monthly Activity Update Request Alert***

- (1) Trigger – on the 10<sup>th</sup> of each month
- (2) Condition(s) Met –
  - Activity Status – NOT Cancelled, Complete, or HOLD AND
  - Activity Type – NOT blank.
- (3) Email Sent to – Relationship Manager
- (4) Provides Basic Information – Request's update

#### ***B.5.2.3 New Activity Update Alerts***

- (1) Condition(s) Met –
  - Activity Status – “In Progress - Update”
- (2) Email Sent to – ARMS Group Email and Outreach Manager.
- (3) Provides Basic Information – on the activity (Activity Description, Activity Comments, and Key Dates / Descriptions – as available).
- (4) Requests Contact for More Information – Relationship Manager

#### ***B.5.2.4 New Activity Completion Alerts***

- (1) Condition(s) Met –
  - Activity Status – “Complete”
- (2) Email Sent to – ARMS Group Email and Outreach Manager.
- (3) Provides Basic Information – on the activity (Activity Description, Activity Comments, and Key Dates / Descriptions – as available).
- (4) Requests Contact for More Information – Relationship Manager

#### ***B.5.2.5 New Activity Hold Alerts***

- (1) Condition(s) Met –
  - Activity Status – “HOLD”
- (2) Email Sent to – ARMS Group Email and Outreach Manager.
- (3) Provides Basic Information – on the activity (Activity Description, Activity Comments, and Key Dates / Descriptions – as available).
- (4) Requests Contact for More Information – Relationship Manager

#### ***B.5.2.6 New Activity Completion Alerts***

- (1) Condition(s) Met –
  - Activity Status – “Complete”
- (2) Email Sent to – ARMS Group Email and Outreach Manager.
- (3) Provides Basic Information – on the activity (Activity Description, Activity Comments, and Key Dates / Descriptions – as available).
- (4) Requests Contact for More Information – Relationship Manager

#### ***B.5.2.7 Activity Red Flag Alert***

- (1) Trigger – At Risk Flag checked
- (2) Condition(s) Met –
  - Activity Status – In Progress – Help!
- (3) Email Sent to – Sponsor and Outreach Manager
- (4) Requests Contact for More Information – Relationship Manager

## References

### **REF-1 INCOSE Policies**

OUT-100 Outreach Principles

OUT-101 Guidelines for the Formation and Approval of Alliances, MOUs, and MOAs

OUT-103 Ambassadors

### **REF-2 INCOSE Procedures, Templates, and Forms**

OUT-PROC-01 Creating / Maintaining Alliance Agreements

OUT-TEMP-01 Alliance Agreement Memorandum of Understanding (MOU)