NAVAL SUPPLY SYSTEMS COMMAND

Procurement Performance Management Assessment Program (PPMAP)

PPMAP User Manual

Version 3.0

Lotus Notes

PPMAP User Manual

©Naval Supply Systems Command

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Chapter

1

Introducing PPMAP

The Procurement Performance Management Assessment Program (PPMAP) User Manual describes NAVSUP 02 and assessed activity roles and responsibilities within PPMAP. Each chapter is designed to address the actions and responsibilities performed by either an activity and/or PPMAP Team. Specifically, Chapter 1 introduces the history, the purpose, and the configuration of the PPMAP application. Chapter 2 provides PPMAP users with navigational methods needed to explore the application. Chapter 3 guides users through the "How-To" of conducting proper assessments via PPMAP. Chapter 4 describes the NAVSUP 02 and PPMAP Team unique roles in the assessment process. Lastly, Appendix A provides a quick tour of Lotus Notes.

Background

PPMAP is designed to support Procurement Performance Management Assessment Program evaluations by the Commander, Naval Supply Systems Command (NAVSUP 02). Activity Assessments report on the adequacy; quality and management of personnel; contract performance; quality assurance, as well as the acquisition cost and price analysis for each activity.

PPMAP contains pre-assessment checklists and activity responses, the summary of conditions observed including findings and recommendations, activity feedback to recommendations, suggestions for improving business practices, and a list of best practices. PPMAP also has a section for posting Management Initiatives submitted by activities to NAVSUP 02; a Conferencing section for creating discussions of critical procurement issues; and a PPMAP Guidance/Instructions section.

PPMAP fosters a collaborative approach between the assessed activity and NAVSUP 02 for both preparation and follow through during the Activity Assessment process. PPMAP sorts and displays data by assessment area or activity for use in improving

business practices at NAVSUP 02 assessed procurement activities, and for compilation of metrics.

Purpose

PPMAP provides users an online, paperless review and assessment tool that saves time in the preparation and follow-up of contracting activity assessments.

PPMAP creates an atmosphere where principal issues and questions can be addressed and resolved online prior to the commencement of the assessment.

PPMAP also provides an online format for the assessed activity to submit status reports for correcting deficiencies deficiencies. PPMAP provides a unique platform for posting all public assessment data and electronically archives all activity assessments for the benefit of all assessed Activities.

PPMAP contains a conference area for users to create and hold on-line conferences for discussing and resolving procurement related issues.

System Configuration

PPMAP is constructed in a Lotus Notes, Windows-based, Personal Computer environment and in Lotus Domino for Internet access. The minimum system requirements for successful PPMAP Lotus Notes installation are outlined in the following hardware and software specifications.

Hardware Requirements (If Not On A Lotus Notes Network)

- Pentium/133+ IBM-Compatible Personal Computer
- 3.5” Floppy Disk Drive
- Dedicated 14.4+ Modem (28.8 preferred)
- Analog Phone Line or Internet Connection

Note:

If on a Lotus Notes Network, the user only needs a computer capable of running the latest version of the Lotus Notes Client.

Software Requirements

- 16 MB RAM (minimum)
- 60-70 MB Hard Disk Space

- 1 MB Video RAM
- Windows® 95 or higher
- Lotus Notes® Client

Getting Started

PPMAP can be accessed in *two* ways. The first is to access PPMAP using Lotus Notes, which is the focus of this manual. The second is via the Internet. A separate user manual describes the use of PPMAP on the Internet.

Internet Access

Most users outside of NAVSUP 02 will use PPMAP via the Internet. Internet access requires a User ID and password, and is requested by accessing the QUADS Registration database at http://quads.navsup.navy.mil. The NAVSUP PPMAP Coordinator adjudicates all requests for access and assigns individual user roles.

Lotus Notes Access

The minimum Lotus Notes configuration and a Notes secure User ID are required to access PPMAP. If help is required, contact your Lotus Notes Systems Administrator.

Required Notes Setup File

In the Lotus Notes directory 'Notes' (located in your assigned hard drive directory, usually c:\), a subdirectory entitled "notes\data" should have been created during installation. The local database replica, *PPMAP.nsf*, is stored in this subdirectory. PPMAP will not properly update without these files in their correct location.

Server Numbers/IP Addresses

The server numbers/IP addresses will be incorporated into various publication server connection documents at the time of installation. However, should it become necessary to reconfigure Lotus Notes due to local software changes, these phone numbers will be important.

- **(DSN) 430-8207**
  DSN Number (Modem Connection)
- **(717) 605-8207 or 8208**
  Commercial Number (Modem Connection)
- **204.222.238.17**
  Internet Address (TCP/IP Connection only)

Adding the **PPMAP** Icon

If a PPMAP icon was not added to your Lotus Notes desktop when the application was installed, a connection document must be added to your personal name and address book. Please see your Systems Administrator for assistance.

Once the PPMAP icon has been added to the Lotus Notes Workspace, you are ready to begin working with PPMAP.

PPMAP Support

If you need assistance using PPMAP, please contact one of the following:

NAVSUP Contracting Field Support Division, PPMAP Coordinator

Name: Andrea Reisser (SUP22A1)
Phone: (717) 605-2735
Fax: (717) 605-4040
E-Mail: Andrea_M_Reisser@navsup.navy.mil

PPMAP Functional Project Manager

Name: Dave Bunten
Phone: (703) 679-3413
Fax: (703) 679-3401
E-Mail: dbunten@.caci.com

Chapter

2

Exploring **PPMAP**

Before working with PPMAP, you should become familiar with Lotus Notes terminology and navigation techniques. If you are unfamiliar with Lotus Notes basics, refer to Appendix A for a Quick Tour of Lotus Notes.

Launching **PPMAP**

Double click the Lotus Notes icon from your desktop to launch the application. A Lotus Notes opening "splash" screen appears while the system is initializing. The splash screen transitions to the Lotus Notes workspace as shown in Figure 2.1.

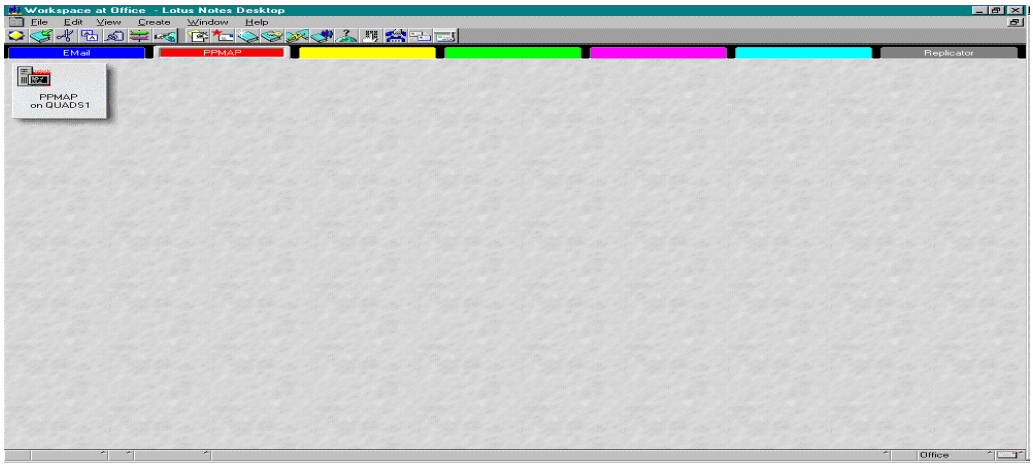
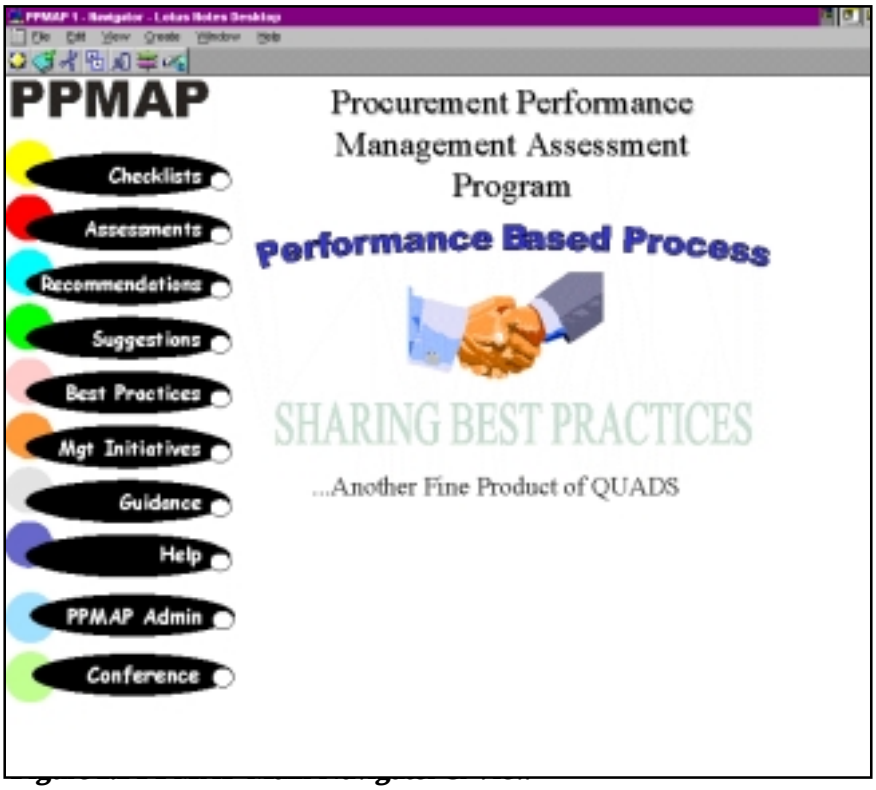


Figure 2.1 Typical Lotus Notes Workspace

To access the database, double click the PPMAP icon from the workspace page.

Navigating in **PPMAP**

The next screen that appears is the PPMAP Main Navigator and view as depicted in Figure 2.2. *All navigational activities in PPMAP begin at the Main Navigator*. The PPMAP Main Navigator view is divided into ten distinct areas: Checklists, Assessments, Recommendations, Suggestions, Best Practices, Mgt (Management) Initiatives, Guidance, Help, PPMAP Admin, and Conference. To access a particular PPMAP section, place the mouse pointer over the desired hotspot name. A red box highlights the topic. A single mouse click opens the applicable PPMAP Assessment section view. To close a particular view, select **File | Close** from the menu bar.



Note:

At any time if you wish to return to the PPMAP Main Navigator, select the **Home** hotspot located in the navigator.

Navigating to Checklists

Select the **Checklist** hotspot from the PPMAP Main Navigator to access the Checklist navigator and view as shown in Figure 2.3. Nine Assessment Areas and Pre-Assessment Letters appear in the view pane. This view can be expanded to shows checklists organized within each assessment area, checklist responses, comments and questions, and responses to the site. Expanding and collapsing views are means by which you may control desktop size, appearance and navigation process.

The Checklist navigator offers the PPMAP user five ways to view the assessment information:

- Checklists By Area
- Checklists By Name
- Responses By Date
- Responses By Name
- Responses By Type

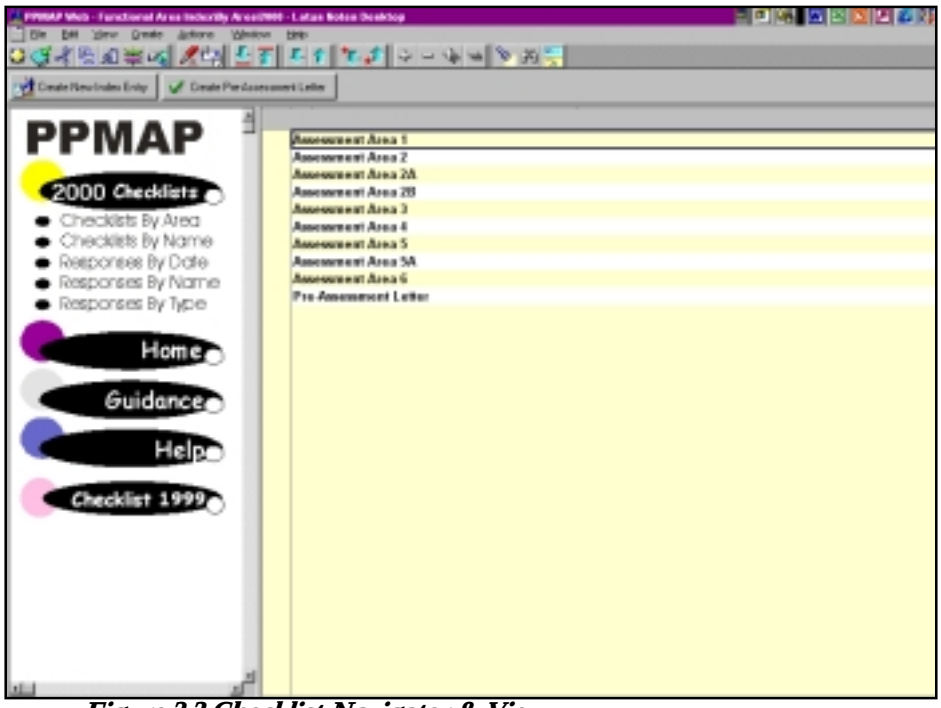


Figure 2.3 Checklist Navigator & View

Checklists By Area

Selecting the **Checklists By Area** sort order in the Checklist view displays a list of the nine Assessment Areas with their respective checklists, and Pre-Assessment Letters sorted by activity. Arranged underneath the applicable checklists may be activity checklist responses, comments and questions, and NAVSUP 02 responses.

Checklists By Name

Selecting the **Checklists By Name** sort order displays a list of assessment checklists in alphabetical order and Pre-Assessment Letters sorted by activity.

Responses By Date

Selecting the **Responses By Date** sort order displays the response dialogue between an activity and NAVSUP 02, in date order, with most recent on top.

Responses By Name

Selecting the **Responses By Name** sort order identifies individuals by name and command that have provided checklist responses, comments and questions, or responses to checklist issues.

Responses By Type

Selecting the **Responses By Type** sort order displays checklist responses, comments and questions, first sorted by type, and then sorted by specific activity. This view is an excellent management tool for monitoring the percentage of checklist responses completed by a particular activity and any outstanding posted comments/questions that require NAVSUP 02 or activity action.

Navigating Home

To navigate to other areas, return to the PPMAP Main Navigator by selecting the **Home** hotspot in the navigator or by selecting **File | Close** from the menu bar.

Navigating to Assessments

In the PPMAP Main Navigator, click on the **Assessments** hotspot. The Assessments navigator and view as shown in Figure 2.4 opens and displays a list of assessed sites and their applicable Assessment Report(s). In this view, Assessment information is only viewable in a By Site sort order.

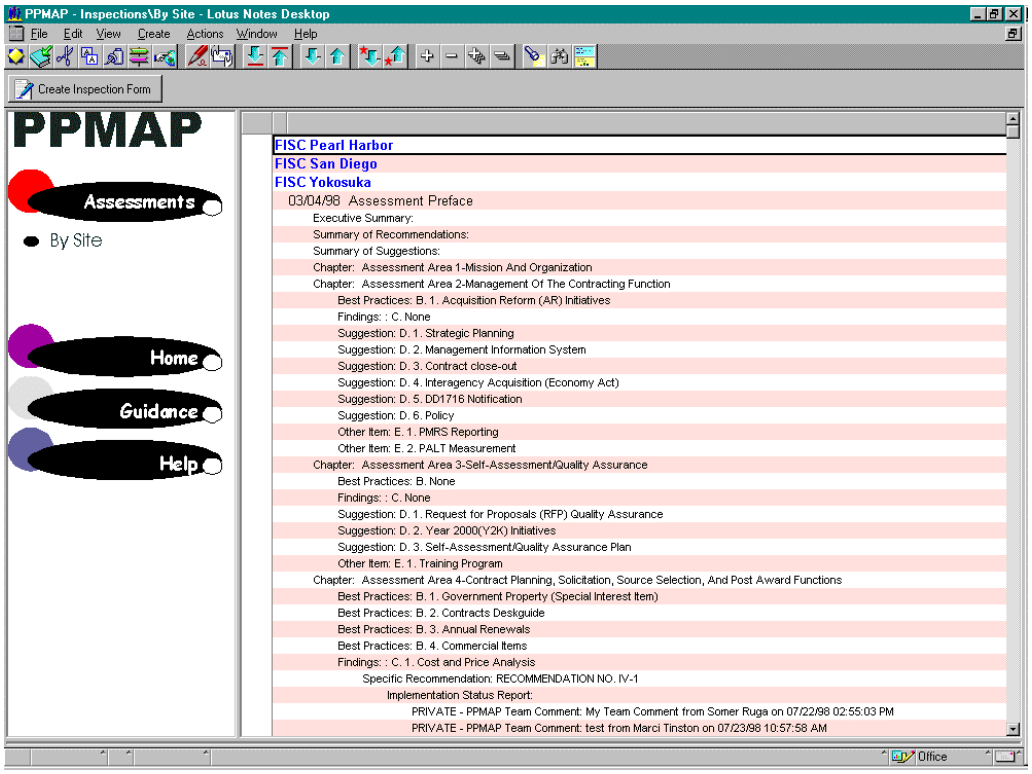


Figure 2.4 Assessments Navigator & View

By Site

The default **By Site** view shows by command a table of contents of what each command's assessment contains in Assessment Area sequence

Navigating Home

To navigate to other areas, return to the PPMAP Main Navigator by selecting the **Home** hotspot in the navigator or by selecting **File | Close** from the menu bar.

Opening an Assessment View

To open one of the parts of an assessment simply highlight that line and double click. The respective part will open.

Navigating to Recommendations

To see Recommendations, select the **Recommendations** hotspot from the PPMAP Main Navigator. The Recommendations navigator and view appear as shown in Figure 2.5. This view displays recommendations that result from the NAVSUP 02 assessment. Activities will use PPMAP to review and rectify any outstanding assessment issues. The Recommendations navigator has two sort order choices available: By Assessment Area and By Site.

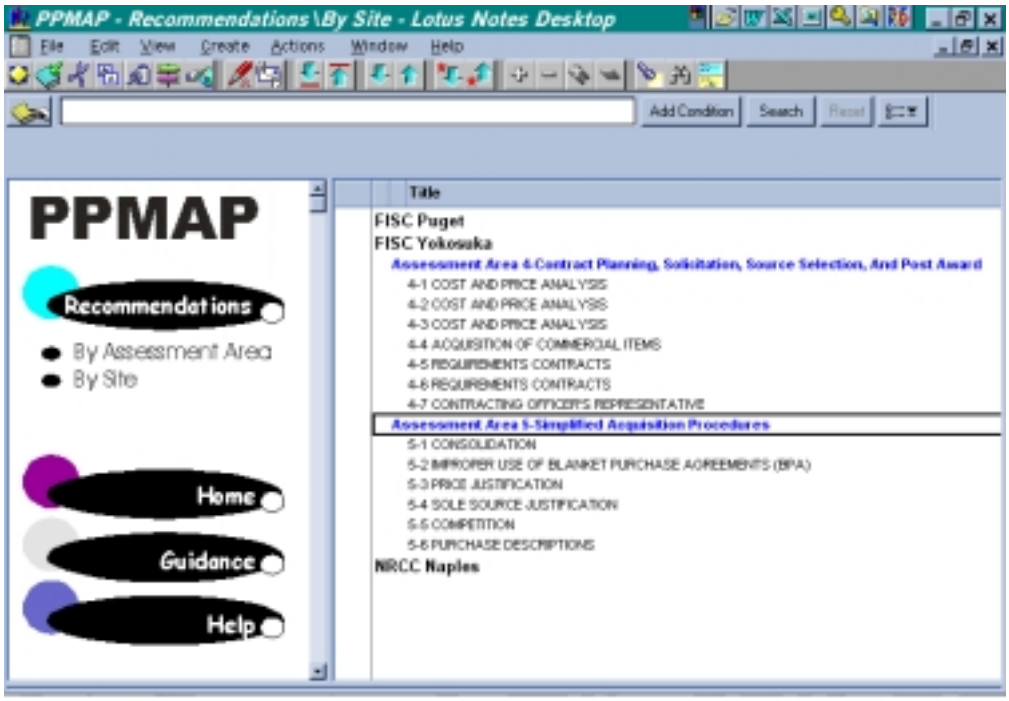


Figure 2.5 Recommendations Navigator & View

By Assessment Area

Selecting the **By Assessment Area** hotspot in the Recommendations navigator displays NAVSUP 02 recommendations to the assessed activity grouped by assessment area. The activity is required to take action to fix or improve upon deficient area(s).

By Site

The Recommendations area defaults to the By Site sort order. This view groups NAVSUP 02 recommendations by the assessed activity. It is only necessary to select the **By Site** hotspot to toggle from the By Assessment Area sort order.

> NOTE:
>
> PPMAP offers several ways of viewing the information contained within it. The Recommendations, Suggestions, Best Practices, Mgt Initiatives views offer two different sort orders: By Assessment Area or By Site. The default view is the By Site view.

Navigating Home

To navigate to other areas, return to the PPMAP Main Navigator by selecting the **Home** hotspot in the navigator or by selecting **File | Close** from the menu bar.

Navigating to Suggestions

To access the Suggestions navigator and view, select the **Suggestions** hotspot from the PPMAP Main Navigator. The Suggestions navigator and view, similar to Figure 2.6, appears. This view displays a list of activities that have received "non-binding" suggestions from NAVSUP 02 on ways to improve their business practices. Two sort orders are available from the Suggestions navigator: By Assessment Area and By Site.

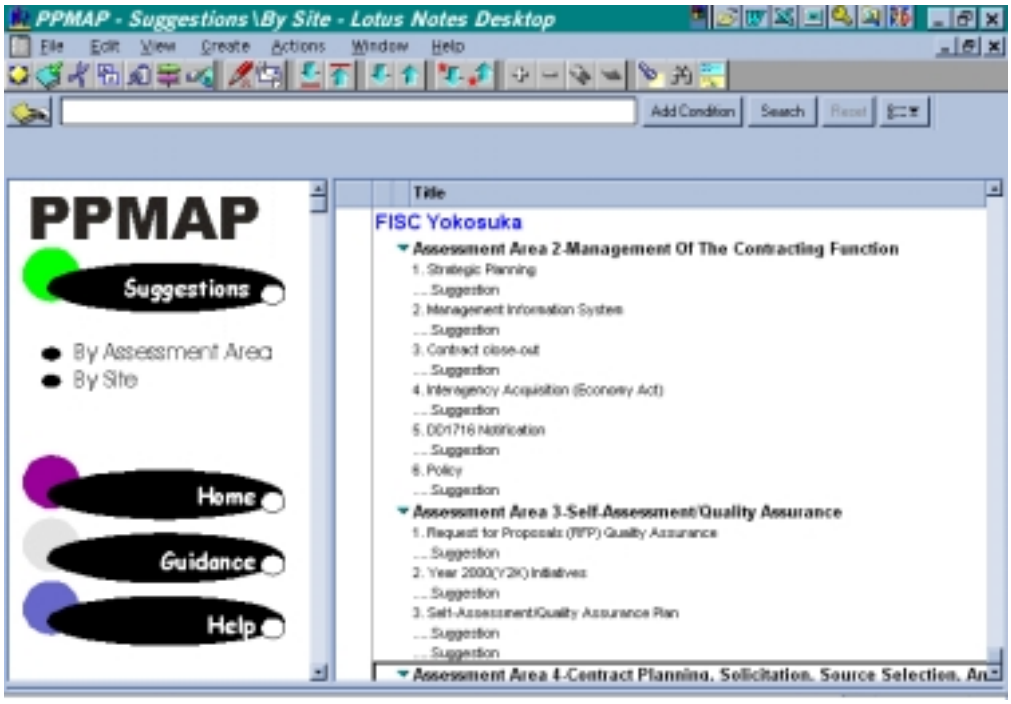


Figure 2.6 Suggestions Navigator & View

By Assessment Area

Selecting the **By Assessment Area** sort order in the Suggestions navigator displays NAVSUP 02's suggested ways to improve a specific activity's business practices. In the view, suggestion titles are grouped within each Assessment Area.

By Site

The default suggestions **By Site** sort order groups suggestions first within an activity; a secondary sort in the view is within Assessment areas which displays suggestions in a sequential listing of order of entry.

Navigating to Best Practices

To navigate to the Best Practices navigator and view, as shown in Figure 2.7, select the **Best Practices** hotspot from the PPMAP Main Navigator. This view lists activities that have been identified as executing business practices that are recognized as "Noteworthy Accomplishments". The Best Practices navigator has two sort order selections available: By Assessment Area and By Site.

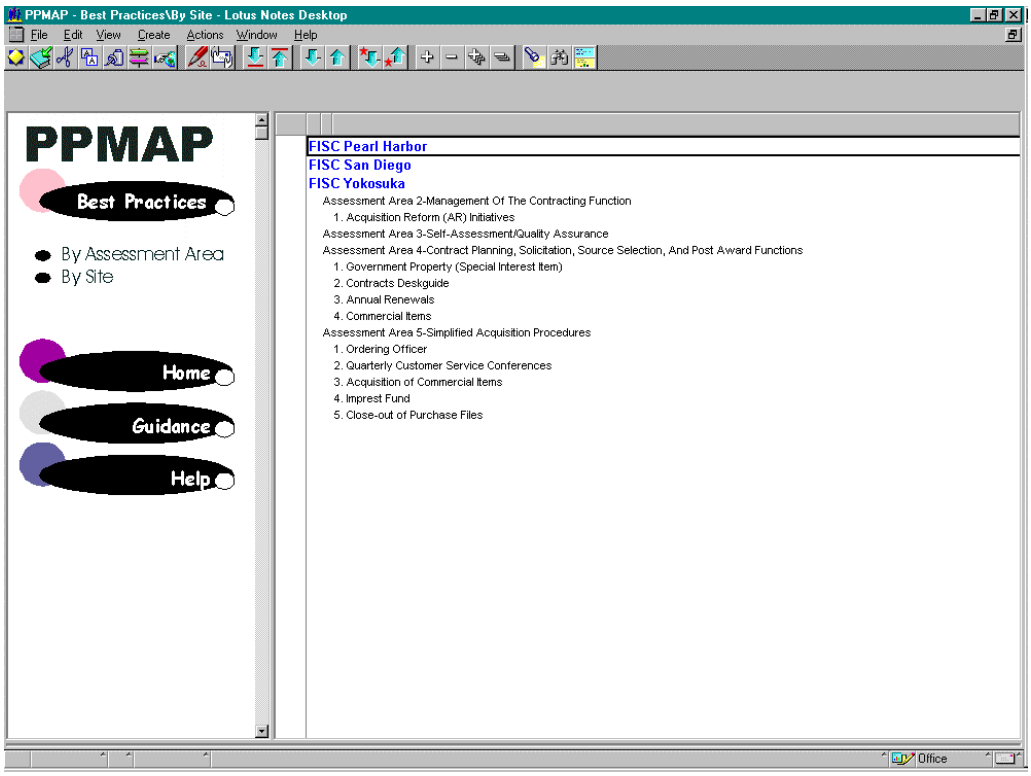


Figure 2.7 Best Practices Navigator & View

By Assessment Area

Selecting the **By Assessment Area** sort order from the Best Practices navigator displays the Assessment Team's recognition of an activity's successful business performance(s) grouped by Assessment Area.

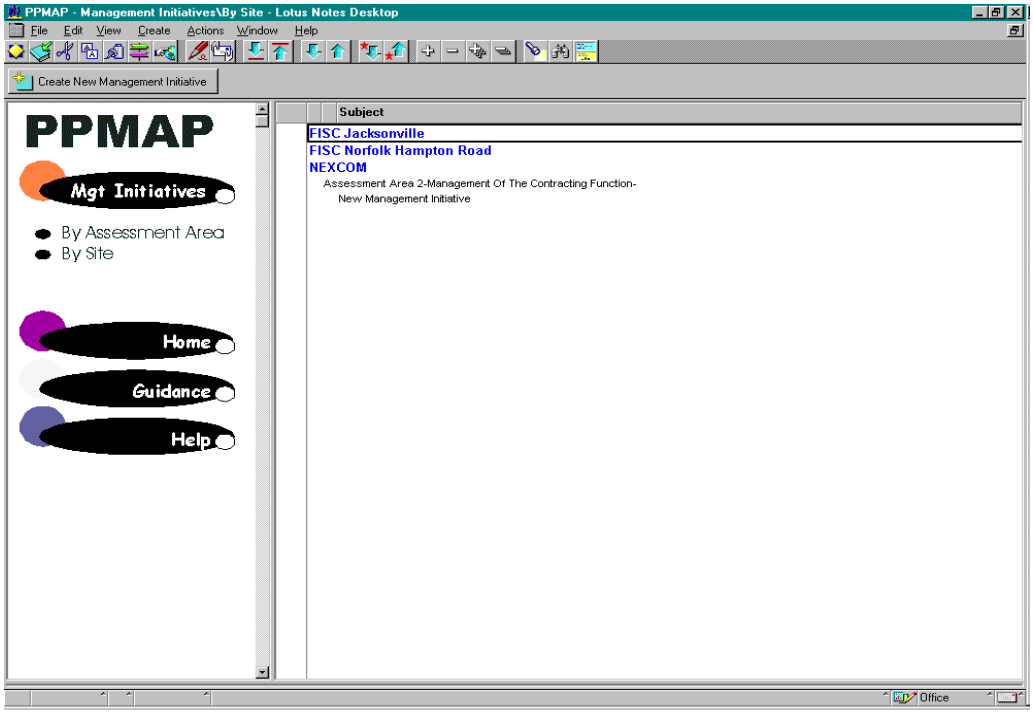
By Site

The Best Practices **By Site** sort order groups Best Practices identified during the performance assessment by activity. To toggle back from By Assessment Areas, select the **By Site** sort order in the navigator.

Navigating to Management (Mgt) Initiatives

Select the **Mgt Initiatives** hotspot from the PPMAP Main Navigator to view the Mgt Initiatives navigator and view. This view, as shown in Figure 2.8, opens to display information describing actions activities have taken that resulted in improved business operations, generated cost savings, generated cost avoidance, and other similar management initiatives. The navigator in Mgt Initiatives offers two different ways to sort the information: By Assessment Area and By Site.

Figure 2.8 Mgt Initiatives Navigator & View



By Assessment Area

Select the **By Assessment Area** sort order in the Mgt Initiatives navigator to display specific management initiatives grouped within Assessment Areas.

By Site

The **By Site** sort order groups management initiatives within the activity that submitted the information.

Navigating to Guidance

To access the Guidance navigator and view as shown in Figure 2.9, select the **Guidance** hotspot from the PPMAP Main Navigator. The Guidance navigator and view displays a comprehensive guidebook specifically designed to help activities better understand the assessment process, conduct self-evaluations, and become familiar with the assessment report format. In addition the post assessment critique forms are accessed in this view. The Guidance is separated into two distinct sections: Guidance and Critiques.

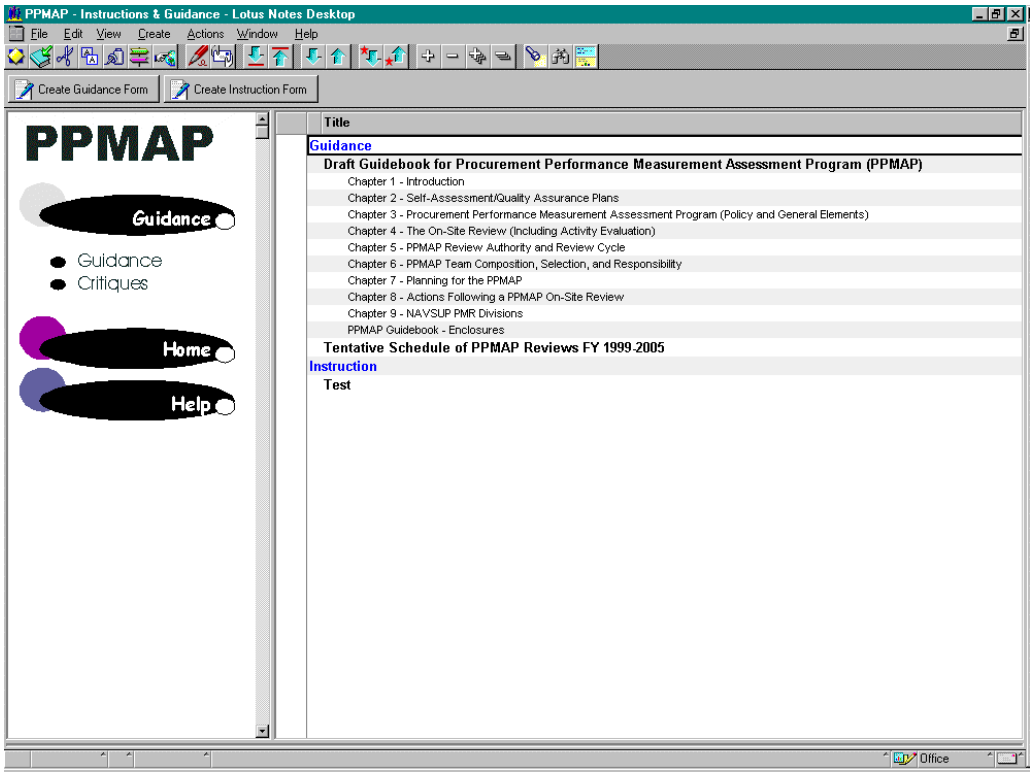


Figure 2.9 Guidance Navigator & View

Guidance

The **Guidance** sort order is the default, and displays pertinent Guidance by chapter and section. To toggle back from the Critiques view, select the **Guidance** hotspot in Guidance navigator. The Guidance navigator can also be accessed from every other PPMAP Navigator view by selecting the **Guidance** hotspot in the navigator.

Critiques

Select the **Critiques** hotspot from the Guidance navigator to display a list of assessed activities that have provided NAVSUP 02 with feedback on the quality and professionalism of the Assessment Team and their process.

Navigating Home

To navigate to other areas, return to the PPMAP Main Navigator by selecting the **Home** hotspot in the navigator or by selecting **File | Close** from the menu bar.

Navigating to Help

The PPMAP application provides an online copy of this user manual. To access PPMAP Help, select the **Help** hotspot from any of the PPMAP Navigation panels.

PPMAP Admin Section

The PPMAP Admin section is used by the NAVSUP PPMAP Coordinator to manage the auto email function; for archiving and accessing archived checklists; and for adding and deleting electronic signatures. The PPMAP Admin section is described in Chapter 4.

Figure 2-10 PPMAP ADMIN

Navigating to Conference

The conference section is only available for use via the Internet version of PPMAP.

Chapter

3

Using **PPMAP**

Chapter 3 is designed to provide NAVSUP Headquarters and field contracting activities a paperless, user-friendly assessment process. NAVSUP 02 is responsible for generating the Pre-Assessment Letters and the actual assessment report. Activities then have the responsibility to review the Pre-Assessment Letter, to ask questions to clarify procedures, to work through various checklists to prepare for the on-site visit, to provide Implementation Status Reports (ISRs) in response to assessment report recommendations, and to provide feedback reports in response to assessment report suggestions.

Pre-Assessment Letters

The Pre-Assessment Letter is published six months before the scheduled assessment date. The letter is the kick-off document directing the "to be assessed" activity to begin preparation for the assessment. The activity will be notified via email when the Pre-Assessment Letter is posted in PPMAP. The email will provide navigation instructions for finding PPMAP on the Internet. The "to be assessed" activity reviews the Pre-Assessment Letter, responds to the assessment checklists, and prepares for the upcoming PPMAP.

Viewing Pre-Assessment Letters

Pre-Assessment Letters are visible to all PPMAP users and are only accessible via the Checklist navigator and view. To view Pre-Assessment Letters, select the **Checklists** hotspot from the PPMAP Main Navigator. In the Checklist navigator and view, select the **Checklists By Area** or **Checklists By Name** sort order in the Checklist navigator. In the view pane, on the right side of the screen, highlight **Pre-Assessment Letter**. Selection of the View Expand All icon shows all assessment letters categorized by site. Double click on the name of the applicable site assessment letter to view its contents.

Select the **Close Document** button located at the top of the screen to return to the Checklists view.

Checklists

Checklist responses provide information for NAVSUP 02 to review and to gauge the health of an activity prior to the on-site visit. PPMAP categorizes the Assessment Checklists into nine overarching areas:

- Assessment Area 1 -Mission and Organization
- Assessment Area 2 - Management of the Contracting Function
- Assessment Area 2A - PPMAP Detachment
- Assessment Area 2B -Small Disadvantaged Business Utilization (SADBU)
- Assessment Area 3 - Self-Assessment/Quality Assurance
- Assessment Area 4 - Contract Planning, Solicitation, Source Selection, and Post Award Functions
- Assessment Area 5 - Simplified Acquisition Procedures
- Assessment Area 5A - Purchase Card
- Assessment Area 6 - Special Interest Items

These nine areas also correspond to the Chapter titles in the Assessment Report that is generated by the Assessment Team at the conclusion of the on-site visit. *Chapter 4: Creating Assessment Reports* expands on this topic. PPMAP provides the capability for NAVSUP 02 to enhance the assessment process through online interaction between NAVSUP 02 and the "to be assessed" activity. This interaction begins with completion of the Checklists.

Viewing Checklists

There are two sets of checklists in PPMAP. They are identified by the hot spots *"2000 Checklists"* and *"Checklist 1999"*. The *"Checklist 1999"* is the original PPMAP group of checklists and it has been superceded by the *"2000 Checklists"*. The navigation instructions in this section are identical for either checklist. Assessment area checklists can be seen in two sort orders: By Area or By Name.

- **By Area.** To locate a particular checklist by area, select the **Checklists** hotspot from the PPMAP Main Navigator. In the Checklist navigator, select the **Checklists By Area** sort order. Pressing the "View Expand All" icon reveals Functional Sub areas, Checklists, comments, questions, and responses. Double click a Checklist item to view its contents. Select the **Close Document** button to return to the Checklists By Area view.
- **By Name.** To locate a particular checklist by name, select the **Checklists** hotspot from the PPMAP Main Navigator. In the Checklist navigator, select the **Checklists By Name** sort order and double click on the Checklist item in the view to reveal its contents. Select the **Close Document** button to return to the Checklists By Name view.

Creating Checklist Responses

To create checklist responses, select the **Checklists** hotspot from the PPMAP Main Navigator. In the Checklist view, select the **Checklists By Area** sort order. To see the view

expanded you might need to select the "View Expand All" icon. (Or, to see the view collapsed, select the "View Collapse All" icon.) Double click the applicable checklist to open it. Select the **Create Checklist Response** button located at the top of the screen. The view defaults to Edit mode. (Edit mode is evident by the brackets [ ] throughout the form.

The Checklist Response form opens with the checklist questions visible. Answer each Checklist item by placing the cursor at the end of each question and typing the response. When finished responding, select **File | Save** to save the response; then, select the **Close Document** button to return to the Checklist form. In the Checklist form, select **Close Document** button again to return to the Checklist by Area view. Continue creating responses to each Checklist until all Checklists are complete. This process may take several weeks to finish. Remember, PPMAP Checklist responses are visible only to NAVSUP and the activity being assessed.

Creating Checklist Comments and Questions

PPMAP provides Activity and Assessment Team personnel an interactive question and answer forum. Activities can request clarification on checklist questions or make a comment on the checklist. To create a comment or question on an assessment checklist, select the **Checklists** hotspot from the PPMAP Main Navigator. Select the **Checklists By Area** sort order from the Checklist navigator and double click the applicable Assessment Area to display the individual checklists.

Open the appropriate Checklist and select the **Create Comment/Question** button located at the top of the screen. Chose the appropriate Comment or Question radio button. Summarize your thoughts in the *Key Thought* field; then, add your comment or question in the *Detailed Comment or Question* area - Be explicit. Select **File | Save** from the menu bar to save the comment or question. Select the **Close Document** button at the top of the screen to return to the Checklist form view. To add additional comments or questions pertaining to that checklist item, select the **Create Comment/Question** button again to repeat the process. When there is nothing further to add, select the **Close Document** button to return to the Checklists By Area view. Any online dialogue between the activity and NAVSUP 02 is viewable by all PPMAP users.

Viewing Responses

To view all dialogue entries between PPMAP Team members and an Activity, use the Checklists By Area view. Select the **Checklists** hotspot from the PPMAP Main Navigator. In the Checklist navigator, select the **Checklists By Area** sort order. Selecting the "View Expand All" icon displays the Functional Sub areas, Checklists, comments and questions, and site responses. Double click on any dialogue entry to view its contents. Select the **Close Document** button to return to the Checklists By Area view.

PPMAP provides three ways to sort responses: **Responses By Date, Responses By Name**, or **Responses By Type**.

- **Responses By Date.** To identify dialogue between an activity and NAVSUP 02 on a particular date, select the Response By Date sort order from the Checklist navigator. A list of dates displays in descending order. Select the applicable response date and click on the "View Expand All" icon to expand the view. Double clicking on the

desired response(s) accesses the associated response contents. To return to the Checklist Response By Date view, select the **Close Document** button.

- **Responses By Name.** To locate a particular checklist responder by name, select the **Responses By Name** sort order in the Checklist navigator. A list of names displays in alphabetical order. Select the applicable name. Select the "View Expand All" icon if you wish to expand the view. To open a particular response item, select it and double click. Use the **Close Document** button to return to the Checklist Responses By Name view.

- **Responses By Type.** To identify a particular type of dialogue between an Activity and NAVSUP 02, select the **Response By Type** sort order in the Checklists navigator. Available Response Types include: Checklist Response, Comment, Question, and Response to Site. The view may need to be expanded to see all the applicable response types. Select the desired response and double click it to view. Select the **Close Document** button to return to the Checklist Responses By Type view.

Note:

Comments and questions are viewable by all PPMAP users. However, checklist question responses and dialog are only viewable by the activity creating the response and the PPMAP Team.

Assessments

Assessment Reports are a central part of the PPMAP database. The Assessment navigator and view showcases what the Assessment Team found noteworthy about the assessed activity (i.e., Best Practices) and what they found that requires attention (i.e., Recommendations and Suggestions).

One benefit from generating and maintaining Assessment Reports on-line is that commands can view PPMAP reports for other commands and use them as a tool to improve their current business operations. An Assessment report contains the following parts:

- ***Cover Letter –*** Records the assessment dates and assessment team composition.
- ***Executive Summary*** - Summarizes the results of the assessment in outline form. The Summary provides a quick look at what was discovered during the assessment.
- ***Summary of Recommendations*** - Summarizes the major discrepancies requiring remedial action.
- ***Summary of Suggestions*** - Summarizes suggested ways to improve business practices.
- ***Chapters*** - There are six Chapters or nine Assessment Areas. *(Assessment Areas/Chapters are identified in the Checklist discussion area of this chapter.)* Each chapter/assessment area in the assessment report may contain any, or all, of the following sections:
  - **Section A - General** - Provides a brief commentary on how the assessment of the area was conducted and other items the assessor wishes to include.
  - **Section B - Best Practices** - These items are noteworthy business practices identified by the Assessment Team during their visit.
  - **Section C - Findings and Recommendations** - This section is the heart of an Assessment report. It provides descriptive findings on what needs to be addressed. The recommendations are actions the assessed activity is expected to take to correct the finding(s). The assessed activity is required to use the "Implementation Status Reports" form in PPMAP to layout their plan of action along with the dates for completion. NAVSUP 02 reviews the reports and adjudicates online when all actions have been completed to fix the problem.
  - **Section D - Suggestions** - Suggestions are non-binding ways assessed Activities can improve operations. These "infractions" are not significant enough to be classified as a Finding/Recommendation in Section C of the chapter and therefore, no formal remedial action is required. However, a "Suggestion Feedback" form is provided for activities to report actions taken to address the deficiency noted in the Suggestion.
  - **Section E - Other Items** - This area is a catchall for information that does not fit neatly in Sections A-D. This information is strictly for information only.

Note:

Assessment Area 6 "Special Interest Items" - This chapter section is organized differently from the rest of the chapters/assessment areas. Chapter 6 demonstrates how the assessed activity complies with a list of CNO/NAVSUP 02 Special Interest Items. Where there is action required/desired - this information should be referenced as a "recommendation" or a "suggestion" in a previous chapter according to the respective assessment area covered by that chapter.

Viewing the Assessment Report

Activities will receive an email from NAVSUP when their assessment report has been posted in PPMAP. To view the Assessment Report, select the **Assessments** hotspot from the PPMAP Main Navigator. From the Assessments view select **View Expand All** or the multiple plus sign on the tool bar to display all applicable subsections within the report related to a given activity. Select a section entry to display the report information. All published reports can be viewed by other activities, down to the Implementation Status Report (ISR) level. The ISR and the dialog surrounding the ISR content and resolution are kept private between the PPMAP Team and the assessed activity.

Creating Implementation Status Reports

Implementation Status Reports (ISR) are required for each recommendation. Each assessed activity is required to use the ISR form in PPMAP to communicate their "Plan of Action". This includes estimated dates for completion to correct the NAVSUP 02 findings. NAVSUP 02 reviews the report and completes the ISR status when all actions are complete.

To generate an Implementation Status Report based on an Assessment Finding and Recommendation(s), select the **Recommendations** hotspot from the PPMAP Main Navigator. In the Recommendations view, highlight your command, the select the "View Expand All" icon to display all of the assessment findings and recommendations. Select and open a recommendation. From the Recommendations view, select the **Create Implementation Status Report** button located at the top of the form. Complete only the *Implementation Status Report* section of the form with the appropriate action descriptions and expected completion date (enter date as mm/dd/yy) for that specific recommendation. Do not enter information in the *PPMAP Team* section; it is designated for the PPMAP Team to use during the adjudication process. Once the ISR form is complete, select **Close Document** at the top of the form to save the ISR. You will return to the Recommendation. Use the **Close Document** button to return to the Assessment navigator and view.

An alternate method for creating Implementation Status Reports is via the Assessments navigator. From the Main Navigator select Assessments. Find your command Recommendations and Findings on the right side and proceed to create the Implementation Status Report as explained above.

Updating Implementation Status Reports

NAVSUP 02 reviews the ISR during the adjudication process and responds by way of the "Response to Site" form. If the Assessment Team does not concur with the proposed plan of action, the activity can modify the ISR information using the "Compose Update" form. To update or change an existing ISR, select the **Recommendations** hotspot from the PPMAP Main Navigator. In the **Recommendations** view pane, locate (view might need to be expanded) and double click on the appropriate ISR. From the Implementation Status Report view, select the **Compose Update** form icon on the SmartIcons toolbar. Complete the required information on the compose update form and select **Close Document** from the SmartIcon toolbar. Select yes and the form will be saved and closed.

> Note:
>
> An automatically generated email reminder will be sent to an activity on the Implementation Status Report "Expected Completion Date".

Implementation Status Report Open/Completed Status

To quickly view the open or completed status of an Implementation Status Report select **Assessments** from the PPMAP Main Navigator. Locate your command assessment. On each Implementation Status Report line PPMAP will show Not-Completed or Completed.

Creating Suggestion Feedback

Activities have the option to respond with action taken on Suggestions. Select the **Suggestion** Hotspot on the PPMAP Main Navigator. Select the "By Site" view to ensure the Suggestions are sorted by site. Select **collapse all** (if the right side view is not already collapsed) and highlight your command. Select **expand all** to show all the suggestions for your command. Locate the Assessment Area and suggestion you wish to respond to and double click the "suggestion" view to open. Select **Create Feedback** from the top of the form. Complete the required information on the Feedback Form. Select **Close Document** from the top of the form, yes in the small window, and the form will be saved and closed. Select **Close Document** in the Suggestion form and you will return to the main suggestion view.

Management (Mgt) Initiatives

Management Initiatives describe what actions an activity has implemented to improve business operations, generate cost savings, cost avoidance, and other similar improvements. The results are documented in PPMAP so other activities can view and implement similar solutions without "reinventing the wheel". This area is a repository for management initiatives activities submit to NAVSUP 02.

Management Initiatives are not part of the PPMAP Assessment report. There are two ways to view Management Initiatives: By Assessment Area and By Site.

By Assessment Area

To view management initiatives by assessment area, select the **Mgt Initiatives** hotspot from the PPMAP Main Navigator. Selecting the **By Assessment Area** sort order in the Mgt Initiatives navigator displays management initiatives grouped within the assessment areas. The subject of the management initiative and submitting activity detail is provided in the fully expanded view. Double click any entry to display initiative information.

By Site

To view management initiatives by site, select the **Mgt Initiatives** hotspot from the PPMAP Main Navigator. Select the **By Site** sort order in the Mgt Initiatives navigation panel. The view identifies sites that have initiated actions resulting in improvement of specific business operations, cost savings, cost avoidance, and other similar management initiatives. Highlight any site, and select the "View Expand All" icon to expand the view. Double click the desired entry to view the initiative information.

Guidance

The Guidance view offers a comprehensive handbook that activities may use to help them better understand the assessment process, to conduct self-evaluations, to prepare for the assessment, and to help administer customer surveys.

NAVSUP 02 personnel create guidance documents. NAVSUP 02 guidance documents are considered to be living documents. Therefore, PPMAP offers activities the capability to comment and submit recommended changes to documents listed in the Guidance view.

Viewing Guidance

To view Guidance in PPMAP, select the **Guidance** hotspot from the PPMAP Main Navigator. The view opens to Guidance. Use the "View Expand All" icon to see all of the Guidance sections. Double click the applicable guidebook entry to display its contents. Select the **Close** button to return to the Guidance navigator and view.

Chapter section views offer links to their subsections. Simply select the section title to view the subsection contents.

Creating Comments

Activities are invited to comment on ways to improve Guidance documents. To create comments, double click the applicable guidance section title. When viewing the text on which you would like to comment, select the **Create Comment** button. Select either the comment or question radio button. Identify any key thoughts on the Guidance and add your comment or question. Select **File | Save** from the menu bar to save the Comment or Question. Select the **Close Document** button to return to the Guidance book section view. Add any additional comments or questions at this time. When finished, select the **Close** button to return to the Guidance view.

Viewing Instruction Forms

Instructions are also posted in the Guidance view section under the title Instructions. To review instructions posted within PPMAP, select the **Guidance** hotspot from the PPMAP Main Navigator. From the Guidance view, double click on the title **Instruction** or select the "View Expand All" icon to display a list of all instruction forms in PPMAP. Double click the applicable instruction form title to display its contents. Select the **Close** button to return to the Guidance view.

Critiques

NAVSUP 02 welcomes feedback from assessed activities about the quality and professionalism of the assessment process and the assessment team. PPMAP critiques are electronic questionnaires completed by the assessed activity at the completion of each assessment. Critiques serve as a "report card" to assess the performance of the Assessment Team, and NAVSUP 02 will use the information for future process improvement efforts.

Composing Critiques

Critiques are contained in the Guidance area. To complete a critique, select the **Guidance** hotspot from the PPMAP Main Navigator, then select the **Critiques** hotspot from the Guidance navigation panel. Select the **Compose Critique** button. Complete the survey by selecting the radio buttons that most closely reflect the activity's opinions, and type any comments you have in the free form text fields. When the form is complete, select the **Save & Close** button located at the top of the screen. When prompted, "Do you want to save this new document", select **Yes** to save the critique.

Conference

This section is not accessible via Lotus Notes. To use the Conference feature you must access PPMAP via the Internet.

PPMAP is accessed via the QUADS homepage at http://quads.navsup.navy.mil. If you do not have a PPMAP Username and Password assigned, you must first register for PPMAP access. Registration is also initiated via the QUADS homepage.

Chapter

4

NAVSUP 02 Features

Chapter 4 is designed for and applicable only to NAVSUP 02 personnel. Only users with NAVSUP 02 user defined roles and system administration privileges are able to utilize and view the PPMAP features discussed in this chapter. *Other PPMAP users will not be able to access the functions and views discussed in this Chapter.*

NAVSUP 02 is responsible for creating Pre-Assessment Letters, creating checklists, corresponding with the "to be assessed" activity, generating all Procurement Performance Management Assessment reports for the assessed activity, adjudicating assessed activity responses to PPMAP report findings and recommendations, creating and updating PPMAP guidance, determining rules for use of the conference feature, and managing the Admin section.

Pre-Assessment Letters

The Pre-Assessment Letter is published six months prior to the scheduled assessment date. The letter is the kick-off document directing the "to be assessed" activity to begin preparation for the assessment.

Generating Pre-Assessment Letters

To generate a Pre-Assessment Letter, select the **Checklists** hotspot from the PPMAP Main Navigator. Select **Checklists By Area** in the Checklist navigator, then select the **Create Pre-Assessment Letter** button at the top of the screen to start composing the letter. Identify the site by selecting from the pull down menu or begin to type it until the system recognizes and accurately supplies the site name. PPMAP defaults to the closest site name until an exact match is found. Type the assessment date in MM/DD/YY format. Type the required text or use the Copy and Paste functionality offered by Windows to paste the information from another source (e.g., MS Word). When finished, select **File | Save** from the menu bar to save the Pre-Assessment Letter. Select the **Close Document** button to return to the Checklists view. To verify

that the Pre-Assessment Letter was generated, expand the Pre-Assessment Letter view to locate the letter created.

> **Note:**
>
> When the Pre-Assessment letter is saved and closed it triggers an automatically generated email notification to the activity to look in PPMAP for the letter.

Checklists

Checklists are forums for NAVSUP 02 to gauge the health of an activity by assessment areas prior to the assessment visit. PPMAP provides the capability for NAVSUP 02 to enhance the assessment process through online discussions between NAVSUP 02 and the "to be assessed" activity.

Creating a New Index Entry

The PPMAP checklists are arranged by existing PPMAP functional areas or "chapters". The **Create New Index Entry** feature allows for creation of new functional areas or "chapters". From the Checklists by Area view select **Create New Index Entry** at the top of the screen**.** In the form add the new Functional Area (chapter) name and, if required, the sub functional area. Select **Close Document**, answer "yes" in the pop-up screen, and the new chapter will be created. If you are adding a new chapter with new checklists, the new chapter must be created before attempting to create new checklists.

Creating New Checklists

To generate a New Assessment Checklist Item, select the **Checklists** hotspot from the PPMAP Main Navigator. Select the **Checklists By Area** sort order in the Checklist navigator, then highlight the applicable **Assessment Area**. Select the "View Expand All" icon if necessary to view the Blue Assessment Area title. Highlight the appropriate Blue Assessment Area title and select the **Create New Checklist** button.

In the Checklist form, type the Checklist number, name and Checklist information in the text blocks provided. Select **File | Save** to save the Assessment Checklist to the applicable assessment area. Select the **Close Document** button to return to the Checklists view.

Managing Responses

Chapter 3 included a discussion of how to research and display a snapshot of comments, questions, or responses generated by an activity to NAVSUP 02. PPMAP provides the interactive means for NAVSUP 02 responses to activities.

Responding to Comments and Questions

To create a response to a checklist question or comment that an activity has generated, select the **Checklists** hotspot from the PPMAP Main Navigator. Select the desired **Responses By Date, Responses By Name** or **Responses By Type** sort order in the Checklist navigation panel to view responses in various sort orders. Select and double click to open and view the comment or question contents. To respond, use the **Actions Edit Document** smart icon or pull down menu to open the response portion of the form in *Edit* mode. Type your answer in the space provided in the Response section at the bottom of the form. Select **Close Document** and when prompted, click "Yes" to save your response and return to the "Responses By …" view you previously selected.

Responding to Checklist Responses

The PPMAP Team Assessment Area action person may determine that additional information is desired relative to the responses submitted for a checklist. To do this from the Checklists view, select the **Responses By Date, Responses By Name** or **Responses By Type** sort order desired from the Checklist navigator. Highlight the applicable Assessment Date, Team Member, or Type. You may need to expand the view to see the Checklist Response document. Double click the Checklist Response to display the Checklist form. Select the **Response to Site** button to respond or to ask for additional clarification. Fill-in the **Response to Site** form. Select the **Save & Close** button when you have finished to return to the Checklist Response view. Select the **Close Document** button to return to the "Responses By …" view. Repeat the process for each Checklist Response that requires additional action.

Assessments

Assessment Reports are a central part of the PPMAP database. The "Assessment" navigator in the main navigator screen takes you to the Assessment view. This view contains the complete PPMAP report for each command shown.

The value of generating and maintaining an Assessment Report on-line is that other activities can view the reports and use them as a tool to improve their current business operations. NAVSUP 02 personnel create the Assessment reports in PPMAP.

An Assessment Report contains the following parts:

- ***Cover Letter*** - Records the assessment dates and assessment team composition.
- ***Executive Summary*** - Summarizes the results of the assessment in outline form. The Summary provides a quick look at the highlights of the assessment.
- ***Summary of Recommendations*** - Summarizes the major discrepancies requiring remedial action.
- ***Summary of Suggestions*** - Summarizes suggested ways to improve business practices.
- ***Chapters*** - There are six Chapters or nine Assessment Areas. *(Assessment Areas/Chapters are identified in the Checklist discussion area of Chapter 3.)* Each chapter/assessment area in the assessment report may contain any or all of the following sections:
  - **Section A - General** - Provides a brief commentary on how the assessment of the area was conducted and other items the assessor wishes to include.
  - **Section B - Best Practices** - These items are business practices identified by the Assessment Team during their visit that are recognized to be noteworthy.
  - **Section C - Findings and Recommendations** - This section is the heart of an Assessment report. It provides descriptive findings on processes or procedures requiring command attention. The recommendations that are part of each finding are actions the assessed activity is expected to take to correct the finding. The assessed activity is required to use the Implementation Status Reports form in PPMAP to provide their plan of action and milestones for completion. NAVSUP 02 reviews the reports and adjudicates online when all actions have been completed to fix the problem.
  - **Section D - Suggestions** - Suggestions are non-binding ways assessed Activities can improve operations. These "infractions" are

not significant enough to be classified as a Finding/Recommendation in Section C of the chapter. However, a "suggestion feedback" form is submitted by the assessed activity explaining action taken in reaction to each "suggestion".

* **Section E - Other Items** - This area is for information that does not fit neatly in Sections A-D. This information is strictly for information only.

Note:

Assessment Area 6 "Special Interest Items" - This chapter section is organized differently from the rest of the chapters/assessment areas. Chapter 6 demonstrates how the assessed activity complies with a list of CNO/NAVSUP 02 Special Interest Items. Where there is action required/desired - this information should be referenced as a "recommendation" or a "suggestion" in a previous chapter according to the respective assessment area covered by that chapter.

Creating the Cover Letter

To generate the Assessment Report Cover Letter, select the **Assessments** hotspot from the PPMAP Main Navigator. From the Assessments view, select the **Create Assessment Report** button. Select the Site Name from the pull down menu or begin to type it until the system recognizes and supplies the remainder of the correct name. PPMAP will default to the closest site name until an exact match has been located. Type the assessment date using MM/DD/YY format. Type the applicable Cover Letter text, and select **File | Save** from the menu bar to save the Cover Letter to the designated site. Select the **Close Document** button to return to the Assessments view.

Creating the Executive Summary

The Executive Summary cannot be created until the Cover Letter has been created in PPMAP. After the Cover Letter has been created, select the **Assessments** hotspot from the PPMAP Main Navigator. Select the applicable site name in the view and double click to expand and display its Assessment Cover Letter. Double click the Assessment Cover Letter to open the document and select the **Create Report Section** button located at the top of the screen. Choose **Executive Summary** from the dialog box pick list and enter the required information in the appropriate fields. Select **File | Save** from the menu bar to save the Executive Summary. Select the **Close Document** button to return to the Cover Letter view. Other report sections may be added by selecting the **Create Report Section** button in the Cover Letter view or you can choose to return to the Assessments view by selecting **Close Document** button in the Cover Letter form.

Creating the Summary of Recommendations

The Summary of Recommendations cannot be created until the Cover Letter has been entered in PPMAP. After the Cover Letter has been generated, select the **Assessments** hotspot from the PPMAP Main Navigator to go the Assessment view if not already there. Select the applicable site name in the view and double click it to expand the view to display the Assessment Cover Letter. Use the **Create Report Section** button at the top of the Cover Letter form screen to create the Summary of Recommendations section. Choose **Summary of Recommendations** from the dialog box pick list and enter the required information. Select **File | Save** from the menu bar to save the Summary of Recommendations form. Click the **Close Document** button to return to the Cover Letter view. Other report sections may be added by selecting the **Create Report Section** button, or you can return to the Assessments view by pressing the **Close Document** button.

Creating the Summary of Suggestions

The Summary of Suggestions section can only be added after the Cover Letter has been created. Navigate to the Assessments navigator and view by clicking the **Assessments** hotspot from the PPMAP Main Navigator. Select the applicable site name in the view, expand the view to display the Assessment Cover Letter, and double click to open it. Using the **Create Report Section** button at the top of the Cover Letter form screen prompts a dialog box from which you should select **Summary of Suggestions**. When the form opens, enter the information in the space provided. Click the **Close Document** button; when prompted, answer "Yes" to save the Summary of Suggestions and return to the Cover Letter view. Add more report sections by repeating the process, or select the **Close Document** button to return to the Assessments view.

Creating Chapters and Chapter Sections

The chapters and chapter sections can only be added after the Activity Cover Letter has been created in PPMAP. Select the **Assessments** hotspot from the PPMAP Main Navigator to navigate to the Assessment view, and locate and open the applicable report Cover Letter. From within the Cover Letter, select the **Create Report Section** button and choose **Assessment Chapter** from the dialog box pick list. Select the appropriate Chapter Title from the pull down menu or begin typing the Chapter Title. PPMAP will default to the closest name until an exact match is found. When the Chapter form opens, type the applicable text. Use the **Close Document** button, and when prompted select "Yes" to save the Chapter and return to the Cover Letter document. An interim save may be done at any time by selecting **File | Save** from the menu bar.

Creating Chapter Subsections

Standard Chapter subsections are: each Best Practice, each Finding, each Suggestion, and Other Items. To add a section to an Assessment Chapter, the Assessment Chapter must have already been created. In the Assessments view, select and double click the

applicable Chapter to open it, and use the **Create Chapter Subsection** button. Choose from the **Create New Assessment Section** dialogue box pick list for the section being created: a Best Practice, a Finding, a Suggestion, or Other. Select the type of section and then click **OK**. When the appropriate form opens, identify the Section Letter, Section Title, and type any applicable text in the space provided. Select **File | Save** from the menu bar and then use the **Close Document** button to return to the Chapter document. If more Chapter sections are required, repeat the procedures for each section required. To return to the Assessments view, select the **Close Document** button from the Chapter document.

Creating Specific Recommendations

Specific Recommendations cannot be created until a Chapter Finding section has been entered in PPMAP. Click the **Assessments** hotspot from the PPMAP Main Navigator, and locate and open the applicable Finding entry in the view. Use the **Create Specific Recommendation** button from within the Finding document to open a Recommendation form. Add a Recommendation Number and enter the information in the space provided. Use the **Close Document** button and when prompted, select "Yes" to save the recommendation, and return to the Finding document to which it applies. Either create more recommendations by repeating this process, or use **Close Document** to return to the Assessments view.

Creating Specific Suggestions

Specific Suggestions cannot be created until a Chapter Suggestion section has been entered in PPMAP. Click the **Assessments** hotspot from the PPMAP Main Navigator, and locate and open the applicable Suggestion entry in the view. Use the **Create Specific Suggestion** button from within the Suggestion document to open a Suggestion form. Type or paste in the suggestion in the space provided. Use the **Close Document** button and when prompted, select "Yes" to save the specific suggestion, and return to the Suggestion document to which it applies. Either create more specific suggestions by repeating this process, or use **Close Document** to return to the Assessments view.

Email Notification When Assessment Is Posted

After all sections of the assessment have been posted in **PPMAP** go to the Cover Letter for that assessment. Select the **Notify Site** button to automatically create an email to the assessed activity. The email notifies the activity that their assessment has been posted and to commence creating Implementation Status Reports in response to the assessment findings and recommendations.

Working with Implementation Status Reports

All assessed activities are required to provide NAVSUP 02 with Implementation Status Reports (ISR). After an activity has added their plan of action to PPMAP, NAVSUP 02 reviews and provides feedback about the ISR to the activity.

Reviewing/Editing Implementation Status Reports

To the review an ISR, select the **Assessments** hotspot from the PPMAP Main Navigator. From the Assessments view, select the "View Expand All" icon to display a list of reports, select and double click to open the applicable ISR. Use the **Edit Document** button at the top of screen to change to Edit mode. This will allow the form to be reviewed and edited. Scroll to the *PPMAP Team* section of the form and select one Concurrence Status radio buttons: **Concur**, **Do Not Concur**, or **Partially Concur** to indicate the acceptability of the Plan of Action.

The status of required actions is tracked by selection of a radio button to indicate completion. If the plan of action is still in progress, select the **Not Completed** Radio Button. Return to the ISR for final adjudication and use the **Completed** Status radio button to indicate when all corrective action has been satisfactorily completed. Use the **Close Document** button, and when prompted, select "Yes" to save the form and return to the Assessments view. Note: In the **Assessments** view the "Implementation Status Report" line will indicate **Completed** or **Not Completed**. This allows users to scroll through an assessment contents without opening each ISR to see the status.

PPMAP Team Only Comments

There may be times during the review of an activity ISR when dialogue among PPMAP Team members is considered private. PPMAP allows PPMAP Team members to exchange this information in a way that is only visible by PPMAP Team members. To generate these private comments, select the **Assessments** hotspot from the PPMAP Main Navigator, and select and open the applicable ISR. Click the PPMAP **Team Only Comment** button to open the form in its default Edit mode. The system documents the author of the comment and provides free form text fields in which a summary and applicable comments may be entered. When finished, select the **Close Document** button, and when prompted, choose "Yes" to save the comment and return to the ISR. Use the **Close Document** button from within the ISR to return to the Assessments view.

Suggestions

Assessed activities have the option to provide feedback for actions taken in response to PPMAP **Suggestions.** To view the feedback forms select **Suggestions** from the Navigator pane. Double click on "Suggestion Feedback" to view the feedback report.

Responding to Suggestion Feedback

To respond to a suggestion feedback form select **Create Response** at the top of the form. In the spaces provided, enter the key thought and the detailed comments, then select **Close Document.**

Management (Mgt) Initiatives

Management Initiatives describe actions an activity has implemented to improve business operations, generate cost savings or cost avoidance, and other similar improvements. The results are documented in PPMAP so other activities can view and implement similar solutions at their own activity. This area is a repository for the management initiatives submitted to NAVSUP 02. While Management Initiatives are not part of the PPMAP report, activities may submit them to NAVSUP 02 during the assessment, or at any other time they choose. At their discretion, NAVSUP 02 adds these initiatives to PPMAP. There are two ways to view Management Initiatives: By Assessment Area and By Site.

Adding Management Initiatives

To add management initiatives to PPMAP, use the **Mgt Initiatives** hotspot from the PPMAP Main Navigator to navigate to the Mgt Initiatives view. Select the **Create New Management Initiative** button to open a Mgt Initiatives form. Type an Initiative Title; then, using the pick lists, select the appropriate reporting activity and assessment area. Details may be added in the available area. When finished, select **File | Save** from the menu bar to save the initiative and select the **Close Document** button to return to the Mgt Initiatives view.

Guidance

Guidance was created to provide a comprehensive reference for conducting a complete management assessment. Guidance consists of forms, sections, subsections, and comments. PPMAP provides NAVSUP 02 a tool to validate that an activity is meeting mission requirements and ensuring the integrity of the contracting process. This approach minimizes compliance-oriented aspects of oversight, integrates quality assessment factors, and requires development of performance-based, self-assessment metrics for critical acquisition processes. By making Chiefs of the Contracting Offices (CCO's) responsible for performing self-assessments, measuring quality, collecting data, and taking necessary corrective action, NAVSUP 02 enables a process of continuous improvement. NAVSUP 02 grants contracting authority to field procurement activities to make individual procurements up to specified limits. The PPMAP process is one method by which NAVSUP 02 grants or revises field procurement authority.

A PPMAP Guide usually provides eight areas of focus for an activity:

- A description of new self-assessment and quality assurance plan requirements
- An overview of the corresponding PPMAP process
- A profile of the on-site PPMAP

- Information regarding review authority and review cycles
- Information regarding team composition, selection, and responsibility
- Requirements for PPMAP planning
- An explanation of actions following a PPMAP
- A discussion of a NAVSUP 02 Divisions' responsibilities

Creating Guidance Forms

To generate a new assessment guidance form, select the **Guidance** hotspot from the PPMAP Main Navigator. From the Guidance navigator and view, select the **Create Guidance Form** button. Identify the Guidance form Title, and add the applicable document text in the space provided. When the form is complete, it must be saved and closed for sections and comments to be added to it. Select **File | Save** from the menu bar to save the newly created guidebook. Select the **Close** button to return to the Guidance view.

Creating Guidance Sections

A Guidance Section can only be created after a Guidance form has been entered in PPMAP. Select the **Guidance** hotspot from the PPMAP Main Navigator. From that navigator, expand the **Guidance** view by using the "View Expand All" icon to display a list of all guidebooks. Open the applicable guidebook by double clicking on it and use the **Create Section** button at the top of the screen to open a section form. Indicate the Section Number and Title in the appropriate spaces, and add text in the space provided below the section of the form labeled **Document Section**. Select **File | Save** from the menu bar to save the new guidebook section and the **Close Document** button to return to the Guidance document of which this section is a part.

Adding Subsections

To generate a Guidebook Subsection, a Guidance form and Guidebook Section must first have been created. Go to the Guidance navigator and view by selecting the **Guidance** hotspot from the PPMAP Main Navigator. In the view, select and double click the Guidebook Section to which the subsection will be added. From within the Section document, use the **Compose Subsection** button to open a Subsection form. Indicate the Section Number and Title in the appropriate spaces, and add text in the space provided below the section of the form labeled **Document Section**. Click the **Close Document** button, and when prompted, choose "Yes" to save the Subsection and return to the Guidebook document of which this subsection is a part. If more Subsections are to be created, click on the **Compose Subsection** button and repeat the process, or if finished, use the **Close Document** button to return to the Guidance navigator and view.

Responding to Guidance Comments and Questions

To respond to comments submitted by the activities, select the **Guidance** hotspot from the PPMAP Main Navigator. Expand the Guidance section to display a list of all

guidebooks, by selecting the "View Expand All" icon. Locate and open the desired comment. Select the **Action Edit Document** icon in the SmartIcon toolbar to open the comment into the Edit mode. When in Edit mode, add your response to the *Response* section. When finished, select **File | Save** from the menu bar. Select the **Close Document** button to return to the Guidance navigator and view.

Creating Instruction Forms

To generate a new instruction form, select the **Guidance** hotspot from the PPMAP Main Navigator. From the Guidance navigator, select the **Create Instruction Form** button located at the top of the screen. Add the Instruction Title in the form, and type or paste the applicable information in the available free form text field. When finished, select **File | Save** from the menu bar. Select the **Close** button to return to the Guidance view.

PPMAP Admin Section

The PPMAP Admin Section contains the: Site Mailing List for adding and deleting people to receive auto emails; Archiving Checklist for archiving checklist responses and dialog; Archive for retrieving archived checklist information; and Signature Files for changing to "electronic" bitmap signature used to authenticate pre-assessment letters and the assessment cover letter.

Site Mailing List

The PPMAP coordinator has the ability to select that will receive automatically generated emails at each activity. Emails are automatically generated when posting the pre-assessment letter, the assessment report and when the estimated completion date for an Implementation Status report is reached. The **Site Mailing List** is the default view when you open the PPMAP Admin Section. To create a new mailing list select **Create Mailing List**, then in the form select the activity, and enter the email addresses of all the people in the activity who are to receive auto email notifications. When all of the information is entered, select **Save | Close**.

To add new names to an existing mailing list, select the mailing list to be modified from the **Site Mailing List** view, and then select **Edit Document.** Add or delete the email addresses, then select **Save|Close.**

To delete a mailing list, select the mailing list to be deleted from the **Site Mailing List** view, select **Edit|Clear**, and then select **View|Refresh** (or F9).

Archiving Checklist Responses

There is a need to archive checklist responses for future reference. Archiving the responses keeps the current checklist response view free of checklists for assessments that have been completed.

To archive checklist responses, select the **Archiving Checklists** hot spot in the PPMAP Admin Section. From the pull down menus, select the name of the activity to be sent to archive, and then select the year. To activate the archiving process select **Archive Now**. The checklist responses for the activity selected will be saved in a separate archive database.

Viewing Archived Checklist Responses

To view an archived checklist, select the **Archive** hot spot from the PPMAP Admin Section. The screen will change and there will be a new set of navigators to use to find the checklist responses. If you are looking for the checklist responses from a specific command, the select "Responses by Type". Other navigators allow you to look for responses by date, and by name. The archive also contains placeholders for archived checklist questions.

Signature Files

The **Signature Files** contains a list of the signatures of NAVSUP 02 personnel authorized to sign PPMAP reports electronically. To view the list of signatures, select **Signature Files** hot spot from the Admin Section. The signatures are bitmap images of the actual signature of the authorizing official. To add a signature, contact the PPMAP support personnel. They will scan the signature of the new authorizing official and add it to the **Signature Files**.

Appendix

A

Quick Tour of Lotus Notes®

The user interface for the assessment process is a Lotus Notes (Release 4.0 or higher) desktop that incorporates the document functionality that you will need in the PPMAP database.

Lotus Notes Workspace

The Lotus Notes Workspace, shown in Figure A.1, is the window Notes displays when you open Lotus Notes. The workspace consists of the menu bar, several tabs with various database icons on each tab, the status bar, and the SmartIcon toolbar. You can organize sets of related database icons on different tabbed pages in the workspace, and give each page a descriptive name. The last page is automatically occupied by the Replicator, which allows you to manage replication activities. You cannot rename the Replicator page.

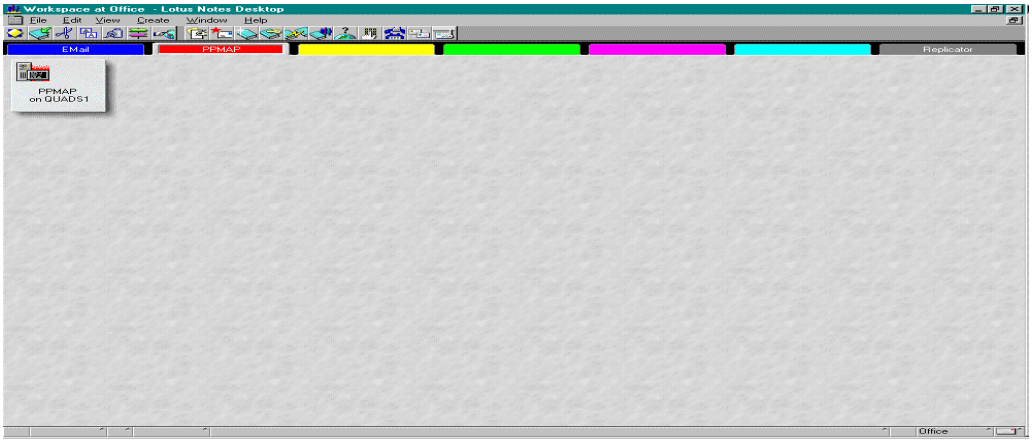


Figure A.1 Lotus Notes Workspace

SmartIcons

While working in Lotus Notes, you have access to the standard Lotus Notes Universal SmartIcon set. These are buttons at the top of the Lotus Notes workspace that, when pressed, will execute common file menu commands. For many tasks, it is simpler to click SmartIcons than to pull down menus or recall and type keyboard shortcuts. The SmartIcons are "context - sensitive," meaning they change according to where you are in the database to allow for the common functionality most often required in that part of the database. An illustration is at Figure A.2, followed by a description of each SmartIcon.

> Note:
>
> When you hold the mouse pointer over the SmartIcons, Lotus Notes displays a brief description of the icon. You can hide or display these descriptions by choosing **File | Tools | SmartIcons** from the menu bar. In the resulting dialog box under Show, select or deselect Descriptions. Click [**OK**].

Figure A.2 Lotus Notes Universal SmartIcon Set

Properties. Displays the properties such as file size, indices of documents or databases.

File Save. Saves the current object.

Cut, **Copy, and** **Paste.** "Cut" removes the currently selected text/object and places it on the clipboard. "Copy" copies the currently selected text/object and places it on the clipboard. "Paste" copies the text/object from the clipboard to the current cursor position or over the currently selected text/object.

Help Guide Me. Calls up the Help section of Lotus Notes.

Actions Edit Document. Places the currently selected document in "Edit Mode."

Actions Forward. Forwards a mail memo.

Navigate Next Main. Will navigate to the next document at the highest level of the document hierarchy.

Navigate Previous Main. Will navigate to the previous document at the highest level of the document hierarchy.

Navigate Next Document. Will navigate to the next sequential document.

Navigate Previous Document. Will navigate to the previous sequential document.

Navigate Next Unread. Will select and navigate to the next unread (not previously viewed) document.

Navigate Previous Unread. Will select and navigate to the previous sequential unread (not previously viewed) document.

View Expand. In outline view, will expand the subordinate documents for the selected document.

View Expand All. In outline view, will expand all subordinate documents in the view regardless of selection of any particular documents.

View Collapse. In outline view, will remove view of subordinate documents and show only the superior document with a "twistie," indicating that subordinate documents are available.

View Collapse All. In outline view, will distill the view to the top level only with "twisties" to indicate subordinate documents are available.

Edit Find/Replace. Allows the classic text search with replacement of the designated text.

View Show/Hide Search Bar. Toggles from the outline view with the search bar to the outline view without the search bar (For the search bar to be useful, the database must be full text indexed).

View Show/Hide Preview Pane. Toggles from the outline view with a selected document "tiled" to the outline view without the selected document "tiled."

Lotus Notes® Search Features

Full Text Search

Lotus Notes has a powerful feature that gives a distinct advantage to users. The advantage is the ability to search for items of interest with the online search engine. Lotus Notes contains a "Free Text" search engine that allows users to find instances of an item across the spectrum of the database. For example, identifying 'Best Practices' procedures on the simplification of acquisition procedures might be a daunting task involving searches through three or four major views. With the text engine search in Lotus Notes, this procedure takes less than a minute.

To initiate a search across a spectrum of documents in **PPMAP**, select the SmartIcon View Show/Hide Search Bar icon in the SmartIcon toolbar, if the search bar if not already visible. Type the search criteria in the search bar and select the Search button. The results display a listing of documents according to ranking (i.e., most relevant to least relevant document).

Quick Search

To initiate a quick search which only searches in the specific view that is active, place your cursor in the view and begin typing the information. The Quick Search window appears displaying the search criteria as it is being typed. **PPMAP** will locate and highlight the specific record or its equivalent.

Printing

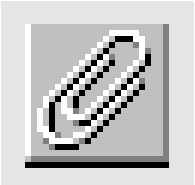
Printing a Document

To print a document in **PPMAP**, select the document to be printed from a **PPMAP** view. Select **File | Print** from the menu bar. Select [**OK**] in the dialog box to submit the job to the default printer.

Printing a View

To print the current **PPMAP** view, select **File | Print** from the menu bar. Ensure the "Print View" radio button is selected in the dialog box and then select [**OK**] to submit the job to the default printer.

Attaching Files



Notes allows for files to be attached. Attach files are normally for clarification purposes only. Open the desired form and scroll to the bottom of the screen using the scroll bar on the far right of your desktop. If you are attaching a file in a form, place the mouse cursor in the appropriate field of the form.

Select **File | Attach** from the menu bar. A dialog box will appear allowing you to browse your hard drive to locate the file you wish to attach. Select the desired file and click **Create**. The file will appear as an application icon. Select **Close Document** to save and submit the report/form/section. Click **Yes** in the resulting dialog box.

Detaching Files

Some of the sections may have attached source files. Attached file(s) will appear as an icon(s) at the bottom of the document. To view these files, double click this icon.

Double clicking the application icon will bring up a dialog box, shown in Figure A.3, prompting you to choose from among the following options:

- View
- Launch

- Detach

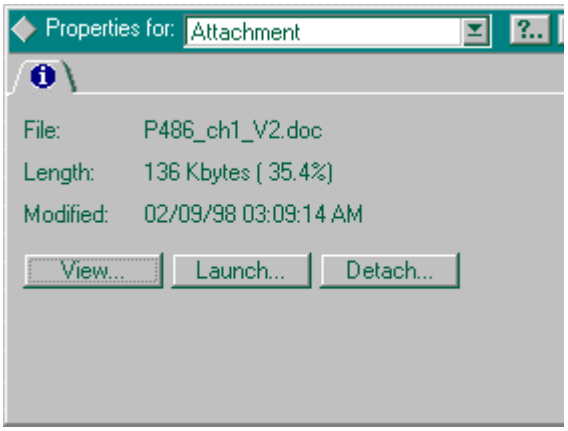


Figure A.3 Attachments Dialog Box

If you do not have the native text editor application (for example, Microsoft Word), you may **View** it in the Lotus Notes Universal Viewer. In the universal file viewer, the file may be viewed and the text may be copied to the clipboard to be used with whatever word-processing application you may have. *Hence, there is no need for you to have the native word processing application of the source document.*

If you have the native application on your desktop, you may choose to **Launch** the attached file(s) in the native word-processing application.

You may **Detach** (really a misnomer - one actually saves it to the hard drive) an attachment. Selecting the **Detach** option brings up a dialog box prompting you to specify where on your hard drive to save the attachment. The file name of the attachment appears in the File Name field of the dialog box once you have selected it. Click the **Detach** button to save the file to the local drive.