



# DAMIR

<https://ebiz.acq.osd.mil/damir>

## DAES Review User's Guide

Developed for OUSD (AT&L)

by

CACI – CMS Information Systems, Inc.  
14370 Newbrook Dr.  
Chantilly, VA 20151  
(703) 679-5345

Last Updated: March 4, 2011



## TABLE OF CONTENTS

<b>Overview .....</b>	<b>1</b>
Introduction .....	1
Users .....	1
Security .....	2
Classification .....	2
Accessing DAES Review .....	2
<b>Assessments .....</b>	<b>4</b>
Requesting an Assessment .....	4
Instructions .....	4
Building a Request .....	4
Filter Options .....	5
Display Options .....	5
Incomplete Requests .....	5
Displaying the Requested Assessments .....	6
Sorting Assessments .....	6
Grouping Assessments .....	7
List Columns .....	7
Selecting an Individual Assessment .....	7
Exporting the List .....	7
Reports .....	7
Stoplight Charts .....	7
Synopsis .....	7
Microsoft PowerPoint Compatibility .....	8
Bulk Release .....	8
Viewing Assessments .....	8
Assessment Options .....	8
Report Options .....	9
Release Process Workflow .....	9
Creating New Assessments .....	9
Create a Blank Assessment .....	10
Create From an Existing Assessment .....	10
Keep In Mind .....	11
Check Spelling .....	11
Editing Assessments .....	11
Releasing Assessments .....	12
Via the View Page .....	12
Via the List Page (Bulk Release) .....	12
Assessment Quick Tips .....	13
Creating Reports .....	13
View or Edit an Assessment .....	14
Report Options .....	14
Creating Stoplight Charts .....	14
Other Features .....	15
Saved Requests .....	15
<b>References .....</b>	<b>17</b>
Guidance .....	17
Indicators .....	17
Ratings .....	17
Technical Assistance .....	17
<b>Index .....</b>	<b>18</b>

Notes.....21

## TABLE OF FIGURES

Figure 1 - DAMIR Portal Purview Modules .....	3
Figure 2 - Request OSD Assessment Page .....	4
Figure 3 - OSD Assessments List Page .....	6
Figure 4 - OSD Assessment Status Page .....	9
Figure 5 - OSD Assessment Edit Page .....	10
Figure 6 - Report View .....	14
Figure 7 - Stoplight Chart .....	15



# Overview

### INTRODUCTION

DAES Review supports MDAP and MAIS program oversight by providing OSD Action Officers with the capability of rating current program performance and by providing executive users with a virtual review of each program. Users with access to DAES Review, depending on their privileges, may provide their assessments of programs, review and/or edit assessments, release the assessments to other users in the DAES Review and DAMIR DAES communities, as well as access historical reviews of their programs of interest.

The DAES process supports users from within the OSD community writing assessments against a series of indicators. Each indicator is descriptive of an aspect of the program under development. Each assessment consists of a rating (Green, Yellow, or Red), an explanation of that rating, and a short synopsis of that explanation which is used to provide a one-page highlight of the program status. The Program Manager's assessments, which are provided by the Program Office and contain current ratings and explanations, are linked to the OSD assessments and provided with the OSD Assessments for a more complete review of the current program status.

Currently, the DAES review process supports OSD reviews of programs quarterly. DAMIR DAES Review allows users to input assessments as often as monthly, in response to the assessments submitted by the program office. However, the DAES review process is evolving and changes to that process are expected and will be reflected in DAMIR as quickly as possible.

DAES Review is available through the DAMIR user interface and access to it is limited to users who are part of the virtual DAES process and to users who monitor that process. Requests for access to DAES Review should be made through the DAMIR point-of-contact (POC) in the office that requires DAES Review privileges or through the DAMIR hotline if a POC has not been established for an office. (See the **References** section, **Technical Assistance**, on page 17 for contact information.)

### USERS

User access to the DAES Review area is controlled by the DAMIR security features. Even within DAES Review users are only given access to the controls and features that are necessary for performing their duties. Several specific roles have been identified and all users of DAES Review must perform according to at least one of these roles (although many users perform several roles at different times during the DAES process). Before a given user can be granted access to DAES Review, all the roles that user should be able to perform, with respect to specific programs and organizations, must be identified. Requests for access should be made through DAMIR technical support and must include the specific roles a user will perform in DAES Review.

Generally, these are the roles users may take on in the DAES Review process:

- **Viewers** – These users may be given access to assessments at various points in the review process, depending on their needs. These users will always be able to view fully released assessments and may have access to other assessments that are currently being developed, if they have been specifically permitted. They may not, however, create new assessments or promote them in the review process. Requests for viewing privileges should include the point in the release process at which the user requires access. This privilege is only necessary if the user is not performing in one of the other roles at a given release level.

## DAMIR DAES Review

- *Action Officers* – These users have access to all released assessments and any assessments that are in process for their office. Action Officers can also create assessments, edit any assessments that are at their level of review, and promote them for further review. Users who perform only the Action Officer role may only promote their assessments to the next level of their office's release process. If an office has established a limited release process, it is possible for an Action Officer to be the sole releaser for his or her assessments. In these cases, the Action Officer would release to the DAMIR DAES community.
- *Supervisors* – Some offices within OSD require one or more levels of supervision in the release process. Users who supervise the release process have access to all released assessments. They also have access to any assessments that are in process for their office and have also been released to their level of review. Very often these users also have the additional privileges of the Action Officer, however this is not necessarily so. The main role of these users is to review assessments that have been promoted to them and to promote these assessments forward in the release process.
- *Final Release Authority* – Some offices also require a final release authority. Users at this level of release have access to all released assessments. They also have access to any assessments that are in process for their office and have also been released to their level of review. This is the last level of review for any office working with OSD Assessments. Very often these users also have the additional privileges of the Action Officer, Supervisor or both. However, this is not necessarily so. The main role of these users is to review assessments that have been promoted to them and determine if it is appropriate to move them forward to the DAMIR DAES community. This is the final review level for OSD assessments.

### **SECURITY**

DAES Review security is a subset of the DAMIR security system. A series of security groups has been established specifically to support DAES Review. DAES Review security is established on a program-by-program and user-by-user basis. Individuals who require privileges to perform specific roles in support of specific organizations and programs must become members of the appropriate security groups in order to receive the appropriate privileges. Specifically, the security groups of which the user must become a member are the groups that have been established to support the particular organizations and programs the individual is reviewing.

DAES Review security is designed to be supported by users within the office at the various levels of review/release. Additional training and assistance in this process is available by contacting DAMIR technical support. (See the **References** section, **Technical Assistance**, on page 17 for contact information.)

### **CLASSIFICATION**

DAMIR DAES Review contains and allows input for unclassified information only. Any user who feels classified information must be discussed as part of his or her assessment should contact either their office's DAMIR point-of-contact or the current DAES point-of-contact.

### **ACCESSING DAES REVIEW**

DAES Review is available through the DAMIR user interface via the following website:

- <https://ebiz.acq.osd.mil/DAMIR>

## DAMIR DAES Review

Once in DAMIR, the user should select **DAES Review** from the list of available Purview modules on the DAMIR Portal page. Note: A user's listing of Purview modules may differ from those listed in Figure 1 – DAMIR Portal Purview Modules. This is due to differences in the user's privileges to access various DAMIR features.

**Figure 1 – DAMIR Portal Purview Modules**



# Assessments

## Requesting an Assessment

To build a request, the user must first be on the **Request OSD Assessments** page. This page is organized to accept the specifics of the request, providing support with global filters and other features.

Figure 2 – Request OSD Assessment Page

The screenshot shows the 'Request OSD Assessments' page. It features a navigation breadcrumb, a search bar, and a 'Create Assessment' section with dropdowns for Program and Indicator, and a 'Create Blank' button. A 'Filter Programs By' section includes checkboxes for MDAP, Pre-MDAP, MAIS, Unbaselined MAIS, Special Interest, Other, and Unknown, along with an 'Active Status' dropdown and a 'Refresh View' button. The main body contains 'OSD Assessment Request Instructions' and a 'No Active Request' status. Below this are several dropdown menus for Program, Review Date, FCB, DAES Group, OSD Rating, Indicator, Status, Action Officer, Office, and Service. At the bottom, there are buttons for 'Check Results', 'Clear Request', and 'See List'. A 'Number of Assessments: 21' is displayed. Callout boxes provide detailed explanations for these features.

**Main Navigation**  
"Bread Crumbs" provide links to previous pages visited in the navigation path.

**Create Assessment**  
These controls create a blank assessment. Select the program and the indicator desired.

**Filter Options**  
This section provides the user with global filters for program type and status.

**Check Results**  
Use the button to update the **Number of Assessments** which indicates the number of assessments found that match the selections above.

**See List**  
Use this to show a list of assessments that match the selections above.

**Clear Request**  
Clears all current selections so that the user can create a fresh request.

**Selections**  
Each list contains the possible choices that can be used to refine the request.

### INSTRUCTIONS

Throughout DAMIR, data entry screens are supported with on-screen instructions through a blue banner in the main body of the page. The blue banner contains links to **Hide** or **Show** the instructions appropriately. When the instructions are displayed, clicking the **Hide** link will hide all but the blue banner. When the instructions are hidden, clicking the **Show** link will display them and move the controls and displays of the page down so that they are still available for use.

### BUILDING A REQUEST

A request to view or edit an assessment begins by using the selection controls in the main body of this page. Selecting an item from any of the lists will automatically update the displayed data area below that list control. The list control will add the item if it is not already displayed or remove the item if it is. For example, the image above shows three

## DAMIR DAES Review

months have been selected. If the user selects a month not already displayed, that month will be added to the list. If the user selects any of the displayed months again, that month will be removed from the display list.

After making selections, clicking on the **Check Results** button will update the **Number of Assessments** indicator. To view the list of assessments matching the criteria selected the user must click on the **See List** button. At any time, the request can be reset to begin again by clicking on the **Clear Request** button. It is recommended that the user limit the number of assessments before requesting the **List** view. A smaller list is easier to work with and takes less time for the website to return the requested assessments.

When making selections for a request, the user must keep in mind that every assessment in the resulting list can match any of the selections in a given category but must match at least one of the selections in each category. That is, if two programs are selected then all assessments for both programs may be listed, but if there is also a date selected then all the assessments for both programs, but only for that date, will be listed.

### FILTER OPTIONS

Some global filters are available along the left side of the screen. These filters are common to DAMIR modules and allow the user to filter according to Program Type (e.g., MDAP, MAIS, Other) or Program Status (i.e., Active Only, Inactive Only, or Show All).

### DISPLAY OPTIONS

Because the DAES Review process has changed over time, adding and removing relevant indicators for review and changing the ratings available to users, the Display Options area has been provided to allow users to search for historical data that contains obsolete values. Checking the **Show Obsolete Indicators** checkbox and then **Refresh View** will cause the page to refresh. The available choices in the Indicator and **OSD Rating** picklists will change to display obsolete values. (See the **References** section for more information.)

### INCOMPLETE REQUESTS

If a user requests information and does not find it in the result set, it may be because:

- the **Review Date** selection does not match the appropriate **Effective Date** set when the OSD Assessment was created ();
- the global filters (using the **Filter Programs By** controls) are excluding a type of program or are not including programs that do not match the selected **Active Status**;
- there is a conflict between selected filters (e.g., a January date and a DAES Group other than “C”);
- the data is not available in DAMIR;
- the program data has changed (Note that OSD staff may change the type, status, DAES group, and other aspects of a program that is requested);
- and/or the user does not have privileges to view that program.

Should a result set not match expectation, the user should confirm these selections match the actual program and assessment information, clear the request using the **Clear Request** button, and try again.

## Displaying the Requested Assessments

To view the requested assessments, the user must click on the **See List** button. The requested assessments are then displayed in a list on the **List** page beneath the **Current Selections** area. The results are limited by the current selections, the user's privileges to view the data, and the global filters from the **Filter Programs By** controls (See **Filter Options**). Assessments which have not yet been released to the DAMIR DAES community are not provided unless the user has specific privileges to view that particular data at its current release level, or the assessment has at some point been released to a level at

Figure 3 – OSD Assessments List Page

The screenshot shows the DAMIR OSD Assessments List Page. The page header includes the DAMIR logo and navigation links. A callout box titled "Reports, Stoplight and Synopsis Charts" points to the top navigation area, stating: "View assessments in one of the compilation reports or charts. Export is available to MS Word." Below the header, there are filter controls for "Filter Programs By" (MDAP is selected) and a "Release Controls" section with buttons for "Check All Assessments", "Remove Checkmarks", and "Toggle Checkmarks". A "Release Marked Assessments" button is also present. A callout box titled "Bulk Release" points to the "Rel?" column, stating: "Users can select any or all assessments for release at the same time. Use when checkboxes appear in the 'Rel?' column." The main table displays a list of assessments with columns: Rel?, Review Date, Full Name, Indicator, Service, and Effect. A callout box titled "Column Headers" points to the column headers, stating: "Columns can be sorted or grouped using these headers." A "Visible Fields" sidebar on the left allows users to customize which columns are displayed, with a callout box titled "Visible Fields" stating: "Customize which columns are displayed in the list. The column names with a check mark are the ones currently displayed in the list." The sidebar includes checkboxes for ACAT, Created By, DAES Group, Effective Date, JCA, Full Name, Indicator, Last Updated, Office, PNO, Program Name, Rating, Release Point, Review Date, Service, Subprogram Name, and Type. A "Refresh View" button is at the bottom of the sidebar. A callout box titled "Keyboard Controls" points to the bottom of the table, stating: "Users may access sorting and grouping features without using the mouse." The bottom of the page shows pagination controls: "Page 1 of 1 (5 Records)", a page size dropdown set to 25, and a "Word" button. A callout box titled "Page Size" points to the page size dropdown, stating: "Change the amount of data displayed in the list at one time."

which the user has privileges. At any time, the user may return to the Request page by using the **Request OSD Assessments** link in the main navigation area of the page.

### SORTING ASSESSMENTS

Clicking (and clicking a second time) on the column title allows the user to sort the data in the list according to the selected field in ascending (or descending) order. For example, if the user intends to sort by Review Date in descending order and then by Service, he/she would click the **Review Date** column header, wait for the sort, click it again, wait for the sort, and then click on **Service** column header. Additional controls are available beneath the list for selecting columns and sorting. This feature orders the sort

in a manner similar to the mouse controls. **Clear Sort** can be used at any time to remove all sorts and begin again.

### GROUPING ASSESSMENTS

Dragging a column header onto the top bar of the list (**Drag a column header and drop it here to group by that column**) will group items according to that particular field. Multiple fields can be placed on the header to allow grouping by multiple fields. These can be reordered by dragging and dropping within the grouping header. Additional controls are available beneath the list for selecting the columns and grouping. This feature performs grouping in a manner similar to the sorting controls (described above). **Clear Group** can be used at any time to remove all groupings and begin again.

### LIST COLUMNS

Although the columns in the List view provide sufficient information for most purposes, DAES Review allows the user to tailor the list to show a variety of information. The **Visible Fields** group along the left sidebar uses checkbox controls to indicate which fields are currently displayed. The checkboxes can also be used to change the visible fields in the list. Simply check or uncheck appropriately the columns to be presented or hidden, respectively. Click on **Refresh View** to reflect those changes in the list. New fields are automatically added to the end of the list's columns. The order of the columns can be selected by choosing new columns one at a time or by using the grid's drag and drop features. To move a column, click on the column header, hold the click, and move the cursor along the header bar until arrows identify the point into which the column should be inserted. Releasing the click will force the grid to refresh with the column in the new position.

### SELECTING AN INDIVIDUAL ASSESSMENT

Clicking on the magnifying glass icon () in any row of the list will display that individual assessment in the View format. For more information on the View page, see the Viewing Assessments section.

### EXPORTING THE LIST

Beneath the list are controls that allow the user to export the list information to Microsoft **Excel** or **Word**. When the user clicks on the appropriate link, the entire result set will be exported using the grouping, sorting, and column order presented in the list. The exported file can be saved on any computer, however they may only be opened with Microsoft Excel 95/2003, Microsoft Word 2003, more recent versions of these, or other compatible products.

### REPORTS

Clicking on the **Report View** link displays the results of the request as a report, concatenating all the assessments on one page. The assessments will be ordered as they are on the **List** page. The report format can be modified using features on the **Report** page. After it is well formatted, export the report to MS Word using the **Report to MS Word** link. (For more information, see the Creating Reports section.)

### STOPLIGHT CHARTS

Clicking on the **Stoplight View** link displays a chart of all the ratings associated with the programs and dates represented in the results list. This chart is ordered by date, service, and then program. This chart can be exported to MS Word by using the **Stoplight to MS Word** link. (For more information, see the Creating Stoplight Charts section.)

### SYNOPSIS

Clicking on the **Synopsis View** link displays a chart of all the ratings associated with the programs and dates represented in the results list. This chart is ordered by date, service,

and then program. This chart can be exported to MS Word by using the **Synopsis to MS Word** link. (For more information, see the Creating Stoplight Charts section.)

### **MICROSOFT POWERPOINT COMPATIBILITY**

Users who wish to use assessment information that contains charts in Microsoft PowerPoint must first produce the report or chart in Microsoft Word format using the **...MS Word** links. The Word document should be saved immediately to disk and then opened in Microsoft Word. Using Word, each chart can be copied and then pasted to PowerPoint using PowerPoint's **Paste Special** dialog. The option to paste the information as a **Microsoft Office Word Document Object** must be selected. Although the text may be modifiable after the object is pasted into PowerPoint, the formatting is not. It is recommended that the chart be formatted as much as possible in DAMIR before beginning this process. Note that each chart or page of information must be pasted into PowerPoint separately.

### **BULK RELEASE**

For users who have numerous assessments to release, it can be helpful to be able to release a number of assessments at one time. This is accomplished through the **List** page. The controls for bulk release are contained in the **Release Controls** panel above the list and in a column in the list itself marked **Rel?** which contains checkboxes on appropriate rows. (For more information, see the Creating Stoplight Charts section.)

## **Viewing Assessments**

To view an assessment, the user must first make a request that would include the assessment using the **Request** page and display the results on the **List** page. Clicking on the magnifying glass icon (🔍) for a specific assessment in the list displays the full assessment (as shown in Figure 4 – OSD Assessment Status Page).

### **ASSESSMENT OPTIONS**

The controls at the top of the left side of the display allow the user to navigate further.

- **Assessment Status** – A view of the assessment which contains the Release Process controls.
- **Edit Assessment** – When active, allows the user to edit the assessment.
- **New Assessment** – When active, allows the user to begin creating a new assessment using this assessment as a template.
- **Delete Assessment** – When active, allows the user to delete the assessment.

These controls are enabled according to the user's privileges and the status of the assessment. For any user with privileges to create an assessment, either the **Edit Assessment** or **New Assessment** link options may be available. **Edit Assessment** will be available only if the assessment is still under review and the user has privileges to edit it. Any assessment that has been released to DAMIR can be used as the basis of a new assessment using the **New Assessment** link.

Note that an assessment may only be deleted by a user who has release authority at the highest level of the release process that the assessment has reached. This information is available through the release process workflow (See **Releasing Assessments Via the View Page**). An assessment cannot be deleted if it has been released to the DAMIR DAES community.

## REPORT OPTIONS

**Assessment Status** page (as well as the **Report** page) contains a group of **Report Options** controls. These controls allow the user to customize the look of the page. The checkbox **Show AO Information** allows the user to control whether the Responsible Action Officer area is visible. It should be noted that action officer information is provided for internal review processing only. For assessments that are still in processes, the **Show Release Process** checkbox allows the user to control the visibility of the workflow information. In each case, changing the selection on the checkbox and then clicking **Refresh View** will cause the page to refresh and the new page to be formatted as requested.

## RELEASE PROCESS WORKFLOW

For any assessment that is still in process, a release process workflow is displayed beneath the assessment and the Responsible Action Officer areas of the **View** page. This section allows the user to monitor the release process and, if privileges allow, to take action in that process. (For more information, see the **Releasing Assessments Via the View Page** section.)

Figure 4 – OSD Assessment Status Page

The screenshot shows the OSD Assessment Status Page for 'RQ.4A/B UAS GLOBAL HAWK Nov 2010 Performance Assessment by Training'. The page is annotated with several callout boxes:

- Assessment Options:** A sidebar on the left containing 'Assessment Options' (Assessment Status, Edit Assessment, New Assessment, Delete Assessment), 'Report Options' (Show AO Information, Show Release Process), and a 'Refresh View' button.
- OSD Assessment View Instructions:** A top header with a 'Show' button and a 'Previous' link.
- Basic information identifying the assessment is listed at the top:** Points to the title 'RQ.4A/B UAS GLOBAL HAWK Nov 2010 Performance Assessment by Training'.
- PM Assessment:** Points to the 'PM Assessment' section showing a green 'G' grade and 'No explanation provided.'.
- OSD Assessment: - Synopsis - Rating & Explanation:** Points to the 'OSD Assessment Synopsis' and 'OSD Assessment' sections.
- Report Options Controls determine whether Action Officer and/or Release Process Workflow are visible:** Points to the 'Report Options' section in the sidebar.
- The Action Officer who created this assessment is listed here with specific contact information:** Points to the 'Responsible Action Officer' table.
- Release Process Workflow DAMIR keeps an audit trail of the releases for the assessment. This area shows when it was last released at each level. Release/Assign Buttons provide the controls to release forward or assign back to any level:** Points to the 'DAES Review Submission Status Instructions' table and the 'Release' button.

Action Officer	Room	Phone	E-Mail	Fax
AT&L Instructor				

Process Step	Status
Training	Pending
Supervisors	Pending
Action Officers	In Process

## Creating New Assessments

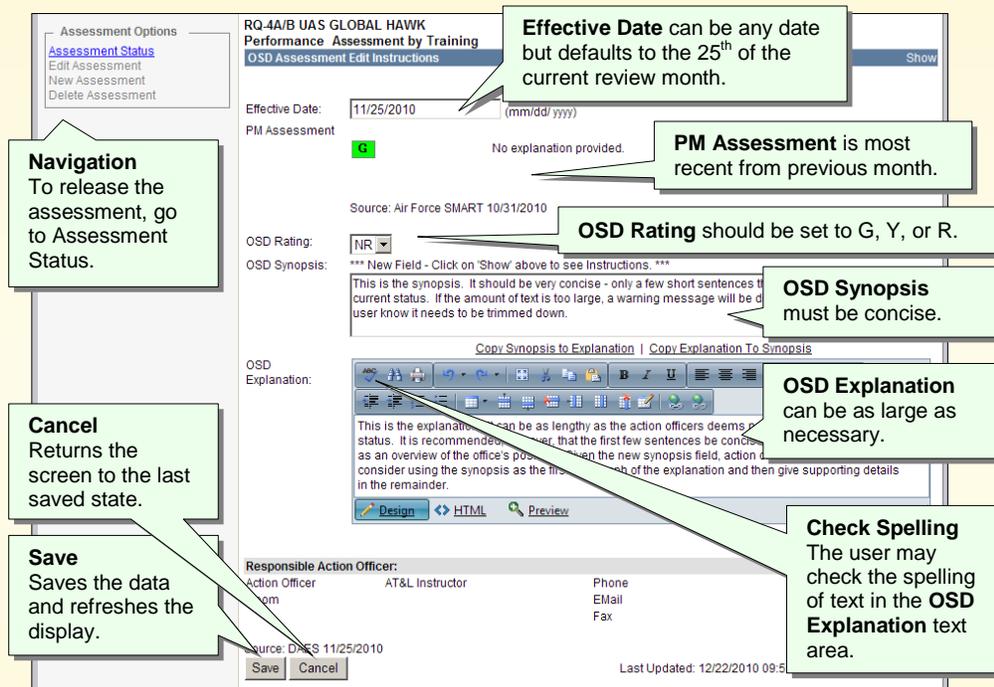
New assessments can be created in two ways, either by using a blank template or by using an existing assessment as a template.

### CREATE A BLANK ASSESSMENT

To create an assessment using a blank template, the user must use controls available on the **Request OSD Assessments** page (see Figure 2 – Request OSD Assessment Page). These controls are only available to users with Action Officer privileges. The user must select both a program and an indicator to successfully create a blank assessment. Clicking on the **Create Blank Assessment** button will present an editable page that is similar in format to the **Assessment Status** page.

Note that all data entry is set to the defaults: the **Effective Date** is set to the current review date, the **OSD Rating** is set to the first item on the list, and the **OSD Synopsis** and **OSD Explanation** areas are blank. The user should take care to ensure that each data item is completed appropriately for the program/subprogram, indicator, and date of review.

Figure 5 – OSD Assessment Edit Page



A warning message is displayed at the top of the assessment to remind the user that this is a new assessment and so does not exist in the database. Use the **Save** button to properly save the new assessment. When the assessment has been saved, the page will refresh and there will no longer be a warning message at the top of the page.

### CREATE FROM AN EXISTING ASSESSMENT

To create an assessment using an existing assessment as a template, the user must first make the appropriate selections on the **Request OSD Assessments** page so that the results list will include the desired existing assessment. After clicking on the **See List** button to view the results list the user must then click on the magnifying glass icon (🔍) in the row that indicates the desired assessment. The assessment will be displayed using the **Assessment Status** page. If the assessment has been released, and the user has Action Officer privileges, the **New Assessment** link will be active. Clicking on the **New Assessment** link will present the user with an editable page, similar in format to the

**Assessment Status** page. The **OSD Rating**, **OSD Synopsis**, and **OSD Explanation** will be preset to the values from the chosen assessment. The **Effective Date** will default to the current review date. Note that the **OSD Explanation** will be prefixed with the phrase "Copy of Previous". This is to ensure that at some point in the review the explanation will be reviewed and edited.

A warning message is displayed at the top of the assessment to remind the user that this is a new assessment and so does not exist in the database. Use the **Save** button to properly save the new assessment. When the assessment has been saved, the page will refresh and there will no longer be a warning message at the top of the page.

### KEEP IN MIND

The **OSD Explanation** is the official explanation for the rating selected and will be released with it as the OSD Assessment. The **PM Assessment** is separate and is presented for reference only. If another more recent PM Assessment is made available before the end of the review cycle it will be linked with this OSD assessment at that time.

Both the **OSD Synopsis** and **OSD Explanation** but contain at least some text in order to save the assessment. Although both fields are capable of receiving a great deal of text, it is recommended that the **OSD Synopsis** be concise. When the recommended amount of text is exceeded, the OSD Synopsis text will change color and an alert will be presented above it. Further, it is recommended that the first few lines of the **OSD Explanation** be a concise statement of the position of the office which would be followed by support for that position. It is possible to copy the text from one to the other using the links provided (i.e. **Copy Synopsis to Explanation** and **Copy Explanation to Synopsis**).

Only one unreleased OSD assessment for any program/subprogram, indicator, or office is allowed, regardless of date. An error message will be presented when the user tries to create an assessment if an existing one has not been released. The existing assessment should either be released or deleted before the new assessment can be created.

The edit controls on the page can be reset to their initial values at any time by clicking the **Cancel** button.

The user may return to the assessment **View** page at any time by clicking the **Assessment Status** link.

### CHECK SPELLING

Since assessments will be viewed by a wide number of users, a spell checking feature has been provided to minimize errors. Before submitting an assessment, the user should click the **Spell Checker** button on the explanation editor toolbar (  ) and walk through the spell check process.

## Editing Assessments

If an assessment is still under review, any user in the office originating the assessment and with rights at the current release level can edit the assessment. The edit display is the same display used for creating assessments, with the same limitations and controls. The major difference is that changes made using the edit page, once saved, update the selected assessment rather than creating a new one.

A warning message is displayed at the top of the assessment whenever changes are made to any edit control. It is removed after the **Save** button is clicked and the data is successfully updated to the database.

### Releasing Assessments

Assessments that have been created in DAES Review must go through a formal release process in order to be released to the DAMIR DAES community. This process is somewhat unique to each office and may include any of the roles discussed in the **Overview**. Although each office may be unique, all users and assessments in an office are part of the same release process. Releases can be performed either through the individual assessment **View** page or through the **List** page.

#### VIA THE VIEW PAGE

At the bottom of the assessment **View** page (see Figure 4 – OSD Assessment Status Page) is the Release Process Workflow. This area lists the levels of release required for the assessment. Each level of release can be opened by clicking on the ( + ) button next to the name of the **Process Step**. Every user who has release authority for the assessment at that level will be listed along with basic contact information. The current **Process Step** that is allowed to release the assessment will have a **Release** button in the right-most column of the workflow. If the user is able to release the assessment, that button will be enabled. Clicking the button will force a prompt to the user confirming the release. Accepting that prompt will release the assessment to the next level of the workflow. The page will refresh and the workflow will change to indicate the new level of release. If the button performs the final release, it will be marked **Finalize**. After the assessment is finalized the workflow will no longer be visible.

The workflow also contains a column labeled **Auto Pass?** This column allows the user to opt out of future reviews of the assessment in case a reviewer at a higher level chooses to assign the assessment back to a lower level for review. If the user wishes to opt out of future reviews, the **Auto Pass** checkbox must be checked before clicking on the **Release** button. It should be noted that the Action Officer cannot opt out of the release process.

If the assessment has been released, but has not been released from the highest level of the workflow, it is possible to assign the assessment back down to a previous level for corrections. In this case, each of the lower levels of release will have an **Assign** button in the right-most column. Clicking the button for the process step to which the assignment should be made will force the assessment back down to that level. The assessment **View** page will refresh indicating that change. The assessment will continue to be visible, but not editable, to any level of the process to which it had been released previously.

#### VIA THE LIST PAGE (BULK RELEASE)

Releasing OSD Assessments through the **List** page (see Figure 3 – OSD Assessments List Page) allows the user to release several assessments at the same time. This feature should only be used if the assessments have all been reviewed independently and found acceptable. On the **List** page, if the user has privileges to release assessments, a panel marked **Release Controls** will be presented above the list and a column marked **Rel?** will be presented in the list. Assessments for which the user has release privileges will show a checkbox in this column. Assessments for which the checkbox contains a checkmark will be processed for release when the user requests. The panel contains links that allow the user flexibility in marking assessments for release. The user may **Check All Assessments**, **Remove Checkmarks** from all marked assessments, and **Toggle Checkmarks** to removed the checks from all checked assessments and check the assessments that were unchecked. After the correct assessments have been checked, the user must click on the **Release Marked Assessments** button to release the checked assessments. It should be noted that the entire result set will be processed, even those assessments which are not visible in the list. It is therefore recommended that the list page size settings be set to display all the assessments in order to avoid unexpected releases.

There is no facility for assigning assessments back to another level of the process through the OSD Assessments List page. Assignments must be performed using the View page and the Release Process Workflow.

### Assessment Quick Tips

Using the **Create Assessment** controls from the **Request** page is the quickest way to create a new assessment. Creating an assessment this way requires the user to first select both the indicator and the program/subprogram for the assessment and then click the **Create Blank** button to proceed to the edit screen. All assessment fields (i.e. the rating, the synopsis, and the explanation) must be entered before the assessment can be saved.

Both **OSD Synopsis** and **OSD Explanation** are required. An assessment cannot be saved without at least some text in each text box.

- DAMIR will time out after several minutes and, if the edit page is not saved in time, may cause the loss of any data entered since the page was displayed. Users should frequently click the **Save** button to avoid data loss.
- The **Date** must be in mm/dd/yyyy format. Although any valid date is acceptable in the date field, the date typically used (and the date to which the system defaults) is the 25<sup>th</sup> of the month of the current OSD review. The most recent PM Assessment dated within the previous month will automatically be linked with the OSD assessment when it is displayed.
- Use official guidance for selecting the OSD Rating. Guidance is available on the **Guidance** page of the DAMIR public website:  
<http://www.acq.osd.mil/damir>.
- To determine the release status of an assessment, view the assessment on the **Assessment Status** page and check the release process workflow at the bottom of the page. If the workflow is presented, the **Release** button will indicate the current level of release. An assessment which has already been released to DAMIR will not show the release process workflow.
- DAMIR has a control feature designed to limit the amount of outstanding, unreleased data. Only one unreleased OSD assessment for any program/subprogram, indicator, or office is allowed, regardless of date. An error message will be presented when the user tries to create an assessment if an existing one has not been released. The existing assessment should either be released or deleted in order to save the new assessment.

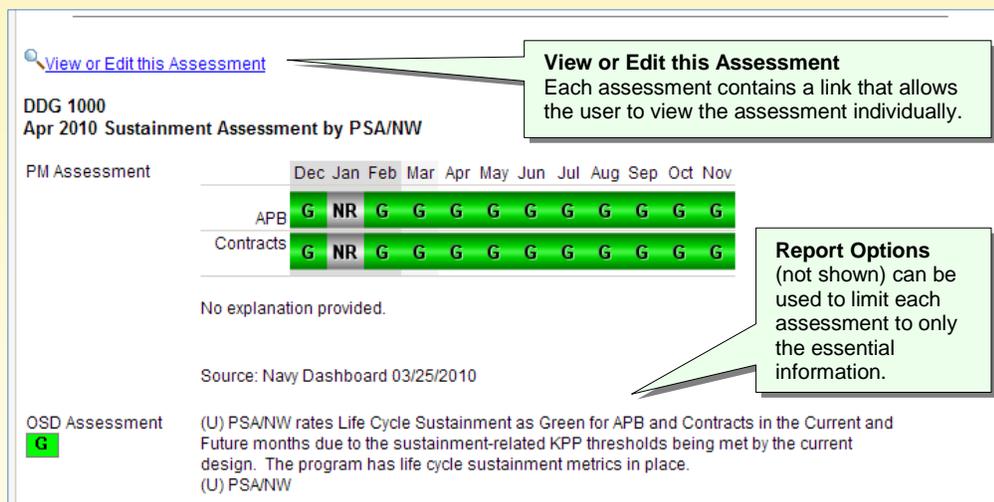
### Creating Reports

This feature allows the user to display the results of the request as a report, concatenating all the assessments in one page. This eliminates the need to click on every assessment in order to obtain a quick view of the information. The report feature can also provide a clean printable view of all the requested assessments at one time.

To create a report, the user must first make selections on the **Request OSD Assessments** page and click on **See List** to view the results list. The user should make sure that the list is correct before clicking on the **Report View** link. The report display is then presented. (Note that the length of time required to produce the report display is based on the number of assessments requested for display. It can take up to a minute to display the results of the **Feedback Report** saved request. That request can contain over 400

assessments, depending on the date of the DAES Review.) The report display can be customized using features from the **Report Options** menu.

**Figure 6 – Report View**



### VIEW OR EDIT AN ASSESSMENT

It is possible to go from the **Report** page to edit a specific assessment. Each assessment on the **Report** page has a link above it that allows the user to view it individually. Click the **View or Edit this Assessment** link to view the assessment and from there click the **Edit Assessment** link to edit. Click on the navigation link for the **OSD Assessments List** page and then click on the **Report View** link to return to the **Report** page.

### REPORT OPTIONS

Depending on the audience, the report may need to be customized. When sending an assessment report to users who are not part of the OSD DAES Review process, it is wise to strip the report of any contact information or information concerning the current release status of the assessments. To do so, select the appropriate option and then click on the Refresh View button.

- **Show AO Information** – When checked, this option shows the detailed information about the action officer who created the assessment. Uncheck this option to hide the assessment’s creator and allow the assessment to speak for the office.
- **Show Release Process** – When checked, this option shows the detailed information that shows where the assessment is in the release process. Since this information is only provided for those involved in the release process, uncheck this box to prevent it from displaying.

## Creating Stoplight Charts

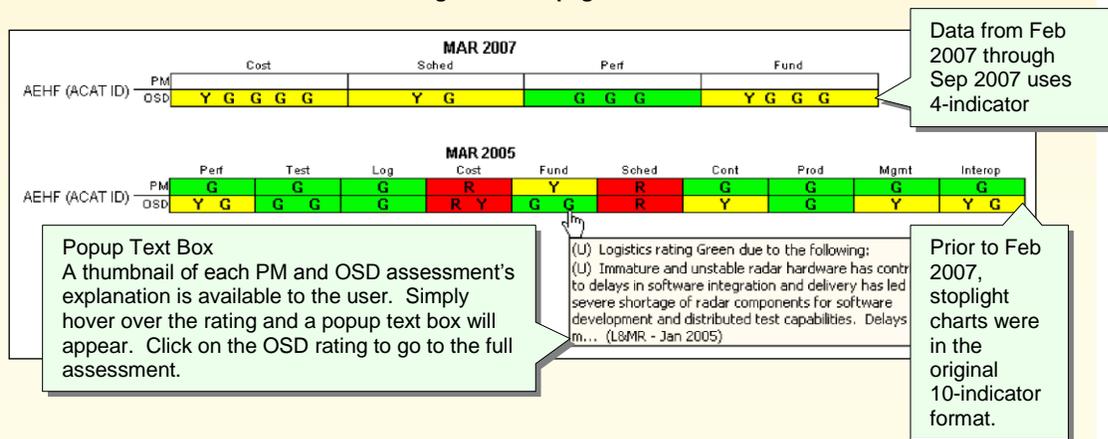
The Stoplight charts are intended to provide the user with an overview of the assessments for a given DAES Review period and a given program in a graphic format. The stoplight chart display is limited to the **Program**, **Service** and **Review Date** selections made on the **Request OSD Assessments** page. It is ordered by date, service, and then program. The user can create a stoplight chart by first making selections on the **Request OSD Assessments** page, clicking **See List**, and then clicking on **Stoplight View**. The

## DAMIR DAES Review

Stoplight Chart may display information in three formats, depending on the date of the DAES Review presented. A 10-indicator presentation is used for reviews performed before January 2007 and as of June 2010. Between January 2007 and September 2009, a 4-indicator presentation was used. Between September 2009 and May 2010, stoplight charts presented information in a 5-indicator format.

After the stoplight chart is displayed, the user can view a ‘thumbnail’ of basic information from any assessment by moving the cursor over the rating graphic for that assessment and leaving it there for a few seconds. The information in the ‘thumbnail’ for any OSD assessment includes the first 300 characters of the assessment explanation, the office that had release authority over the assessment and the date of the assessment. By clicking on an OSD rating within the stoplight chart, the corresponding assessment will be displayed in view format. The information in the ‘thumbnail’ for any PM assessment includes the first 300 characters of the assessment explanation, the indication ‘PM’, the type of the PM assessment (APB or Contracts), and the date of the DAES Report.

**Figure 7 – Stoplight Chart**



## Other Features

### SAVED REQUESTS

In order to facilitate the many reasons why a user may be using the DAES Review Request features, a feature has been provided that allows each user to save a number of common requests that can change the request filters and list settings at the click of a link. This feature is found on the left sidebar of both the **OSD Assessment Request** page and the **OSD Assessments List** page. The controls consist of a series of links and two buttons: **Save** and **Delete**. The links are the saved requests and include two standard links, **Feedback Report** and **My Recent Work**. All other links are created according to the user's saved requests and are identified by the name the user supplied when the save was made.

- **Named Request** – Although not listed in this fashion, each request that a user has saved using the **Save Request** button is listed in the option menu by name. Clicking on the named request menu item will provide the user with nearly the same set of current request selections and list columns, order, sorting and grouping that existed at the time of the save. In order to facilitate the monthly processing of DAES Review users, dates and DAES Groups are changed to provide the most current references. Therefore, if the original request was made in August for June, July and August assessments, the saved request will return September, October and November when used in November. Note that there are two “canned”

## DAMIR DAES Review

requests that cannot be changed or deleted, **Feedback Report** and **My Recent Work**. These are described in more detail below.

- **Save** – Clicking this option will save the **Selections** and the list columns, sorting, and grouping. The user is prompted to provide a name under which the request is saved. The saved request can be retrieved by clicking the link created with the name the user provided.
- **Delete** – When any Named Request is selected and the user clicks on this option, the named request is removed from the list.
- **Feedback Report** – Clicking this option will provide the user with an established set of **Current Selections**, list columns, sorting and grouping that provide a result set capable of supporting the Feedback Report. This feature is provided for backward compatibility with the original DAES Web product in support of the need to provide information to users who do not yet have access to DAES Review.
- **My Recent Work** – Because DAMIR business practices maintain the most recent state for any page, each time a user enters DAES Review the most recent request made is presented. If that was not what the user desired to see, the page controls could be used to clear the request and establish a new one. Since the most common request made by action officers is to view the existing assessments related to the current virtual DAES review (either from a previous cycle or generated during this one), a link is provided to assist the user in that request. This link establishes a request for all assessments initiated by the user for this review and the previous three DAES Review periods related to it.

## References

### GUIDANCE

Guidance is available on the **Guidance** page of the DAMIR public website:

- <http://www.acq.osd.mil/damir>.

### INDICATORS

(Consult guidance for information on these indicators and how to review them.)

- **Performance** – Performance Characteristics
- **Test** – Test & Evaluation
- **Sustainment** – Life Cycle Sustainment (LCS)
- **Cost**
- **Funding**
- **Schedule**
- **Contracts**
- **Production**
- **Management** – Management Structure
- **Interoperability**
- **Logistics** – *Available for historical reference only*

### RATINGS

(Consult guidance for information on these ratings and how to use them.)

- **NR** – No Rating
- **G** – Green
- **GA** – Green Advisory – *Available for historical reference only*
- **Y** – Yellow
- **YA** – Yellow Advisory – *Available for historical reference only*
- **R** – Red
- **RA** – Red Advisory – *Available for historical reference only*

### TECHNICAL ASSISTANCE

Technical assistance with DAES Review, as with any aspect of the DAMIR product, is available through the following:

DAMIR Hotline Phone: 703-679-5345

DAMIR Hotline Email: [damir@osd.mil](mailto:damir@osd.mil)

Support Website: <http://www.acq.osd.mil/damir>

## Index

<b>- A -</b>	
Assessment Options .....	8
<i>Assessment Status Link</i> .....	8
<i>Delete Assessment Link</i> .....	8
<i>Edit Assessment Link</i> .....	8
<i>New Assessment Link</i> .....	8
Assessment Status Link	
<i>Assessment Options</i> .....	8
<i>Viewing an Edited Assessment</i> .....	11
Assessment Status Page .....	See OSD
Assessment View Page	
<b>- B -</b>	
Building a Request .....	4
Bulk Release .....	8
<b>- C -</b>	
Cancel Button .....	11
Check All Assessments Link .....	12
Check Results Button .....	5
Check Spelling .....	11
Clear Group Link .....	7
Clear Request Button .....	5
<i>Incomplete Requests</i> .....	5
Clear Sort Link .....	7
Copy Explanation to Synopsis Link .....	11
Copy Synopsis to Explanation Link .....	11
Create a Blank Assessment .....	10
Create Assessment Controls .....	13
Create Blank Button .....	13
Create From an Existing Assessment .....	10
Creating New Assessments .....	9
Creating Reports .....	13
Creating Stoplight Charts .....	14
Current Selections .....	6
<b>- D -</b>	
DAES Review	
<i>General Description</i> .....	1
<i>Purview Module Link</i> .....	3
DAMIR Hotline .....	17
Delete Assessment Link .....	8
Delete Button	
<i>Saved Requests</i> .....	15
Function .....	16
Display Options .....	5
Displaying the Requested Assessments	
.....	6
<b>- E -</b>	
Edit Assessment Link .....	8
<i>Assessment Options</i> .....	8
<i>Availability</i> .....	8
<i>Creating Reports</i> .....	14
Editing Assessments .....	11
Effective Date	
<i>Create a Blank Assessment</i> .....	10
<i>Creating Assessments</i> .....	11
<i>Valid Data Entry</i> .....	13
Excel	
<i>Exporting the List</i> .....	7
Exporting the List .....	7
<b>- F -</b>	
Feedback Report Link	
<i>Canned Requests</i> .....	16
<i>Creating Reports</i> .....	13
<i>Explanation</i> .....	16
<i>Saved Requests</i> .....	15
Filter Options .....	5
Filter Programs By .....	6
<b>- G -</b>	
Grouping Assessments .....	7
Guidance .....	17
<b>- H -</b>	
Hide .....	See Instructions
<b>- I -</b>	
Indicator Picklist	
<i>Request OSD Assessments Page</i> .....	5
Indicators .....	17
Instructions .....	4
<b>- L -</b>	
List Page .....	See OSD Assessments List
Page	
List View .....	See OSD Assessments List
Page	
<b>- M -</b>	
magnifying glass icon .....	7
Microsoft PowerPoint Compatibility .....	8
My Recent Work Link	
<i>Canned Requests</i> .....	16
<i>Explanation</i> .....	16
<i>Saved Requests</i> .....	15
<b>- N -</b>	
New Assessment Link	
<i>Assessment Options</i> .....	8
<i>Availability</i> .....	8
<i>How it is used</i> .....	8
<i>Privileges</i> .....	10

## DAMIR DAES Review

Number of Assessments Button .....5

### - O -

OSD Assessment View Page .....	11
<i>Assessment Status Quick Tips</i> .....	13
<i>Bulk Release</i> .....	13
<i>Create a Blank Assessment</i> .....	10
<i>Create From an Existing Assessment</i> .....	10
<i>Release Process Workflow</i> .....	9
<i>Releasing Assessments</i> .....	12
<i>Report Options</i> .....	9
OSD Assessments List Page	
<i>Assigning Assessments</i> .....	13
<i>Building a Request</i> .....	5
<i>Bulk Release</i> .....	8
<i>Creating Reports</i> .....	14
<i>Displaying the Requested</i> <i>Assessment</i> .....	6
<i>Releasing Assessments</i> .....	12
<i>Reports</i> .....	7
<i>Saved Requests</i> .....	15
<i>Viewing Assessments</i> .....	8
OSD Assessments Report Page	
<i>Creating Reports</i> .....	14
<i>Displaying the Requested</i> <i>Assessments</i> .....	7
<i>Viewing Assessments</i> .....	9
OSD Explanation .....	11
OSD Explanation Data Entry	
<i>Assessment Quick Tips</i> .....	13
<i>Copy of Previous</i> .....	11
<i>Create a Blank Assessment</i> .....	10
<i>Create From Existing</i> .....	11
<i>Keep in Mind</i> .....	11
OSD Rating.....	13
OSD Rating Picklist	
<i>Create a Blank Assessment</i> .....	10
<i>Create From Existing</i> .....	11
<i>Request OSD Assessments Page</i> .....	5
OSD Synopsis	
<i>Assessment Quick Tips</i> .....	13
OSD Synopsis Data Entry	
<i>Create a Blank Assessment</i> .....	10
<i>Create From an Existing</i> .....	11
<i>Keep in Mind</i> .....	11
Other Features.....	15

### - P -

Performance .....	17
PM Assessment .....	11

### - R -

Ratings .....	17
Refresh View Button	
<i>Report Options</i> .....	14

<i>Show Obsolete Indicators</i> .....	5
<i>Show Release Process</i> .....	9
<i>Visible Fields</i> .....	7
Release .....	13
Release Controls	
<i>Bulk Release</i> .....	8
<i>Check All Assessments Link</i> .....	12
<i>Release Marked Assessments Button</i> .....	12
<i>Remove Checkmarks Link</i> .....	12
<i>Toggle Checkmarks Link</i> .....	12
<i>Via the List Page</i> .....	12
Release Marked List Assessments Button	12
Releasing Assessments .....	12
<i>Bulk Release</i> .....	12
<i>Via the List Page</i> .....	12
<i>Via the View Page</i> .....	12
Remove Checkmarks Link .....	12
Report Options	
<i>Controls</i> .....	14
<i>Creating Reports</i> .....	14
<i>Show AO Information</i> .....	9
<i>Show Release Process</i> .....	9
<i>Viewing Assessments</i> .....	9
Report Page .....	See OSD Assessments Report Page
Report to MS Word .....	7
Report View Link	
<i>Creating Reports</i> .....	13
<i>OSD Assessments List Page</i> .....	7
<i>Returning to the Report</i> .....	14
Reports.....	7
Request OSD Assessments Link .....	6
Request OSD Assessments Page	
<i>Assessment Quick Tips</i> .....	13
<i>Create From Existing</i> .....	10
<i>Creating a Blank Assessment</i> .....	10
<i>Creating Reports</i> .....	13
<i>Creating Stoptlight Charts</i> .....	14
<i>Requesting an Assessment</i> .....	4
<i>Saved Requests</i> .....	15
<i>Viewing Assessments</i> .....	8
Request Page .....	See Request OSD Assessments Page
Requesting an Assessment .....	4

### - S -

Save Button	
<i>Assessment Quick Tips</i> .....	13
<i>Creating a Blank Assessment</i> .....	10
<i>Creating From an Existing</i> .....	11
<i>Editing Assessments</i> .....	11
<i>Saved Requests</i> .....	15
Function.....	16
Saved Request Links.....	15
Saved Requests.....	15



***Notes***

