

Assigning Records

The DAR-Q Coordinator's main responsibilities are to function as a liaison to OSD and to assign records to appropriate individuals. When the DAR-Q period begins, the Agency Coordinator(s) will assign all records within each DAR-Q population to a Level 1 Reviewer at a minimum, following these steps:

1. The Coordinator can select a specific DAR-Q population or the ALL option to view and assign records. Users with multiple roles will need to select the Coordinator role from the drop-down menu before performing any actions to the record.
2. The Coordinator can filter for unassigned records by filtering the 'Workflow Status' column header for "To Do" or selecting the number under "Unassigned".
3. The Coordinator can select the individual record to assign.
4. Then the Coordinator can select the 'Assign' button to initiate the process to assign a record to the appropriate Level 1 Reviewer.

The screenshot displays the 'DORMANT ACCOUNT REVIEW QUARTERLY' interface. At the top, it is labeled 'UNCLASSIFIED//FOUO'. The header includes the 'DORMANT ACCOUNT REVIEW QUARTERLY' logo and 'ADVANA' branding. Below the header, there are filters for Agency (MOCK NAVY), Population (UDOU - Undelivered Order), Role (Coordinator 1), Data (In Review), and Period (21Q1). A summary table shows counts for various workflow statuses: Unassigned (47115), Assigned To Coordinator, Assigned To Reviewer, In Testing (23), Validated (14), and Approved. The main data table lists records with columns for Workflow Status, Current Assignee Level, Coordinator 2 Group, and Coordinator 3 Group. A right-hand panel features an 'ASSIGN' button and a list of assignees including Coordinator 2, Coordinator 3, Reviewer 1 through 5, and Tester. A sidebar on the left contains navigation icons.

Assigning Records (cont'd)

The Coordinator can assign records individually or in bulk to a lower level Coordinator or a Level 1 Reviewer. Holding the CTRL button while selecting specific records allows the Coordinator to select multiple noncontiguous records. The Coordinator can assign multiple consecutive records by selecting a record, then holding the Shift button while selecting the last record in the group.

5. The Coordinator can select multiple records (rows highlighted in green) to be assigned to a Level 1 Reviewer.
6. The Coordinator can also select all of the records on the page by clicking the "SELECT ALL" button.

UNCLASSIFIED//FOUO

DORMANT ACCOUNT REVIEW QUARTERLY

POWERED BY **ADVANA**

+ EXPAND

	Unassigned	Assigned To Coordinator	Assigned To Reviewer	In Testing	Validated	Approved
All	47115	1000	-	23	14	-

Agency: MOCK NAVY

Population: UDOU - Undelivered Order ...

Role: Coordinator 1

Data: In Review

Period: 21Q1

INITIATE

SELECT ALL RESET FILTERS EXPORT KSD ATTACHMENTS MASS ASSIGNMENT QTR1 FY2021 Review, Data as of: 12/31/2020 RESET COLUMNS HIDE/SHOW COLUMNS

Details	Record Selection	Sub-Allotment	System	Subhead	Beginning Fiscal Year	Ending Fiscal Year	Basic Symbol	Budget SubActivity	BLI	Document Type Code	Funds Center	MRI	ARI	SRI	ASSIGN	REQUIRE KSD
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SABRS_NAVY	7B4B	2019	2019	1804		1B4B	RC	D3824NW3824	NM0070	ND3824	ND3824	<div style="border: 1px solid #ccc; padding: 5px; font-size: 10px;"> <p>ASSIGN</p> <p>REQUIRE KSD</p> <p>COMMENTS</p> <p>Normal</p> </div>	<div style="border: 1px solid #ccc; padding: 5px; font-size: 10px;"> <p>5</p> </div>
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SABRS_NAVY	7B1B	2019	2019	1804		1B1B		F7025NW7025	NM0070	NE7025	NF7025		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SABRS_NAVY	6B1B	2019	2019	1804		1B1B		D3825NW1388	NM0060	ND3825	ND3825		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SABRS_NAVY	12TA	2019	2019	1804		4A1M	RC	71202N71208	N71201	N71201	N71202		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SABRS_NAVY	6A1A	2019	2019	1804		1A1A		E7012NWA012	NM0060	NE7012	NE7012		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SABRS_NAVY	52FA	2017	2017	1804		BSS1	WR	00520N05271	N00520	N00520	N00520		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SABRS_NAVY	6B1B	2019	2019	1804		1B1B		D3825NW5685	NM0060	ND3825	ND3825		
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SABRS_NAVY	7A1A	2019	2019	1804		1A1A		F7025NW7025	NM0070	NE7025	NF7025		

Agency: MOCK NAVY

Population: UDOU - Undelivered Order ...

Role: Coordinator 1

Data: In Review

Period: 21Q1

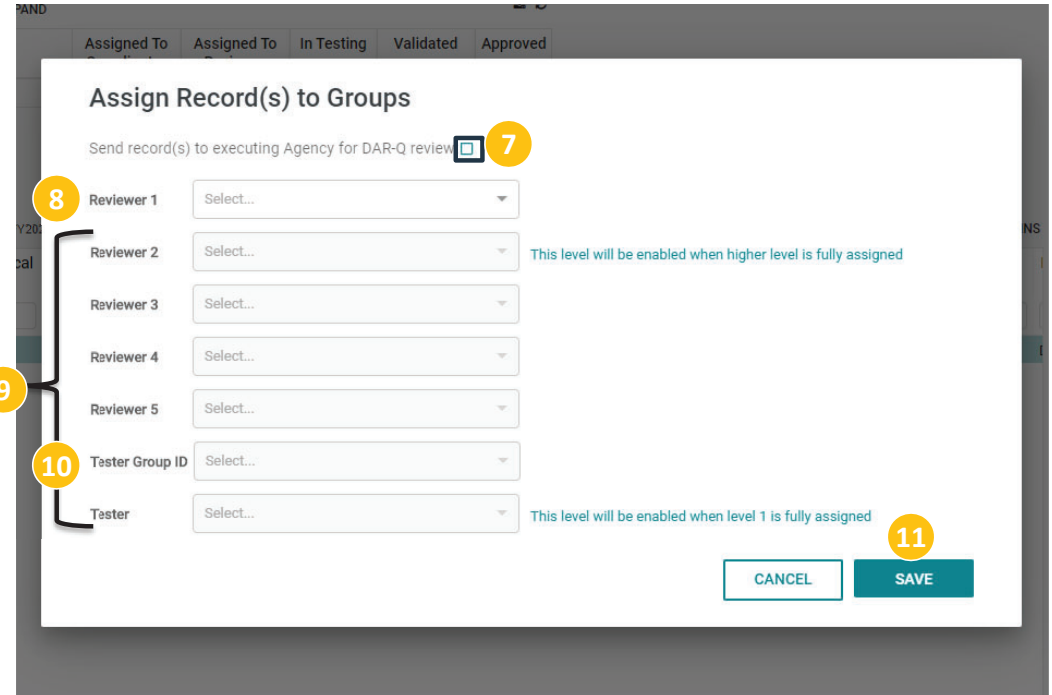
INITIATE

SELECT ALL RESET FILTERS EXPORT KSD ATTACHMENTS MASS ASSIGNMENT QTR1 FY2021 Review, Data as of: 12/31/2020 RESET COLUMNS HIDE/SHOW COLUMNS

Details	Record Selection	Sub-Allotment	System	Subhead	Beginning Fiscal Year	Ending Fiscal Year	Basic Symbol	Budget SubActivity	BLI	Document Type Code	Funds Center	MRI	ARI	SRI
<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	SABRS_NAVY	7B4B	2019	2019	1804		1B4B	RC	D3824NW3824	NM0070	ND3824	ND3824

Assigning Records (cont'd)

7. If the record consists of sub-allotted funds that need to be sent to another agency for review the Coordinator can check the box at the top of the assignment screen.
Refer to the [Record Sub-Allotment](#) section herein for further details on this DAR-Q tool functionality.
8. The Coordinator can select an individual Level 1 Reviewer or a Reviewer group (if applicable) from the drop-down menu or type the name of the Level 1 Reviewer into the the search box.
Note: *Only the first 10 names will appear in the drop-down. If the applicable Level 1 Reviewer does not appear in the drop-down, please type in his or her name or select the "More" option.*
9. If known, the Coordinator can assign the complete workflow associated with the record at this time by assigning the record to additional levels of review (if applicable) and tester.
10. The Coordinator has the option of selecting a Tester Group ID from the dropdown.
Note: *If a Tester Group ID is selected from the dropdown, only those Testers aligned to the selected Group ID will display. If no Tester Group ID is selected, all of the Testers in the agency will display.*
11. After all appropriate levels of review and/or a tester has been selected, click SAVE to assign records.



Assigned To Assigned To In Testing Validated Approved

Assign Record(s) to Groups

Send record(s) to executing Agency for DAR-Q review 7

8 Reviewer 1 Select...
Reviewer 2 Select... This level will be enabled when higher level is fully assigned
Reviewer 3 Select...
Reviewer 4 Select...
Reviewer 5 Select...

9 10 Tester Group ID Select...
Tester Select... This level will be enabled when level 1 is fully assigned

CANCEL SAVE 11

Assigning Records (cont'd)

12. To confirm that the records have been assigned, the Coordinator can click the 'Refresh' button above the summary table. The count of records that were assigned will be removed from the 'Unassigned' column and moved to the 'Assigned to Reviewer' or 'In Testing' column. These records will now show the name of the selected Reviewers/Testers within the detailed table.

- 12a. Summary Table Refresh button
- 12b. Expand/Collapse button
- 12c. Level 1 Reviewer assigned

Note: The Coordinator can click on the 'Expand' button to see and confirm that records have been assigned at the Level 1 Reviewer level.

UNCLASSIFIED//FOUO

Agency: MOCK NAVY

Population: UDOU - Undelivered Order

Role: Coordinator 1

Data: In Review

Period: 21Q1

12b + EXPAND

12a

	Unassigned	Assigned To Coordinator	Assigned To Reviewer	In Testing	Validated	Approved
All	47115	995	5	23	14	-

SELECT ALL RESET FILTERS EXPORT KSD ATTACHMENTS MASS ASSIGNMENT QTR1 FY2021 Review, Data as of: 12/31/2020

Obligation Number	PIIN	SPIIN	CLIN	ACRN	Transaction Type	Unliquidated Amount	Adjustment Amount	Workflow Status	Current Assignee Level	Coordinator 2 Group	Coordinator 3 Group	Reviewer 1 Group
17RC80047	N0018917FZ875		0003	AA		\$11,819.00		To Do	Reviewer 1	C2 Test Group	C3 Test Group	R1 Test Group
90077300				AA		\$11,812.43		To Do	Reviewer 1	C2 Test Group	C3 Test Group	R1 Test Group
19RC003Z0	N6817119P0082		0001	AA	2D	\$11,824.75		To Do	Reviewer 1	C2 Test Group	C3 Test Group	R1 Test Group
18RC014SC	W91QUZ06D0012	V802	1001	DH	2D	\$11,808.14		To Do	Reviewer 1	C2 Test Group	C3 Test Group	R1 Test Group
18RC067LD	N6945018F0177		0001	AA	2D	\$11,842.92		To Do	Reviewer 1	C2 Test Group	C3 Test Group	R1 Test Group

Agency: MOCK NAVY

Population: UDOU - Undelivered Order

Role: Coordinator 1

Data: In Review

Period: 21Q1

12 - COLLAPSE

	Unassigned	Assigned To Coordinator	Assigned To Reviewer	In Testing	Validated	Approved
Me	47115					
Coordinator 2		995				
Coordinator 3		-				
Reviewer 1			5		-	-
Reviewer 2					13	
Reviewer 3					-	
Reviewer 4					1	
Total	47115	995	5	23	14	-

ADVANA / DAR-Q User Guide

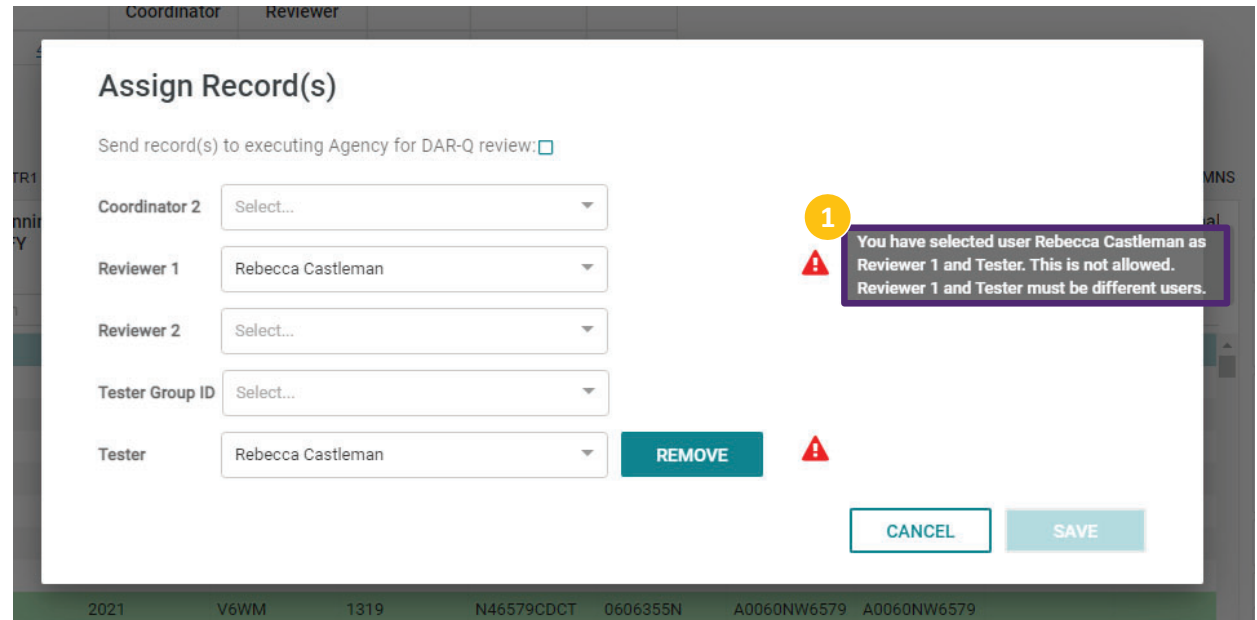
Unclassified // CUI // DOD Only

42

Assigning Records (cont'd)

The Coordinator will receive a warning message, preventing assignment of records if the following occurs:

1. The Coordinator attempts to assign to him/herself or another user as both tester and reviewer for the same record.



Coordinator Reviewer

Assign Record(s)

Send record(s) to executing Agency for DAR-Q review:

Coordinator 2

Reviewer 1

Reviewer 2

Tester Group ID

Tester

1 You have selected user Rebecca Castleman as Reviewer 1 and Tester. This is not allowed. Reviewer 1 and Tester must be different users.

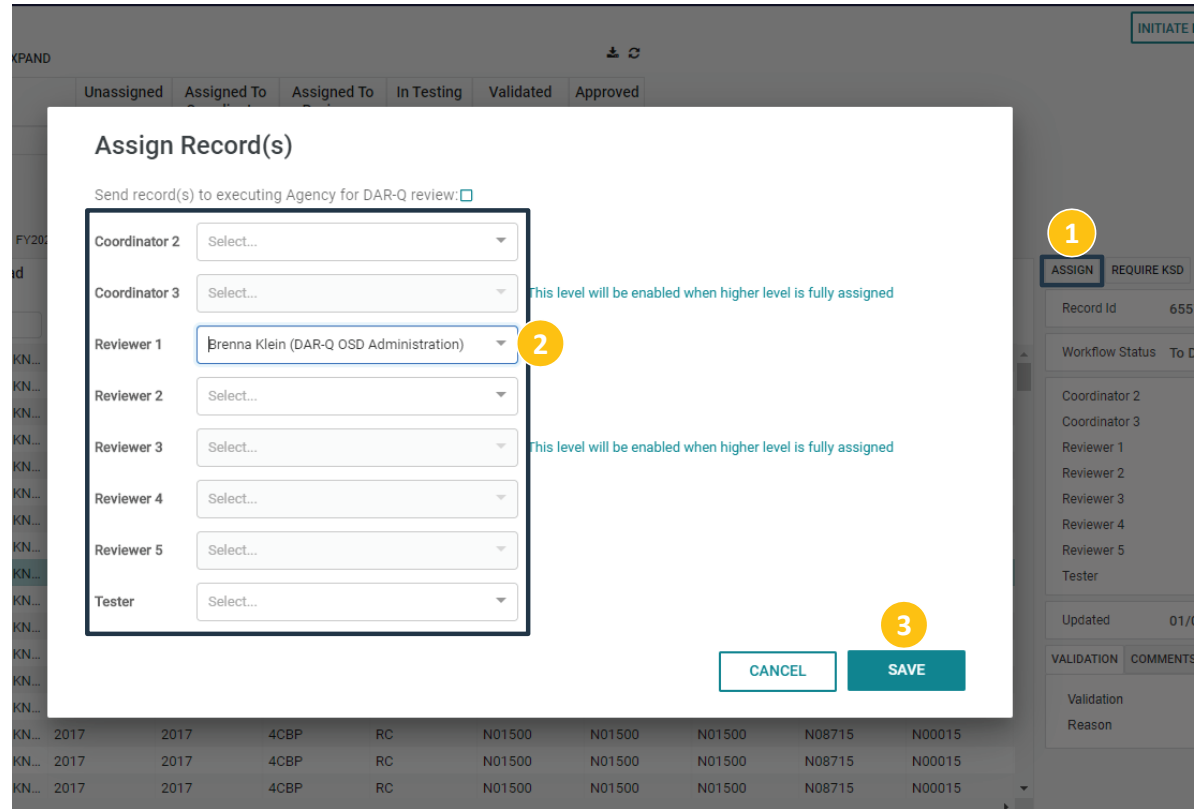
2021 V6WM 1319 N46579CDCT 0606355N A0060NW6579 A0060NW6579

Reassigning Records

1. The Coordinator can reassign records to a different individual or group in the workflow below them, if necessary. The Coordinator will click on the 'Assign' button, to do so.
2. A Confirmation screen will appear and the Coordinator will select the individual or group for which they would like to reassign the record from the dropdown menu.
3. Then click SAVE.

Note: For agencies utilizing group functionality, the Coordinator cannot reassign the record to a Coordinator or Reviewer that is not in the group hierarchy.

Note: Coordinators cannot reassign records once they are in the fully 'Approved' status (Workflow Status = Approved and Current Assignee Level = Coordinator). The Reviewer 1 will need to first unapprove the record to allow the Coordinator to reassign the record.



Assign Record(s)

Send record(s) to executing Agency for DAR-Q review:

Coordinator 2: Select...

Coordinator 3: Select... This level will be enabled when higher level is fully assigned

Reviewer 1: Brenna Klein (DAR-Q OSD Administration) 2

Reviewer 2: Select...

Reviewer 3: Select... This level will be enabled when higher level is fully assigned

Reviewer 4: Select...

Reviewer 5: Select...

Tester: Select...

CANCEL SAVE 3

Record Id	Workflow Status	Assignee Level
655	To D	Coordinator 2
		Coordinator 3
		Reviewer 1
		Reviewer 2
		Reviewer 3
		Reviewer 4
		Reviewer 5
		Tester