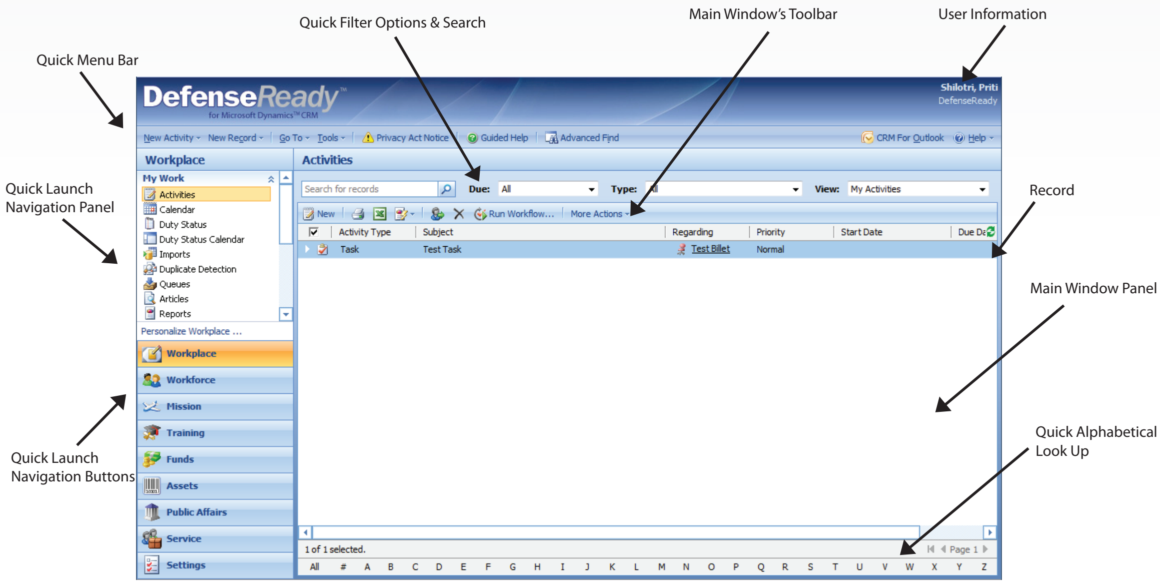
Evaluations Management

DefenseReady Quick Reference Guide

Welcome to DefenseReady!

Built on the Microsoft Dynamics CRM platform, Defense*Ready* is a suite of DoD enterprise business applications providing solutions for Force Readiness, Mission Execution, and Training Management. Defense*Ready* allows DoD organizations to effectively manage personnel and resource information at the local level, in order to achieve mission readiness and force mobilization. This guide is intended for users as a reference guide for some of the most common actions within Defense*Ready*.



Navigate Using the Quick Launch Navigation

The *Quick Launch Navigation* displays to the left of the content area on every page of a site, and contains links to the site's sections such as sub sites, document libraries, lists, and discussion boards.

Below is a description of each section displayed on the *Quick Launch Navigation*:

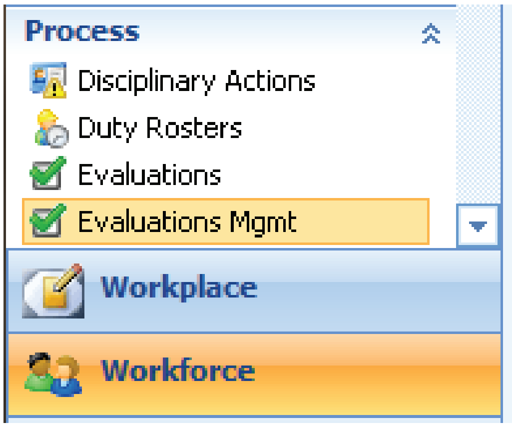
- *Workplace* displays all of the contacts, activities, calendars, queues, and announcements related to the sections within the sites.
- *Workforce* displays information regarding managing personnel information, plus staff action tasks.
- *Mission* is an enterprise-level deployment management system supporting operational and executive travel missions.
- *Training* provides a complete learning management system for members of government organizations who require on-the-job training.
- *Funds* displays information on two central aspects which apply to all organizations: budget and acquisition.
- *Assets* displays information on end-to-end asset accountability and equipment visibility tied to users.
- *Public Affairs* consists of three main functions: public information, command and internal information, and community relations.
- *Service* standardizes and manages requests and their fulfillment, monitors the workflow for all of the services, and provides a single point of entry for all needs in the organization.

Not all document libraries, picture libraries, lists, surveys, and discussions contained in a site are displayed on the Quick Launch Navigation. Additional items may be added by modifying settings.

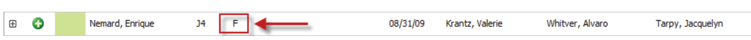
J1 walkthrough - Modify rating chain, and start evaluation process

Modifying the rating chain before starting the evaluation process

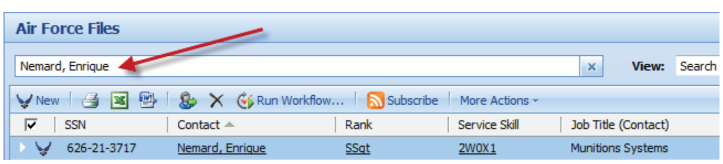
1. Select the *Evaluations Mgmt* link within the *Workforce* section.



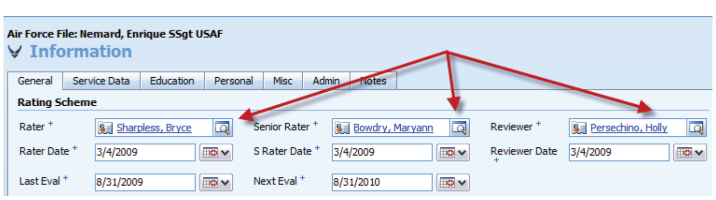
2. The current rating chain can be seen within the management screen. If this needs to be changed, look up the ratee in the Service-specific files based on the "Svc" field. NOTE: A = Army, N = Navy, F = Air Force, M = Marines.



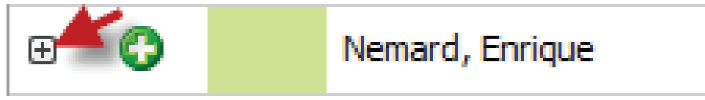
3. Search the Service-specific files for the ratee.



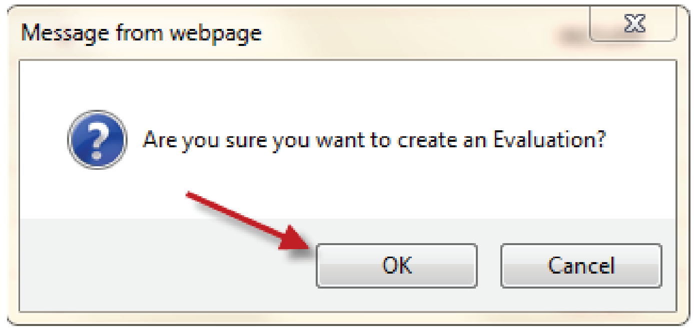
4. Open the *Service File* and update the rating chain as needed.



5. Start the evaluation process by clicking the "+" sign

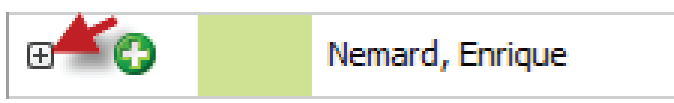


Once prompted, click the "OK" button.

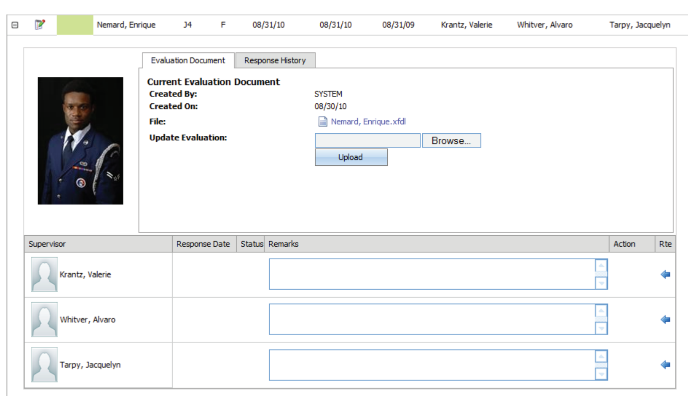


Viewing an evaluation in process

1. Clicking the "+" sign will show the details of the evaluation.

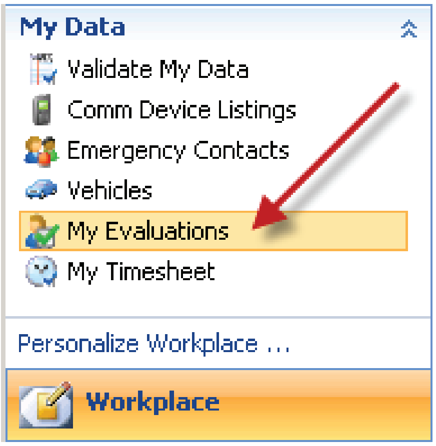


2. The evaluation document can be downloaded and the entire rating chain can be viewed. Also, by clicking on the *Response History* tab, any approvals and/or comments from the rating chain can be viewed.

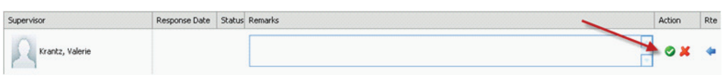


Rating scheme team member walkthrough

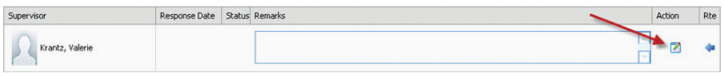
1. Once a member of the rating chain logs in, they can click on the *My Evaluations* link within the *Workplace* section.



2. Once the evaluation is expanded to see details, the person that must perform the next action on an evaluation will see *Approve/Reject* buttons. Remarks can be entered before selecting the action.



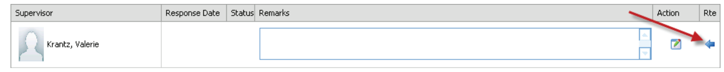
3. Once all rating scheme members have approved the evaluation, they must mark the evaluation as signed by clicking the icon indicated here. Every member in the rating scheme will have to confirm the evaluation has been signed by clicking this icon.



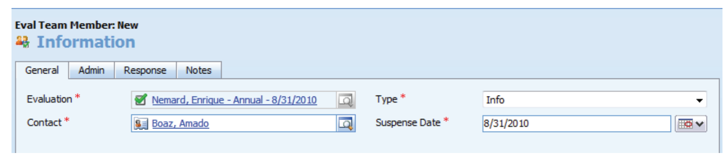
4. Once all rating scheme team members have approved and signed the evaluation, it would then go into a queue as a task, if the organization has set up this workflow and queue.

Routing to additional members

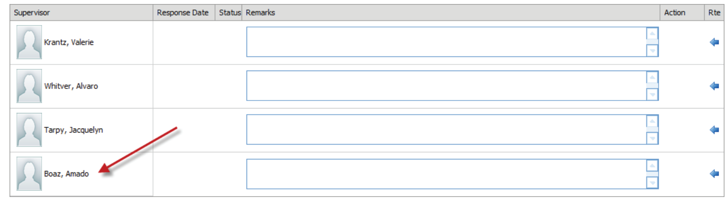
1. The evaluation can also be routed to additional team members for review by selecting the icon as indicated here and entering the contact that needs to be included.



2. Once this screen pops up, all required fields must be filled in, including the type of response and the suspense date.



3. After this record has been saved and closed, the new team member will appear in the list in either the *Evaluations Management* page or the *My Evals* page.

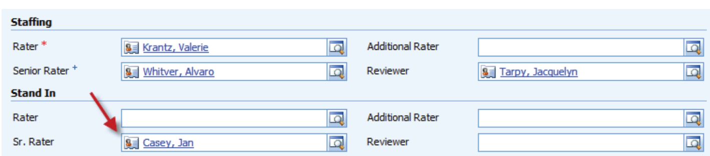


DefenseReady is a force-multiplier that provides a clear view of the total enterprise.

Using a stand-in

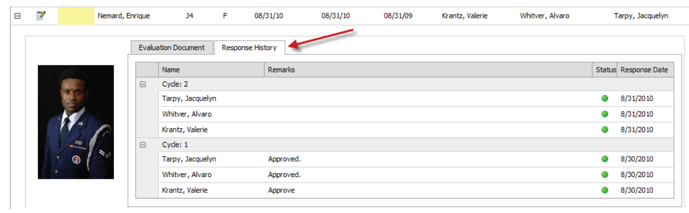
1. An evaluation can have someone perform the process actions other than those in the rating chain via a stand-in Rater/Sr.Rater/Reviewer (and Additional Rater in the Air Force). First the evaluation must be opened by clicking the icon indicated here.

2. Once the evaluation record is opened, there is a *Stand In* section just below the rating scheme. Entering a contact for any position will replace the current team member with the new contact. *NOTE: A stand-in cannot be modified once the approval/signature process has started. Stand-ins must be added at the beginning of the approval process.



Viewing the response history

1. The history of responses may be tracked by opening the evaluation in either the *Evaluations Mgmt* page or within the *My Evals* page. This will show the responses and the dates the responses were recorded in order.



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