


# **DefenseReady**<sup>TM</sup>

*A suite of business solutions for Microsoft Dynamics<sup>TM</sup> CRM*



**Permuta Technologies**

Product White Paper

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## Objective

Presented by Permuta Technologies, the purpose of this paper is to provide a detailed overview of *DefenseReady*, a suite of business solutions for use by the Department of Defense (DoD). This overview explains the software features, setup requirements, economic benefits, acquisition processes, and licensure terms and conditions.

## Background

Organizations within the DoD have spent thousands of hours and have devoted significant portions of their budgets, in their struggle to develop custom business applications that meet their operational and organizational needs. Often the result has been a mix of incompatible legacy applications that have taken years to develop, have required intense maintenance, and have failed to keep up with the growth of technology. Defense organizations have long needed a fast solution which utilizes the latest IT advances.

Now Permuta Technologies presents *DefenseReady*, a fully-integrated suite of business solutions tailored specifically for DoD organizations. The *DefenseReady* suite is built on the Microsoft Dynamics CRM platform, which is a commercial off-the-shelf (COTS) platform that provides a base layer for applications. By building business applications on top of the Dynamics CRM platform, Permuta Technologies provides *customized* off-the-shelf solutions which are fast, flexible, and technologically advanced.

The ready-to-use solutions that are provided by *DefenseReady*, a commercially available product, all capitalize on Microsoft's research and development investments in platform technologies. With the convergence of Microsoft's feature-rich technology and Permuta's extensive DoD expertise, *DefenseReady* delivers advanced, customized business applications in a fraction of the time and costs involved with other technologies.

*DefenseReady* on the Microsoft platform empowers users by enabling them to manage multiple workflows without having to learn new applications, thanks to streamlined user interfaces and wizard-based tools. *DefenseReady's* platform also has built-in reporting functions which allow users to create reports without the assistance of technical support, helping your staff make more informed decisions.

The goal of *DefenseReady* is to provide information management software that is fast, simple, and takes the administrative burden off of users, which allows them to focus solely on the mission of the organization.

## DefenseReady Overview

*DefenseReady* helps organizations manage critical business disciplines, such as workforce, mission, training, funds, assets, service, and public affairs. With *DefenseReady*, DoD organizations can fuel business productivity and gain the insight required for confident decisions, from any location safely and

securely. If your employees have worked with a Microsoft program, or have previously used the Internet, they have all the experience that they need to use *DefenseReady*.

*DefenseReady*'s Microsoft-integrated applications give your organization the power to respond quickly in a demanding operational environment and enable it to bring about the following results.

- Gain visibility, insight, and control over all aspects of a command
- Measure results precisely
- Maintain a rich store of historical organizational information
- Reduce errors, and put accurate information at the fingertips of those who need it
- Enter information once and share it among applications safely and securely
- Realize a greater return on your business management solution
- Increase collaboration, efficiency, and innovation across your team

## Critical Business Disciplines

*DefenseReady* is comprised of the following important business disciplines which are common areas of focus at DoD organizations.

### Workforce Management

The *DefenseReady* Workforce discipline is a consolidated system for managing personnel information, plus staff action tasks. The most important resource in any organization is the intellect of the people who work there. The key to success is realizing the potential of this resource. Empower your people with role-based information and actionable knowledge through data that is uniquely configured for your workforce. *DefenseReady* makes it easy for everyone to focus their daily efforts on highest-value tasks and allows managers to map user tasks and work needs for an individualized experience.

#### *Staff Actions*

For many DoD organizations, staff action management is a complex challenge that involves the routing, tracking, and facilitating of cross-organizational tasks. The *DefenseReady* staff action management solution is a generic framework for managing the core activities of initiating and receiving staff actions, acknowledgement, execution, review, and response delivery. With *DefenseReady*, staff can generate actions directly from *DefenseReady*, Microsoft Outlook, or SharePoint sites. And there are dramatic time savings through the use of templates, which provide an 80% solution for staffing and suspenses, yielding consistent expectations for results. Finally, leaders have overall visibility of each stage via statistics, metrics, and scorecards.

### Mission

The mission is broadly defined as the specific mandate of the organization as a whole and the particular activities that differentiate the organization from most others. Thus, a mission for one organization could differ greatly from the mission of a separate organization. An example of a mission could be to provide all facets of communication for a high-level government official. To meet differing needs, the *DefenseReady* suite can be highly customized to meet the mission requirements of each organization.

## Training

The *DefenseReady* training discipline provides a complete learning management system for members of government organizations, who require on-the-job training. Organizations are able to manage courses, whether they are instructor-led or SCORM-compliant web-based classes, launched via a web-player. Along with managing courses, users can assign and upload courses into the training application.

## Funds

While the financial portion of an application can be multi-faceted, there are often two central aspects which apply to all organizations: budget and acquisition. The budget facet of *DefenseReady* is an internal tracking tool, not a ledger or accounting system. In this way, the budget helps account for the overall financial plan by managing the allocation of funds within each business unit. The acquisition facet stresses automation of the internal business processes and workflows associated with requesting and allocating funds for asset needs.

## Assets

A common thread across most organizations is having an inventory of equipment, whether the items are as simple as pencils, or as massive and intricate as tanks. The *DefenseReady* asset management discipline provides end-to-end asset accountability and equipment visibility tied to users. With streamlined workflows, digital signature capability, audit histories, parallel inventories, and many other features, it serves as a basis for configuration management and supplies answers to questions about assets.

## Service

Microsoft Dynamics CRM already provides a solid foundation for service management and scheduling. Our *DefenseReady* service discipline builds upon these elements and it tailors them to meet the needs of government organizations. The *DefenseReady* service discipline 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. In addition, it tracks facility and compound access, which allows a full overview of visitor access requests.

## Public Affairs

Government organizations are responsible for certain public affairs items and are required to respond to private and public citizen inquiries. There are other types of communication that also fall within the public affairs realm. The area of public affairs consists of three main functions: public information, command and internal information, and community relations. To assist with these functions, *DefenseReady's* platform includes workflow and metrics, so an organization can learn from past mistakes and improve future processes.

## Features and Benefits

*DefenseReady* is intuitive and simple to use. As a result, your personnel save valuable time in their daily work routines. Because they quickly get the information they need, they have more time to analyze

mission-critical data. Plus, they are better equipped with the details they need to effectively solve problems, answer questions, and make smarter operational decisions. Below is a preview of some features and benefits of *DefenseReady*.

### **Familiar Work Environment**

Since *DefenseReady* is built on the Microsoft Dynamics CRM platform, it inherently has a familiar look-and-feel which is similar to applications used every day. New users can start working quickly with any *DefenseReady* application, just like they do with the Microsoft Office products they already know. By using easy drop-downs, tabs, auto-complete, and intuitive drag-and-drop interfaces, *DefenseReady* makes it easy to manage daily tasks without having to re-enter data.

### **Office Integration**

*DefenseReady's* Microsoft platform automatically integrates with the Office suite of applications, such as Excel, Word, and Outlook. Now users can perform daily functions from within these applications.

Through Microsoft Outlook, for example, you can create staff actions, tasks, and many other types of records. Also, calendar items, contacts, and emails generated in Dynamics CRM are automatically synchronized with Outlook. For certain types of data, users can import and export to and from Microsoft Excel. Users can also perform mail merges by using Microsoft Word and the data from *DefenseReady*.

Tying the right capabilities into how people work is one of the fastest and most reliable ways to ensure user adoption within the organization.

### **Ad Hoc Queries and Reporting**

*DefenseReady* allows users to find answers to daily questions faster and to analyze business performance more easily with flexible reporting tools. Real-time query tools allow users to search for specific information, so important command data is only a click away. Users can perform queries and reporting through simple point-and-click tools, without having to depend on complex reports from an IT department.

For more advanced reporting, the platform leverages the full power of SQL Server Reporting Services (SSRS), which provides a highly-scalable server-based platform for reporting and analysis. With increased confidence in your data and up-to-date metrics, your organization can keep operation performance on target by immediately responding to problems.

### **Role-Based Security**

Keep your data secure by defining what parts of the software each employee can access and use. The system administrator can specify which parts of the application each employee can use, down to a very granular level. For example, perhaps some users should have read-only access to the workforce area, but should be denied access to the new mission information. This flexibility to set up security parameters by user helps you keep data secure and safe, while still empowering your team members to improve their efforts.

### **Access Anywhere**

Thanks to offline data access and mobility options, users can access important data and keep the mission up-to-date even when they are away from their workstations. Offline data access allows users to work locally on their laptops, then lets them upload the latest data when they have connectivity.

For *DefenseReady's* platform, there are expanded mobility options available through third-party vendors. These options allow access to data via hand-held devices, such as a BlackBerry or Windows Mobile device (*additional software purchases may be required*).

Since role-based security applies to these two access options, organizations can feel confident that the appropriate people are remotely and safely accessing the data.

### **Simple IT**

From a technical standpoint, *DefenseReady* has numerous features which make deployment and maintenance seamless processes. Such features include an installer for applications, simple deployment, low database administration overhead, and codeless user interface development.

### **Leverage Existing Investments**

*DefenseReady* and Microsoft Dynamics CRM are both built upon the standard Microsoft infrastructure stack, so they both leverage your existing investments. Examples of these existing investments may include Microsoft SQL Server, SQL Server Reporting Services (SSRS), Internet Information Services (IIS), Active Directory, Windows Server, Microsoft Office SharePoint Server, and Exchange Server. The combination of *DefenseReady* and Dynamics CRM can help you maximize the benefits of these existing investments in terms of business applications.

### **Auditing**

*DefenseReady* has a built-in auditing feature which allows for greater accountability and tracking. This tool tracks individual changes to fields in the system and records which user executed the change. The tool is configurable and can be applied to specific sets of data.

### **Point and Click Workflow**

*DefenseReady* can support every unique process that your organization has because it leverages Microsoft Dynamics CRM's powerful workflow engine. Your business processes can be as simple or as complex as your organizational needs, while their execution is reliable and consistent.

### **Service-Oriented Architecture**

*DefenseReady's* Microsoft Dynamics CRM platform is based on a Service-Oriented Architecture (SOA) with complete support for web services. Having a SOA base allows *DefenseReady* to easily and efficiently integrate with other applications. Data can be queried and updated using the web services layer, allowing for compatibility with legacy applications.

### **Central Location**

Since your data may be stored within multiple and disconnected systems, your staff may see conflicting or incomplete information. Disconnected information makes integrated planning and correct decision-

making difficult. Organizations often face issues with having too much data and too many islands of information on personal computers. Each division often works from its own system, and there is no central view of up-to-date mission data. Help your staff to be more effective by providing them with a single repository for information.

### **Duplicate Detection**

Having one central repository for information helps reduce duplicate entries and the potential for error. In addition, users benefit from duplicate detection, which is feature of the platform on which *DefenseReady* is built.

### **Collaboration**

With *DefenseReady's* integrated solutions, your organization can increase collaboration at one central location. Automatic e-mail notification, user-posted notes and attachments, alerts of start times and due dates, and other collaborative features help save time and improve the way your staff works together.

*DefenseReady* also integrates with Microsoft Office SharePoint Server (MOSS), a collaborative workspace which is ideal for team members who are working together on specific missions and staff actions.

## **Economic Benefits**

*DefenseReady* addresses the common custom development issues that frustrate DoD organizations by providing an Enterprise Resource Planning (ERP) system which is readily available as a commercial off-the-shelf (COTS) product.

The custom development route is often expensive, time-consuming, and risky. Even with short-term success while employing it, organizations may face long-term support problems. Custom development can also result in isolated legacy applications with little-to-no integration.

A common response to custom development issues is the use of COTS ERP systems. Commercial industry realizes benefits from ERP systems, which rely on one central location to provide solutions that formerly would have been stand-alone applications. And ERP systems are highly repeatable, pre-built, and low risk. The total cost of ownership with ERP systems is often lower and they allow the formation of a community of users, who are no longer isolated. Having central ERP solutions allows for greater collaboration, which is crucial to bringing about effective command and control systems.

Now government organizations can share in these ERP benefits through *DefenseReady's* total-enterprise solutions. *DefenseReady* solutions interface with products from third party vendors and leverage Microsoft's research and development in application platforms, all of which reinforce the organization's investments.

In order to quickly build the *DefenseReady* applications, we partnered with Microsoft to use their powerful Dynamics CRM application platform. This out-of-the-box Microsoft platform is often used as a

sales and marketing tool, but DoD organizations need to use it for other purposes. Our design takes away the sales and marketing aspects and leaves remaining a feature-rich platform. After using our expertise in DoD business applications to build new ERP solutions, the result is a product which is ideal for the DoD workforce.

*DefenseReady* is ready to be deployed today in your organization. With *DefenseReady*, organizations can realize the first phases of initial operating capability within 30 days. Once the solutions are operational, we tailor the applications to your organization. The result is a fully-functioning total-enterprise solution that specifically meets the operational needs of your organization.

## Licensure

*DefenseReady* is an installable add-on to Microsoft's Dynamics CRM, a commercially available software product. Each user of *DefenseReady* will have a Client Access License (CAL) for both *DefenseReady* and Microsoft Dynamics CRM. Each *DefenseReady* CAL will entitle the user to software assurance and upgrades.

Following is a description of what is included with a *DefenseReady* license:

- Installable code base
- Installation and configuration guide
- Planning guide
- Operations guide
- Utility kits

## Software Assurance

With each *DefenseReady* license, users are entitled to three (3) years of software assurance (SA). SA entitles the user to all upgrades to the product as they are released by Permuta Technologies. Permuta Technologies will determine projected feature enhancements that will be added to the *DefenseReady* baseline of capabilities.

## Support

You may obtain technical support by email ([support@permuta.com](mailto:support@permuta.com)) or by telephone at +1-703-313-6800 (Monday through Friday, 9AM-5PM Eastern Standard Time). Please identify yourself, the product, the version, and the exact nature of the problem. Depending on the issue, there may be additional costs associated with the support. Callers will be notified of costs, if any, before work begins.

## Requirements

This section will outline the basic hardware and software requirements for installing and operating *DefenseReady* and Microsoft Dynamics CRM. The general requirements listed here are not intended to provide all of the necessary details for purchasing, installing, or operating the hardware or software. The intent is to give an overview of requirements. For a complete and detailed list of requirements, please contact the Permuta sales team (contact information in Section A of this document).

### **DefenseReady Requirements**

In order to install and operate *DefenseReady*, the only requirement is that users have a Microsoft Dynamics CRM license. Permuta also recommends the use of Microsoft Office SharePoint Server (MOSS) 2007, although it is not a requirement.

### **Microsoft Dynamics CRM Requirements**

- Microsoft SQL Server 2005
- SQL Server Reporting Services (SSRS)
- Internet Information Services (IIS) 6.0 or 7.0
- Active Directory (AD)
- Windows Server
- Exchange Server (optional, but recommended)

## Acquisition

To obtain *DefenseReady* software for your organization, there are numerous approaches for acquisition. Since the government acquisition process can vary greatly depending on the needs of the specific organization, Permuta has ensured that specialists are available to assist with such issues. Please contact our acquisition team directly. Their contact information can be found in Section A at the end of this document.

## A. Contact Information

For general sales questions:

Permuta Sales Team

703-313-6800

[sales@permuta.com](mailto:sales@permuta.com)

For support:

Permuta Support Team

703-313-6800

[support@permuta.com](mailto:support@permuta.com)