#### **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:

- 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.

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

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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.

- 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.

Send record(s)	to executing Agency for DAR-Q	review 7
Reviewer 1	Select	•
Reviewer 2	Select	This level will be enabled when higher level is fully assigned
Reviewer 3	Select	Ψ.
Reviewer 4	Select	Ψ.
Reviewer 5	Select	Ψ.
Tester Group ID	Select	*
Tester	Select	This level will be enabled when level 1 is fully assigned



- 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.

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2			12			- COLLAPSE	MOCK NAVY -	Agency:	
Approved	Validated	In Testing	Assigned To Reviewer	Assigned To Coordinator	Unassigned		UDOU - Undelivered Order	Population:	
					<u>47115</u>	Me	Coordinator 1 💌	Role:	
				995		Coordinator 2	In Review	Data:	
						Coordinator 3	21Q1 -	Period:	
12	12		5			Reviewer 1			
	<u>13</u>		121			Reviewer 2			
	17		1273			Reviewer 3			
	1		10			Reviewer 4			
	14	23	5	995	47115	Total			



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.

Send record(s) t	to executing Agency for DAR-Q	review:					
Coordinator 2	Select	•		1			
Reviewer 1	Rebecca Castleman	•		A	You have selected Reviewer 1 and Tes Reviewer 1 and Tes	user Rebecca Castler ster. This is not allowe ster must be different	nan as ed. users
Reviewer 2	Select	•					
Tester Group ID	Select	•					
Tester	Rebecca Castleman		REMOVE	A			
				-			

### **Reassigning Records**



- 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.

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PAND						± 3							
	Unassigned	Assigned To	Assigned To	In Testing	Validate	ed Approved							
l	Assign	Record(s	5)										
FY202	Send record(	s) to executing	g Agency for DAI	R-Q review:	•							1	
d	Coordinator 3	Select			- T	nis level will be er	habled when	higher level is	fully assig	ned		Record Id	655
<n< td=""><td>Reviewer 1</td><td>Brenna Klei</td><td>n (DAR-Q OSD Ad</td><td>ministration)</td><td>-</td><td>2</td><td></td><td></td><td></td><td></td><td>-</td><td>Workflow S</td><td>Status To I</td></n<>	Reviewer 1	Brenna Klei	n (DAR-Q OSD Ad	ministration)	-	2					-	Workflow S	Status To I
(N (N	Reviewer 2	Select			-						- 1	Coordinate	r 2 r 3
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<n< td=""><td>Reviewer 4</td><td>Select</td><td></td><td></td><td>-</td><td></td><td></td><td></td><td></td><td></td><td></td><td>Reviewer 3</td><td></td></n<>	Reviewer 4	Select			-							Reviewer 3	
<n< td=""><td>Reviewer 5</td><td>Select</td><td></td><td></td><td>•</td><td></td><td></td><td></td><td></td><td></td><td></td><td>Reviewer 5</td><td></td></n<>	Reviewer 5	Select			•							Reviewer 5	
<n< td=""><td>Tester</td><td>Select</td><td></td><td></td><td>•</td><td></td><td></td><td></td><td></td><td>3</td><td></td><td>Updated</td><td>01/</td></n<>	Tester	Select			•					3		Updated	01/
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