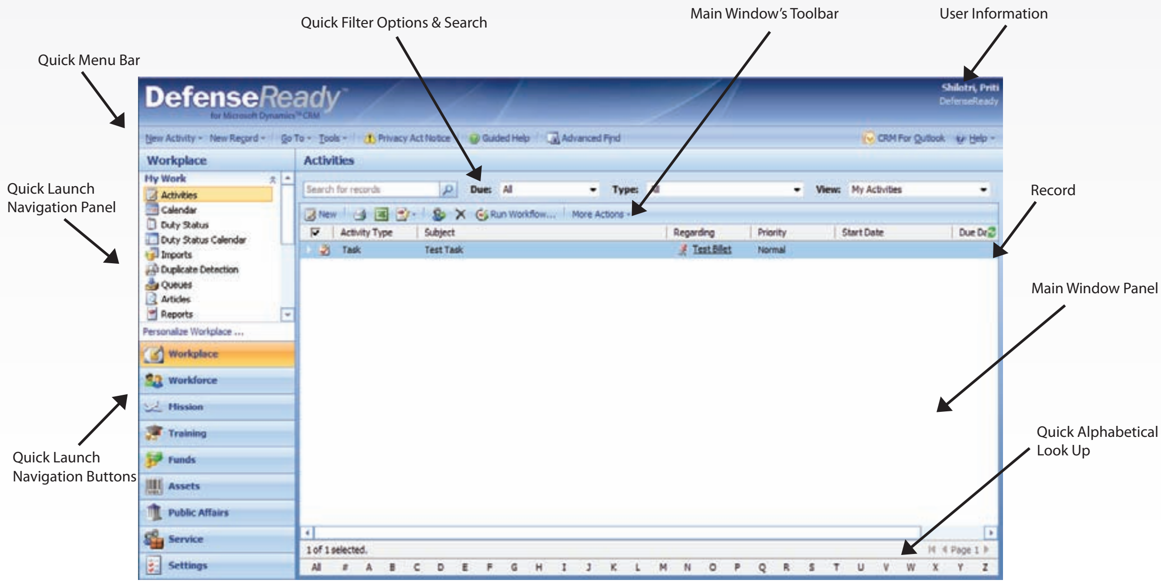
DefenseReady™

Forms Launcher

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 reference guide for some of the most common actions within DefenseReady.

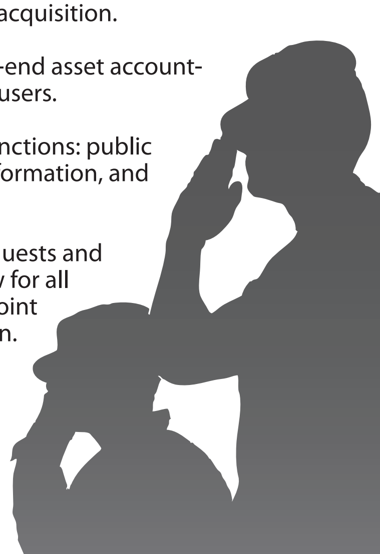


Navigate Using the Quick Launch Navigation

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.

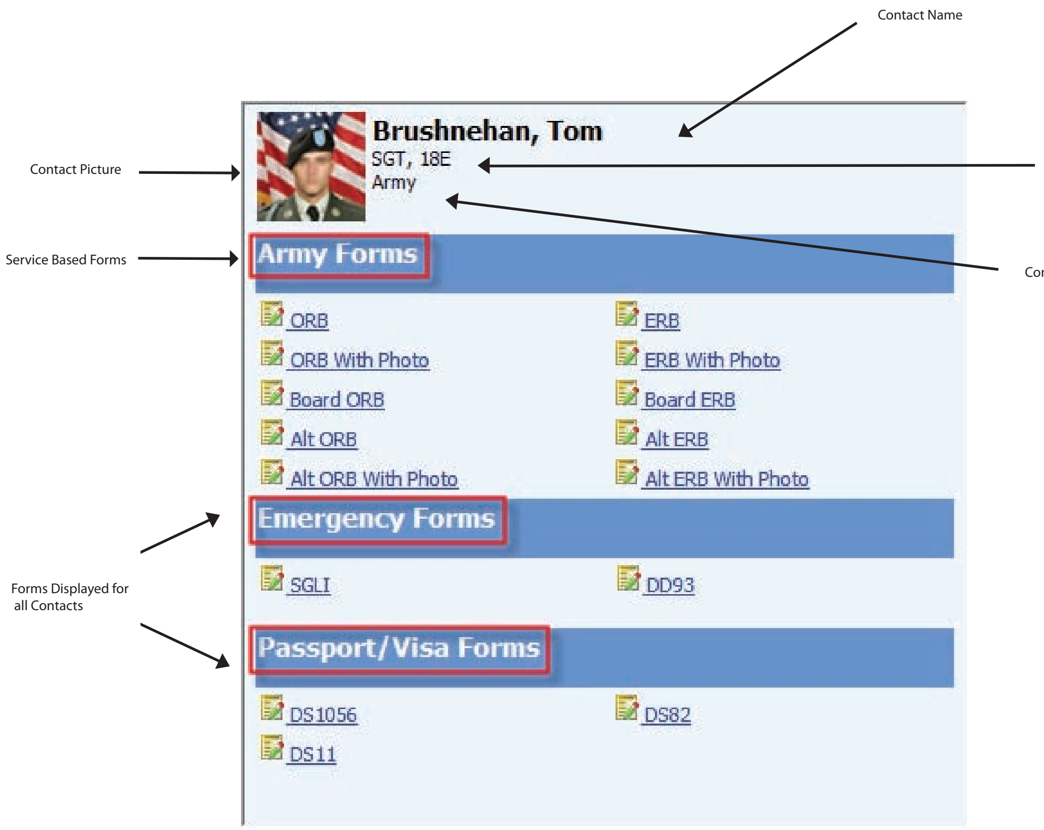
Below is a description of each section displayed on the *Quick Launch Navigation*:

- *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.

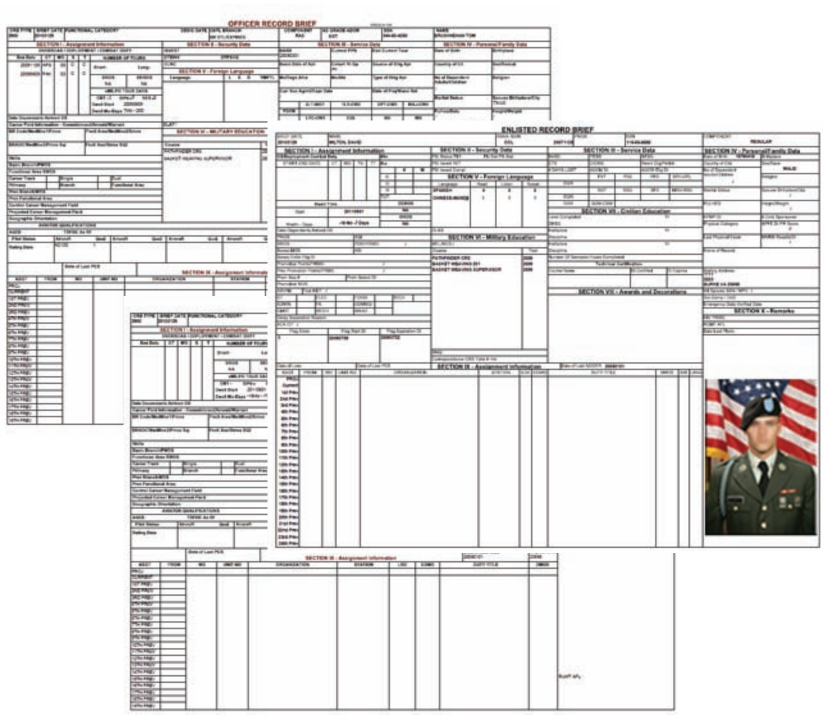
Forms Launcher Window



The Defense*Ready* *Forms Launcher* window is designed to have all the forms that are needed for a contact in one place. The different types of forms are based on the service the contact is in, as well as standard forms that are needed for the contact. The window is broken down into three sections, based on the types of forms.

Standard Service Forms

Defense*Ready* has the capability to interface with both Adobe PDF forms as well as Lotus Forms (formerly known as PureEdge). Our mapping engine provides the flexibility to support virtually any DoD/Federal form in these formats, and supports the built-in digital signature capabilities of both technologies.



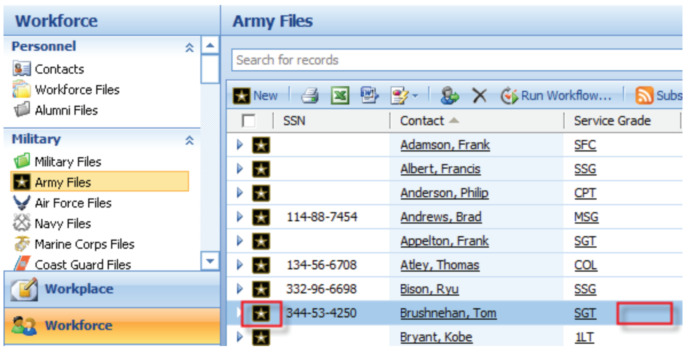
There are numerous forms that are available to our customers. The forms are service specific. The Officer Record Brief (ORB) and Enlisted Record Brief (ERB), seen to the right, are examples of forms that are available to the Army Service Member. There are different types of forms that can be chosen for a contact, which also include photos of the contact.

Working with Forms Launcher

Starting Forms Launcher

1. From the *Workforce* section, click the type of file needed from the *Civilians* or *Military Section* (Military Files and Civilian Files do not have a *Forms Launcher* button).

2. Select a record by single clicking either the icon or an area that does not contain a hyperlink (the Army File grid is displayed).

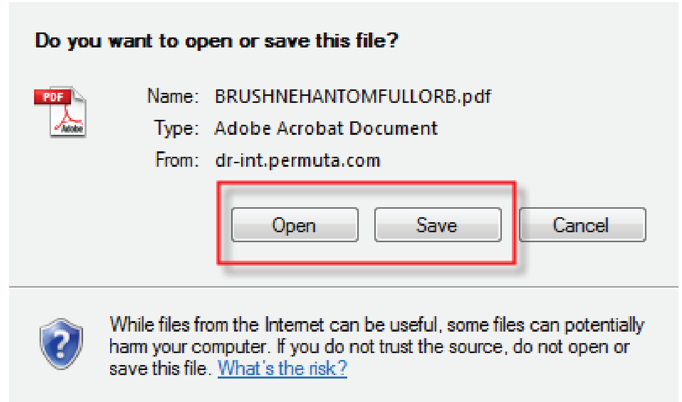


3. To view *Forms Launcher* from the contact record, click the *Forms* button.

4. The *Forms Launcher* window will open.

5. Click on the appropriate form to be displayed.

The type of contact file that is opened will display the Picture, Name, Rank, and Service, as well as the forms that are available based on the contact's service.



7. Click the *Open* button to view the form, or click the *Save* button to save the form to a file or a desktop.

**Tip #1: The form will auto-populate all of the details about the selected contact and then display them in the current form. The form is then ready to Save and Print.*

Microsoft Dynamics CRM

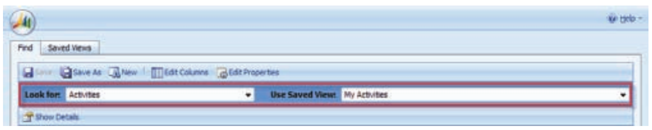
DefenseReady™

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.

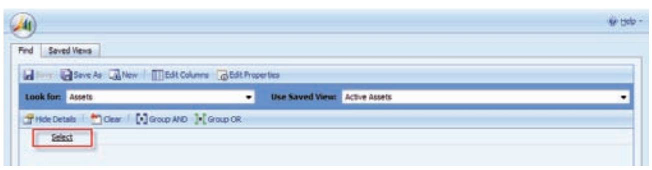
2. Select the *Look For* drop down list to choose the query item. Based on the query item chosen under the *Look For* drop down, the results in the *Use Saved View* drop down will change.



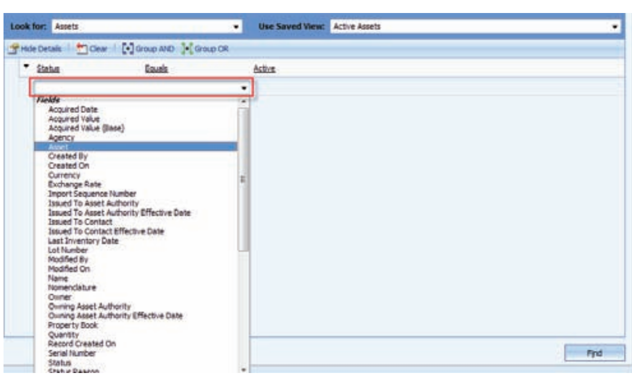
If there are no "Saved Views" under the Use Saved Views drop down that fit the needs of the search, leave it blank and continue to the next step, or select New to start a new query on the item.

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

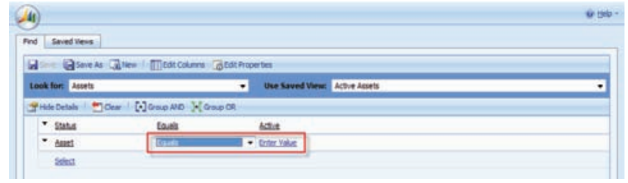
4. Click on the *Select* link to further define the search.



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



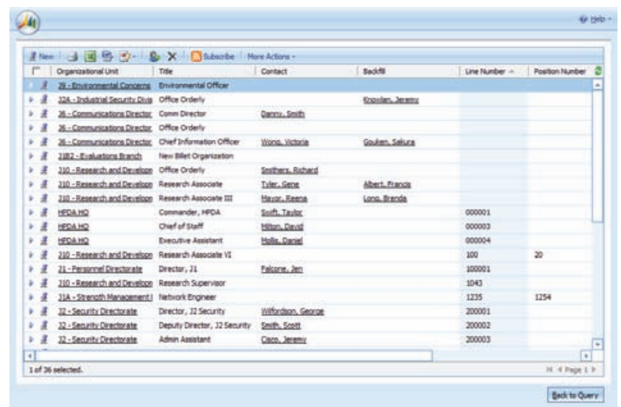
6. Click on the *Equals* drop down to choose a modifier for your results. If a specific value is needed, it can be entered into the *Enter Value* box.



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.

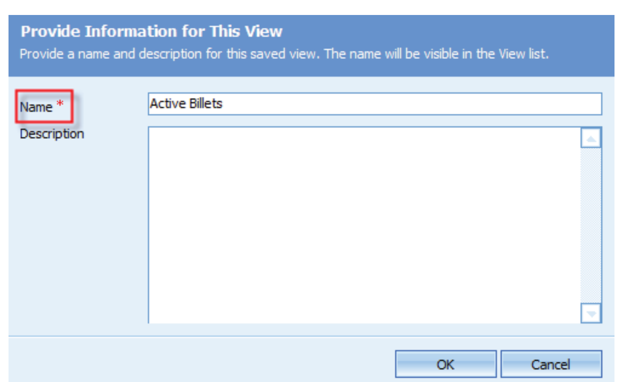
9. A list of search results will appear. Click on column names to sort if needed. From the toolbar, users can also export results to Excel, perform a mail merge, print results, perform duplicate detection on the records, or subscribe to an RSS feed of the search.



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*.



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