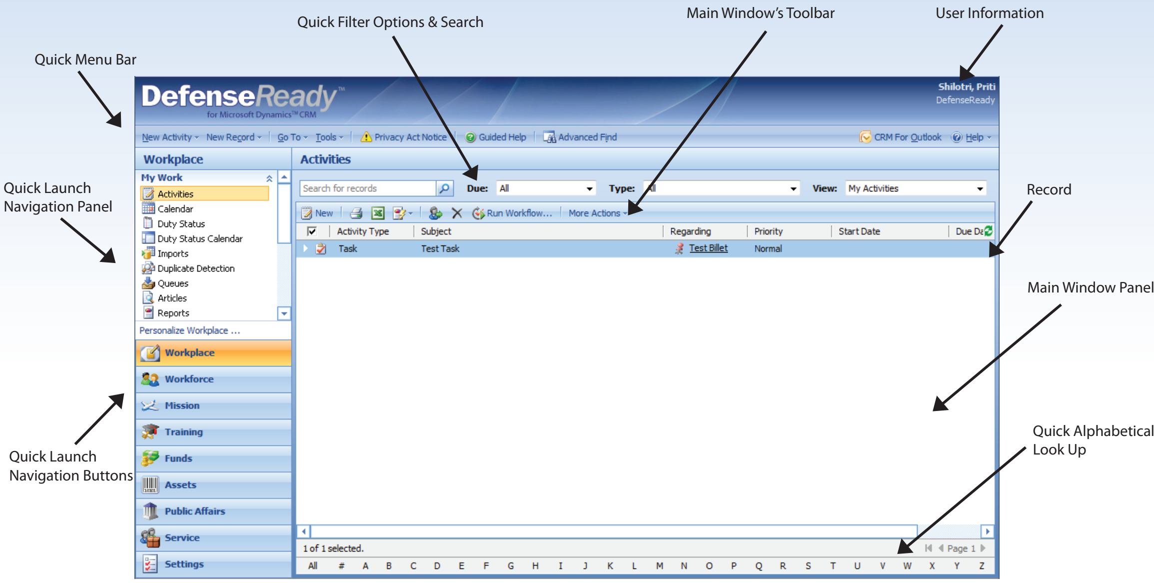
DefenseReady™

Managing Billets

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*.

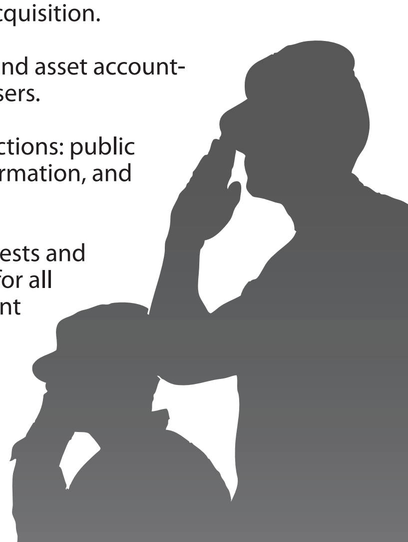


Navigate Using the Quick Launch Navigation

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*:

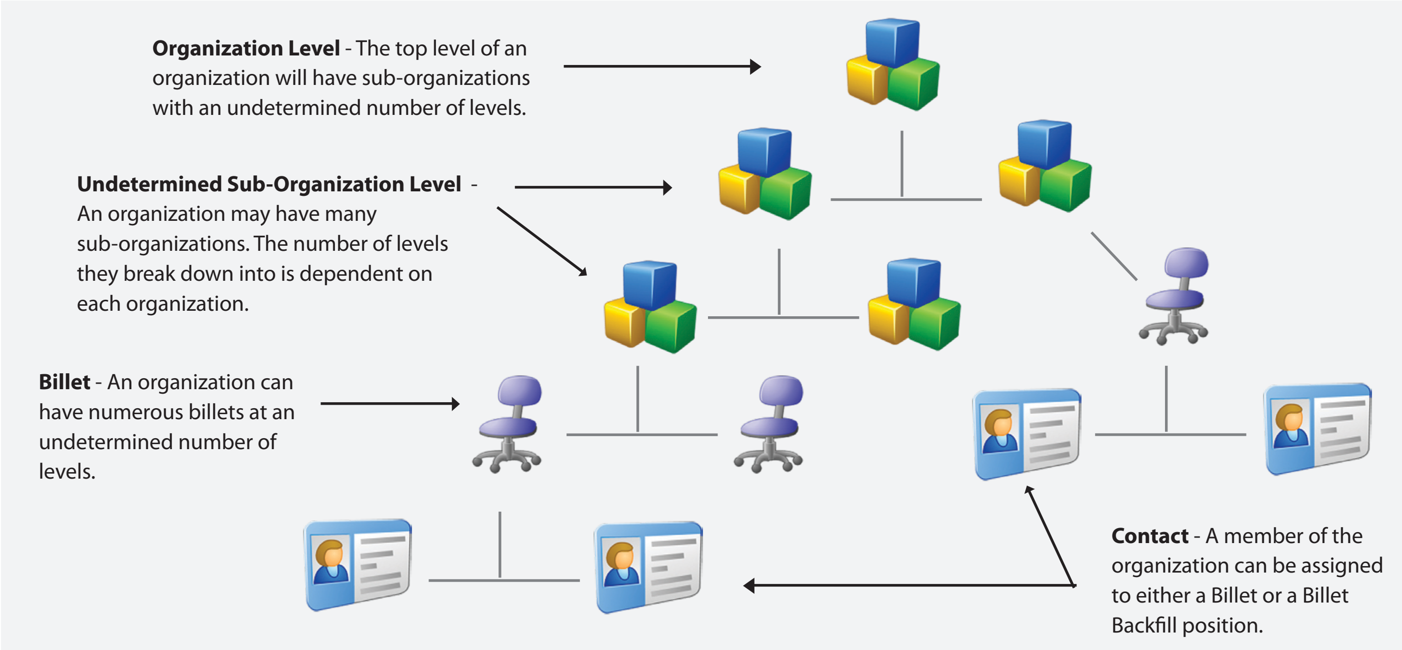
- *Workplace* displays all of the contacts, activities, calendars, queues, and announcements related to the sections within the sites.
- *Workforce* displays information regarding managing personnel information, plus staff action tasks.
- *Mission* is an enterprise-level deployment management system 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.

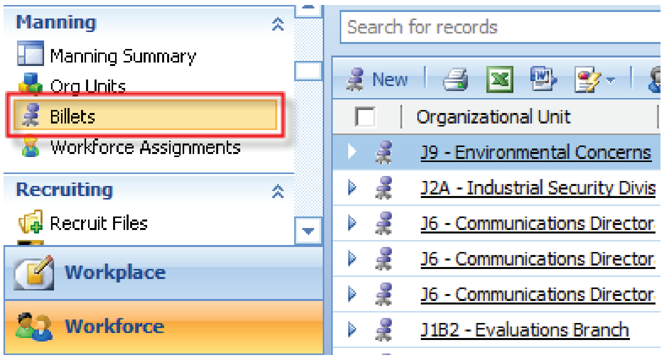
Managing your agency's Billets

The Manning Summary Report can be used to compare irregularities in the billet assignments.



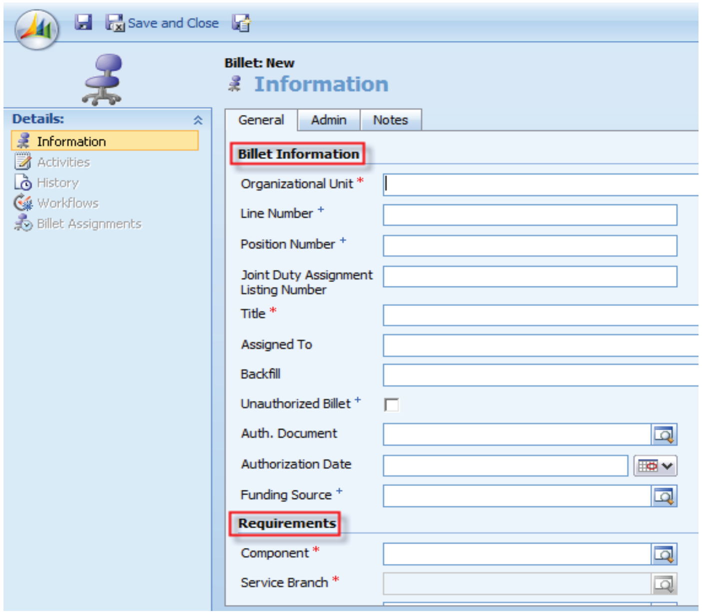
Create a new Billet

1. From the *Workforce* link, click on *Billets* from the *Manning* Section (Billets grid displayed below).



2. If a Billet does not already exist, click the *New* button at the top of the Billet grid (the Billet form is displayed).

Tip #1: To ensure that a Billet does not already exist, use the "Search for records" feature.



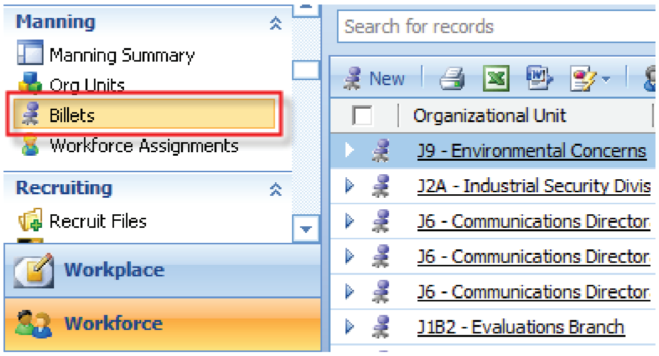
3. Fill in the required information (any field with a *).

4. Press the *Save and Close* button.

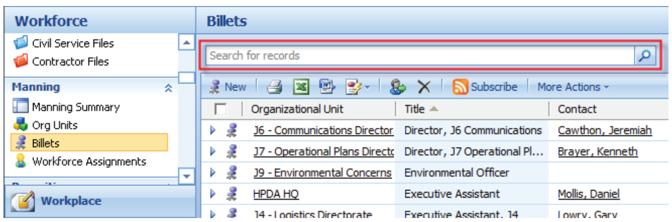
5. The record will be saved and the window will close. The new Billet will be displayed in the Billets grid.

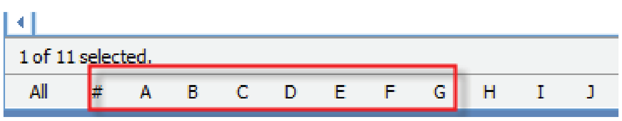
Modifying an existing Billet

1. From the *Workforce* link, click on *Billets* from the *Manning* Section (Billets grid displayed below).

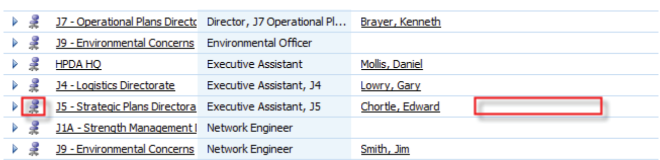


2. Search for a Billet either by typing the name in the *Search for records* field or by selecting a letter of the alphabet at the bottom of the screen.





3. To open the Billet, double click on the icon or an area that does not contain a hyperlink.



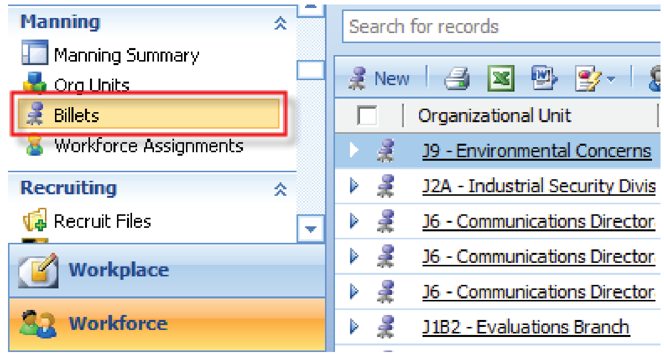
Tip #2: The underlined text will link you to the particular screen for the column. By clicking on the icon, you will be sure to receive all of the information for that Personnel record.

4. Make the required modifications to the record (populate, modify, or delete data in fields).

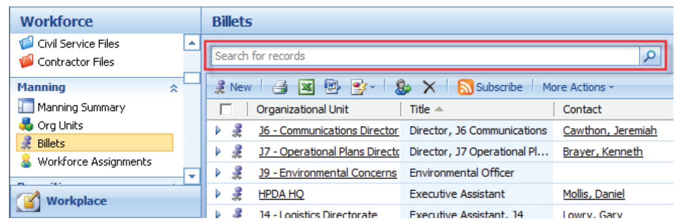
5. Press the *Save and Close* button.

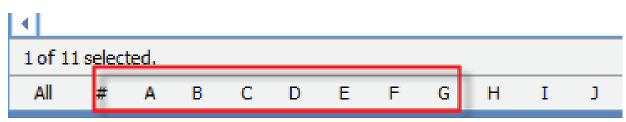
Deactivate an existing Billet

1. From the *Workforce* link, click on *Billets* from the *Manning* Section (Billets grid displayed below).

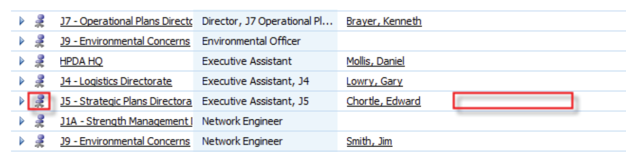


2. Search for a record either by typing the name in the *Search for records* field or by selecting a letter of the alphabet at the bottom of the screen.



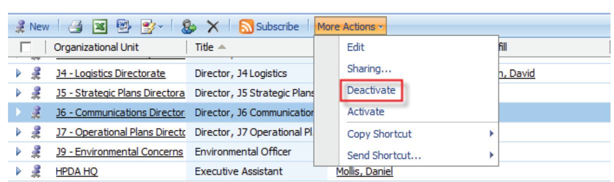


3. Select a Billet by single clicking on the icon or an area that does not contain a hyperlink.



4. Click on the *More Actions* button.

5. Select the *Deactivate* option.



Tip #3: When "Deactivating" a Billet, the members assigned to that Billet are automatically removed from it as well as the Billet Backfill.

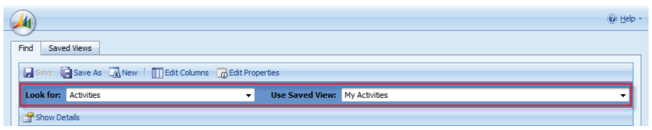
The record is then converted to a read-only file and can be found by using the Advanced Find capability.

Working with Advanced Find

Advanced Find can be accessed from any screen by clicking on the *Advanced Find* button from the Quick Menu Bar. Advanced Find allows users to query any Defense*Ready* data that they have access to, and save these queries as a custom view for future use.

1. From the Advanced Find dialog box, the values for a search can be defined.

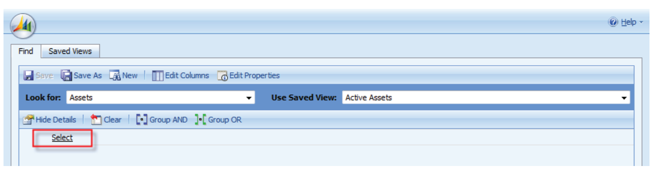
2. Select the *Look for* drop down list to choose the query item. Based on the query item chosen under the *Look for* drop down, the results in the *Use Saved View* drop down will change.



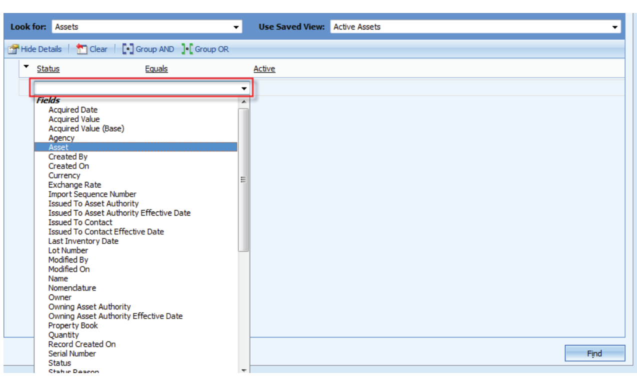
If there are no "Saved Views" under the Use Saved View drop down that fit the needs of the search, leave it blank and continue to the next step, or select New to start a new query on the item.

3. Below the *Look for* drop down, select *Show Details* (once selected, it will change to an option for *Hide Details*).

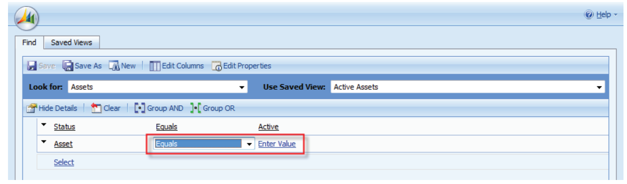
4. Click on the *Select* link to further define the search.



5. The *Select* link will turn into a drop down list; choose the field to be searched from this list.



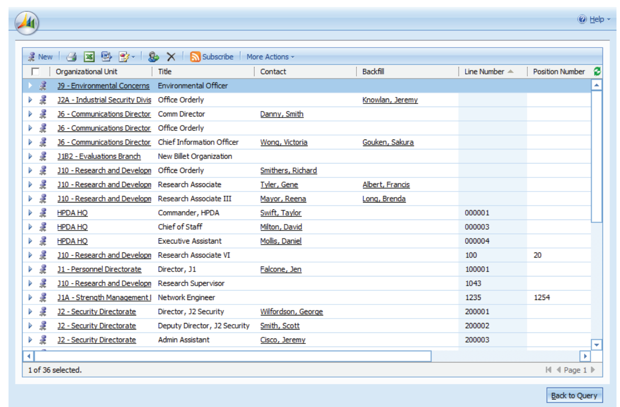
6. Click on the *Equals* drop down to choose a modifier for your results. If a specific value is needed, it can be entered into the *Enter Value* box.



7. Using the Group function allows users to select multiple values. To use this function, enter at least two search criteria rows, then select each row using the arrow at the far left of it. Choose "Select Row" from the arrow drop down.

8. To just run the search without saving the query first: Click the *Find* button at the bottom right corner.

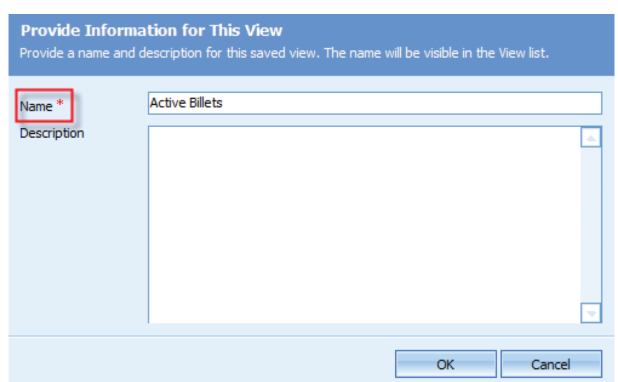
9. A list of search results will appear. Click on column names to sort if needed. From the toolbar, users can also export results to Excel, perform a mail merge, print results, perform duplicate detection on the records, or subscribe to an RSS feed of the search.



Save Query

1. To save the query for future use: Click *Back to Query* to go back to the search page, then click the *Save As* button.

2. Enter the new name of the search in the *Name* field, then click *OK*.



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