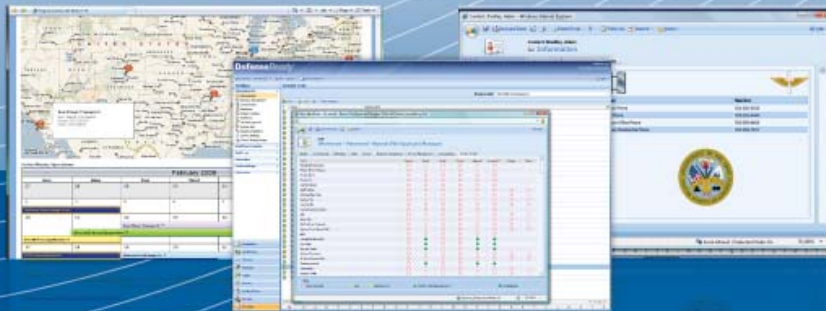


# DefenseReady

for Microsoft Dynamics CRM



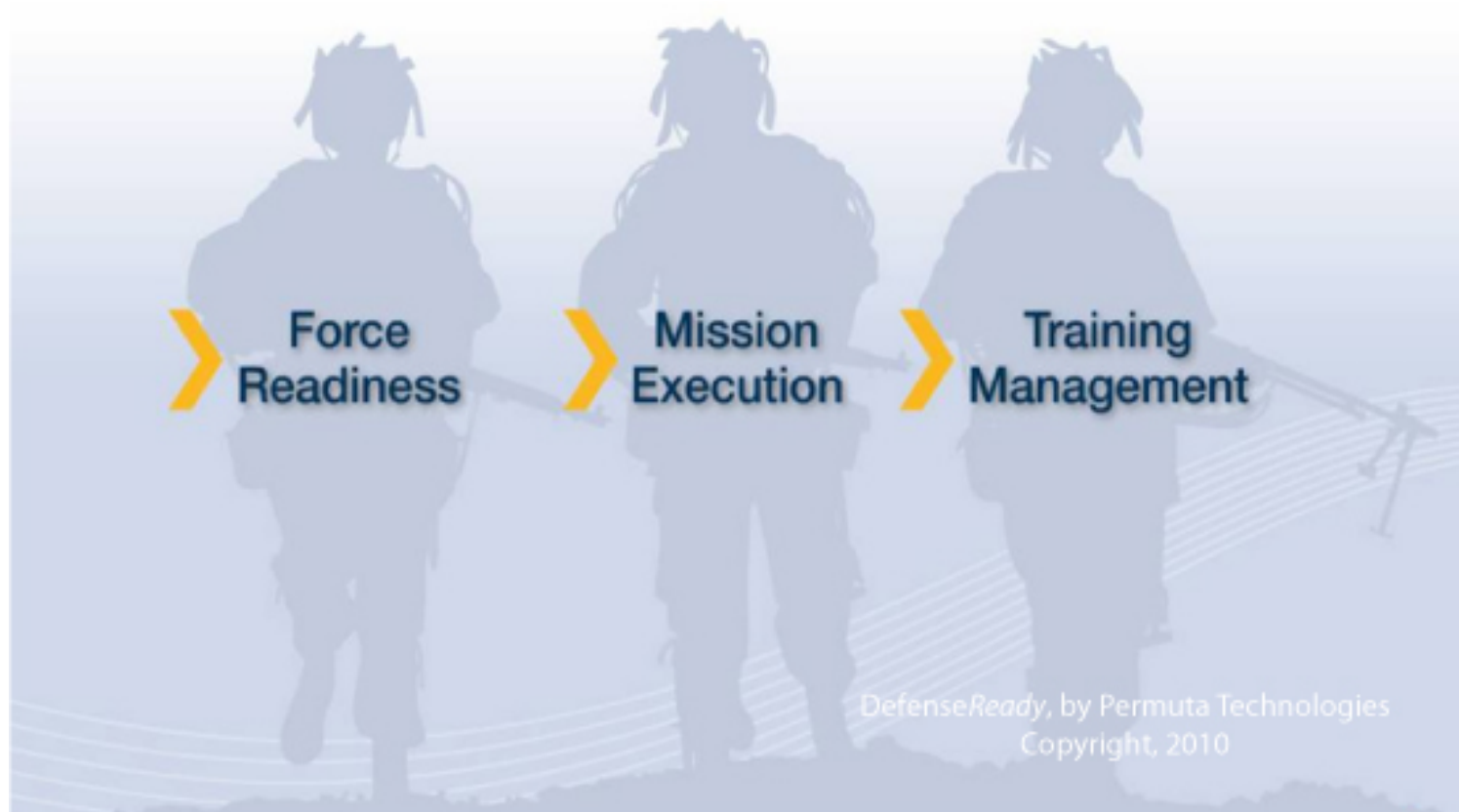
**DefenseReady**<sup>™</sup>  
for Microsoft Dynamics<sup>™</sup> CRM

# DefenseReady for Dynamics CRM

- Suite of solutions for Defense agencies
- Built on Microsoft Dynamics CRM
- Manage personnel & resource information at the local level
- Assess mission readiness & prepare force mobilization



# Mission-Critical Business Areas



# Functionality Overview

- **WORKFORCE**

- Military Files
- Civil Service Files
- Contractor Files
- Evaluations
- Awards
- Manning Summary
- Billets
- Recruits
- Security Files
- Sensitive Items
- Staff Actions/Taskers
- Passports/Visas
- Communication Devices
- Medical Files

- **MISSION/C2**

- Duty Status Calendar
- Strategic Objectives
- Key Performance Indicators
- Mission/Campaign Planning
- Operations
- Staff Duty Log
- Task Forces

- **TRAINING**

- SCORM-Compliant Courseware
- Disciplines
- Qualification Levels
- Training Plans
- Jump Status Tracking

# Key Benefits for Agencies



## Commander

- Achieve clear view of enterprise
- Force-multiplier
- Total workforce accountability

- Tracking & routing of evals, awards, & taskers
- Ad hoc queries & reporting
- Automatically populate standard DoD forms

## Personnel Director



## Operations Director

- Real-time mission planning & execution
- Template-based operations planning
- Cross-organizational collaboration

# Key Benefits for Agencies



## Chief Information Officer

- Rapid implementation, quick ROI gains
- Empowers end-users, freeing IT resources
- Consistent with IT architecture & standards

- Quick, codeless customization
- Create & modify cross-team workflow
- Painless report building

## IT Project Team



## Training Director

- Flexible training delivery
- Web-based (SCORM) training course tracker
- Tight integration with HR system

# Customers in Action

Special Operations Mission	Combat Support Mission	Executive Support Mission
Awards, Evaluations, Personnel Actions, Recruiting	Security, Weapons Qualifications	Planning & Execution, Passports & Visas, Staff Actions
<ul style="list-style-type: none"><li>• Total workforce management</li><li>• Awards lifecycle management</li><li>• Applicant &amp; recruit management</li><li>• Soldier readiness</li><li>• Evaluation routing &amp; tracking (form shell population)</li></ul>	<ul style="list-style-type: none"><li>• Live within 120 days</li><li>• Track clearances, sensitive items, access badges, personnel-issued safe combos</li><li>• Weapons tracking, qualification, &amp; issuing</li><li>• Command dashboards provide senior leaders with real-time status updates</li></ul>	<ul style="list-style-type: none"><li>• Supporting 13 agencies</li><li>• Executive staff responses</li><li>• Operations management (Command &amp; Control, C2)</li><li>• In/out processing</li><li>• Configuration management</li></ul>

# DefenseReady

## DefenseReady Advantage

- One integrated User Interface for all applications:
  - Lowers training cost
  - Provides consistent experience
  - Less hardware & infrastructure costs

**DefenseReady™**  
for Microsoft Dynamics™ CRM

New Activity - New Record - Go To - Tools - Privacy Act Notice - Guided Help - Advanced Find

**Workforce**

**Personnel**

Manage the organization's total workforce with comprehensive personnel tracking.

- Military Files:** general information, assignment history, service data, education, personal information, assignment history, special pay, and rating scheme.
- Civil Service Files:** employment dates, rating scheme, personal information, civilian education, and certifications.
- Contractor Files:** contract, company, personal information, civilian education, and certifications.

**Security**

Track sensitive information, files, and items, along with Special Access Program authorizations.

- Security Files:** clearance, investigation, sensitive information.
- Recruit Security Files:** investigations and check dates.
- Sensitive Items:** item type, numbers, issue information, and important dates.
- Special Access Programs:** program, abbreviation, and billets.

**Manning**

Track chain of command and organizational hierarchy, for strength management.

- Manning Summary:** organizational hierarchy.
- Org Units:** organizational units, and sub-organizations.
- Billets:** billet information, requirements, and assignments.
- Workforce Assignments:** unofficial duty assignments.

**Recruiting**

Enter recruits for screening and security processes, and to initiate on-boarding tasks.

- Military Recruit Files:** general information, promotion data, projected arrival date, projected billet and assignment.
- Civil Service Recruit Files:** general information, projected arrival date, projected billet and assignment.
- Contractor Recruit Files:** projected arrival date, sponsor, and company.

**Processes**

Manage Workforce processes, including evaluations, staff actions/tasks, and awards.

- Evaluations:** staffing, suspense information, PDF/PureEdge document attachments, collaboration site, and routing.
- Staff Actions:** templates, suspense information, approvals, delegation, response, coordination, status, and documents.
- Awards:** award types, period, suspense information, coordination, collaboration, nomination, and package.
- Passports & Visas:** numbers, dates, and types.

**Directory**

Manage organization phone book and communication devices.

- Comm Device Listings:** display, usage, type, and publish.
- Directory Listings:** display order, type, and listing.

permuta  
TECHNOLOGIES

All # A B C D E F G H I J K L M N O P Q R S T U V W X Y Z

Done Internet | Protected Mode: Off 100%



Microsoft Dynamics CRM

DefenseReady™  
for Microsoft Dynamics™ CRM

# Personnel File Detail

## DefenseReady Advantage

- Manage an organization's total workforce:
  - Military
  - Civilians
  - Contractors
  - Recruits
  - Applicants
  - Auxiliary Forces
- Track military & civilian branches separately with service-specific terminology & business rules for enhanced security

Marine Corps File: Brown, Daniel MSgt USMC - Windows Internet Explorer

Marine Corps File: Brown, Daniel MSgt USMC

Information

Details:


- Information
- Activities
- History
- Addresses
- Assignment Prefs
- Assignment History
- Awards
- Billet History
- Certifications
- Civilian Education
- Evaluations
- Languages
- Military Education
- Emergency Contact
- Flags
- Lost Time
- Skill Qualifications
- Special Pay
- Workflows

General Service Data Education Personal Misc Admin Notes

Contact

Contact \*  SSN

MSgt Daniel Brown  
Marine Corps 0231



J3A1 - Operational Plans Branch  
Plans Associate

Security File Info

Clearance	<input type="text" value="Top Secret"/>
Clearance Date	<input type="text" value="5/4/2005"/>
Invest. Type	<input type="text" value="Single Scope Background Inve"/>
Invest. Final	<input type="text"/>
Re-Invest. Due	<input type="text" value="5/3/2010"/>
Duty Phone	<input type="text" value="555-689-2780"/>

[Edit security information](#)

Billet Info

Billet	<input type="text" value="Plans Associate"/>
Org	<input type="text" value="J3A1 - Operational Plans Brani"/>
Para/Line No.	<input type="text" value="W311-311003"/>
Position No.	<input type="text"/>
Billet Info	<input type="text" value="Air Force MSgt 0231"/>
ASI/SQI	<input type="text"/>

[Edit billet information](#)

General

Agency  Employee ID

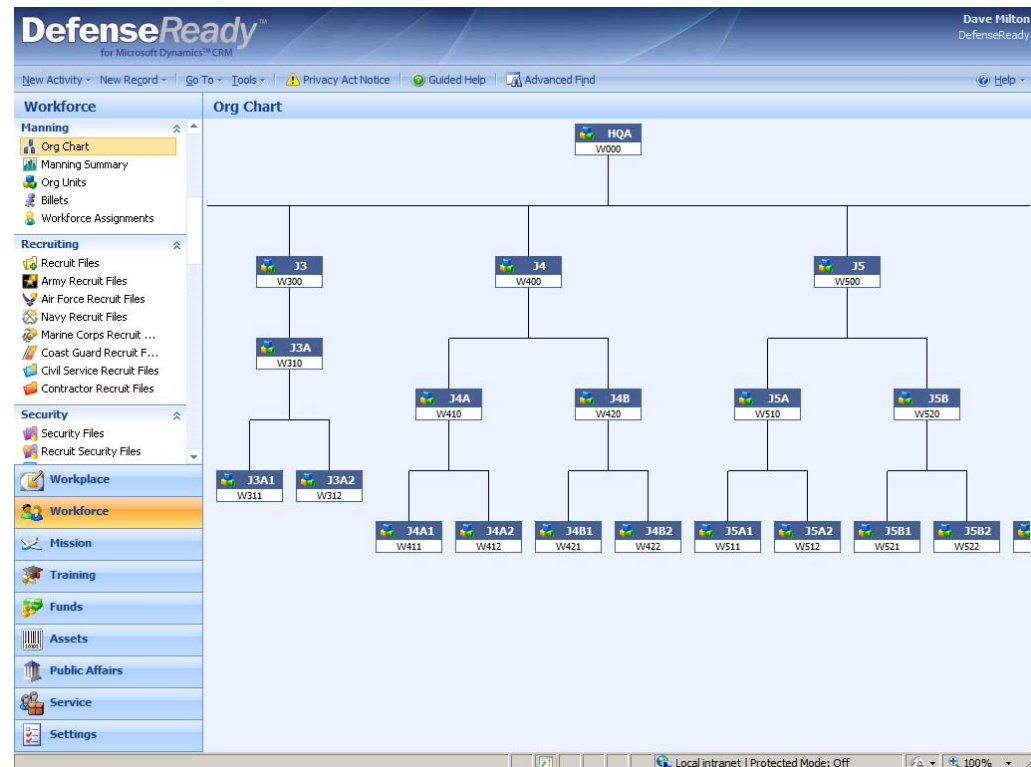
Status: Active

Local intranet | Protected Mode: Off

# Manning

## DefenseReady Advantage

- Continually update & optimize staffing by:
  - Assigning people to billets
  - Forecasting vacancies
  - Projecting backfills
- Export proposed force structure information to subordinate elements & higher headquarters
- Automated system for planning, managing, & constructing multiple manpower authorization documents



# Mission Planning

## DefenseReady Advantage

- Track all working parts of an operation: participants, roles, event itineraries, operational objectives, & checklists
- Promote collaboration, provide a visual representation of deployed forces/resources, using integration with SharePoint & web-based mapping services
- Manage all facets of a task force, including positions/responsibilities for both regular members & augmentees

The screenshot displays the DefenseReady Mission Calendar interface. The calendar shows a weekly view starting from Sunday, July 20, 2009, to Saturday, August 1, 2009. The interface includes a navigation pane on the left with categories such as Mission, Personnel, Performance, Manning, Planning, Workplace, Workforce, Mission, Training, Funds, Assets, Public Affairs, Service, and Settings. The main calendar area shows various mission events with their start and end times and locations.

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
28	29	30	July 1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	August 1

Key events shown in the calendar include:

- Shenandoah Tour - July 2009 (Roanoke, VA) on Sunday, July 26.
- Shenandoah Tour - July 2009 (Harrisonburg, VA) on Wednesday, July 29.
- European Summit (Paris, France) on Thursday, July 30.
- European Summit (Berlin, Germany) on Friday, July 31.
- Asian Swing (Tokyo, Japan) on Saturday, August 1.
- Asian Swing (Seoul, Republic of Korea) on Sunday, August 2.
- Asian Swing (Shanghai, China) on Monday, August 3.

# Training Content

## DefenseReady Advantage

- Complete learning management system
- Manage classroom, web-based, or on-the-job training
- Track disciplines, qualification levels, trainings plans, and assignments

The screenshot displays the DefenseReady training interface. At the top, the logo reads "DefenseReady™ for Microsoft Dynamics™ CRM". A progress bar shows "1 of 15" items. Navigation links include "Hide Menu", "<- Previous", "Next ->", "Close Item", "Return to LMS", and "Help".

The main content area is titled "Information Assurance Training - 2010" and "Security Basics". A "Menu" on the left lists various topics with checkboxes, including "Introduction", "Security Basics", "Local Security Office", "Classification Levels", "Clearances", "Advanced Topics", "Physical Security", "Physical Security Basics", "Photography", "Electronic Devices", "Cell Phone Usage", "Visitor Control", "Visitor Policy", "Visit Requests", and "Escorting Visitors".

The "Self Test" section contains a question: "The three levels of classification are TOP SECRET, SECRET, and \_\_\_\_\_." Below the question is a text input field with the instruction "Select the one best answer." and five radio button options: "SUPER TOP SECRET", "CONFIDENTIAL", "RUMORS", "GOSSIP", and "SUPER SECRET". A "Submit" button is located below the options.

At the bottom of the interface, a progress summary shows "Local Security Office", "Classification Levels", "Clearances", and "Self Test" all with green checkmarks. A "My Notes" section is visible on the right side.

The browser status bar at the bottom indicates "Local intranet | Protected Mode: Off" and a zoom level of "100%".

# Automated Reporting

## DefenseReady Advantage

- Populates standard DoD forms automatically in both Adobe and Lotus/PureEdge
- Generates custom reports via point-and-click report wizard
- Developers build advanced reports via SQL Server Reporting Services (SSRS)
- Users create ad-hoc queries and reports, without help from IT staff

IBM Lotus Forms Viewer - DA Form 2166-8 PAGE 1 of 2

File Action Help

100%

U.S. ARMY Forms Content Management

SAVE SAVE AS PRINT EMAIL NEXT >> Attach External File(s)

**NCO EVALUATION REPORT**  
For use of this form, see AR 623-3; the proponent agency is DCS, G-1.

FOR OFFICIAL USE ONLY (FOUO)  
SEE PRIVACY ACT STATEMENT  
IN AR 623-3.

**PART I - ADMINISTRATIVE DATA**

a. NAME (Last, First, Middle Initial)  
BRADLEY, ADAM

b. SSN  
123-33-3211

c. RANK  
CPT

d. DATE OF RANK  
15A

e. PMOSC  
15A

f.1. UNIT ORG. STATION ZIP CODE OR APO, MAJOR COMMAND

f.2. STATUS CODE

g. REASON FOR SUBMISSION

h. PERIOD COVERED

FROM	THRU	i. RATED MONTHS	j. NON-RATED CODES	k. NO. OF ENCL	l. RATED NCO'S EMAIL ADDRESS (gov or mil)	m. UIC	n. CMD CODE	o. PSB CODE
YEAR MONTH DAY	YEAR MONTH DAY							

**PART II - AUTHENTICATION**

a. NAME OF RATER (Last, First, Middle Initial)  
MILTON, DAVID

SSN  
454-55-5656

SIGNATURE / ...

DATE (YYYYMMDD)

RANK  
MAJ

PMOSC/BRANCH  
15A

ORGANIZATION  
J3

DUTY ASSIGNMENT  
Special Agent

RATER'S AKO EMAIL ADDRESS (gov. or mil)

b. NAME OF SENIOR RATER (Last, First, Middle Initial)  
BARRIS, MIRANDA

SSN  
885-45-5698

SIGNATURE / ...

DATE (YYYYMMDD)

RANK  
LTC

PMOSC/BRANCH  
J3

ORGANIZATION  
J3

DUTY ASSIGNMENT  
Deputy Director, J3

SENIOR RATER'S AKO EMAIL ADDRESS (gov. or mil)

c. NAME OF REVIEWER (Last, First, Middle Initial)  
DUNDAS, RICHARD

SSN  
485-87-5985

SIGNATURE / ...

DATE (YYYYMMDD)

RANK  
YA-2

PMOSC/BRANCH  
J3

ORGANIZATION  
J3

DUTY ASSIGNMENT  
Radio Operator

REVIEWER'S AKO EMAIL ADDRESS (gov. or mil)

d.  CONCUR WITH RATER AND SENIOR RATER EVALUATIONS  NONCONCUR WITH RATER AND/OR SENIOR RATER EVAL (See attached comments)

e. RATED NCO: I understand my signature does not constitute agreement or disagreement with the evaluations of the rater and senior rater. I further understand my signature verifies that the administrative data in Part I, the rating officials in Part II, the duty description to include the counseling dates in Part III, and the APFT and height/weight entries in Part IVc are correct. I have seen the completed report. I am aware of the appeals process of AR 623-3.

SIGNATURE / ...

DATE (YYYYMMDD)

**PART III - DUTY DESCRIPTION (Rater)**

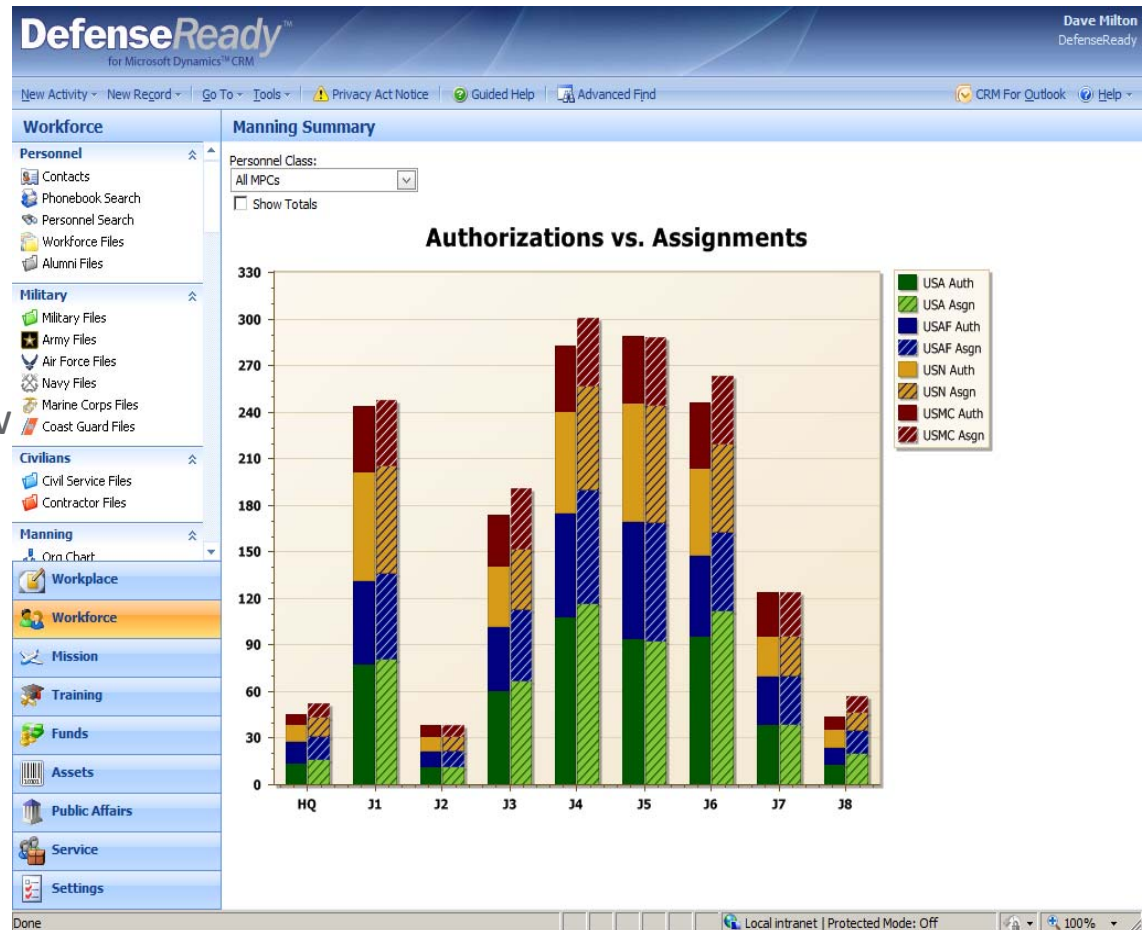
a. PRINCIPAL DUTY TITLE

b. DUTY MOSC

# Dashboards & Reporting

## DefenseReady Advantage

- Display command-level information via SharePoint dashboards
- Combine analytics with workflow for actionable intelligence
- Minimize costs by leveraging existing Microsoft technology investments



# Force Readiness

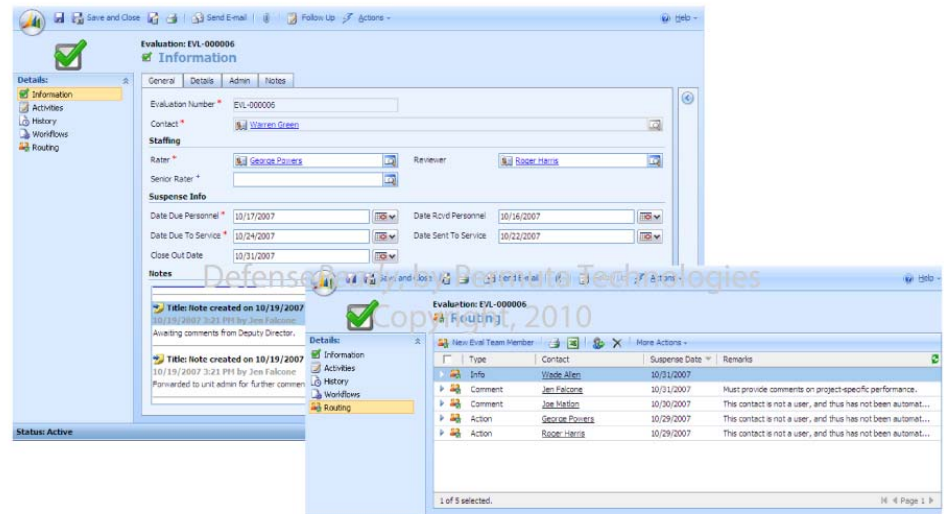
- *DefenseReady* allows DoD organizations to effectively manage personnel & resource information at the local level, in order to accurately assess readiness.
- Mission readiness results in the ability to prepare & manage force mobilization in a demanding operational environment.



# Contact Information



- Permuta Technologies
  - [info@permuta.com](mailto:info@permuta.com)



- DefenseReady Product Info
  - <http://www.DefenseReady.com>