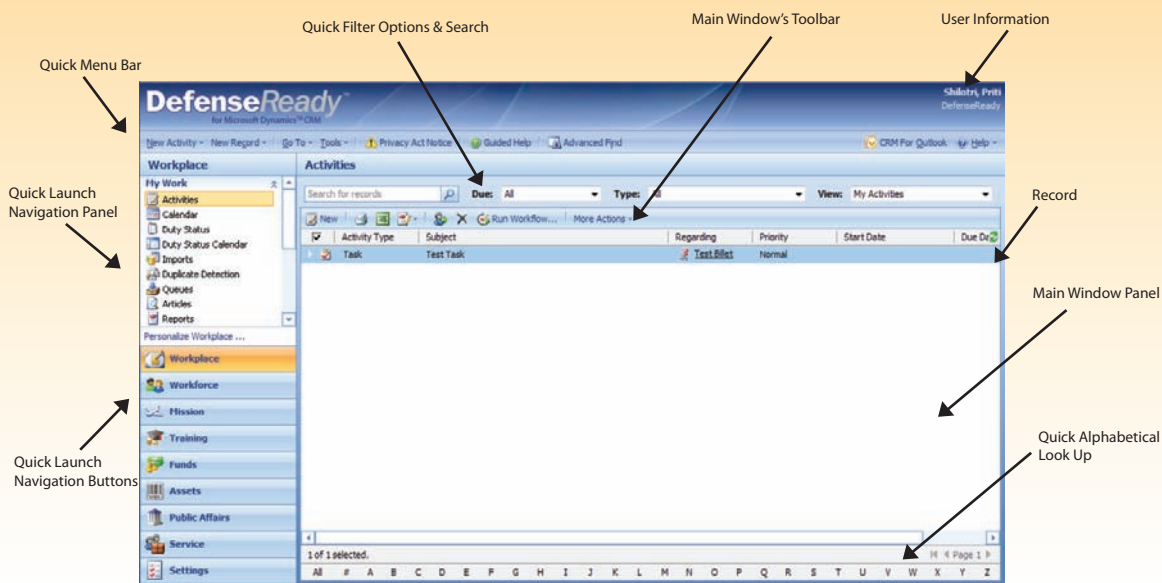


# Civil Service Personnel File

## DefenseReady Quick Reference Guide

### Welcome to DefenseReady!

Built on the Microsoft Dynamics CRM platform, DefenseReady is a suite of DoD enterprise business applications providing solutions for Force Readiness, Mission Execution, and Training Management. DefenseReady 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 quick reference guide for some of the most common actions within DefenseReady.



## Navigate Using the Quick Launch Navigation

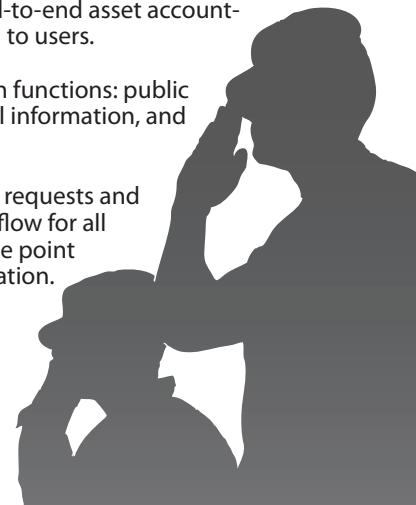
The *Quick Launch Navigation* displays to the left of the content area on every page of a site, and contains links to the site's sections such as sub sites, document libraries, lists, and discussion boards.

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.



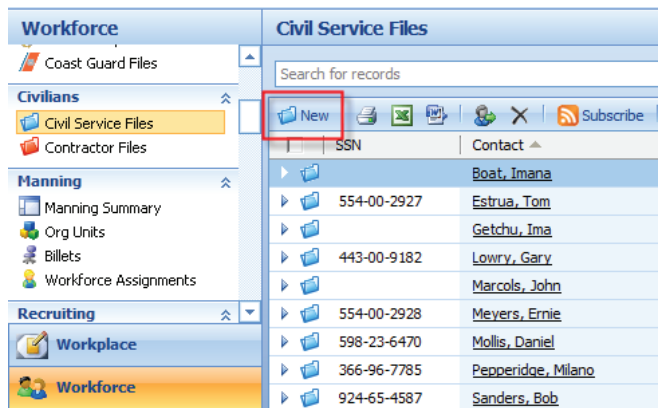
Not all document libraries, picture libraries, lists, surveys, and discussions contained in a site are displayed on the Quick Launch Navigation. Additional items may be added by modifying settings.



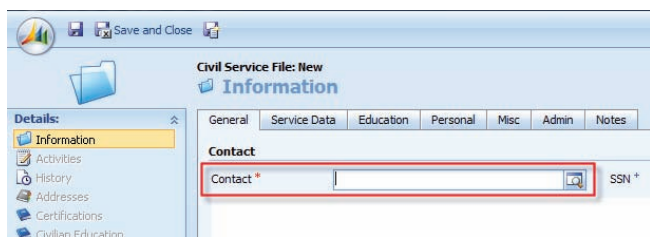
# Working with Civilian Personnel Records

## Create a new Personnel record

1. From the *Workforce* link, click the type of file needed from the *Civilians Section*.
2. Click on the *New* button (the Civil Service File grid is displayed).

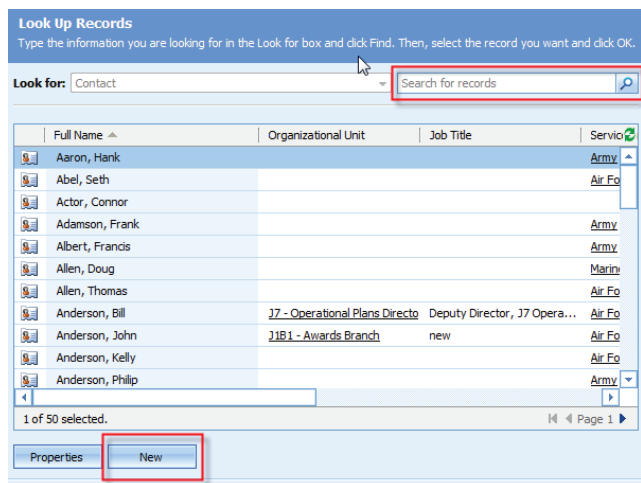


3. The first field is the Contact field. Click on the *Lookup* button at the end of the Contact field.

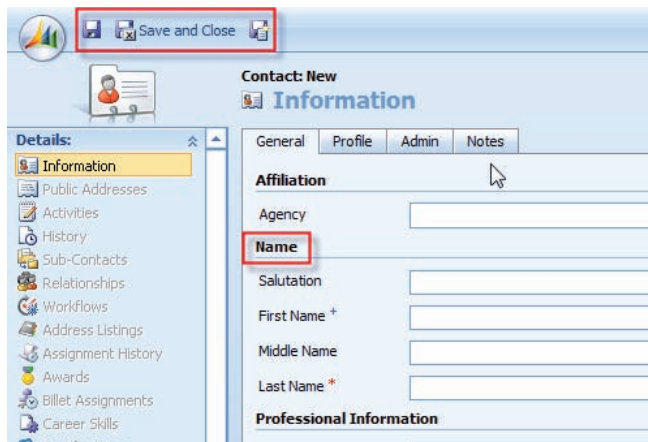


\* *Tip #1: A lookup field is any field with a magnifying glass button on its right (🔍). You can fill in this field by clicking the icon and selecting the value from a list. If you already know the value, you can type in all or part of the value in the text box. After you enter a value you can click on the *Lookup* button and the value will automatically fill without having to select the value from a list.*

4. The Contact lookup form opens.
5. If a contact record does not already exist, then click the *New* button at the bottom of the Contact lookup window.

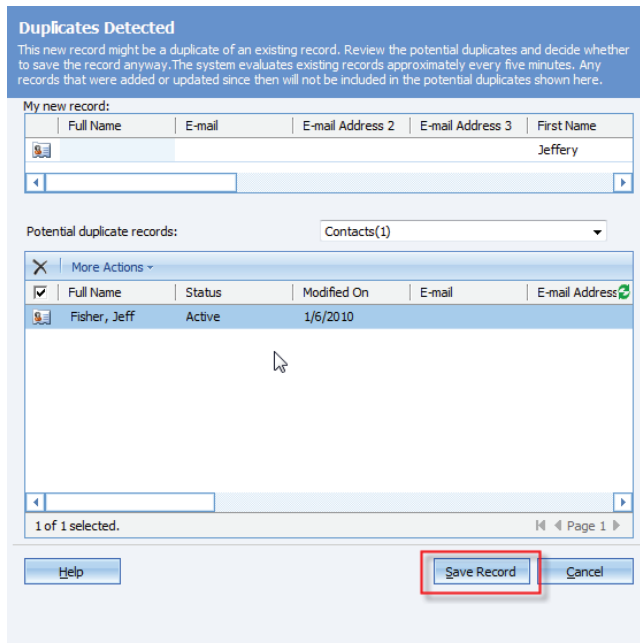


6. From the Contact window that opens, enter the Contact's First, Middle, and Last Name.
7. Press the *Save and Close* button.



*There are three types of Save buttons. The Save button will save the form but leave it open for additional changes, the Save and Close button will save the form and close it, returning back to the main window. The Save and New button will save the form and open a new blank form.*

8. You will be taken back to the Contact Lookup screen, which is filtered automatically to the person's name.
9. Click the *OK* or *Save Record* button.



*A blue warning box will appear for new contacts that may be duplicates, along with a list of names of the possible duplication. Choose *Save Record* if your contact is not a duplicate.*

10. Continue filling in the required fields (fields with the red \*) on the form.

11. Press *Save and Close*.

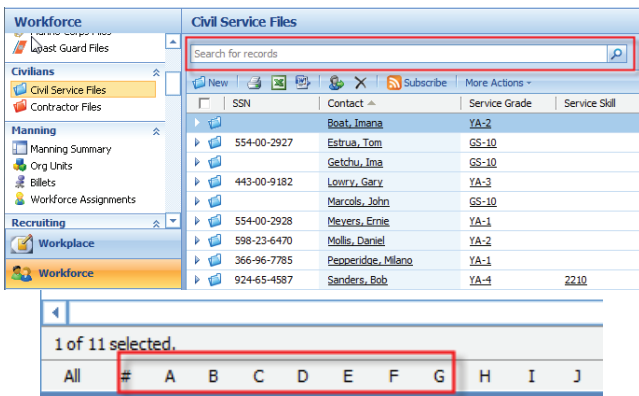
12. The record will be saved and the window will close, returning back to the associated Civil Service File grid.

 When the new Civil Service Personnel record was created, several things happened in the background: a Security file was created, and a Workforce file was created.

## Modify an existing Civilian Personnel record

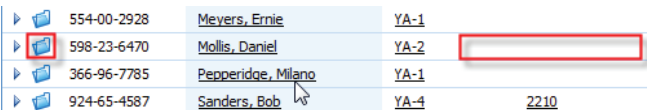
1. From the *Workforce* link, click the type of file needed from the *Civilians Section*.

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. To select a record, single click on the icon or an area that does not contain a hyperlink.

4. To open the record, 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.*

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

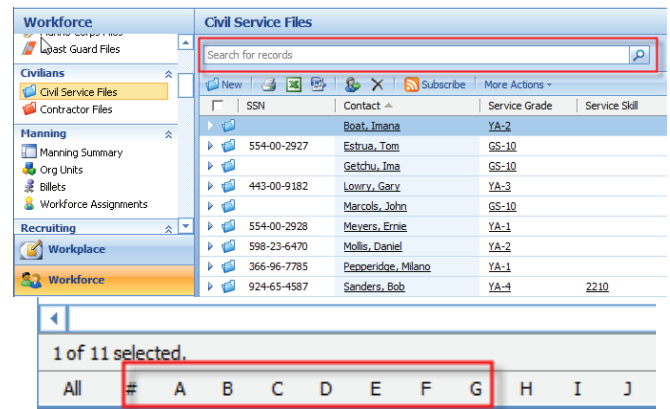
6. Press the *Save and Close* button.



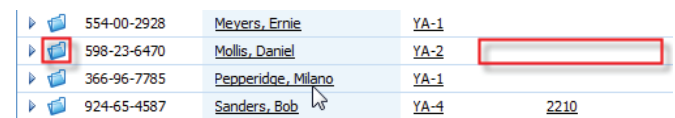
## Deactivate an existing Civilian Personnel record

1. From the *Workforce* link, click the type of file needed from the *Civilians Section*.

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.

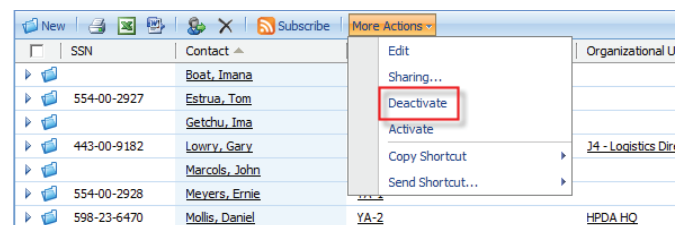


3. Select a record by single clicking on the icon or an area that does not contain a hyperlink.



4. Click on the *More Actions* button.

5. Select the *Deactivate* text.



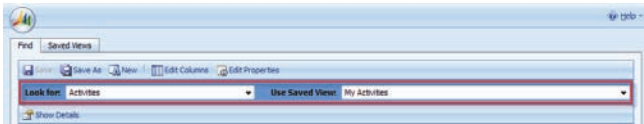
 The record is then converted to a read only file and can be found by using the Advanced Find capability.



## 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 DefenseReady 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.

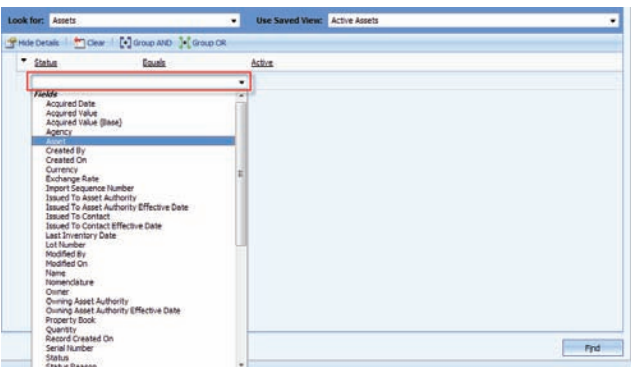


*If there are no "Saved Views" under the [Use Saved Views](#) drop down that fit the needs of the search, leave it blank and continue to the next step, or select [New](#) to start a new query on the item.*

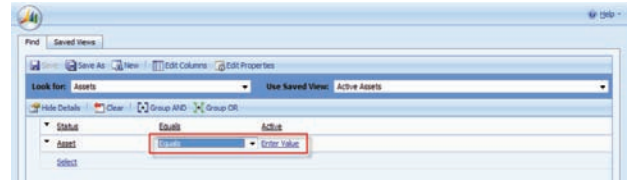
3. Below the [Look For](#) drop down, select [Show Details](#) (once selected, it will change to an option for [Hide Details](#)).
4. Click on the [Select](#) link to further define the search.



5. The [Select](#) link will turn into a drop down list; choose the field to be searched from this list.



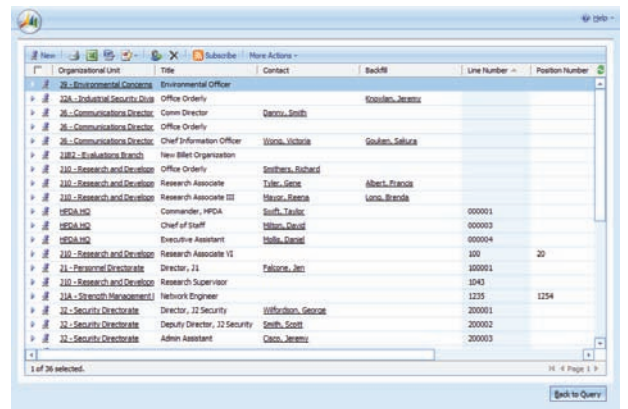
6. Click on the [Equals](#) drop down to choose a modifier for your results. If a specific value is needed, it can be entered into the [Enter Value](#) box.



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 the row and choosing "Select Row" from the arrow drop down. Once you have selected the rows, choose either "[Group AND](#)" or "[Group OR](#)" from the toolbar.

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](#).

**Provide Information for This View**  
Provide a name and description for this saved view. The name will be visible in the View list.

Name: Active Billets

Description:

OK Cancel