3in1 Tool

Field Ordering Officer & Paying Agent Guide

New User Training

Version 3.5

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Joint Contingency Contracting System

Defense Logistics Agency

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Module 1: 3in1 Tool Overview

Lesson 1: What is the 3in1 Tool?

Objectives

After completing this lesson, the participant will be able to:

- ❑ Describe the main purposes of the 3in1 Tool
- ❑ Identify the components of the 3in1 Tool
- ❑ Describe how device, procurement and financial management information is processed using the 3in1 Tool
- ❑ Identify key features and benefits of using the 3in1 Tool

What Is the 3in1 Tool?

The Department of Defense has developed the 3in1 Tool, which automates three key processes: Field Ordering, Receiving, and Payment. These three processes were previously completed using the Standard Form 44 manual processes to purchase supplies and services used in contingency environments by a Field Ordering Officer (FOO) and Paying Agent (PA). The 3in1 Tool records and transmits cash-and-carry type purchases and payments, when conducting on-the-spot, over-the-counter, field cash purchases where GPC use is not feasible. The purchase and payment data are transmitted to the prime database for remote reconciliation and review. The 3in1 Tool is a joint procurement and financial management solution developed to reduce risk to the field team, improve procurement and cash management on the battlefield, eliminate wasted time, and provide immediate visibility into purchases and payments.

Benefits of Using the 3in1 Tool

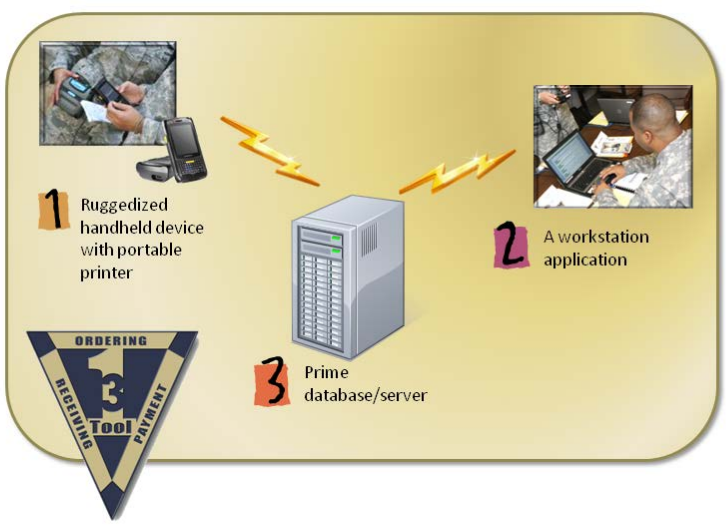
- Eliminates problems associated with paper forms: wasted time duplicating documents, multiple entries into various systems, illegible handwriting, loss or damage to paper, storage/reproduction/shipping
- Reduces FOO/PA exposure to travel in hostile areas by reducing trips to multiple clearance offices by electronically sharing purchase information
- Reduces risk of unmatched disbursements of SF44 purchases
- Reduces risk of payment duplication through electronic verification
- Records all SF44 data, captures receipt images, uploads supporting documents for electronic filing/clearing
- Eliminates need for field paying agents to calculate foreign currency exchange rates
- Automatically maintains obligations and expenditures by purchase request (PR) or cash advance
- Reduces errors and increases accountability with electronic record-keeping and reconciliation between FOO and Contracting Officer (KO), and PA and Disbursing Agent (DA)

- Provides centralized, electronic analysis of obligations, expenditures, available cash, and purchase activities
- Provides audit trail of all transactions in a designated Area of Responsibility (AOR) in the 3in1 Tool system
- Links payment and purchase data directly to financial system, eliminating need for manual entry

3in1 Tool Components

The 3in1 Tool has three main components:

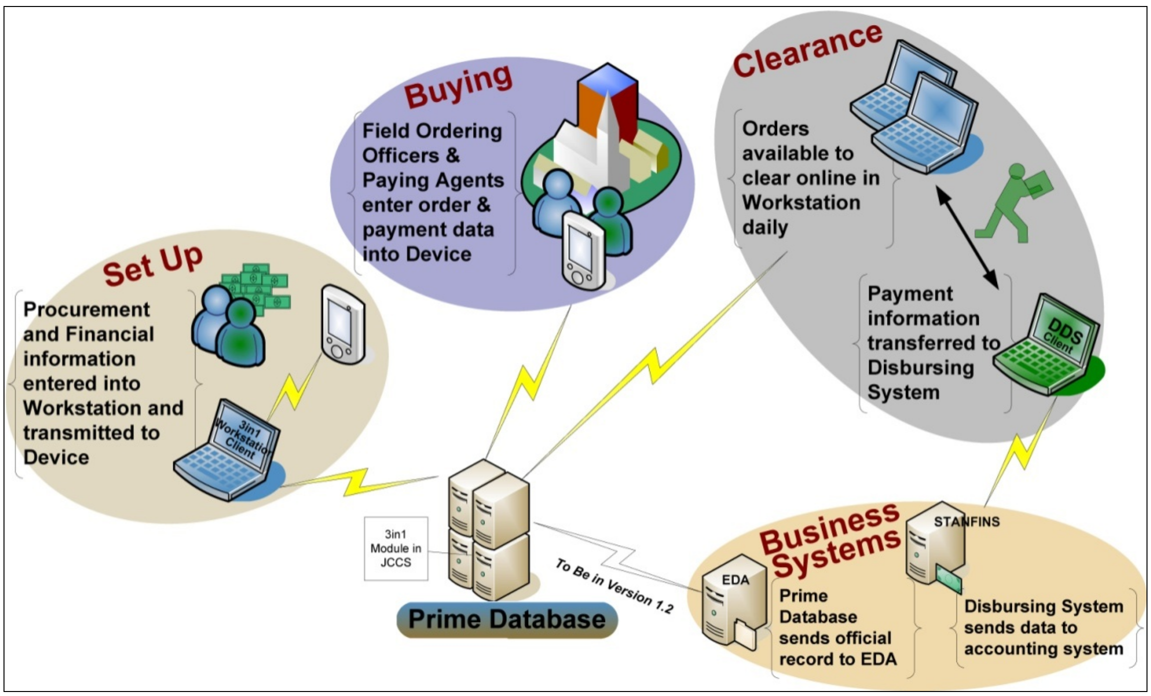
1. The **handheld device** is used in the field to input, temporarily store, and then transmit purchase and payment information. The small, rugged **printer** provides field print capability to document cash payments until data is uploaded.
2. The **Workstation application** is a hard client application that transmits data to the prime database/server in a fully connected mode; stores a replica of the prime database for offline operations; and caches data from the device for later synchronization with the prime database/server.
3. The **prime database/server,** a specialized module within the Joint Contingency Contracting System (JCCS), is an existing system used to manage and post contracts and track contractors housed at DISA (DECC).
   – The 3in1 prime database is used to manage devices and role-based system access; stores, reports, and analyzes purchase and payment data; and transmits payment/ information to other financial systems and order/voucher and receipt images for official document storage to Electronic Data Access (EDA).



Process

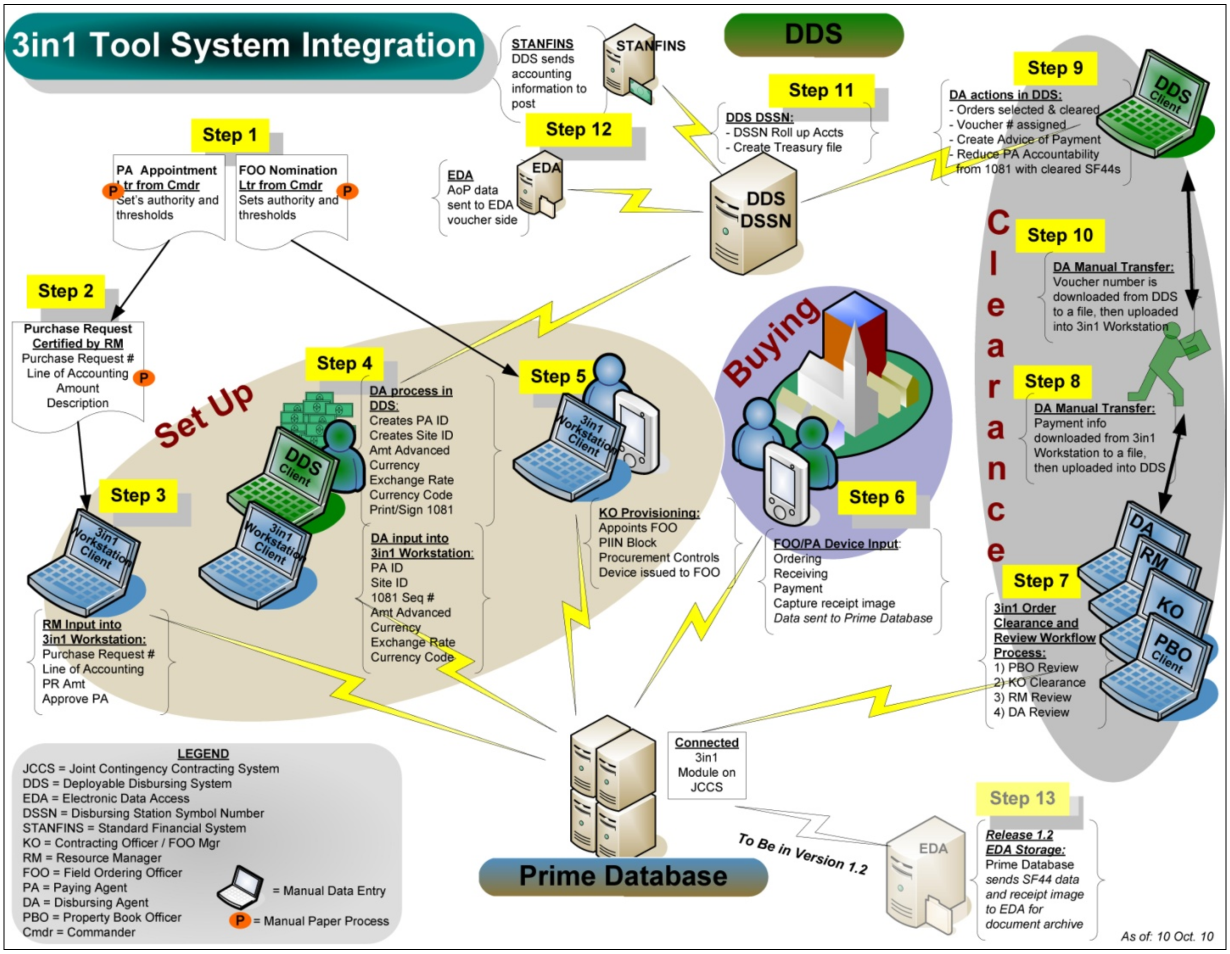
How is the 3in1 Tool used to process device, procurement and financial management information?

1. **Setup**: Device, procurement, and financial management information is entered on the workstation by authorized personnel and then downloaded to the device to set it up for use by an assigned FOO and PA.
2. **Buying**: The FOO/PA teams can processes orders/payments on the device, which can be immediately transmitted to the prime database/server for daily online review/clearance.
3. **Clearance**: Status of clearance and procurement/financial updates is transmitted back to the device as they are processed, to update the device.
4. **Business Systems**: Once orders have completed the review/clearance process, the Disbursing Agent can download and transmit payment information to the Deployable Disbursement System (DDS). Once the voucher number has been assigned, the prime database/server will transmit the SF44 and receipt image to EDA for official document storage. (**Note**: if DDS is not used, the download step can be skipped and voucher numbers can be manually entered.)



3in1 Tool Process Overview

The following figure provides a detailed graphical view of 3in1 Tool integration and is intended for personnel who are familiar with the existing system.



3in1 Tool System Integration

Key Features of the 3in1 Tool

Online/Offline Operations

The device and Workstation application each operate independently, storing data until connectivity to the web is available. The device can transmit via GSM, Wi-Fi, or Ethernet to the prime database; or via USB or Cross Over cable to the Workstation for cache and forward operations. For security purposes, only one communication port may be active at a time. Wireless connectivity requires contracting officer activation at the time of device setup. Data size is minimized to accommodate reduced bandwidth.

Authentication/Security

Devices are uniquely registered with the 3in1 Tool prior to activation and data exchange. Data transmissions are encrypted for maximum security. Users register on the 3in1 Workstation using DoD CAC cards to establish a user ID and DoD-approved strong password, and to obtain approval for role-based access to the device or Workstation. The role-based access hierarchy approves all access based on designated roles. Secure digital signatures activated by user names and passwords are used to execute orders by the FOO and payment certification by the PA. As each step of the purchase is completed, the information is locked in a verifiable file and all data and images are transmitted to the 3in1 Workstation/Prime Database. Any tampering with order or payment information is identified using the validation process when displayed or reported.

Financial Operations

The device automatically calculates the order total and exchange rates. Obligations, expenditures, and cash availability are tracked on the device and prime database. Financial officers can increase or decrease PR and CA amounts on the workstation and transmit to the device in the field. During fiscal year change over, remaining cash can be re-associated with a new PR for the new FY when using the Deployable Disbursement System (DDS). The Disbursing Agent can transfer cleared vouchers electronically to DDS for payment processing and to reduce the PA's cash accountability. The PA will only need to return to the DA to obtain/return cash. After DDS assigns a voucher number to each order and the data is transmitted back to the workstation, the SF44 and receipt can be transmitted to EDA for official permanent document storage. If required, a PA can exchange, return, or add cash in the field, directly on the device.

Procurement Controls

Procurement controls prohibit purchases in excess of authorized limits or check items against unauthorized or special approval lists, and display customizable warning messages on the device. These orders are also flagged during clearance to assist reviewers when clearing orders/payments.

Receipt and Record of Payment

Vendor receipts are digitally recorded on the device using its onboard camera. Government receipt of goods and vendor payment are recorded as a digital image of the physical signature on the device's touch screen. Accountable items can be flagged and reported for property book reporting. Final delivery locations can also be recorded for property accountability tracking.

Online Review/Clearance

When connected, SF44 information is immediately available for review and clearance. Reviewers can view all SF44 information, receipt image, signatures, and required approval letters. Reviewers can approve, disapprove, or flag an order and transmit comments or questions to the field team for response on the device.

Data Backup and Restoration

If a device is damaged, any data not uploaded to the prime database can be retrieved by the system administrator from the MicroSD card using another device. If a device is stolen, it can be deactivated from the system by the system administrator from the Workstation.

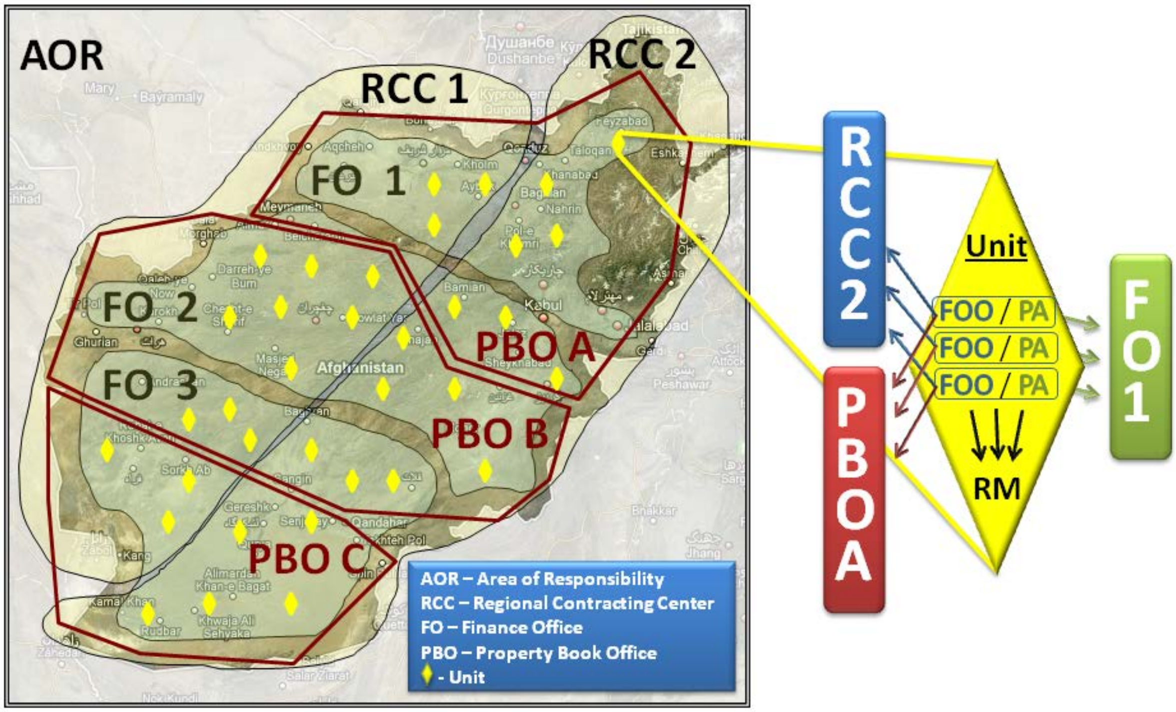
Should a device fail in the field, FOOs can execute manual SF44s with special PIINs issued during set up and then input the SF44 data, and upload the scanned SF44 into the Workstation for automated review/clearance and payment and storage processing. Data processed on the device while offline should be transferred to the prime database or Workstation as soon as possible, for data backup and clearing.

Additional 3in1 Handheld Device Features	Additional 3in1 Workstation/Prime Database Features
 • Provides access to prices previously paid for market research • Can record vendor location by GPS coordinates • Provides ability to attach notes to orders • Creates vendor/shopping lists to minimize time in the market • Reruns an order to quickly process a repeat order • Can returns items ordered, if required • Fiscal Year cognizance prevents prior year PIIN use • FOOs & PAs are linked as a team; multiple FOOs & PAs can be assigned to a device with ability to re-associate as needed. Devices can only be used by assigned FOOs/PAs	 • Runs reports such as Individual and Total FOO Actions and Dollars, PIIN Logs • Generates and issues mass blocks of PIINs based on DoDAAC, FY, FOO ID, to all assigned FOOs, or individually • Provides customizable online role based review/clearance process Runs reports for use by the FOO, FOO Managers, PA, KO, DO/DA, and Commander • Uploads supporting documents for retention in order's electronic file (i.e. approvals, reviews, and receipts) • Tracks expenditures, purchases, cash in the field, obligations, available fund information daily • Pushes PR, PIINs & procurement updates to device remotely

Data Organization by Areas of Responsibility

The 3in1 Tool system supports contingency operations around the world for all services. Data is organized within the system by AOR. Within an AOR there may be multiple Regional Contracting Centers, Finance Offices and Property Book Offices whose region of responsibility may or may not overlap. In the 3in1 system, these regional offices identify the units they are going to support in order to have visibility of the FOOs and PAs, and their executed orders/vouchers. A unit may have multiple FOO/PAs assigned to them. Each FOO is linked through their unit of assignment to the RCC and PBO. Each PA is linked through their unit of assignment to the FOO. Resource Managers (RM) do not have a regional level relationship and only identify the units they are assigned to support.

Depending on how large the operation is will determine the number and types of offices used within an AOR. The minimum required to operate the 3in1 system is an RCC, if only purchase orders will be executed with the 3in1 device. If a PA will be used to issue payments, a FOO must also be used. If a RM is not deployed with the contingency operation, the contracting officer can enter the purchase request information into the system during provisioning.



AOR Organization

Using This Manual

This training focuses on the features of the 3in1 Tool as it used by personnel who serve as Field Ordering Officers (FOOs) or Paying Agents (PAs) in the purchasing process. To use an abbreviated checklist of required tasks for the FOO or PA role, see *Appendix A: FOO/PA Task Checklists*.

This book contains the following parts and modules:

- Module 1: 3in1 Tool Overview

Part 1: System Setup

- Module 2: Hardware/Application Setup
- Module 3: Application Familiarization

Part 2a: Execution: FOO/PA Setup

- Module 4: Activating Devices for FOO/PA Teams

Part 2b: Execution: Purchasing Process

- Module 5: The Ordering Process

- Module 6: Ordering and Financial Features on the Device
- Module 7: Managing Purchase Orders on the Workstation
- Module 8: Viewing Purchase Requests, Cash Advances and Purchases on the Workstation
- Module 9: Clearing Purchase Orders
- Module 10: Managing Cash Advances on the Device

Part 3: Reporting from the Device and Workstation

- Module 11: Reporting from the Device
- Module 12: Reporting from the Workstation

Part 4: Reference Information

- Module 13: Device Management Tools
- Module 14: 3in1 Device Tools & Settings

Appendices

- Appendix A: Appendix A: FOO/PA Task Checklists
- Appendix B: Data Worksheets
- Appendix C: End-to-End Process Diagrams
- Appendix D: IS User Agreement
- Appendix E: Acronym List
- Appendix F: Device Safety Instructions & Specifications
- Appendix G: FieldPro RT43 Printer Information

Lesson Summary

In this lesson, you learned to:

- ❑ Describe the main purposes of the 3in1 Tool
- ❑ Identify the components of the 3in1 Tool
- ❑ Describe how device, procurement and financial management information is processed using the 3in1 Tool
- ❑ Identify key features and benefits of using the 3in1 Tool

Part 1: System Setup

Module 2: Hardware/Application Setup

Lesson 1: Registering New Users

Objectives

After completing this lesson, the participant will be able to:

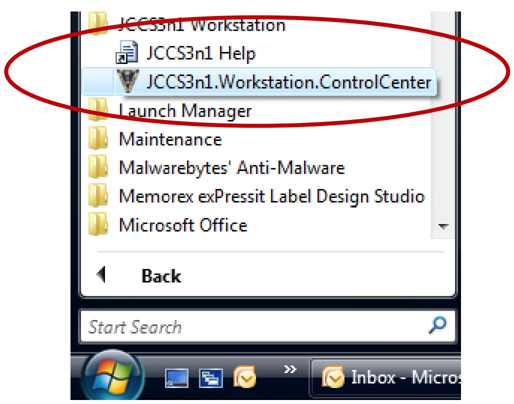
- ❑ Register new users in the 3in1 Tool Workstation
- ❑ Identify various roles used in the Workstation
- ❑ Identify the features that can be accessed by each role
- ❑ Request a role assignment for a new user
- ❑ Upload supporting documents for a new user

Registering a New User

Each 3in1 user must be registered with a user ID and password. The standard practice is for each user to register and create his/her Workstation user ID and password. The feature for registering a new user may be accessed from the 3in1 Workstation Logon window or from the JCCS web site.

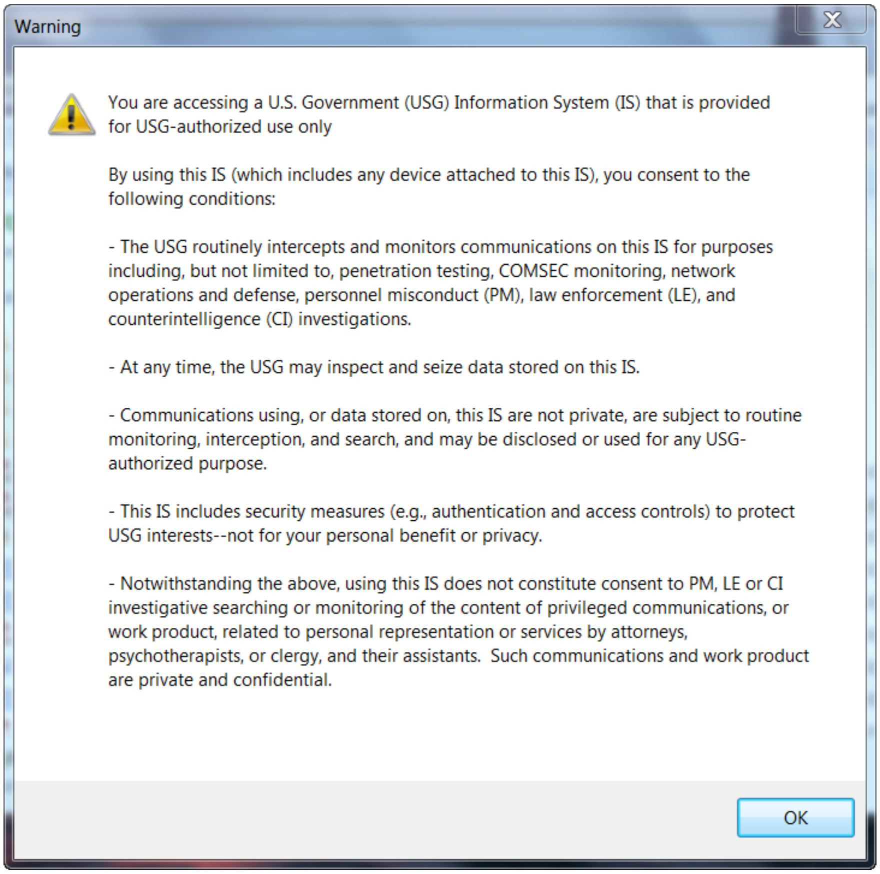
To register a new user from the 3in1 Workstation Logon window:

1. In the Windows tool bar, select **Start**, **All Programs**, **3in1 Tool Workstation**. Double-click **3in1 Tool Workstation.**



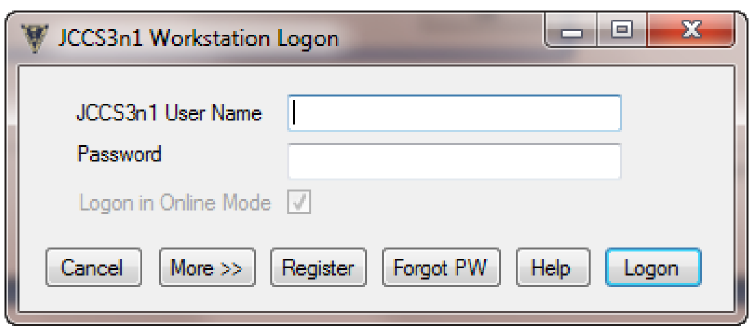
Start, All Programs, 3in1 Tool Workstation

2. Click OK on the initial warning screen concerning authorized use of this U.S. Government Information System.



Warning Screen

3. Click the **Register** button in the *Logon* window.



3in1 Tool Workstation Logon Window

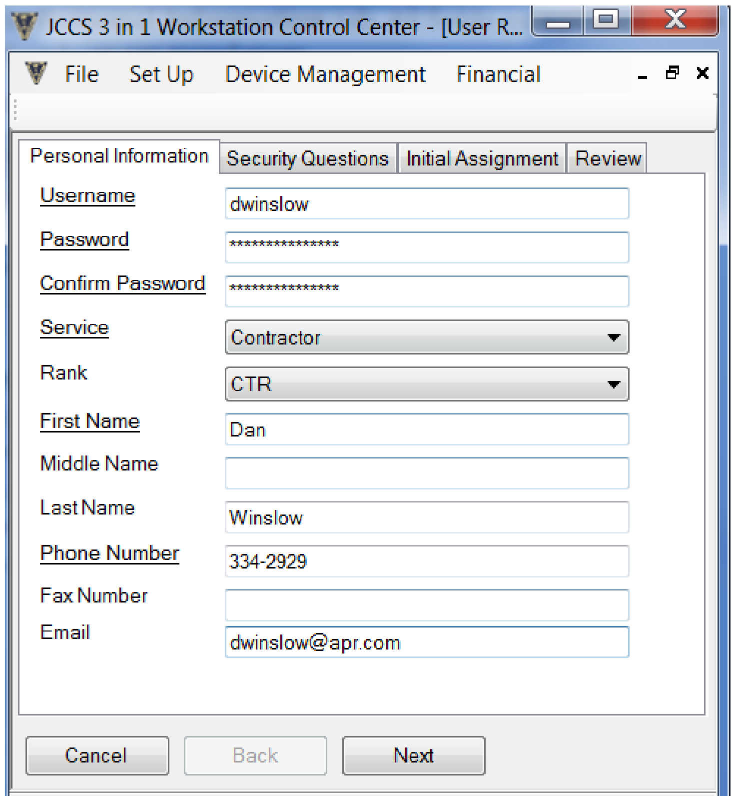
– The *User Registration* window opens.

4. Provide information on the **Personal Information**, **Security Questions** and **Initial Assignments** tabs, then verify your information on the **Review** tab.

You must complete the tabs in order. For example, you cannot proceed to the **Security Questions** tab until the **Personal Information** tab is filled out correctly.

Personal Information

1. Complete all fields in the **Personal Information** tab. All fields except the Middle Name, Phone and Fax Numbers are mandatory.
2. Click the **Next** button to display the **Security Questions** tab.



User Registration Personal Information Tab

A tooltip is displayed if you make an invalid entry or do not enter a required field. Read the tooltip for guidance on making a correction. You cannot advance to other tabs until you complete the required fields on the Personal Information tab.

Password Rules

The following rules apply to creating passwords in the 3in1 Tool Workstation:

- Passwords must contain a minimum of 15 characters:
  - Include at least one uppercase alphabetic character
  - Include at least one lowercase alphabetic character
  - Include at least one non-alphanumeric (special) character
- When resetting passwords:
  - The new password must be different from the previous 10 passwords used
  - A user can change a password only once in a 24-hour period
  - Users are forced to change their passwords after 60 days
- Additional password rules:

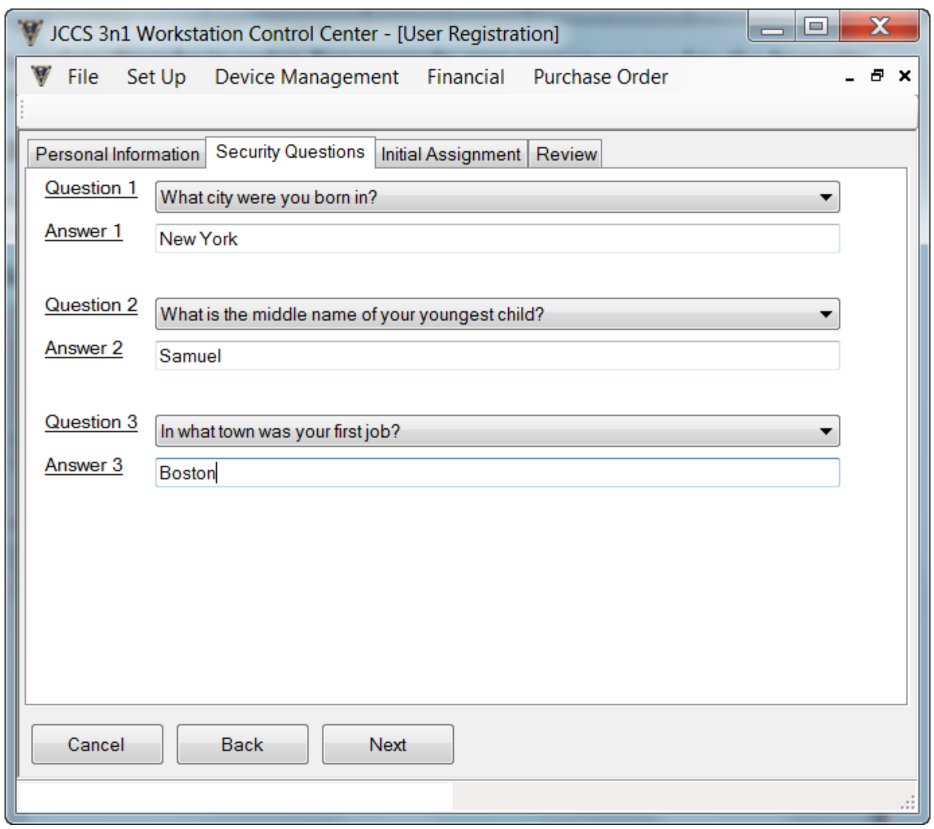
– Only the affected user and administrator can change user's password, as explained in *Module 13: Device Management Tools, Lesson 1: Resetting a Password on the Device and Workstation*
– An administrator can change passwords at any time

Workstation Password Also Used on 3in1 Device

When FOO/PA users register on the Workstation and create a password, they should use this same password to log on to the 3in1 device to which they are provisioned. Later, if there is a need to reset the password on the device or Workstation, please refer to *Module 13: Device Management Tools, Lesson 1: Resetting a Password on the Device and Workstation*.

Note: Keep in mind that only the following special characters can be entered on the device, so use only these special characters as part of new passwords that will be used on both the device and Workstation: ! $ + - : / % ( ) ; " # = & ' * ? @ ,

Security Questions

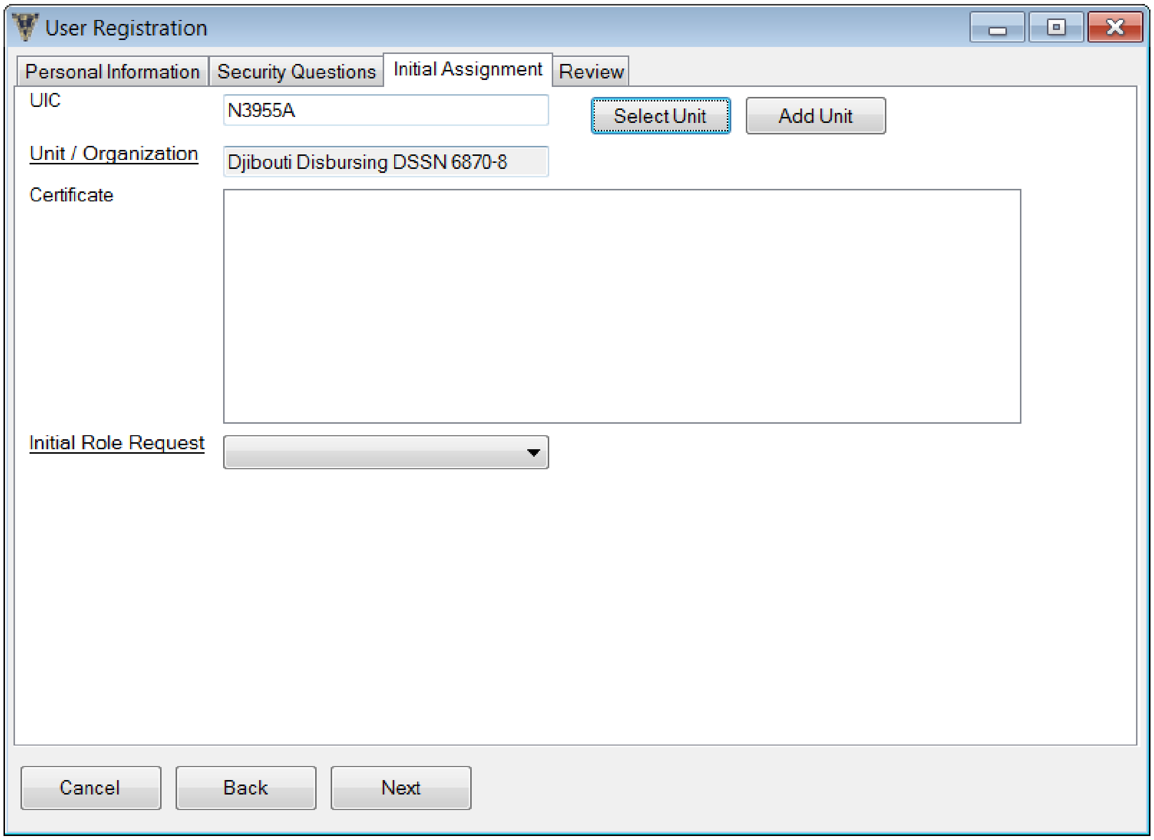


User Registration – Security Questions Tab

1. Select three different security questions from the drop-down lists, then type your responses.
2. Click **Next.**
   – The **Initial Assignment** tab is displayed.

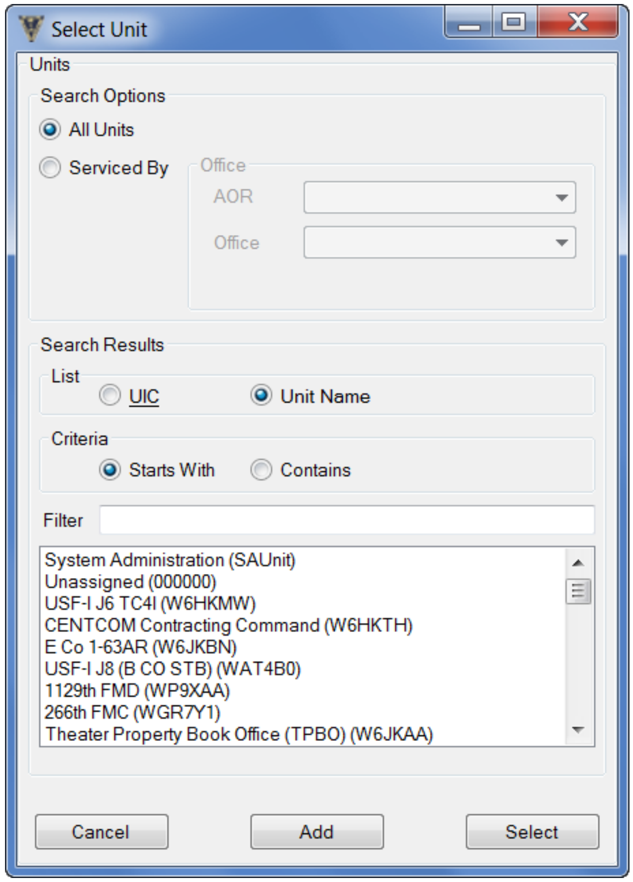
Initial Assignment

1. In the **Initial Assignment** tab, specify your Unit Identification Code (UIC), which is a six-character, alphanumeric code that uniquely identifies each Active, Reserve, and National Guard unit of the Armed Forces. Enter the UIC to which you are assigned for the contingency operation.



User Registration – Initial Assignment Tab

2. Click the **Select Unit** button to select an existing UIC.
   – The *Select Unit* window is displayed.

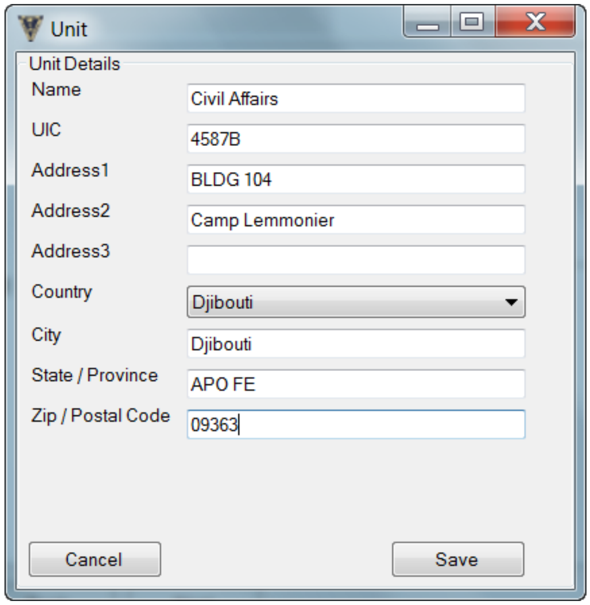


Select Unit Window

3. In the *Select Unit* window, under **Search Options**, click a radio button to search for all units or those serviced by a specific AOR and office.
4. Under **Search Results**, choose to display the search results by UIC or unit name.
   – The list of units updates to match the specified criteria.
5. Select a unit from the list, then click the **Select** button.
   – The UIC and corresponding unit/organization display.

Alternatively, you may be assigned to a non-DoD specified unit without an assigned UIC. If so, you may create a UIC:

1. On the **Initial Assignment** tab, click the **Add Unit** button. This opens the *Unit* window.
2. On the *Unit* window, fill in the details about the new unit, such as the full name and address.
3. Click the **Save** button.



Create a Unit

Each user must have an assigned role. Every user is assigned the "User" role automatically, which allows a user to log in to the Workstation, but not perform any tasks. Access to most 3in1 Tool Workstation features is role-based. It is necessary to request a role on the **Initial Assignment** tab; the role must be approved before it is activated.

Appendix C, *End-to-End Process Diagrams*, provides a reference for how different roles participate in the purchase and clearance process. The number of roles required to operate the system will depend on how it will be used. Like the SF44, the 3in1 Tool is designed to be flexible in supporting large, sustained or small, short-contingency operations. If only a purchase order is going to be executed, then only a KO, System Administrator, and FOO are required. If a Purchase Order and Payment Voucher will be executed, then a System Administrator, KO, FFO, DA, and PA are required. For large, sustained operations, additional personnel may be desired to further separate the duties in the system, such as: Property Book Office, Resource Manager, and additional reviewers.

The roles available in the 3in1 Tool Workstation are as follows:

- **Field Ordering Officer:** Nominated by the unit Commanding Officer, has been trained, is qualified and appointed in writing to make purchases using the 3in1 Tool using the 3in1 Tool using data provisioned to the 3in1 device by the KO.
- **Paying Agent**: Appointed in writing by the unit Commanding Officer, and has been trained and accepted in the PA role to make payments and certify vouchers for purchases using cash or negotiable instruments. Has been assigned a FOO to work with as a team using the 3in1 Tool.
- **Contracting Officer (KO)**:
  - The individual expressly authorized to enter into, administer, and/or terminate contracts.
  - Responsible for activating and deactivating 3in1 Handheld devices

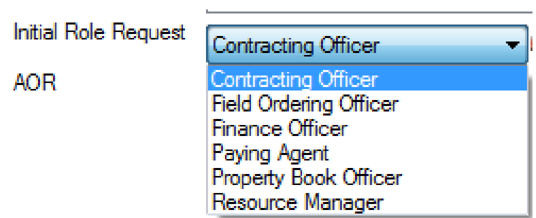
- Acts as the FOO Manager and is responsible for appointing and training FOOs. The FOO Manager is responsible for approving FOOs into their roles in the 3in1 Workstation, provisioning/deprovisioning devices and assigning them to FOOs, linking FOOs and PAs into a team, and establishing the procurement controls and accounting information for that team.
- The KO can also assign PRs to the FOO. Ensures all FOO orders comply with appropriate laws, executive orders, regulation, and other applicable procedure and approvals.
- The KO reviews and clears orders in the 3in1 Workstation to ensure conformance to acquisition regulations and to track the purchase of supplies and services.
- The KO may also need to perform the role of System Administrator to push temporary passwords to 3in1 handheld devices to unlock them.
- The KO may also need to set up and maintain the AOR and office structure with the 3in1 system.

- **Resource Manager (RM)**:
  - Assigns finance and accounting information, the Line of Accounting (LOA) on the Purchase Request (PR) and enters the PR information into the 3in1 prime database from the 3in1 Workstation.
  - Records changes to the PR amount in the Workstation for transmission to the 3in1 device.
  - Reviews orders and payments in the 3in1 prime database, using the 3in1 Workstation to ensure conformance with financial regulations, to track the costs of supplies and obligations of funds, and to obtain payment information for manual update in the accounting system.
- **Property Book Officer**: The PBO maintains inventory records of supplies, equipment and other tangible assets for the requiring activity. The PBO reviews and clears orders in the 3in1 prime database, using the 3in1 Workstation, to ensure that pilferable and accountable items that have been purchased are entered into the unit's property book.
- **Disbursing Agent (Finance Officer)**: The Disbursing Agent (DA) is responsible for maintaining obligations and cash advances in the prime database. The DA uses the 3in1 Workstation to enter cash advances to PAs for payments on orders. The DA reviews payments in the 3in1 prime database, transfers approved 3in1 payment data to the Deployable Disbursing System (DDS) and captures the voucher number assigned to the order by DDS and enters the voucher number on the order in the 3in1 prime database.
  - ***Note***: If DDS is not used, accounting reports can be generated and downloaded to Excel for manual accounting by the finance office, and the voucher numbers can be manually added on the 3in1 Workstation.
- **AOR Administrator:** A role created for the 3in1 Workstation specifically to add or edit Areas of Responsibility (AORs) and various types of offices within each AOR. No other role can add or edit an AOR.

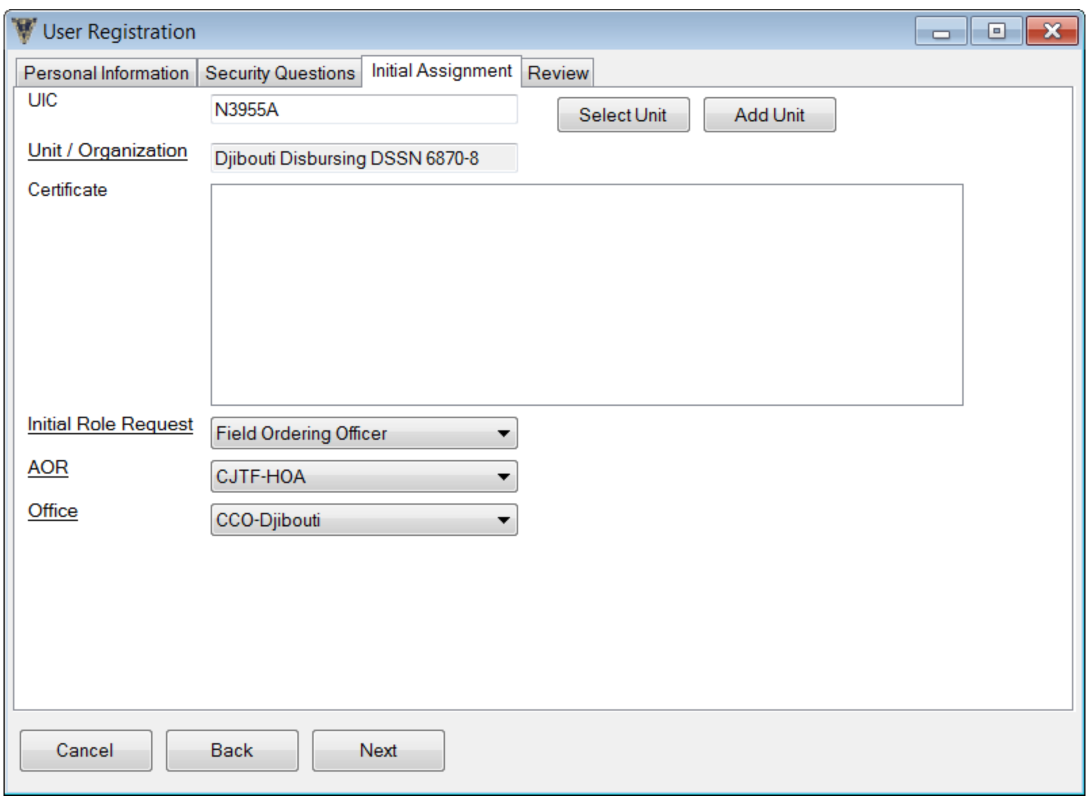
- **Reviewer**: Allows a person to be added to the clearance workflow to review orders beyond those previously listed with a review type authority. This may be a units Commander or Deputy Commander who may need to review and approve the purchase prior to contracting and finance clearing the order and voucher.
- **System Administrator:** A "super user" who can access all 3in1 Tool Workstation features. This is a standard role in most software applications. This person is usually responsible for managing user accounts and setting up general application features, such as creating AORs and offices.

To make an initial role request for a new user:

1. In the **Initial Assignment** tab, in the select a role from the **Initial Role Request** drop-down list.

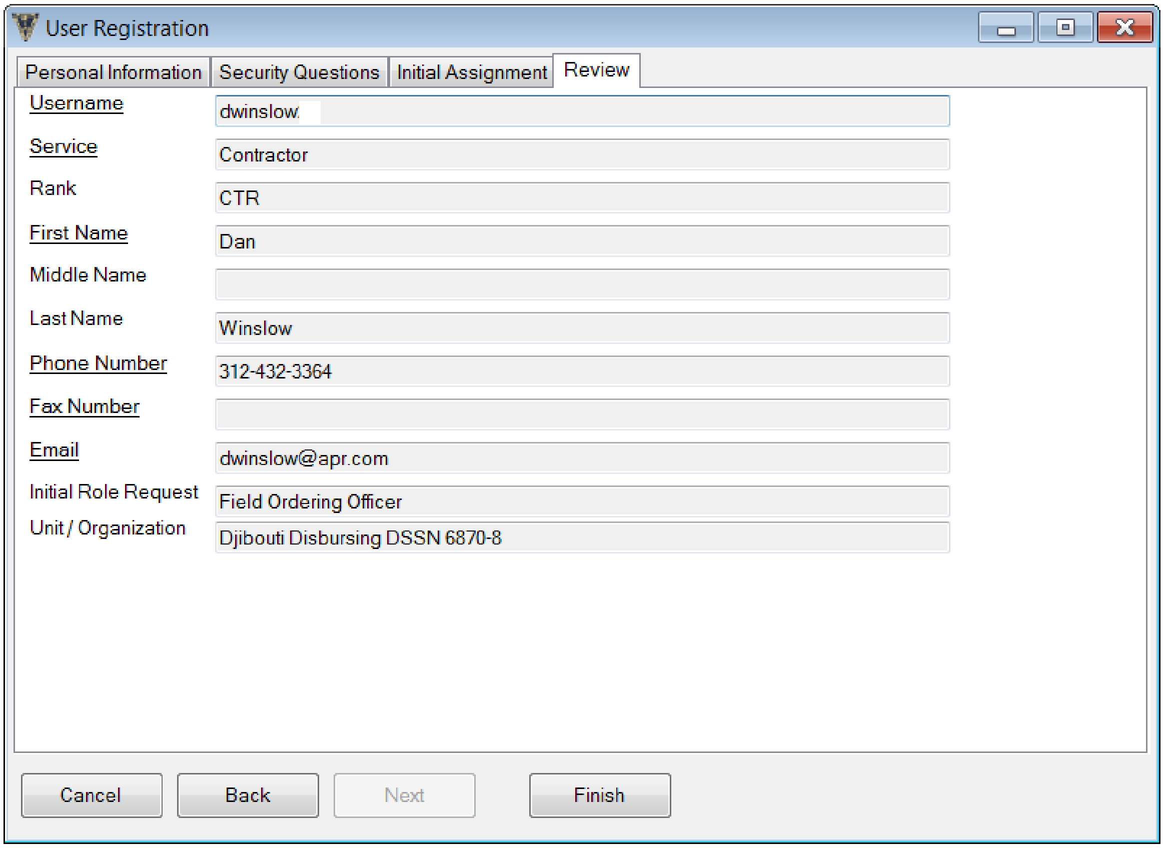


2. In the **Certificate** field, select the appropriate certificate for digitally signing documents and forms using the 3in1 Tool Workstation. For training purposes on non-CAC systems the **Certificate** field is optional.



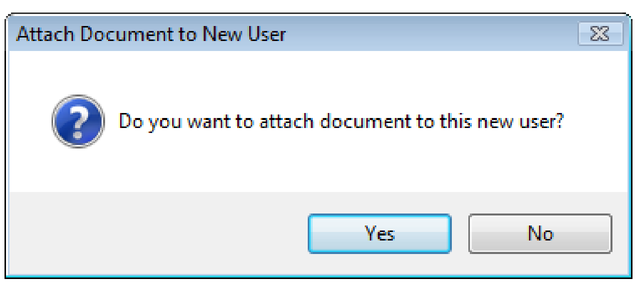
3. Click **Next**.
   – The *Registration Review* window is displayed.

Finishing the Registration Process and Uploading Supporting Documents



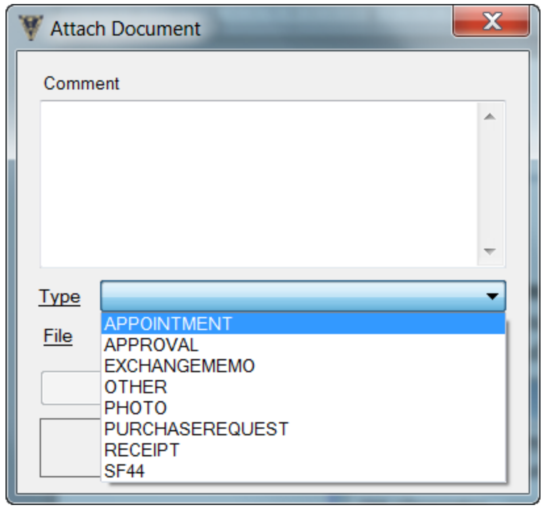
User Registration Review Tab

1. Review the information on the *Review* tab.
2. If you need to change anything, click the **Back** button and make edits. Otherwise, click the **Finish** button to complete the registration.
3. The following dialog box asks if you want to attach a document. Click Yes to upload a 577 form, appointment letters, or other document file. Otherwise, click No.



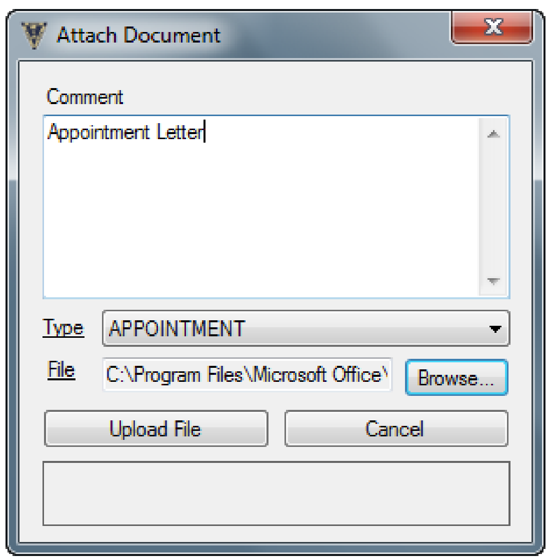
Attach Document to New User Dialog Box

4. In the *Attach Document* dialog box, select the document type.



Attach Document Dialog Box

5. Click the **Browse** button to select the document.
6. Click the **Upload File** button to attach the document file.



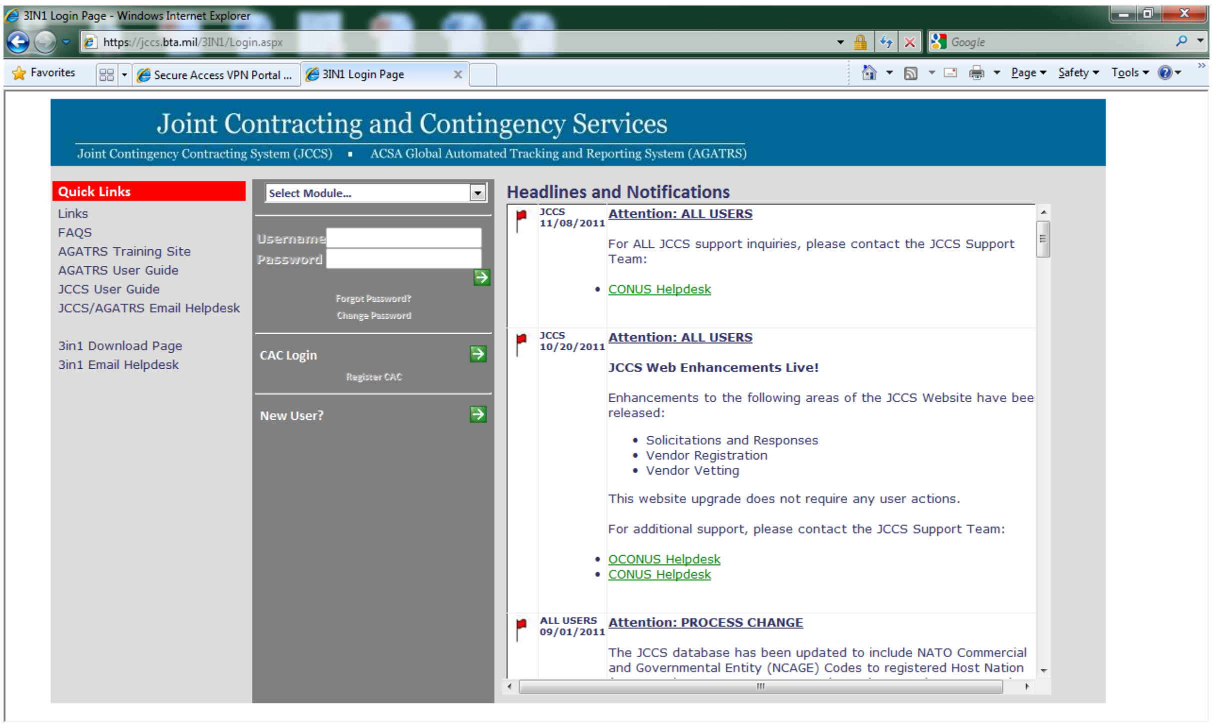
You have now completed the registration and may log in to the 3in1 Tool Workstation. See *Module 3: Application Familiarization*, *Lesson 1: Navigating the 3in1 Workstation Application* for details on how to log in to the Workstation.

Web-Based User Registration

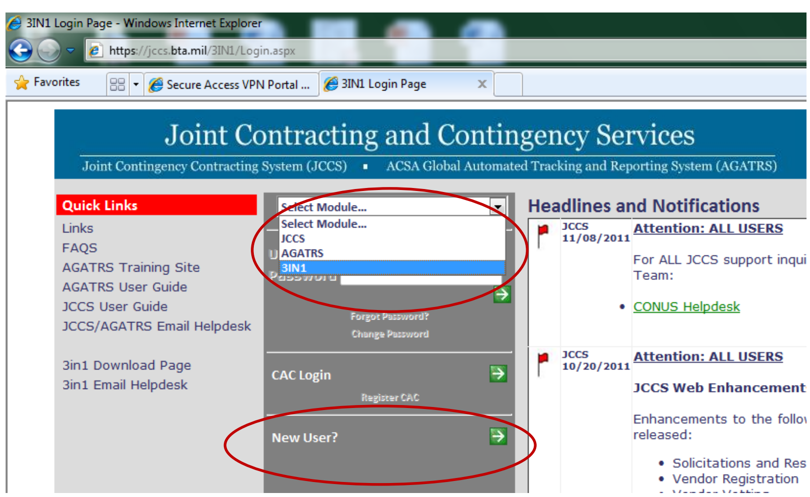
As an alternative, new users can register using JCCS. Users can also access 3in1 web-based reporting and clearance features.

To register a new 3in1 Workstation user on the JCCS web site:

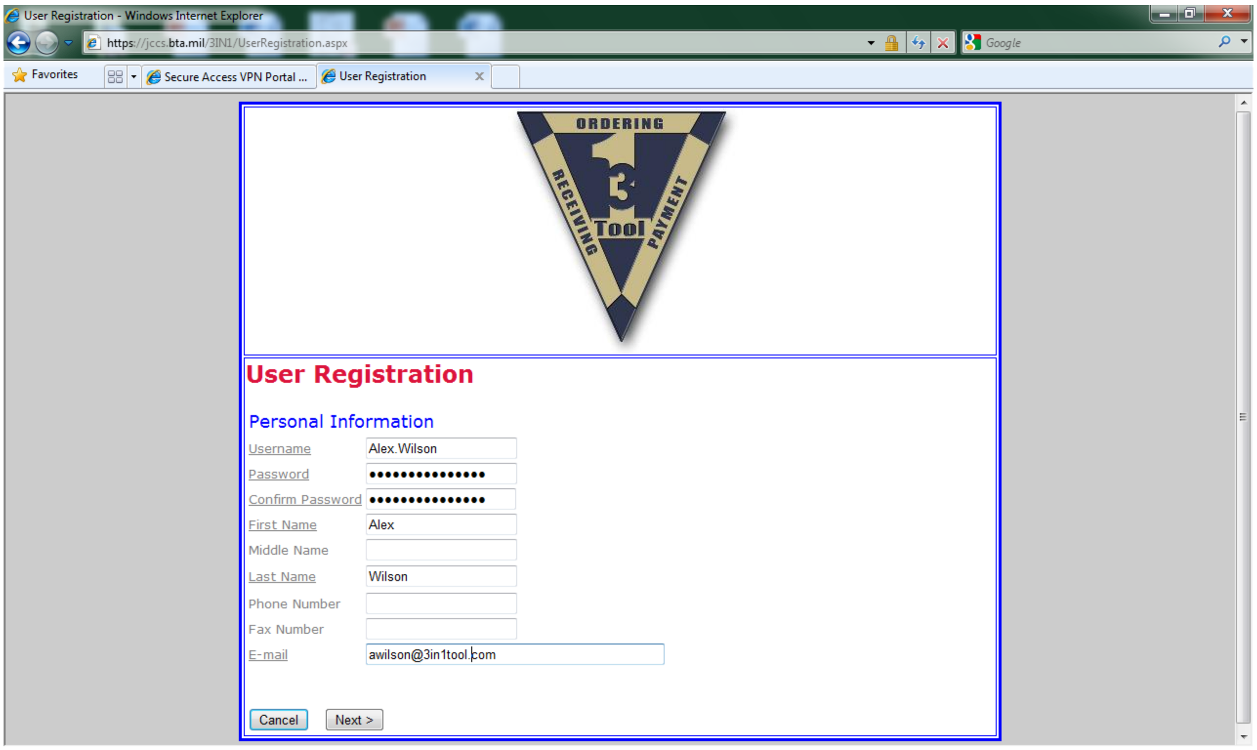
1. Navigate to the following link from your Internet browser: https://www.jccs.gov/3IN1/Login.aspx
2. Select **CAC/Digital Certificate Users**.
3. Select your DOD certificate.
   – The JCCS web page is displayed.



4. Select **3in1** from drop-down list.
5. Click the green arrow beside **New User?**



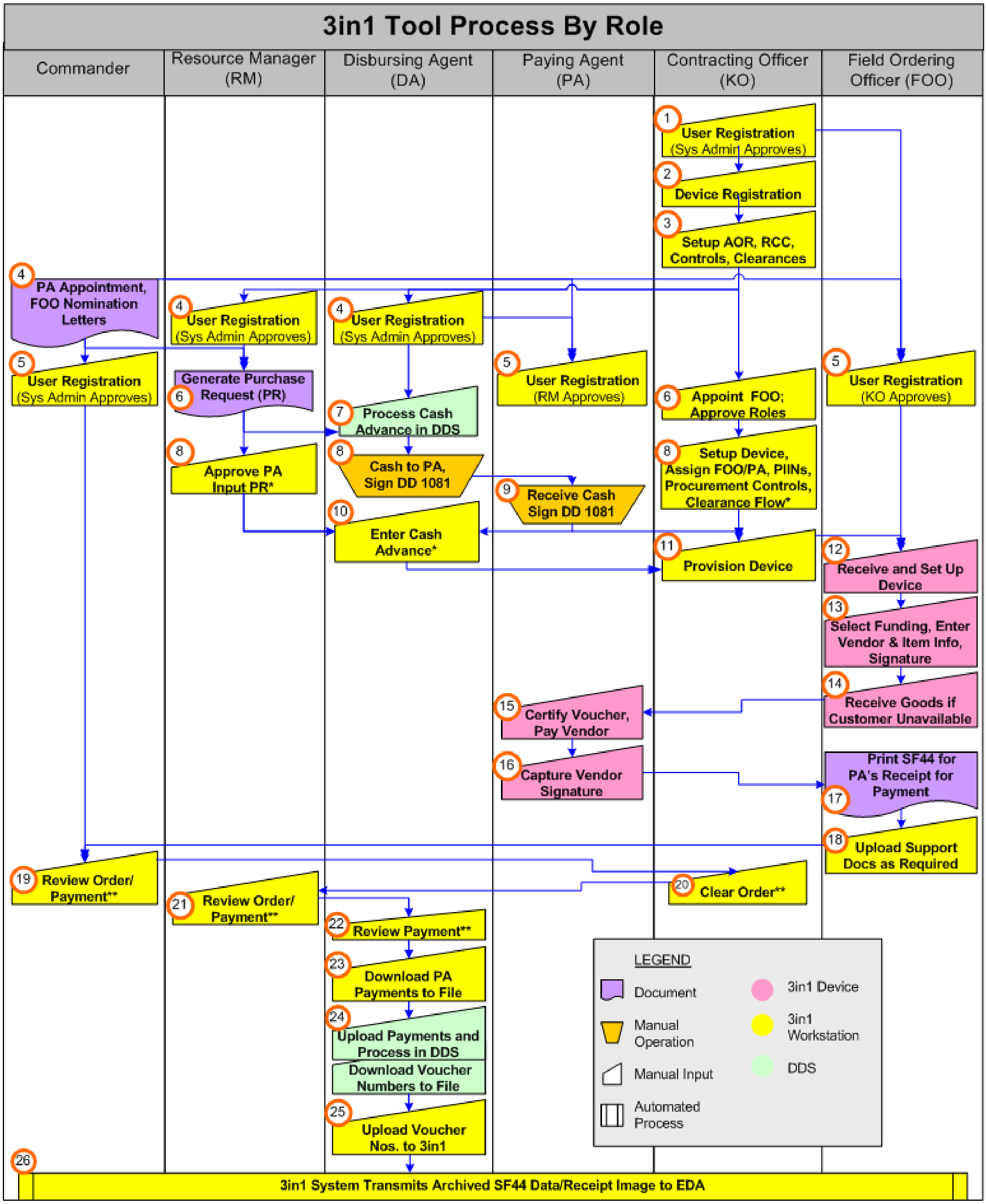
6. The first of several registration screens is displayed. Fill in the registration screens that prompt you for personal information, security questions, and initial assignment. These screens are identical to those described earlier, used when registration is launched by clicking the **Register** button on the Workstation *Logon* dialog box.



Web-based User Registration – Personal Information Screen

Role-Based Access to 3in1 Workstation Features

Some 3in1 Workstation features are available to only those users who are assigned a specific role. For example, any role can access the Reports feature, but only a Contracting Officer can issue mass PIIN blocks. The following figure provides a list of 3in1 tasks that are performed by each role in the 3in1 Workstation.



* The RM/DA/KO updates financial/procurement information in the Workstation as needed. All updates are downloaded to the device when connected to the network.
**The sequence or number of reviewing personnel or offices can be tailored by RCC.
***DDS=Deployed Disbursing System (Note: If DDS is not used, 23 and 24 can be omitted and voucher numbers can be manually entered.)

Lesson Summary

In this lesson, you learned to:

- ❑ Register new users in the 3in1 Tool Workstation
- ❑ Identify various roles used in the Workstation
- ❑ Identify the features that can be accessed by each role
- ❑ Request a role assignment for a new user
- ❑ Upload supporting documents for a new user

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Lesson 2: Getting Started with the 3in1 Device and Printer

Objectives

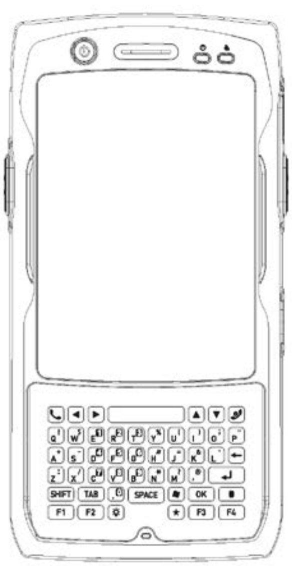
After completing this lesson, the participant will be able to:

- ❑ Identify the components of the 3in1 handheld device
- ❑ Access the basic functions of the 3in1 handheld device
- ❑ Manage power on the 3in1 handheld device
- ❑ Identify the features of the FieldPro RT43 printer and perform a printer self-test

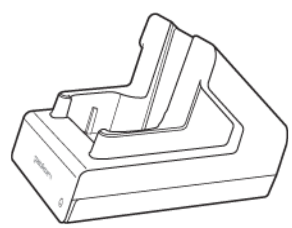
3in1 Handheld Device Kit Components

The 3in1 Tool application is designed to run on the Pidion BIP 6000, which is a ruggedized military standard handheld device. Refer to this section to learn about the main components of the 3in1 device. A portable, rugged printer is also provided, which connects to the device; see the section, *Getting Started with the Printer*.

3in1 Tool Components

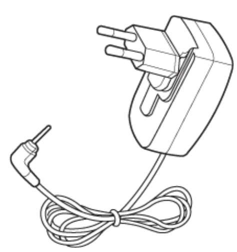


BIP 6000 Main Body

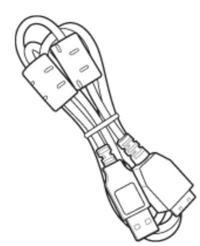


Desktop Cradle for charging and Ethernet connection

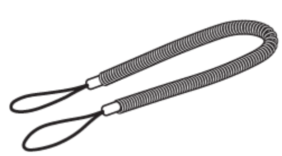
Battery



Power Charger



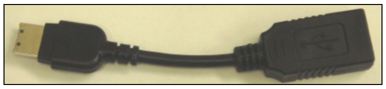
USB Cable



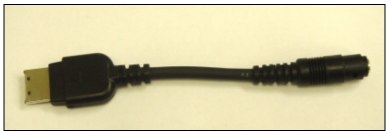
Spring Wire

Stylus Pen

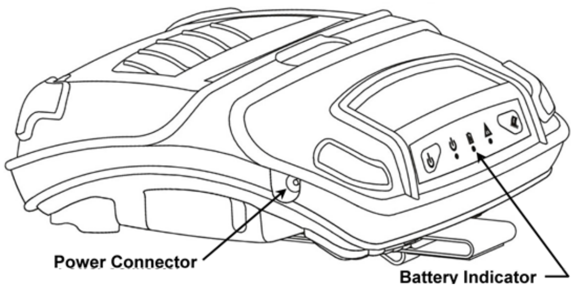
USB-Ethernet adapter



Adapter to connect device to Ethernet adapter

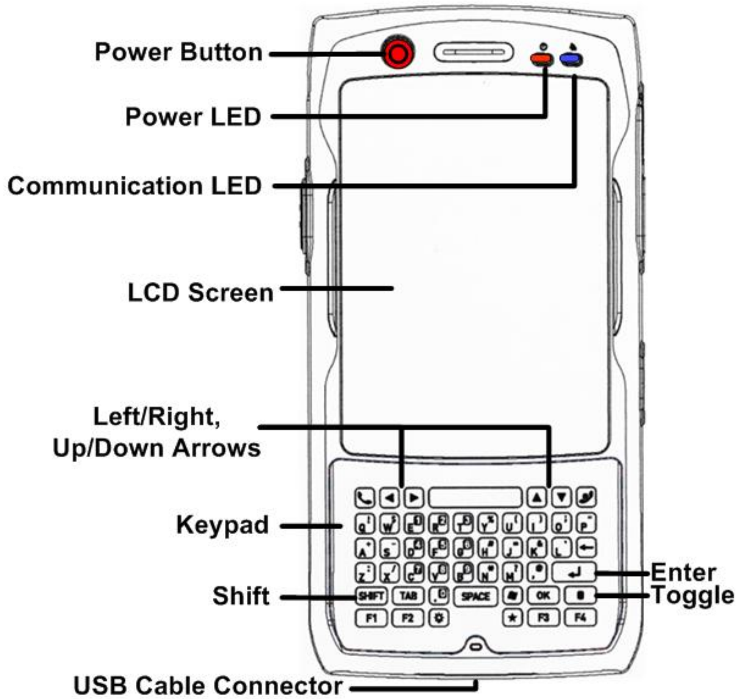


Adapter for non-cradle device charging (Note: the small end connector is for the wall charger. The larger end adapter is for the car charger)

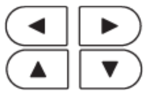
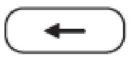


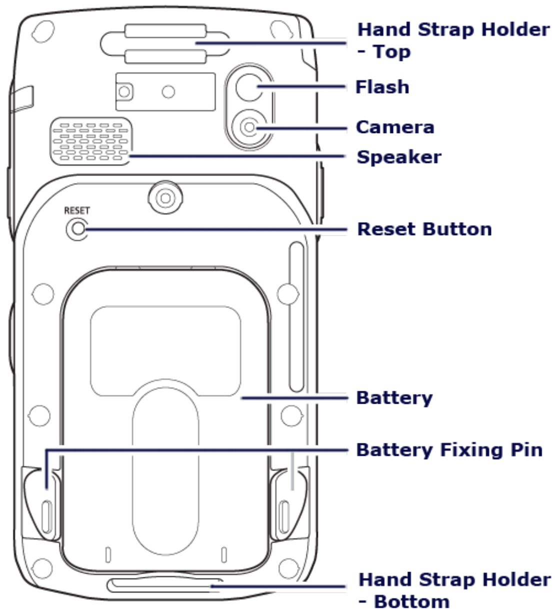
FieldPro RT43 Printer

Handheld Device Features

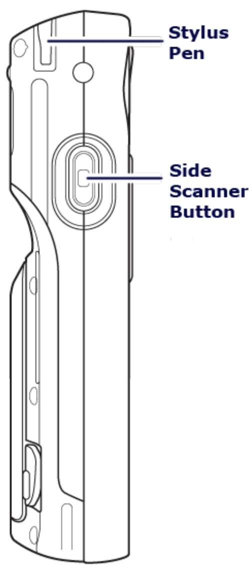


Front View of Handheld Device

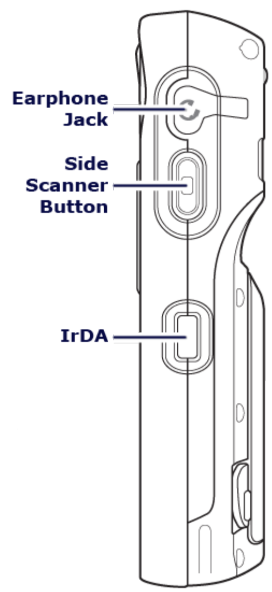
3in1 Device Buttons	Function
	**Power Button** Used to switch the device On/Off
	**Arrow Buttons** Used to move left/right/up/down.
	**Backspace Button** • The cursor moves backward, erasing the letters. • If you press and hold (at least 3 seconds) this button, the letters are deleted one by one promptly and continuously.
	**Enter Button** • Changes lines in the text input mode. • This button works like the Enter key in computer.
SPACE	**Space Button** • The cursor moves to the right, leaving an empty space.
SHIFT	**SHIFT Button** • Used to switch between Lowercase/Uppercase English alphabet. (The default is Lowercase.) • If you press this button once and then an alphabet key, the uppercase of the key is entered. Then, input mode is switched to the lowercase. • If you press this key twice, the input mode is remains in Uppercase, like Caps Lock, until you release it. • To release the Caps Lock, press the SHIFT key twice.
	**Toggle Character Button** • Used to switch the input character between letters and symbols/numbers. The default is to enter letters. Pressing the mode change button once shifts to numbers or symbols, depending on the key. See below for an example.



Rear View of Handheld Device



Device Left Side View

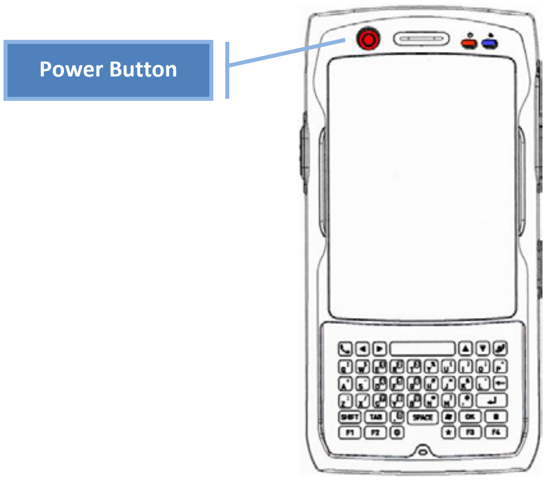
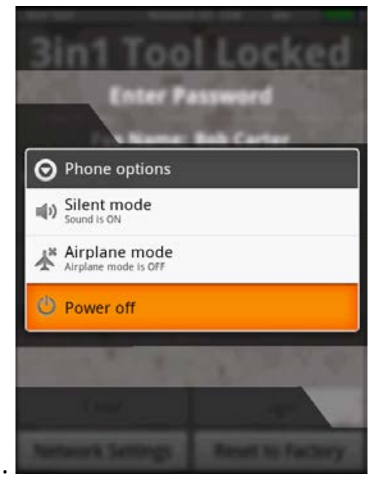


Device Right Side View

Notes:

1. Not all the device features will be available while the 3in1 tool is running on the device. For example, IrDA is not used.
2. For 3in1 the device has a QWERTY keypad

Turning the Device On/Off

Switching Power On/Off	
 Switch the power on/off by pressing the [Power] button on the upper part of the terminal. Press and hold the button for four seconds	 A shutdown menu appears. Select **Power off**. Wait for a confirmation message, then tap **OK**. The device will power off in a few seconds.

Using the Device Touch Screen and Keyboard

The 3in1 device has a touch screen that works in a similar way as other devices that you may be familiar with, such as bank ATM machines. To select an item displayed on the device screen, use the stylus pen to touch the screen. Alternatively use the arrow keys to navigate to your selection and press the **Enter** button.

The QWERTY Keyboard

The device has a physical keypad with a QWERTY keyboard that provides the following features:

- Entry of all 26 letters of the alphabet, in both upper and lower case
- Entry of any number
- Entry of 18 special characters (useful for setting strong passwords)
- Right, left, up and down navigation, using the arrow keys
- Scan bar codes on purchase items by pressing the orange button on the device (the Bar Code Scanner must be enabled for the device)
- Put the device to sleep and wake up the device by pressing the Star button  or the red End Phone Call button 
- Set the screen brightness by pressing the button with the light bulb icon
- Unlock the device by pressing F1 or F2
- Disable the on-screen keyboard by pressing F4

The following buttons have been disabled on the keyboard:

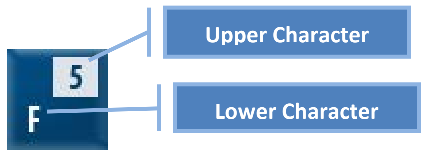
- The Call button 
- The Windows button 

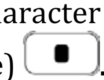
Entering Uppercase Characters with the QWERTY Keyboard

To enter an uppercase character on the standard keyboard, press the **Shift** button before entering the character. For example to enter “FOO”, press: **Shift, F, Shift, O, Shift, O**. Do not simultaneously press Shift and the character. Please note only one uppercase character will be entered after pressing the **Shift** key.

Entering Numbers and Symbols with the QWERTY Keyboard

Most of the keys on the keypad can be used to enter two different characters. By default, the lower character of the key is entered. Numbers and special characters are the upper character of the key.

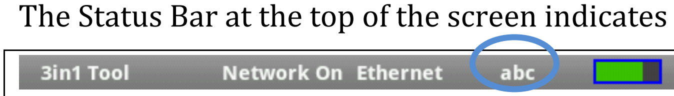


On the QWERTY keyboard, enter the upper character of a key by pressing the **Toggle Character** button (the button with the square) . Unlike the **Shift** button, which is used to enter a single upper character, the **Toggle Character** button locks. Use it to enter multiple upper case characters. Press the **Toggle Character** button again to enter lower characters.

For example, to enter “b35c”:

1. Type **b**
2. Press the **Toggle Character** button.
3. Type **3 5**
4. Press the **Toggle Character** button.
5. Type **c**

The Status Bar at the top of the screen indicates the keyboard mode:

	Input in normal (letter) mode. Mode is indicated by “abc” in the Status Bar at the top of the screen.
	Input in uppercase letter mode, indicated by “ABC” on the Status Bar. This means that the user just pressed the SHIFT key.

	The user has pressed the Toggle Character button  and can now enter numbers and symbols. Note that the "abc" in the Status Bar has changed to "123/SYM".

Device Status Bar

Deleting a Character

Press the **Backspace** button to delete the character to the left of the cursor.

The On-Screen Keyboard

An on-screen (soft) keyboard can be activated by either selecting **General Settings** on the *Log On* screen or selecting the **Tools** tab on the device, then selecting **General Settings** and **On-Screen Keyboard**. Once activated, the onscreen keyboard is displayed by touching a field requiring data entry. To remove the keyboard, either complete the data entry for that screen or press F4 on the device keyboard. See *Module 14: 3in1 Device Tools & Settings, Lesson 1: Device Settings* for details.

Entering Uppercase Characters with the On-Screen Keyboard

Unlike the behavior of the Shift key used to type uppercase characters, the **Toggle Character** button locks when pressed. Upper characters will continue being entered until the **Toggle Character** is pressed again.

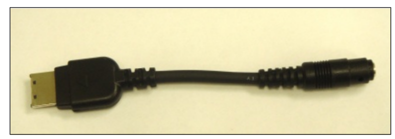
Entering Numbers and Symbols with the On-Screen Keyboard

On the on-screen keyboard press the character entry mode button on the extreme lower left.  . The on-screen keyboard allows for more special character entry then the physical QWERTY keyboard.

Charging the Device with a Desktop Charger or DC Adapter

The device comes with an AC adapter, a cradle, and a DC adapter. The device can be charged with the cradle, or with the DC adapter.

To use the cradle, place the device in the cradle and connect the AC adapter to the adapter jack on the rear side of the cradle. Note there is a battery slot on the craddle, to simultaneously charge the back up battery. Use only the supplied AC adapter for maximum safety and effectiveness.



The device can also be charged without the cradle. Users may find the cradle to be too bulky to carry with the device. For these users, the supplied 20-pin DC adapter should be used (shown at the right.)

Attach the device to the DC adapter as shown below.

DC adapter attached to handheld device

Charging Status Indication	
	Red: In Charging Green: Charged

The charging indication lamp on the desktop charger and the terminal are switched to green when charging is finished. The battery will not be damaged if charging is continued.

Charge status is indicated in the device Status Bar, which is explained in *Module 3: Application Familiarization, Lesson 4: Navigating the 3in1 Device Application*. When the charge falls to below 20% remaining, the device should be charged before continuing. The device can be used actively for up to four hours on a full charge. It goes into a low-power sleep mode when it is idle. However, it should be turned off when not in use to conserve battery power and recharged prior to use.

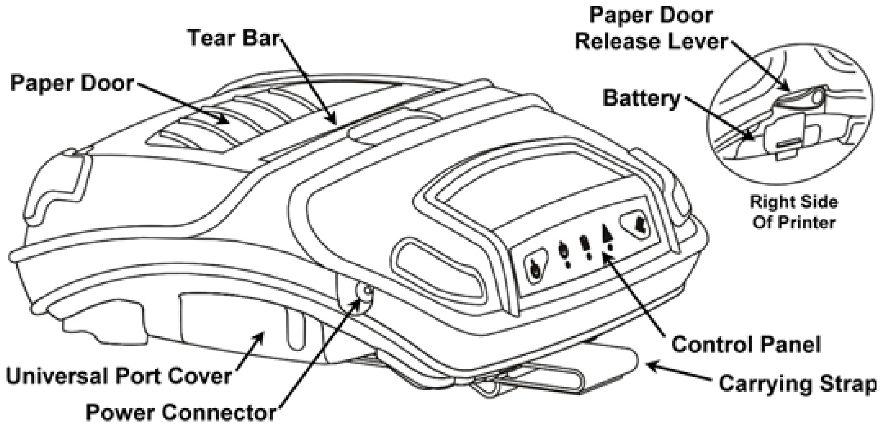
Note: The RJ-45 (looks like a big phone plug) connection may be enabled on some cradles. Ask your administrator if you have an Ethernet-capable cradle or a charging-only cradle. There is no way to distinguish these two cradle types visually.

To use Ethernet on the device via the cradle, the USB cable must be removed. Ethernet will not work via the device cradle while a USB cable is connected to the cradle.

Getting Started with the Printer

The FieldPro RT43 is a small, rugged printer that attaches to the 3in1 device and provides hard copy documentation of cash payments. For normal daily use, most users will only need to turn the printer on and off, tear off printed output, load paper, and charge the battery.

Note: You must charge the battery for at least 2½ hours prior to the first use. See *Appendix G: FieldPro RT43 Printer Information* for details on how to charge the battery and other printer features.

Printer Features


FieldPro RT43 Printer Features

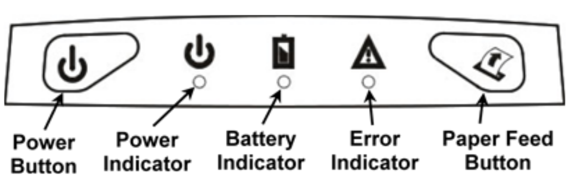
Turning the Printer On and Off

Refer to the figure below to locate the printer's Power button. To turn the printer on, press the Power button, hold down for two seconds, then release.

To turn the printer off, press and hold the Power button. The printer will "beep" and then power down after the button is released.

Tip: When the printer is first powered on, the green Power Indicator light stays on continuously for several seconds. After that initial period, the Power Indicator changes to a mode of blinking once every two seconds. To determine if the power is "on", observe the Power Indicator light for several seconds to see if it is blinking. The reason for this slow blinking mode is to extend printer battery life as long as possible.

The printer can remain "on" for up to 24 hours without being charged. The printer can print through a full roll of paper on a single charge.

Turning the Printer On and Off	
 Printer Control Panel	• To turn the printer on, press and the Power Button, hold for two seconds, then release. – • To turn the printer off, press and hold the Power button. The printer will "beep" and then power down after the button is released.

Connecting the Printer to the Device

A USB cable is fixed to the printer. **To connect to the device to the printer:**

1. Connect the printer USB cable to the device USB adapter.
2. Plug the USB adapter into the device.
3. Turn on the printer.
4. Ensure the printer has paper.

The printer is now connected to the device and ready for printing the SF44 or any other screen that has a Print button.

Performing a Printer Self Test

To perform a self test, press and hold the **Paper Feed** button while turning on the printer with the **Power** button. The printer will print a test page with the following information:

- The printer's firmware revision level and release date
- Printer serial number
- The current values for items in the Format menu
- The current values for items in the Options menu
- The type of optional interface, if installed, and which interface is currently selected
- The presence of the optional Magnetic Card Reader, if installed
- The current battery voltage
- A list of additional fonts, if installed
- A list of logos, if installed
- A print head test pattern

Note: At the bottom of the test page, the message "Press Feed for Setup Menu" will be printed. Do not press any buttons at this time. After approximately four seconds, "Setup Not Requested" will be printed and the printer is ready for normal use.

Resetting the Printer

Occasionally, there are communication errors between the device and the printer. These can be caused by a loose cable, electrical interference, or software errors.

The signs of a communication error are: the printer emits a continuous beeping sound, illegible printing on the paper, or the printer seems "frozen" and does not respond to any print commands.

To correct this, power off the printer by pressing and holding the Power button. If that does not work, open the battery compartment and shift the battery so it is not in contact with the connectors, for a few seconds. It is helpful to hold the printer in a position so that the battery will drop downwards, and use the thumbnail to release the battery retainer. Then re-seat the battery properly and close the battery compartment securely; turn on the printer and try to print.

If communication errors occur frequently, inform your technical support person. It may be necessary to replace a cable or the printer.

Solving Print Quality Problems

After extended usage, the print quality may become degraded. The two main causes of this:

- Low battery: The print head uses heat to print onto the thermal paper. If the battery is run down, the print head may not be able to generate enough heat to make dark marks on the paper. The solution is to fully charge the battery.
- Build-up on the print head: The print head uses a high temperature to react with a safe temperature-sensitive compound in the supplied paper. This reaction may leave a residue on the print head. The solution to this is to use a clean, lint-free piece of cloth, cotton swab, or paper towel, moistened with rubbing alcohol, and wipe off the printer head. Contact support for help with this, if necessary.

Note that the printer is a thermal printing system, so it does not use any type of ink cartridge or toner. Thermal print mechanisms are simple, reliable, and do not need any supplies other than paper.

Lesson Summary

In this lesson, you learned how to:

- ❑ Identify the components of the 3in1 handheld device
- ❑ Access the basic functions of the 3in1 handheld device
- ❑ Manage power on the 3in1 handheld device
- ❑ Identify the features of the FieldPro RT43 printer, perform a printer self-test, and reset the printer in the event of communication errors

Module 3: Application Familiarization

Lesson 1: Navigating the 3in1 Workstation Application

Objectives

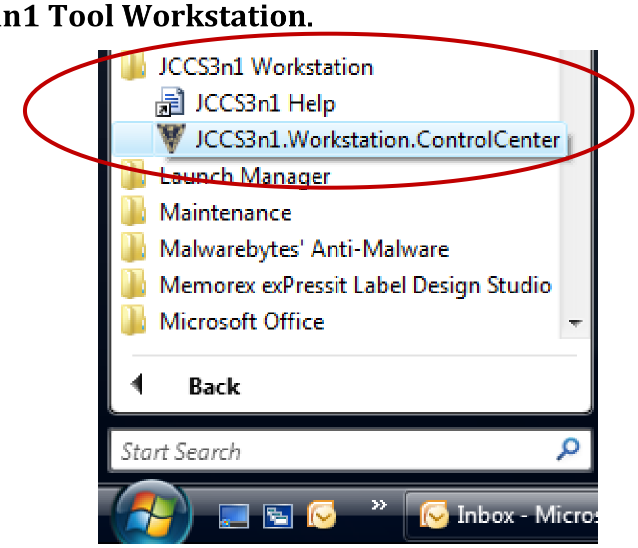
After completing this lesson, the participant will be able to:

- ❑ Log in to the 3in1 Tool Workstation using a valid username and password
- ❑ Log in to the 3in1 Workstation using a Common Access Card (CAC)
- ❑ Use the Forgot Password feature
- ❑ Navigate the 3in1 Tool Workstation main menu

Log in to the 3in1 Tool Workstation

To log in to the 3in1 Tool Workstation:

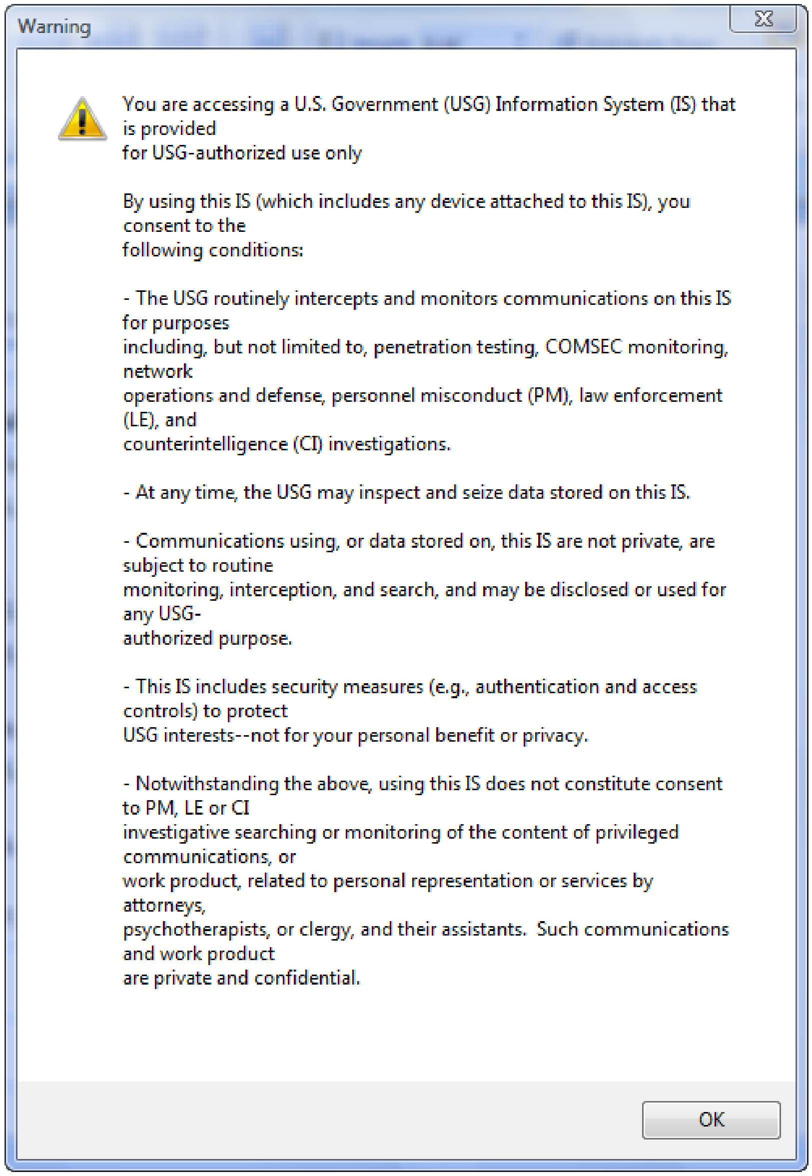
1. In the Windows tool bar, select **Start**, **All Programs**, **3in1 Tool Workstation**. Double-click **3in1 Tool Workstation.**



Start, All Programs, 3in1 Tool Workstation

   – Alternatively, double-click the 3in1 Tool Workstation shortcut icon on your desktop, if it has been set up.

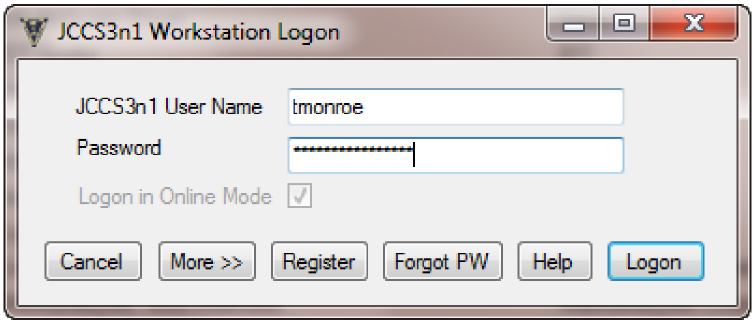
2. Click OK on the initial warning screen concerning authorized use of this U.S. Government Information System.



Warning Screen

3. Enter your user name and password on the *Logon* window.
4. By default, the *Workstation Logon* dialog box is set for online mode.
   - The 3in1 Tool Workstation application can run standalone (offline) or connected to the 3in1 prime database (online). An Internet connection is required to work in online mode.
   - You can work offline and then upload your work to the 3in1 prime database when a connection can be established. In situations where your connection is unreliable, you may want to purposely work offline and control when you go online to update your information. See *Module 3: Application Familiarization, Lesson 5: Going Offline with the 3in1 Workstation*.

5. Click the **Logon** button. The 3in1 Tool Workstation main menu is displayed in a new window.



3in1 Tool Workstation Logon Window

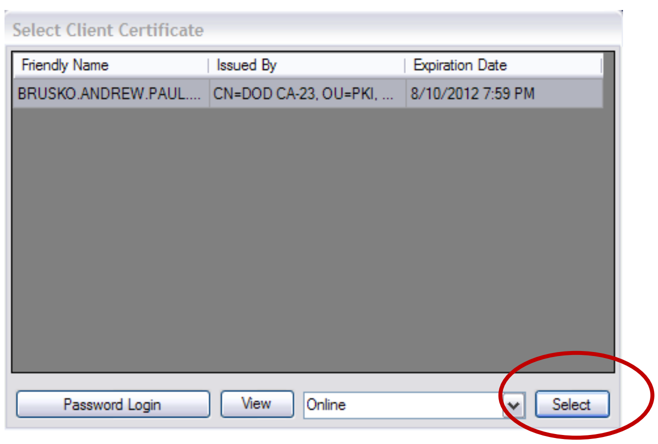
Logging in using a CAC

Users now have the option of logging into the 3in1 Workstation with their Common Access Card (CAC), after registering it with the 3in1 system. If your CAC is not yet registered with the 3in1 system (or you need to change your CAC information in 3in1), see the subsection *CAC Workstation Registration*.

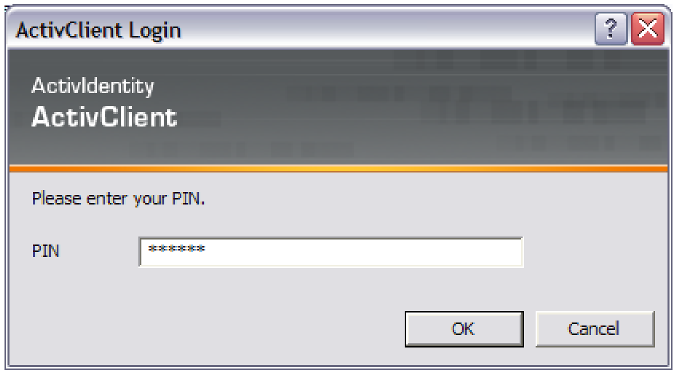
To log in to the 3in1 Workstation using a CAC:

1. Ensure that the CAC is properly inserted into the card reader.
2. Double-click the 3in1 Tool Workstation icon on your desktop.

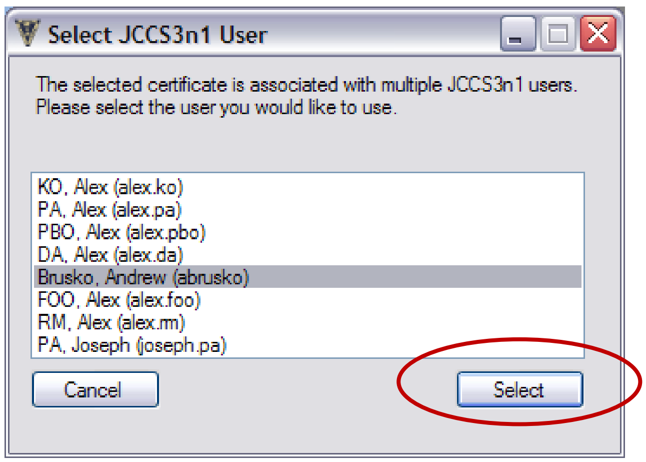
   After opening the 3in1 Workstation application, and passing the initial warning screen, CAC users will see the *Select Client Certificate* screen.
3. Choose a certificate from the *Select Client Certificate* screen. Click the **Select** button.



4. Enter the PIN for the CAC. Click Ok.



5. In general, a CAC will only be associated with a single 3in1 user. Select a user from the list, then click the **Select** button.

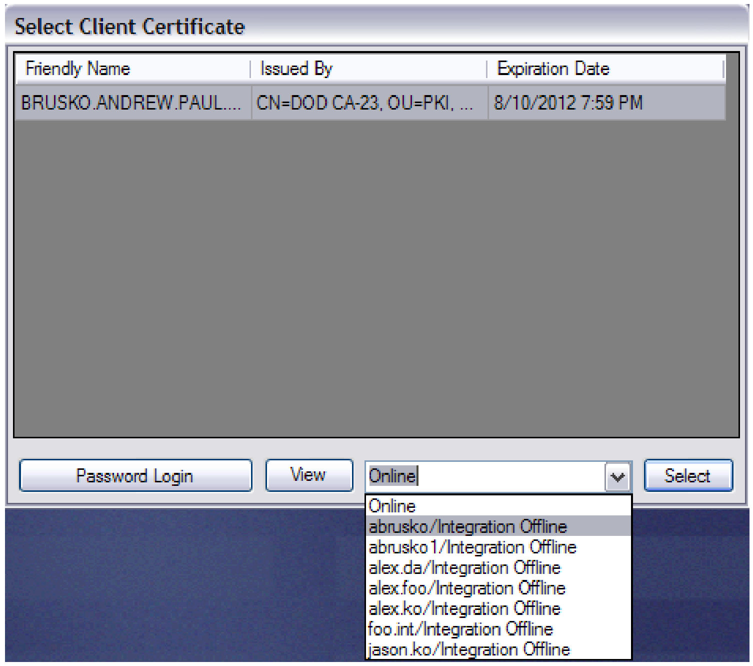


6. You are logged into the 3in1 Workstation under the selected user.

CAC Login Options

If you do not want to log in to 3in1 with a CAC, simply click the **Password Login** button on the *Select Client Certificate* screen. You can also view certificate details of the selected CAC certificate by clicking the **View** button.

By default, the 3in1 system defaults the login to "Online" on the *Select Client Certificate* screen. To log in to an offline replica with your CAC, select an offline replica from the dropdown menu, as shown below.

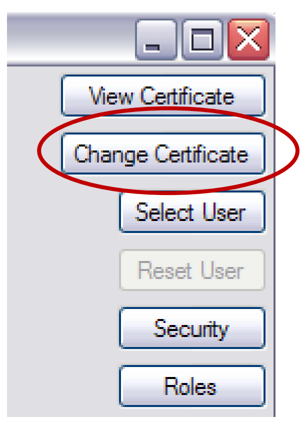


Select Client Certificate - To log in to an offline replica with your CAC, select an offline replica

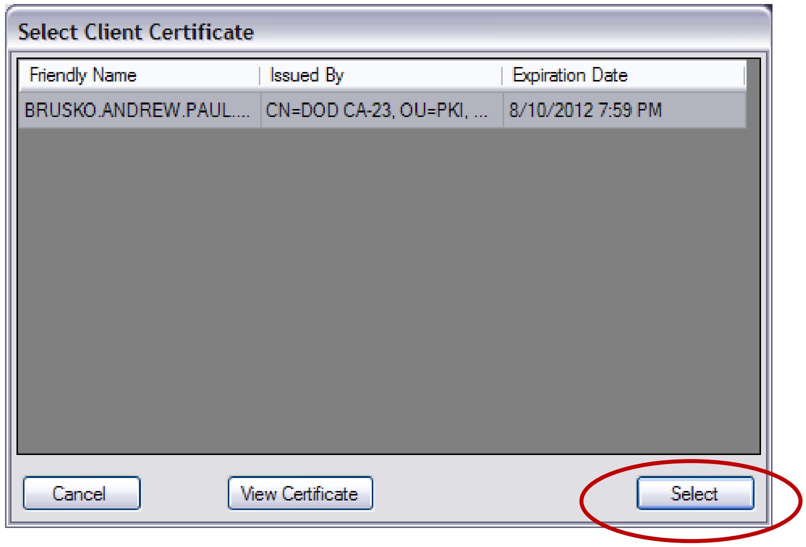
CAC Workstation Registration

Follow the steps below if your CAC is not yet registered with the 3in1 system (or you need to change your CAC information in 3in1), and you are a registered user in the 3in1 system (you have a username/password):

1. Ensure your CAC is inserted into the card reader.
2. Log in to the 3in1 Workstation using your username/password.
3. Select **File**, **Profile Management**, **User Profile** from the main menu.
4. On the *User Profile* screen, click the **Change Certificate** button.



5. Select the client certificate, then click the **Select** button. Enter your CAC PIN if prompted.



Your current CAC information will now be registered with the 3in1 system, allowing you to log in with your CAC in the future.

Login Rules

The following rules govern login procedures for the 3in1 Tool Workstation:

- A valid user name and password must be entered
- Under the following scenarios, users are asked to answer the three security questions which were set up during the user registration process:
  - Three (3) consecutive invalid login attempts during a 20 minute time period. After the third invalid attempt, the user is locked out for 20 minutes, after which he or she can try to log in again.
  - Two (2) unsuccessful login attempt cycles during a 60 minute period

After the 20 minute lockout period, if the user attempts to log in using invalid credentials, three consecutive times, the user is locked out permanently until the account is unlocked by the system administrator/help desk technician. Note that the user account will be locked after three invalid attempts to answer security questions.

If there is a need for a user to reset his/her Workstation password, please see *Module 13: Device Management Tools, Lesson 1: Resetting a Password on the Device and Workstation*.

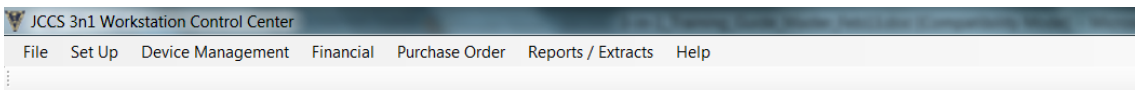
Forgot Your Password?

If you forget your login password, click the **Forgot Password** button (on the *Logon* window). You will be asked the three security questions which were answered during the user registration process. If you provide correct answers to all three questions, you can retrieve/reset the password yourself. If you cannot correctly answer the three questions, as a last resort, the 3in1 Help Desk can reset the password by going into the database.

Changing Your Password

You can change your Workstation password from the 3in1 Logon window. If you are a FOO/PA who has been provisioned a 3in1 device, you should also change the device password to match the Workstation password, so you do not have to remember two different passwords. Please see *Module 13: Device Management Tools, Lesson 1: Resetting a Password on the Device and Workstation* for more information on how the password synchronization feature works.

3in1 Tool Workstation Main Menu



3in1 Workstation Main Menu

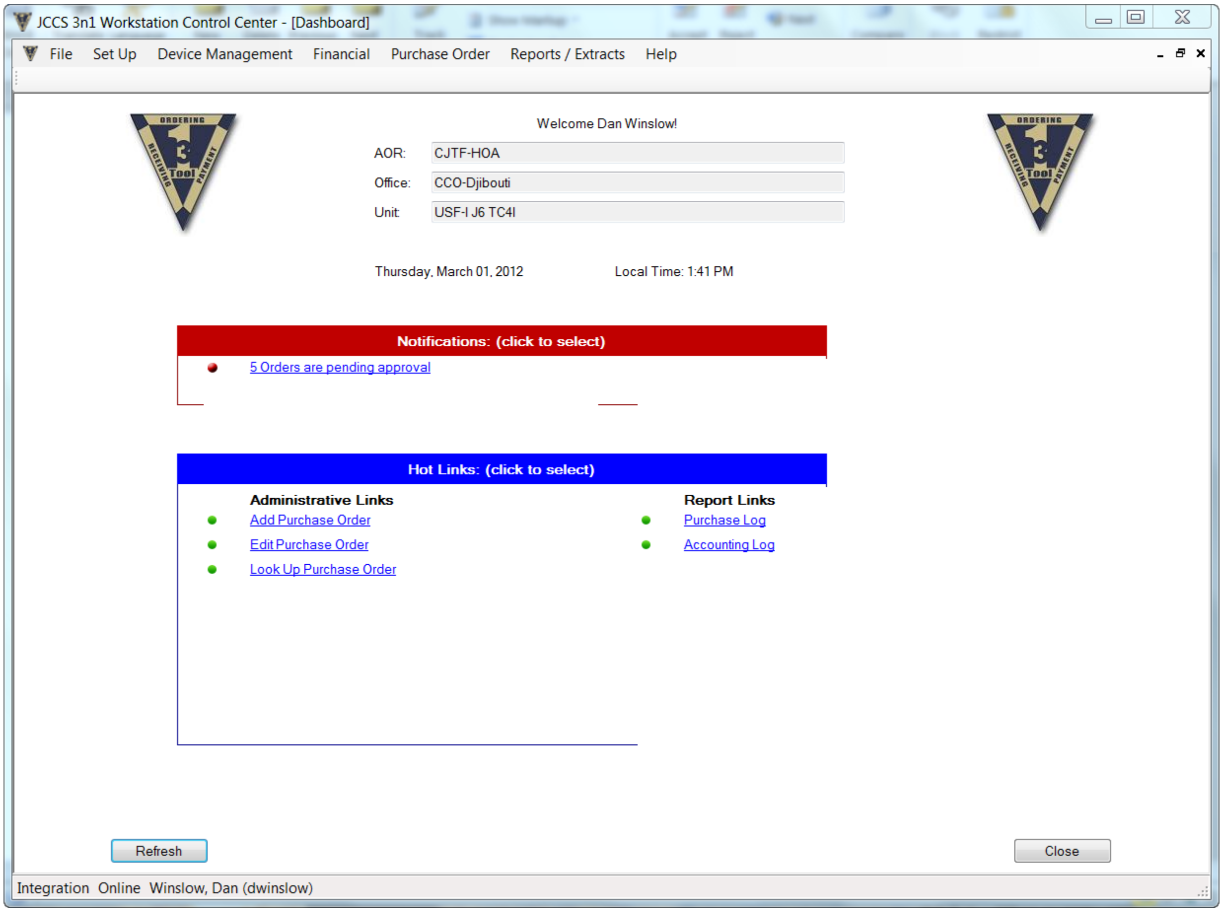
The 3in1 main menu options are listed along the top of the screen. Simply click a menu option and then select from the submenu. The feature opens in a new window. It is possible to open multiple windows so you can quickly move between features.

The following is an overview of the key features listed on the Main Window. Each will be explained in subsequent lessons.

- **File**: Change or verify connectivity mode; attach documents to PRs or users; upload cleared purchase orders; manage user and unit profiles; register new users; and exit the 3in1Tool Workstation application.
- **Set Up:** Define and update AORs and associated offices, manage user roles, establish AOR/RCC procurement control policies, and set up RCC default clearance administration
- An Area of Responsibility (AOR) is created once per operation, as a way to organize procurement and related financial data. Users who are assigned the role of AOR Administrator in the 3in1 Workstation can define areas of responsibility and their associated offices using the **AOR Administration** feature.
- **Financial**: Review purchase requests;; and import voucher numbers from DDS
- **Purchase Orders**: Look up and clear POs; manually add orders; and create and manage Shopping Lists.
- **Reports:** Select from a list of standard reports and produce them in different formats; download orders/vouchers by FOO/PA for backup.

3in1 Workstation Dashboard

When a Field Ordering Officer or Paying Agent logs in to the Workstation, there is an option to display the *Dashboard*, in addition to the main menu explained above. The *Dashboard* is customized for each user, as indicated by the “Welcome *username*” heading.

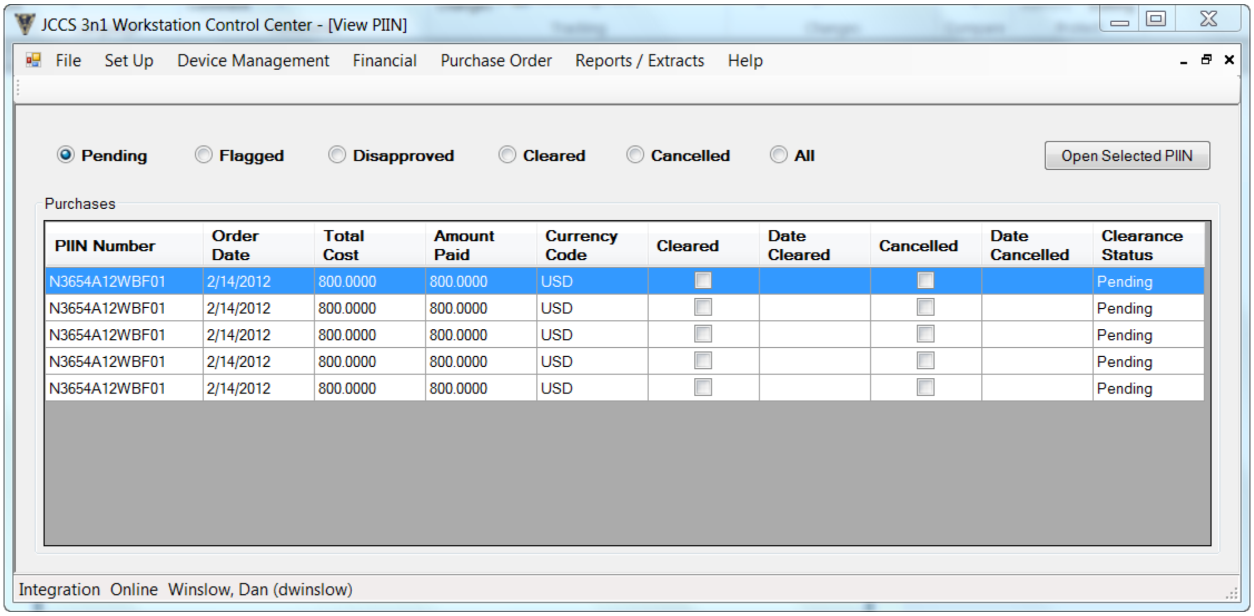


FOO and PA share the same Dashboard Layout

The **Hot Links** section provides clickable shortcuts to frequently used Workstation features. For example, click **Add Purchase Order** in the **Administrative Links** section to go directly to the *Purchase Order* window.

Review the **Notifications** section for recent updates, such as the number of orders pending approval. Click a notification to go to a summary screen.

The following screen shows a number of pending orders for a FOO. The FOO can select a row in the table, then click the **Open Selected PIIN** button to go to the purchase order.



FOO Pending Orders Screen

Displaying the *Dashboard* is an option. To change this setting, go to **File**, **Profile Management**, **User Profile**. See *Module 3: Application Familiarization, Lesson 2: Managing User Account Information*.

Lesson Summary

In this lesson, you learned to:

- ❑ Log into the 3in1 Tool Workstation using a valid username and password
- ❑ Log in to the 3in1 Workstation using a Common Access Card (CAC)
- ❑ Use the Forgot Password feature
- ❑ Navigate the 3in1 Tool Workstation main menu

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Lesson 2: Managing User Account Information

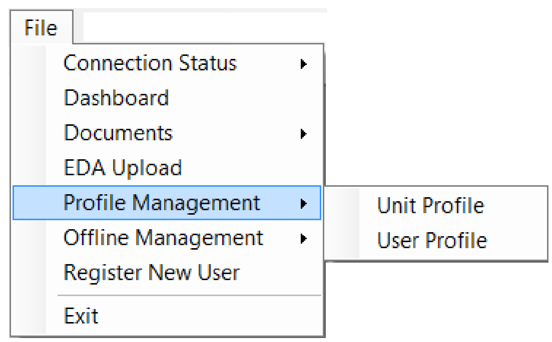
Objectives

After completing this lesson, the participant will be able to:

- ❑ Edit user information on the User Profile Management screen
- ❑ Change a unit assignment
- ❑ View a user's certificate
- ❑ Choose to receive email notifications within the 3in1 system
- ❑ Customize data synchronization settings
- ❑ View user role assignments using the Manage Users feature

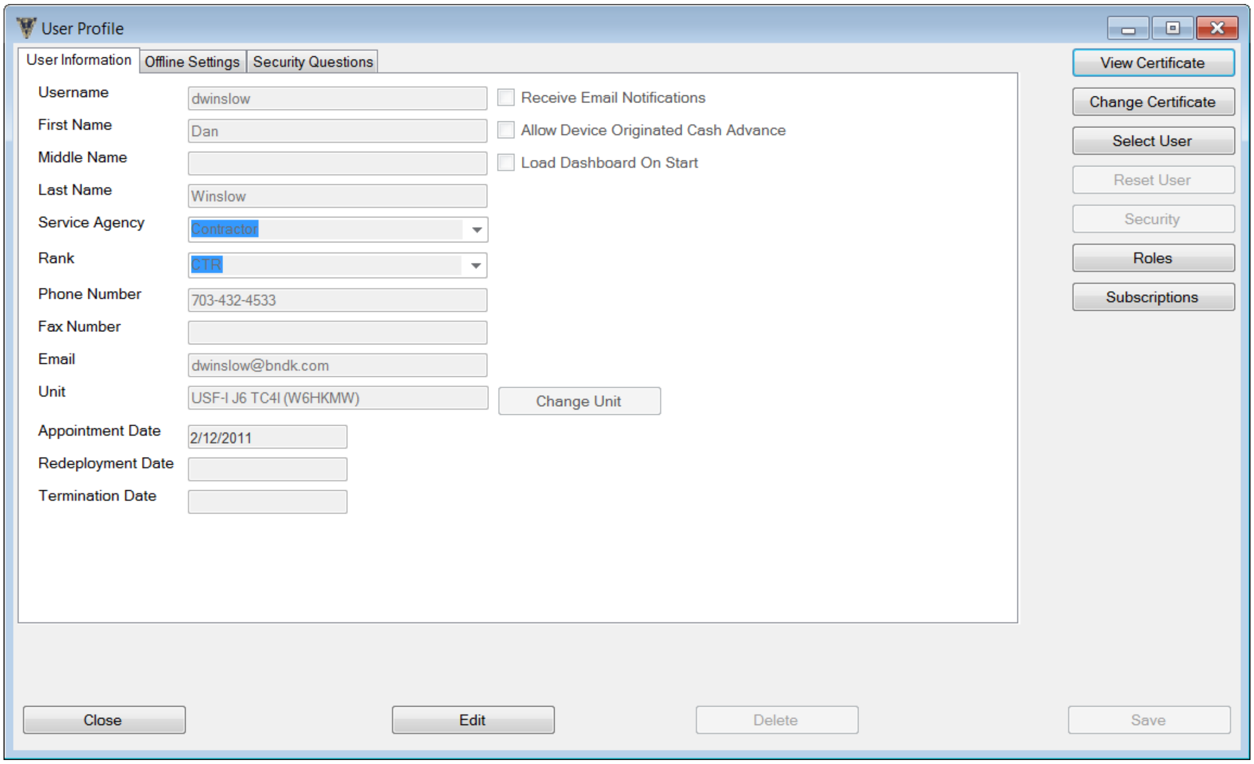
Accessing User Account Information

Users can access their account information by selecting **File**, **Profile Management, User Profile** from the main menu.



The *User Profile* window opens.

Your user information is displayed by default. You may edit most of the fields. Start by clicking the **Edit** button at the bottom of the screen. Be sure to click the **Save** button after making any changes.



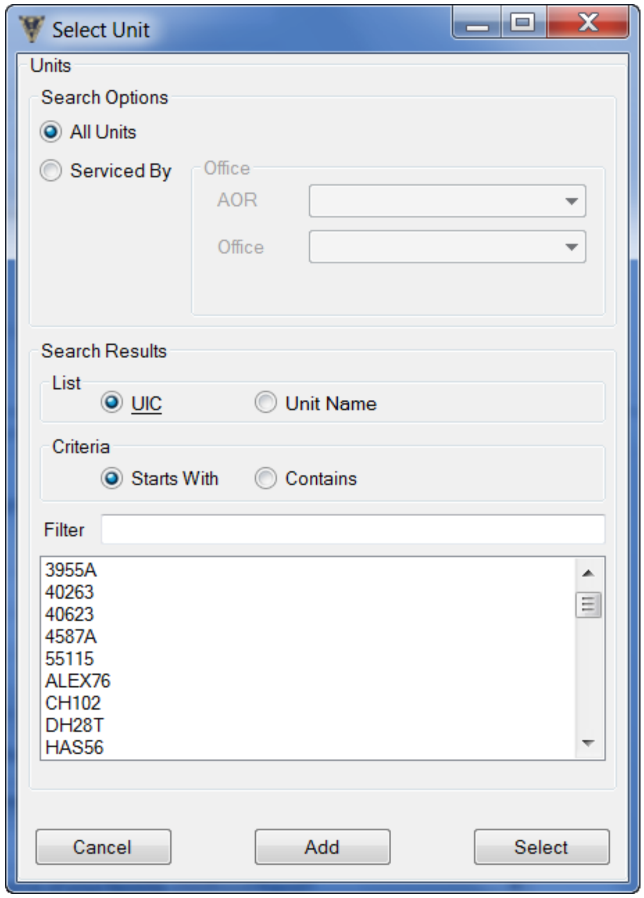
FOO User Profile Window

You may edit the following fields: **First**, **Middle**, and **Last Names**; **Phone** and **Fax Numbers**; and **Email address**. You may also mark the **Receive Email Notifications** checkbox to receive emails generated by the 3in1 system during the clearance process. When one reviewer finishes and approves a PO, it is sent to the next reviewer's queue, based on the clearance configuration that has been established using the Provision Device feature. Typically, a notification email is sent to the next reviewer. A valid email address must be provided on the *User Profile* window, and the **Receive Email Notifications** check box must be marked.

If it is unmarked, the user will not receive 3in1 system-generated emails.

You may also edit the **Appointment**, **Redeployment** and **Termination** Dates.

If you need to change your unit assignment, click the **Change Unit** button. This opens the *Select Unit* window. Use the filter settings to narrow your search for the appropriate unit. Select a unit in the results box, then click the **Select** button.



Select Unit Window - Use the Add button to create a unit

Other buttons that you may select are:

- **View Certificate –** Displays the user's digital signing certificate, if one exists.
- **Change Certificate –** Opens the *Select Client Certificate* window so you can select a different signing certificate for the user, if there is one.
- **Roles –** Opens the *Manage User Roles* window so you can view your assigned roles.
- **Reset User –** Restores previously saved settings

Finally, you may change the three security questions that are used to confirm your identity in the event you forget your Workstation logon password.

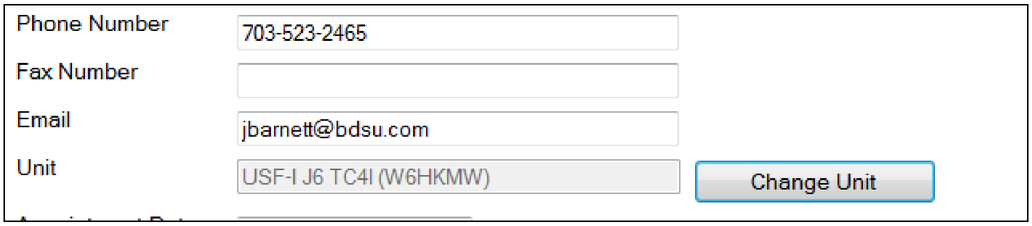
Click the **Save** button to save your changes.

Load Dashboard on Start

To display the *Dashboard* upon user login, mark the **Load Dashboard on Start** checkbox. Leave it unmarked to display only the Workstation main menu. Dashboards display status messages and clickable shortcut. For more information about *Dashboard* content, see *Module 3: Application Familiarization, Lesson 1: Navigating the 3in1 Workstation Application*.

Synchronizing Options

The Synch check boxes on the *User Profile, Offline Settings* tab determine how data on your computer is synchronized with the 3in1 prime database, in the event that you work offline and then return to work online. Offline/online modes are explained in *Module 3: Application Familiarization, Lesson 5: Going Offline with the 3in1 Workstation*.



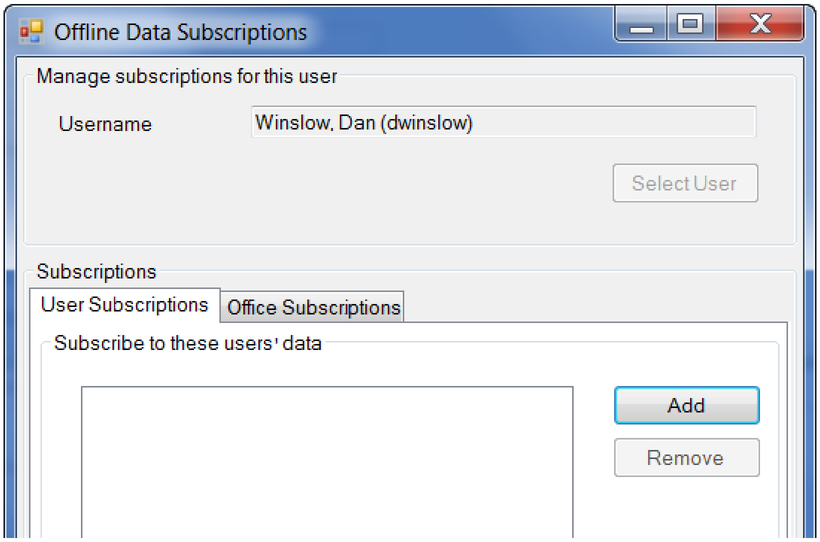
User Profile, Offline Settings Tab

- **Sync on Start** – Synchronize data immediately after logging in to the Workstation.
- **Sync on Exit** – Synchronize data after logging out of the Workstation
- **Document Sync Size Limit –** These options allow users in low bandwidth areas to decrease the time it takes for their local replicas to synchronize by including only certain items in their local replicas. It is recommended that users with low bandwidth choose Small, or select Custom (the default is 200 kilobytes). Users in areas without major bandwidth constraints should choose Large.
  - **Small** - Includes only SF44s in local replica
  - **Medium** - Includes SF44s and receipts in local replica
  - **Large** - Includes SF44s, receipts, and images in local replica
  - **Custom** - Includes documents equal to or smaller than the entered document size limit (in kilobytes) in local replica

User and Office Subscriptions

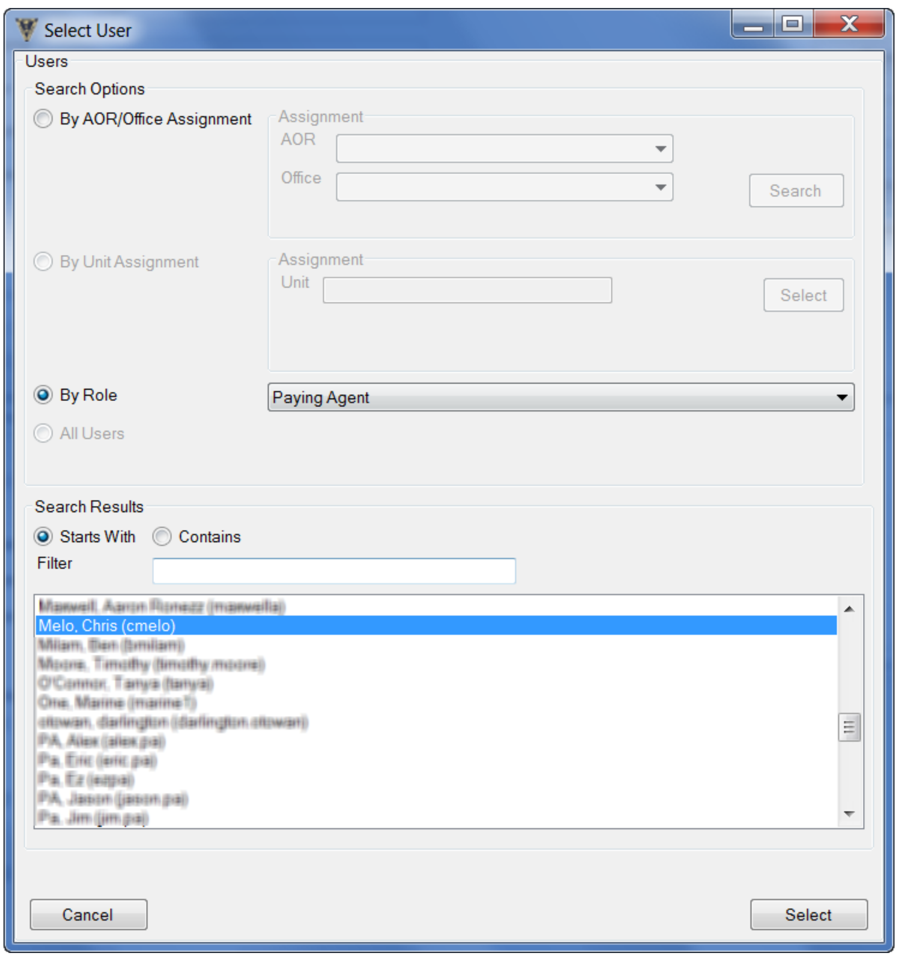
On the *User Profile* window, use the **Subscriptions** button if you need to download data belonging to other offices or users before going offline to work. All subscription data will be included in your offline database.

1. On the *User Profile* window, click the **Subscriptions** button. The *Offline Data Subscriptions* window is displayed.



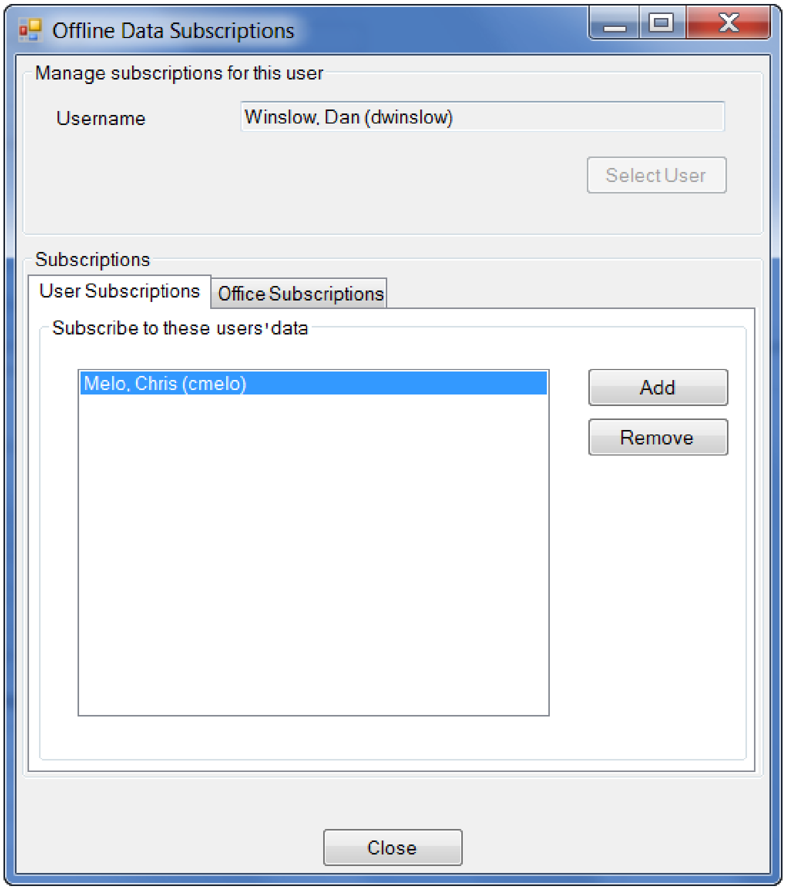
Offline Data Subscriptions Window

2. On the **User Subscriptions** tab, click the **Add** button and select a user.



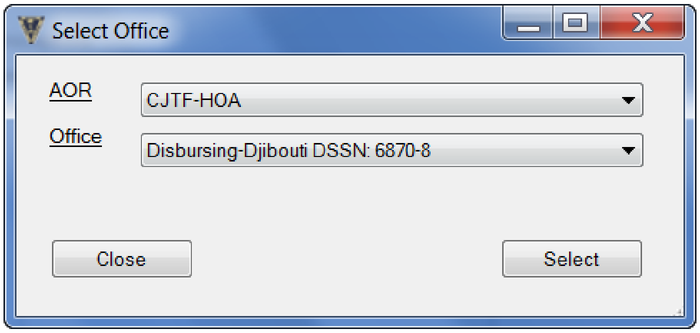
Select a user and click the Select button

The selected user is added to the **User Subscriptions** tab.



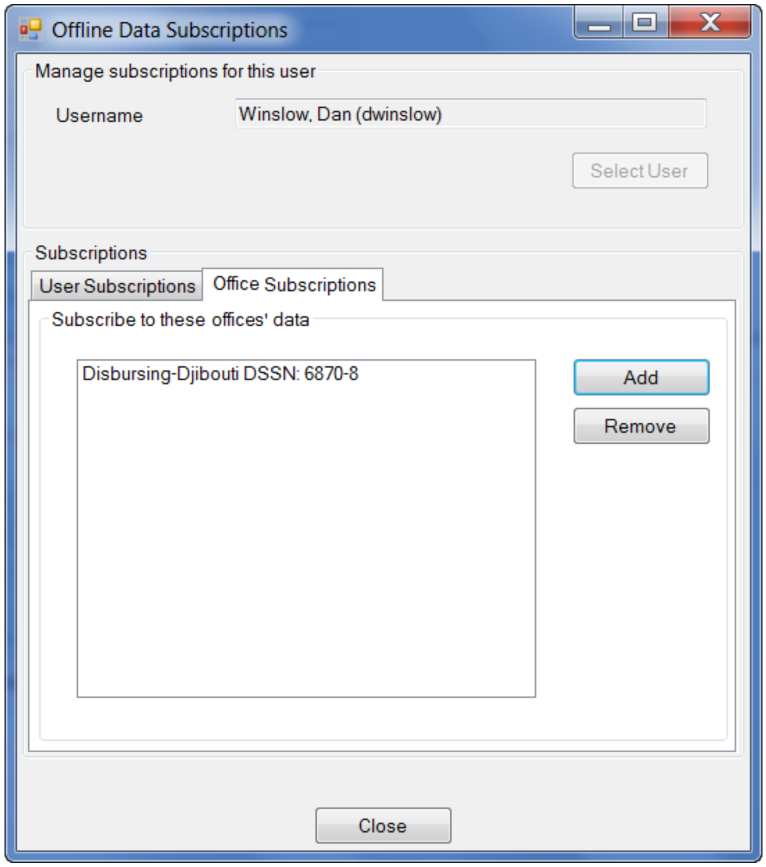
Selected users' data will be downloaded when you go offline to work

3. On the **Office Subscriptions** tab, click the **Add** button to select an office.
4. On the *Select Office* window, select an office from the drop-down list and then click the **Select** button.



Select Office Window

The selected office is added to the **Office Subscriptions** tab.

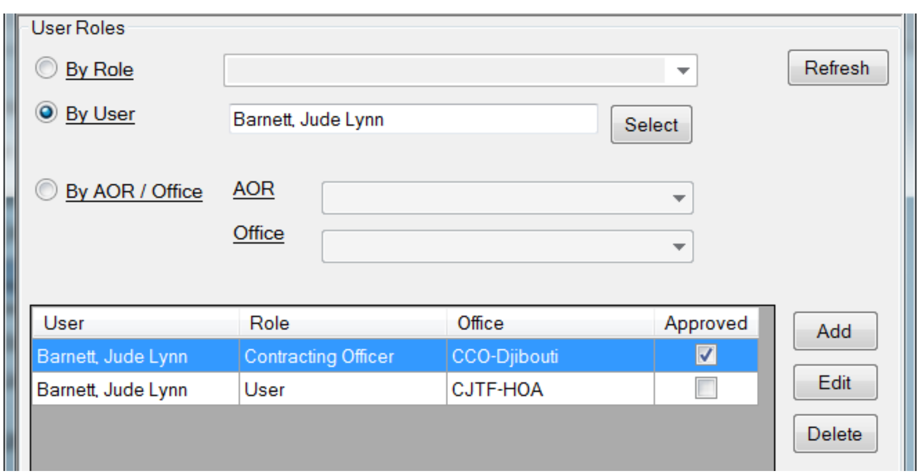


Office Data Subscriptions Window

If you later need to delete a subscription, highlight the user or office name in the table and then click the **Remove** button.

View User Role Assignments

FOOs and PAs may view role assignments made to other users by selecting **Set Up**, **Manage User Roles**. The *Manage User Roles* window is displayed.



Manage User Roles Window

There are several ways to select a user: **By Role**, **By User** or **By AOR/Office**. Select a radio button, and then select a role, user name or AOR/Office combination. The table is updated to show the users who match the selected filter. View the user's assigned roles and offices. The **Approved** checkbox indicates whether the user has been approved for the role. Remember you can only view the information on this page; you cannot edit, add or delete any of the information. Click the **Close** button to close the window.

Lesson Summary

In this lesson, you learned to:

- ❑ Edit user information on the User Profile Management screen
- ❑ Change a unit assignment
- ❑ View a user's certificate
- ❑ Choose to receive email notifications within the 3in1 system
- ❑ Customize data synchronization settings
- ❑ View user role assignments using the Manage Users feature

Lesson 3: Viewing AOR Information and Policies

Objectives

After completing this lesson, the participant will be able to:

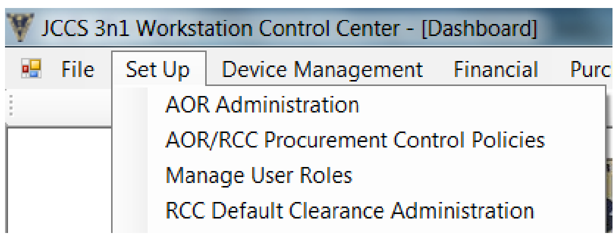
- ❑ Review the details of an assigned AOR
- ❑ Review the name and location of offices within an AOR
- ❑ Review procurement policies associated with the AOR
- ❑ Review the clearance configuration

Reviewing the AOR Organization

FOOs and PAs may review, but not edit information about their assigned AOR, including the list and locations of different offices within the AOR.

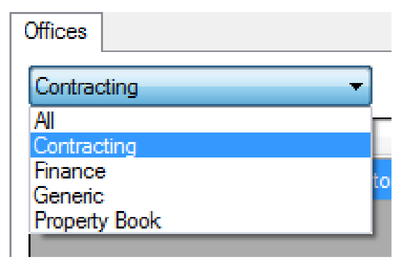
To view the details of an AOR:

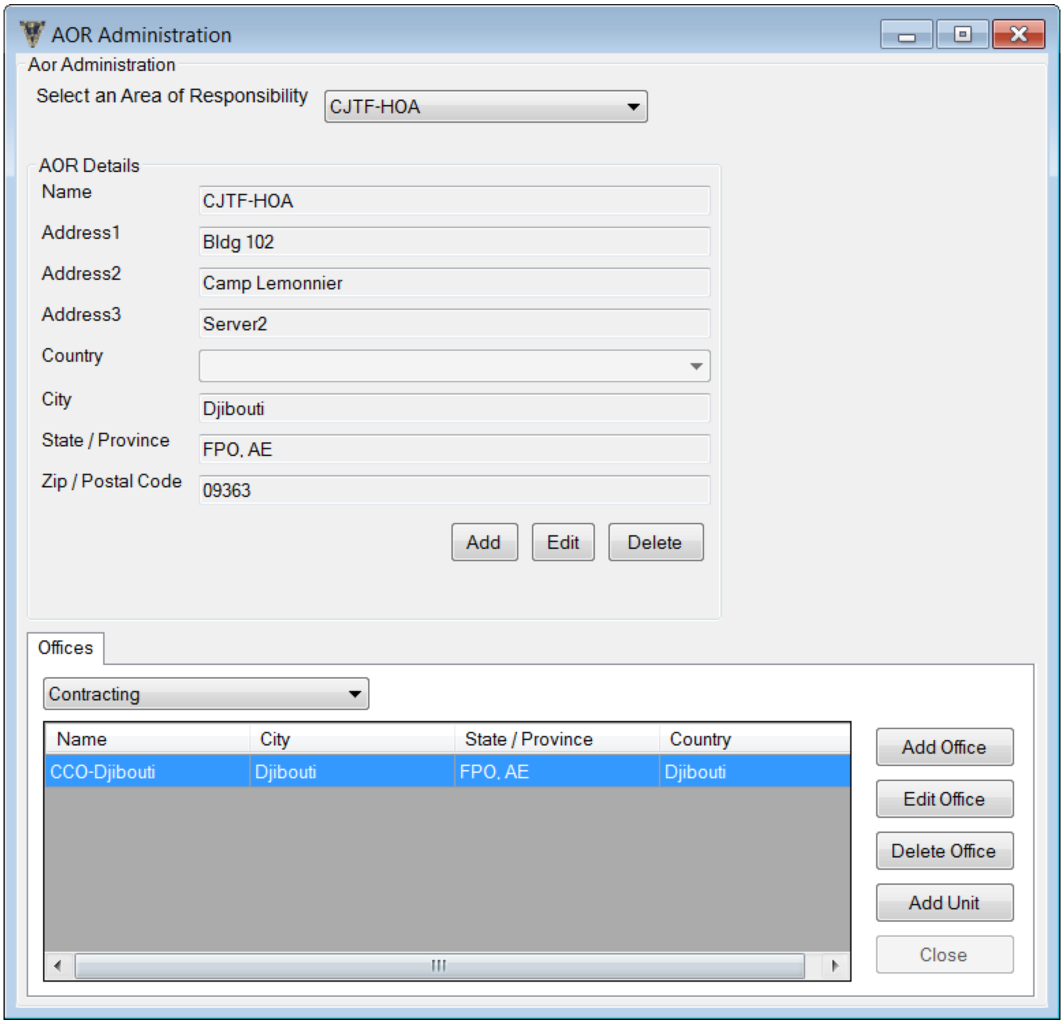
1. Select **Set Up, AOR Administration** from the 3in1 main menu.



   – The *AOR Administration* window is displayed. Review the AOR name and address. You may view details for only the AOR to which you are assigned.

2. To view the names and locations of offices within the AOR, select an office type from the drop down list.





AOR Administration Window

You may not use the Add, Edit, or Delete Office or Add Unit features, nor can you add, edit or delete AORs.

Reviewing Procurement Policies

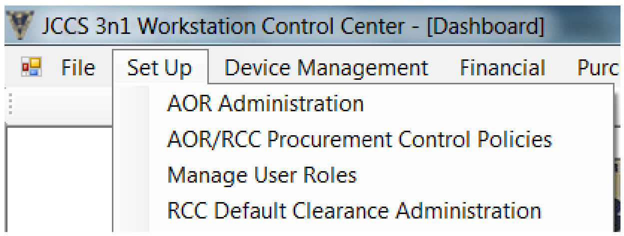
Procurement controls can be established on the Workstation by KOs and transmitted to the device to display a warning message when an unauthorized item, or one that requires special approval, is being purchased; or to prevent a purchase that exceeds the authorized limit. Procurement controls are not required to operate the 3in1 system.

- A procurement control to limit the total authorized purchase amount that a FOO can make on a single order can be established so that the device, once provisioned, will restrict purchases by that FOO to remain below that limit.
- Procurement controls can also be set up to display an alert to the FOO on the device when they try to procure an item that is restricted or requires special approval. A warning can also be applied to a line item total amount, such as requiring a review when purchasing items over a specified limit.

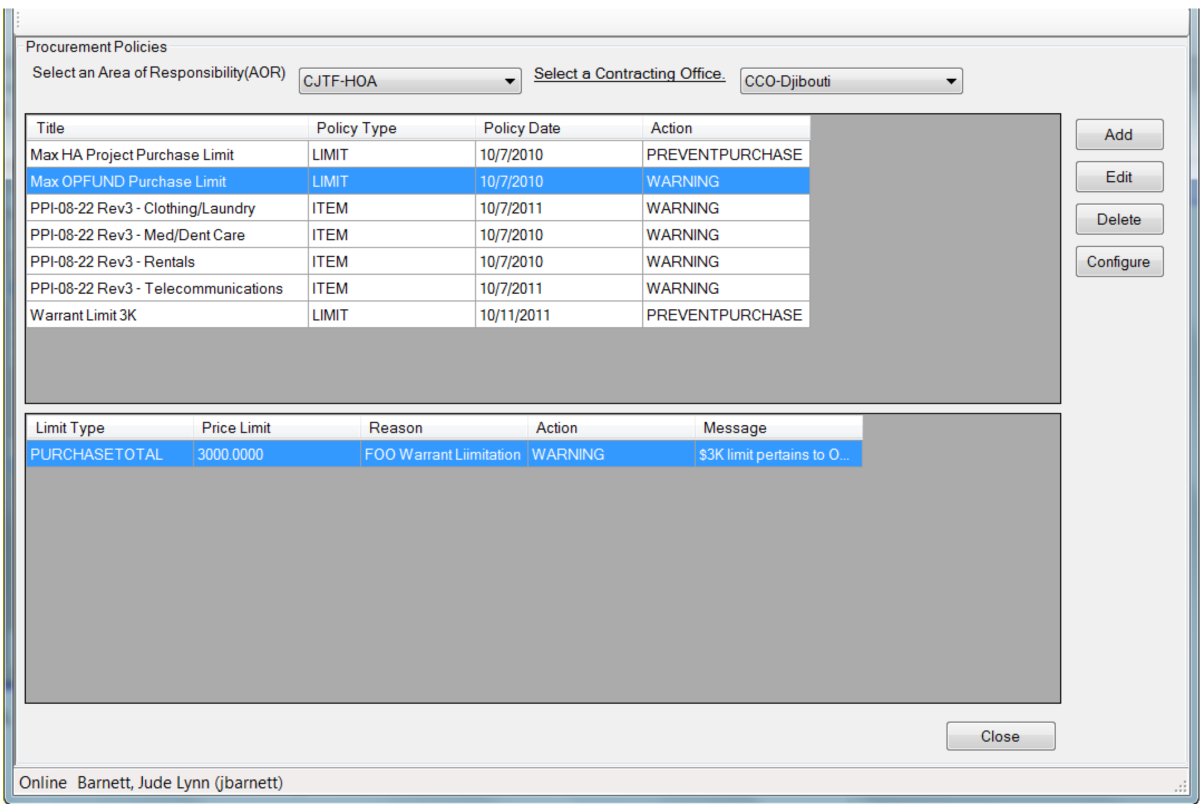
Procurement controls are established at the AOR or RCC level. Defined procurement controls can then be selected when provisioning devices (AOR level policies automatically flow down to each RCC assigned to that AOR). All procurement controls are available for assignment to each FOO as applicable during provisioning.

To view a procurement policy assigned to an AOR:

1. Select **Set Up**, **AOR/RCC Procurement Control Policies** from the main menu.
   - The Procurement Control Policy Administration window is displayed.



2. Procurement controls can be established at two levels: when the AOR is set up and when the Contracting Office is set up.
   - To view procurement controls at the AOR level, select an **AOR** from the drop-down list.
   - To view procurement controls for a Contracting Office, select an **AOR** from the drop-down list, then select a **Contracting Office** from the drop-down list.



– The screen updates to display existing procurement policies associated with the selected AOR Contracting Office.

Procurement control policies are read-only for FOOs and PAs. They may not use the Add, Edit, Delete or Configure buttons.

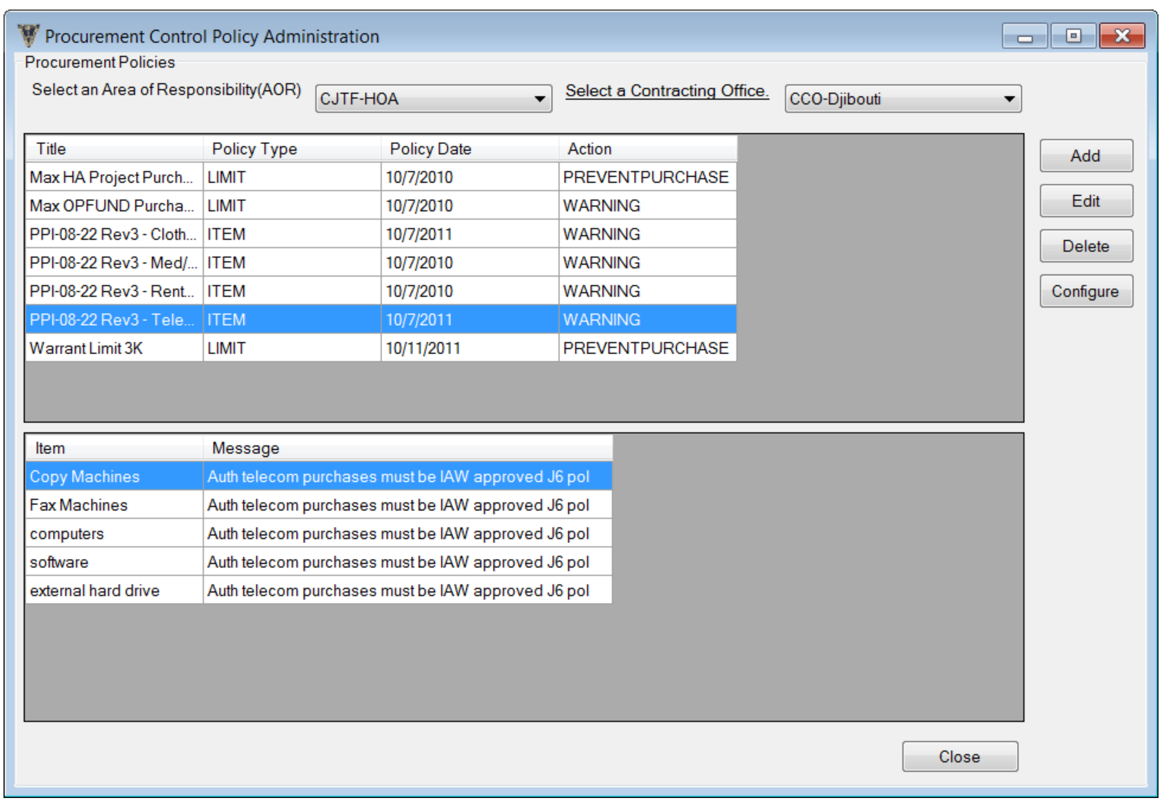
Item Limit and Price Limit Policies

The two types of policy are item limit and price limit. An item limit applies to specific products that require issuing a warning message to the FOO before a purchase is made.

When a Limit policy is selected in the top table, the line items and/or purchase totals are displayed in the bottom table, as shown in the previous figure. You can see the messages displayed when there is an attempt to purchase an item that exceeds the price limit or when a purchase total exceeds the specified price limit. The Action column indicates whether a warning is issued or the purchase is prevented.

A price limit issues a warning if the purchase of items that exceed a set price limit. A price limit can prevent a purchase that exceeds the FOOs total order amount limit. When a limit is exceeded, a specified action occurs: either a warning message is displayed or the purchase is prevented from occurring.

When an Item policy is selected in the top table, the individual items are displayed in the bottom table, as shown in the following figure. You can see the messages displayed when there is an attempt to purchase an item.



Procurement Control Policy Administration Window – Item Policy Selected

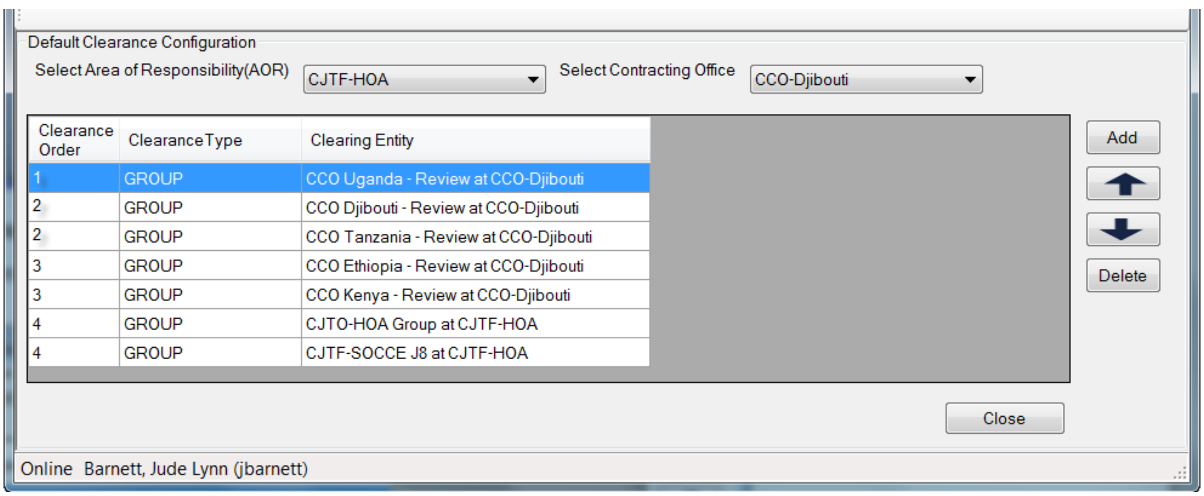
Viewing the Clearance Configuration

Local policy usually dictates who must review/clear a FOO/PA's orders/vouchers in order to close out the process. The Contracting Officer must determine the best way to configure the 3in1 system in accordance with the established policies. The clearance flow can be created with individuals, offices, or groups within an office.

To view the clearance configuration for your AOR:

1. From the 3in1 Tool Workstation main menu, select **Set Up**, **RCC Default Clearance Administration.**
2. The AOR is already selected. Select a Contracting Office from the drop-down list.
   – The clearance configuration is displayed.

The numbers in the Clearance Order column identify the sequence of PO reviewers; the first reviewer is 1. The Clearance Type may be a named individual, anyone in a specific role who is assigned to the office (Office/Role), or a named group of users who share the same role at an office.



Default Clearance Configuration Window

The orders first go to the group or individual numbered "1" for approval, then to "2" and so on. Note that if multiple clearing entities have the same clearance order number (for example there are two entities numbered "2"), the system only requires one of them to issue approval in order to push the order to the next clearance level.

FOOs and PAs can view but not edit the clearance configuration. They cannot use any of the buttons on the right side of the window. Click the Close button to exit the *Default Clearance Administration* window.

Lesson Summary

In this lesson, you learned to:

- ❑ Review the details of an assigned AOR

- ❑ Review the name and location of offices within an AOR
- ❑ Review procurement policies associated with the AOR
- ❑ Review the clearance configuration

Lesson 4: Navigating the 3in1 Device Application

Objectives

After completing this lesson, the participant will be able to:

- ❑ Unlock the 3in1 device
- ❑ Log in to the 3in1 device application
- ❑ Describe the functions on the Status Bar
- ❑ Describe the features of the Dashboard
- ❑ Introduce the Purchase Details features
- ❑ Introduce the PIIN Log features
- ❑ Log out of the 3in1 device application

The 3in1 Tool Application on the Handheld Device

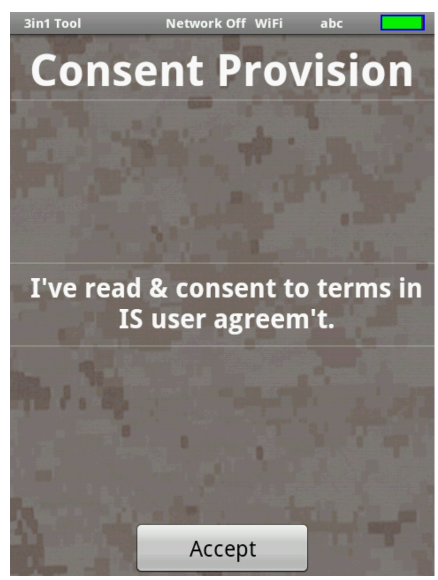
The 3in1 Tool is an application designed to run on the Google Android operating system. While the 3in1 Tool application can run on any Google Android device, most of its features are customized specifically for the Pidion BIP 6000, which is a ruggedized military standard handheld device.

Unlock the 3in1 Device

When you power on the 3in1 handheld device, the device *Unlock* screen is displayed.

Using the stylus pen or your finger, slide the padlock icon  to the right. This will unlock the device.

Logging in to the 3in1 Tool Application



Follow the steps in this section to log in to the device as a Field Ordering Officer (FOO) or Paying Agent (PA). It is assumed the device has already been registered, approved and provisioned to a FOO/PA team using the 3in1 Workstation. If you are logging in for the first time, read *Module 4: Activating Devices for FOO/PA Teams, Lesson 1: Downloading Data to the 3in1 Device for the First Time*.

Consent Provision Screen

The *Consent Provision* screen is displayed after the device is unlocked. The 3in1 Tool is part of the U.S. Government (USG) Information System (IS). Users of the tool must agree and consent to the terms of the IS user agreement.

The purpose of the *Consent Provision* screen, which is displayed when the device is powered up, is to prevent any activity on the device, unless and until the user agrees to the terms of the agreement. Due to character limitations the entire text of the IS user agreement is not provided on the 3in1 Tool. The purpose of this screen is described in *Module 2: Hardware/Application Setup, Lesson 1: Getting Started with the 3in1 Device and Printer*.

Logging in

To log in to the device application:

1. Read the IS user agreement text provided in *Appendix D: IS User Agreement* before tapping the **Accept** button on the *Consent Provision* screen.
   - The *Login* screen is displayed. The device detects the role of the user attempting to log in.
2. On the *Login* screen, select your name in the **Name** field. Enter the same password created on the Workstation when you registered as a user.
3. Type your password in the **Password** field. The device password should be the same as the Workstation login password.
4. Tap **Login** (which is disabled until a password is entered). The *Dashboard* is displayed.

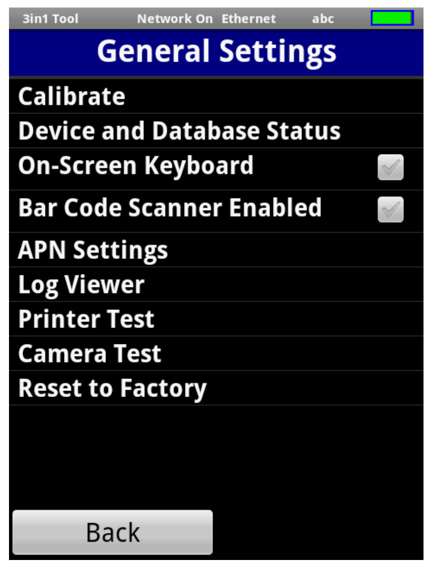
Note: If your name is not on the list, tap the **General Settings** button and then tap **Device & Database Status**. You may have been approved for the device on the Workstation, but that information has not been updated on the device yet. Tap the **Upload to Prime Database** button, then watch the status change from "Fetching data" back to "Idle." Then tap the **Back** button and find your name on the list.

Password Security

Passwords are used in several areas of the device: when a FOO logs in to the device and later, during the order process. In the event that an incorrect password is entered anyplace where a password is required, the user has two more attempts to enter a correct password within 60 minutes after the first attempt. If all three attempts are unsuccessful or 60 minutes from the first attempt have elapsed, the device will lock that FOO out for 60 minutes.

The system then asks the user to answer the three security questions which were set up during the user registration process on the Workstation. If all three questions are answered successfully, the user can reset his/her password.

If it becomes necessary to reset the device password, the system administrator can issue a reset request command from the 3in1 Workstation.



General Settings

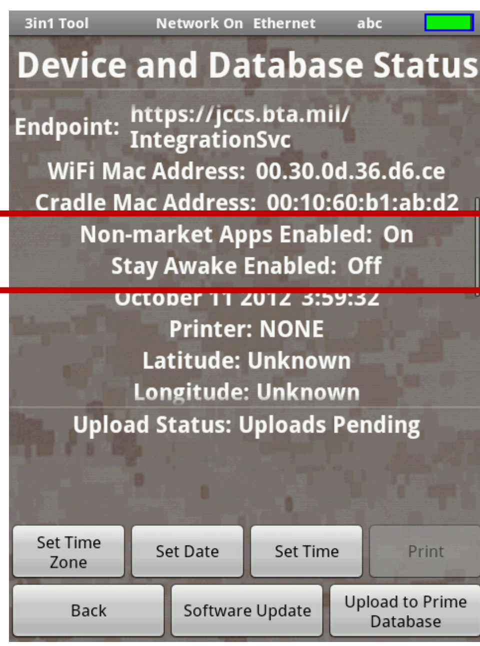
On the *Login* screen, tap **General Settings** to open the *General Settings* menu, which provides access to important settings, including toggling the on-screen keyboard, enabling the bar code scanner for purchases, setting APN for GSM-enabled devices, logging out of the device, and changing the device password. These features are described in *Module 14: 3in1 Device Tools & Settings, Lesson 1: Device Tools*.

Security Check during First Time Use

Important security checks for the handheld device must be performed when using the device for the first time. Users should check the following settings on the *Device and Database Status* screen, which is accessed from the *General Settings* menu.

1. Verify the **ADB (Android Debug Bridge) Enabled** setting is **OFF**. This prevents the installation of unauthorized apps on the device.

2. Scroll down the screen and verify that the **Non-market Apps Enabled** setting is **ON**.
   - The 3in1 program is not available in the Android Marketplace, so the On setting enables 3in1 to run on the device.
3. Also verify that the **Stay Awake Enabled** setting is **OFF**. If the setting is set to ON, return the device or contact the help desk. Do not use the device.
   - Setting **Stay Awake Enabled** to Off also conserves the device battery life.



The FOO and PA Device Dashboards

FOO and PA Roles on the Device

The 3in1 handheld device is used by Field Ordering Officers (FOO) and Paying Agents (PA). The FOO role makes purchases while the PA role manages cash advances. Only one role can be logged in to the device at any time.

Some device features unique to the user role. For example, the cash advance functions are available to PAs but not to FOOs while the Order tab is available to FOOs only, because only a FOO can place orders.

Information Sharing

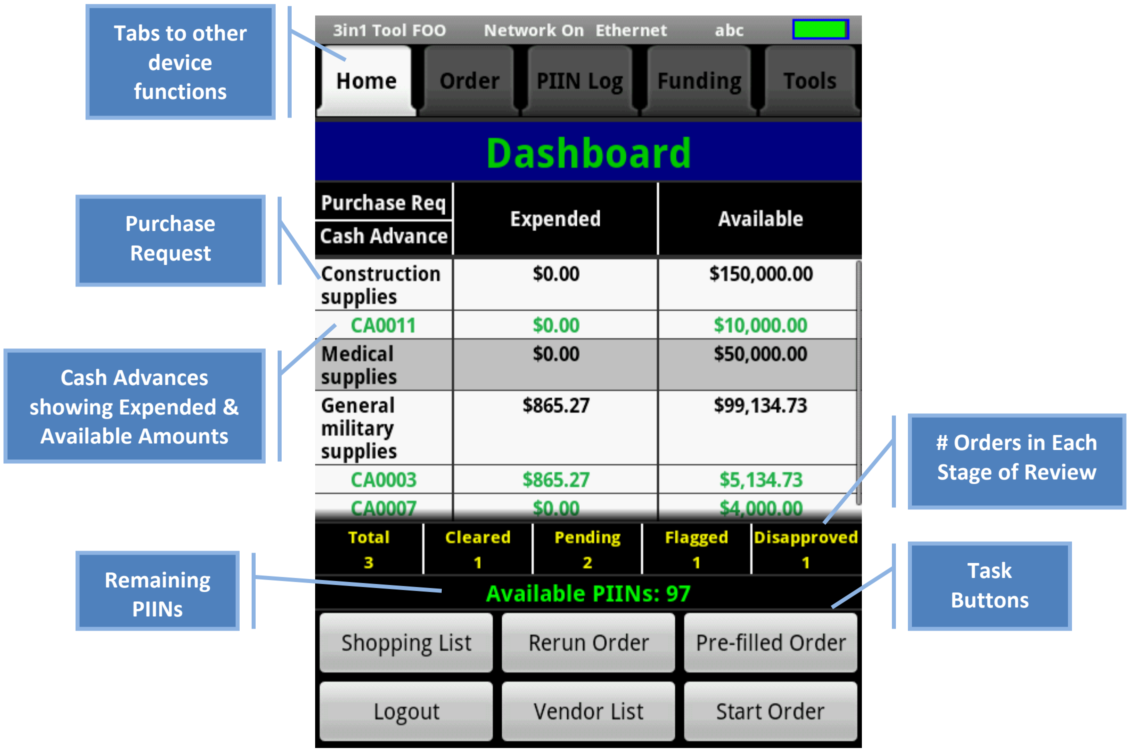
Numerous FOO-PA teams may be assigned to a device on the Workstation. Although each user profile on the device is secure and unique, a major advantage of the 3in1 tool is that it allows information sharing. For example, merchant or shopping list data entered by one user will be available to all users, thus saving time and making the purchasing process more efficient.

Viewing the Dashboard

The device *Dashboard* is the screen where you can access the main features of the device application. The FOO and PA roles have different responsibilities and consequently have different *Dashboard* screens, although they share many features.

The *Dashboard* screen is accessed through the **Home** tab. The Dashboard screen is displayed useful information in a concise format, and is the starting point for using the device. Use the Dashboard as the main screen for understanding the status of orders and finances, as well as for starting various operations on the device.

The table at the center of the Dashboard provides a list of available Purchase Requests (PR), along with an indication of how much has been expended and how much value remains on the PR. Users can also see the name of the PR. Cash advances are located below the PR they were issued against. The device can maintain multiple cash advances in different currencies. The exchange rate is set at the time the cash was advanced from the finance office. This information enables a user to plan purchases. If a PR is intended to be used for an order that will not be paid with cash by a Paying Agent, it will not have any disbursements under it, but may be used to execute a purchase order by the FOO. The Expended amount includes all orders that have been executed. However, if some orders were executed, but not yet paid, the Available Cash amount may be different than the physical cash-in-pocket amount.



FOO Dashboard Screen: Note "FOO" is displayed on the left side of the titlebar.

Near the bottom of the screen, a count of the available PIINs is displayed. If the number is low, the FOO should request additional PIINs from the KO. If the number of available PIINs is zero, the FOO cannot place orders.

Tab Name	Function
Home	Displays the Dashboard, summarizing your orders, showing expended and available amounts, the total number of orders in each stage (pending, flagged, etc.), remaining number of PIINs and buttons for accessing other areas of the application.
Order	Begins the Order Process or displays an active order being executed. . (This tab is not available to Paying Agents.)
PIIN Log	Enables FOOs to view their purchase history: past orders that show when it was paid, when it was signed, who signed it, and other details, as well as order status: cleared, flagged for follow-up, waiting for signatures.
Funding	Displays status of purchase requests and cash advances. The Funding tab is used by the Paying Agent to return, exchange and add cash advances. The FOO can view cash advance details and attach documents.
Tools	Accesses device tools such as the calculator and currency converter. See *Module 14: 3in1 Device Tools & Settings, Lesson 1: Device Tools*.

The *Dashboard* displays the number of orders in each stage of review:

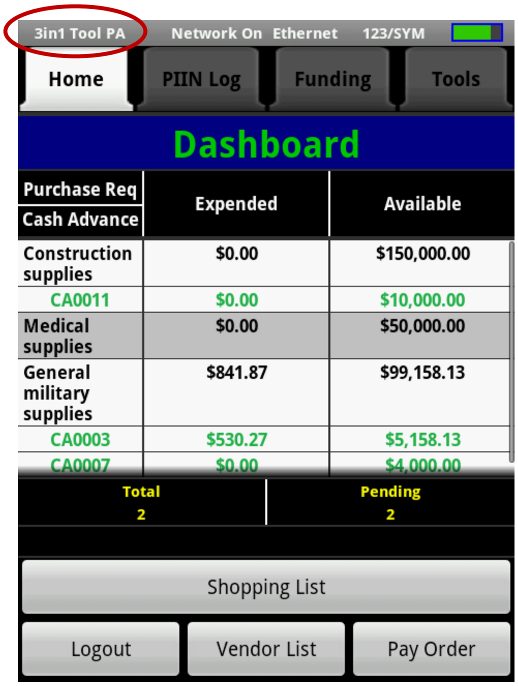
Review Stage	Definition
Cleared	Orders that have been approved, meaning they have been cleared by all reviewers.
Pending	Orders in process or waiting to be reviewed.
Flagged	Orders for which a reviewer has raised an issue or question that needs to be addressed.
Not Sent	Orders that the device has not transmitted to the Workstation.
Disapproved	Orders that have been marked as “Disapproved” on the Workstation Clearance screen.
Total	The total number of cleared and pending orders.

At the bottom of the *Dashboard* screen are six buttons for commonly-used actions.

Button Name	Function
Shopping List	Used to create a list of items, with specified quantities, that need to be purchased. This is helpful to not forget items, and it also saves time in the market by automatically populating the order. See *Module 6: Ordering and Financial Features on the Device, Lesson 1: Shopping Lists.*
Rerun Order	Enables FOO to correct mistakes in a previous order, which has been returned, or start a new order based on a previous order. Like the shopping list, it is a time-saver in the market. See *Module 6: Ordering and Financial Features on the Device, Lesson 2: Returning and Rerunning Purchase Orders on the Device.*
Pre-filled Order	Enables FOOs to start an order, save it, and complete at a later time.
Logout	Logs out of the 3in1 application.
Vendor List	Displays the list of merchants, whose names and addresses can be reused for multiple orders. See *Module 5: The Ordering Process, Lesson 1: Creating Vendors on the 3in1 Device.*
Start Order	Creates an order. See *Module 5: The Ordering Process, Lesson 2: Making a Purchase*

FOO and PA Dashboards

The Paying Agent *Dashboard* is slightly different from the FOO *Dashboard*. Note the “FOO” or “PA” role of the logged in user is displayed in the title bar.



Paying Agent Dashboard

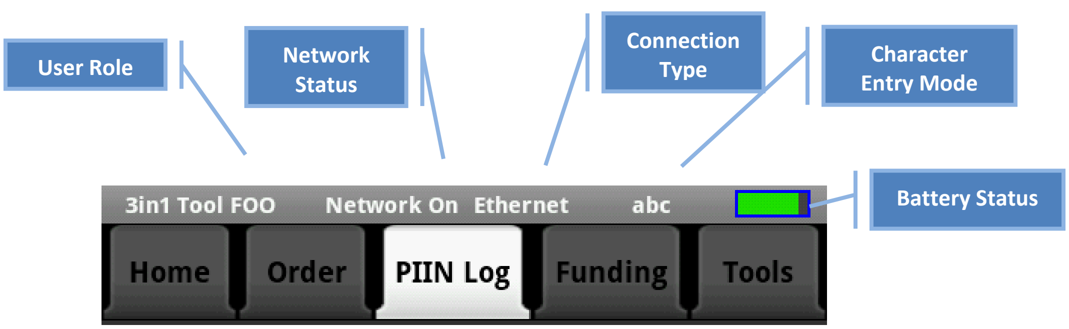
Field Ordering Officer Dashboard

The Paying Agent is not authorized to place orders, while the FOO in not authorized to make payment. The differences between the PA and FOO Dashboards:

- The **Order** tab is available to FOOs, but not to PAs
- The **Rerun Order and Pre-filled Order** buttons are available to FOOs, but not to PAs
- A PA uses a **Pay Order** button, while a FOO uses a **Start Order** button

The Status Bar

The Status Bar displayed at the top of the device screen provides an immediate reference for the network state, the keyboard mode, and the battery status:



To verify a network connection has been established, check the ***Network Status***. If there is no network connection, the status is “Network Off”. If there is a connection, the status is “Network On” followed by the ***Connection Type***.

To read about the various types of network settings available for the device, see *Module 14: 3in1 Device Tools & Settings, Lesson1: Device Settings.*

The ***Battery Charge*** status indicates the remaining battery life. A fully charged battery is represented by a completely filled green rectangle. When the charge is close to running out, the icon changes to red. The device should be charged whenever a charger is available.

Character Entry Mode refers to the current keyboard setting. Four types of characters can be entered.

- Lower case is represented by *abc*
- Uppercase is represented by *ABC*
- Numeric is represented by *123/SYM*
- Special characters are represented by *123/SYM*

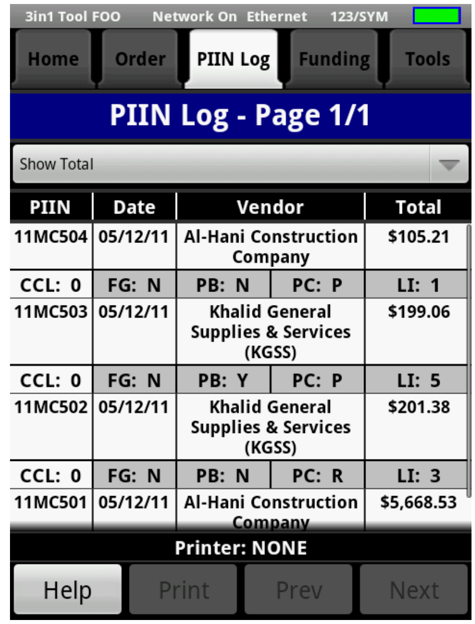
Button	Function
	Use the SHIFT button to switch between lowercase/uppercase English alphabet characters.
	Use the Toggle (Character) button to switch between letters and symbols/numbers.

Features of the Purchase Details Screen

Another key screen that FOOs and PAs will use frequently is the *Purchase Details* screen. The *Purchase Details* screen lists items in a purchase order. Use the buttons on this screen to perform the following actions:

- **Return Order** – Return a purchase order
- **Print** – View and print an SF44. (See *Module 5: The Ordering Process, Lesson 2: Making a Purchase*.) (Available to FOOs only.)
- **Signatures** – View the signatures and confirmation of all parties who participated in the transaction. None of this information can be edited. (See *Module 5: The Ordering Process, Lesson 2: Making a Purchase*)
- **Location** – Capture the GPS coordinates (See *Module 5: The Ordering Process, Lesson 2: Making a Purchase*)
- **View Clearance** – View the approval status of orders; review and respond to order flags
- **Images/Receipts** – Take a picture of a receipt and other items. Multiple images can be taken for an order, such as of the items being purchased or approval letters that must accompany an order. (See *Module 5: The Ordering Process, Lesson 2: Making a Purchase*)
- **PIIN Log –** Return to the *PIIN Log* screen**.**
- **Add Comments** – Enter remarks about an order. If purchasing an accountable item, enter the model and serial number in the Comments section.

PIIN Log Features

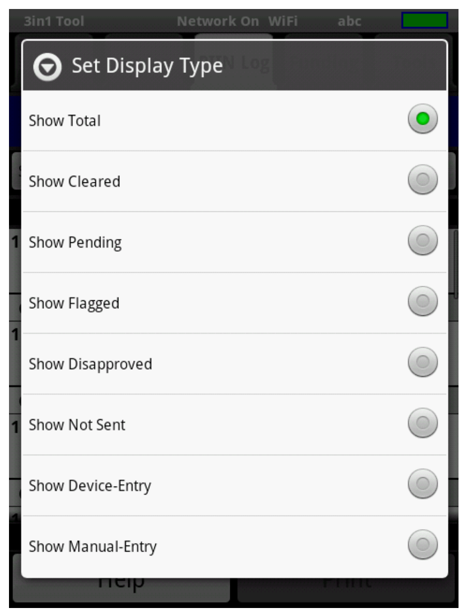


Use the PIIN Log tab to view purchase history and perform the following tasks:

- View all past orders
- Look for orders which have been cleared
- Look for orders which have been flagged, and need follow-up
- Look at orders which are waiting for a signature, such as a Receiver signature
- Find a specific past order for review, for example to see when it was paid, when it was signed, who signed it, and other details

The PIIN Log screen presents a scrollable table of all orders placed.

Orders can be filtered, using the **Set Display Type** filter at the top of the screen:



- **Show Total**: Show all the orders in the device.
- **Show Cleared**: Orders that have passed all the clearance offices.
- **Show Pending**: Orders that have not yet been cleared.
- **Show Flagged**: Orders that have been flagged by a clearance office.
- **Show Disapproved**: Orders that have been disapproved by a clearance office.
- **Show Not Sent**: Orders that have not yet been transmitted to the prime database. If orders have not yet been transmitted, connect the device to a network to allow the orders to be transmitted.
- **Show Device Entry:** Orders that have been entered on the device.
- **Show Manual Entry:** Orders that were entered on the Workstation, and then transmitted to the device.

These filter options are helpful when there are many orders in the PIIN Log, and the user needs to select only a subset to view. You can also control the number of orders displayed by adjusting the Archive setting, which is described in *Module 14: 3in1 Device Tools & Settings, Lesson 1: Device Settings.*

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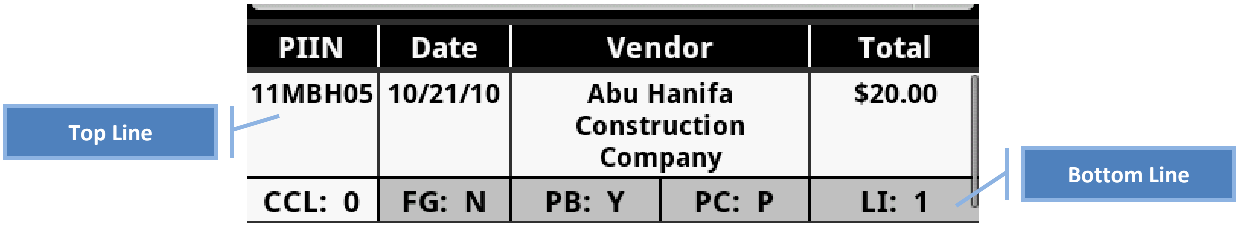
Each PIIN (order) takes two lines in the PIIN Log table.



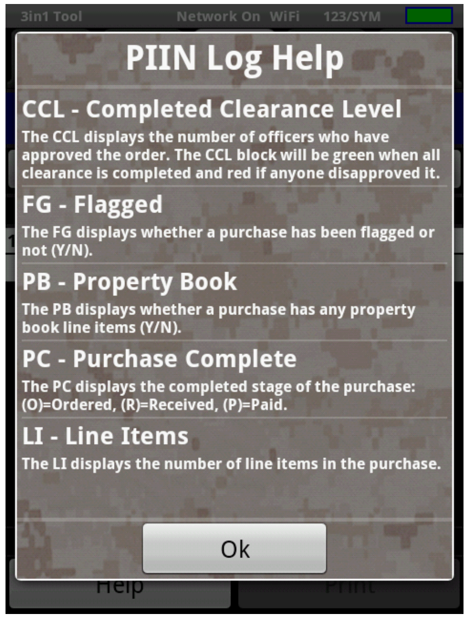
The following table describes the function of each column in the top line.

Top Line Information	Description
PIIN	The last seven digits of the PIIN itself, which begins with the fiscal year and followed by the contract type “M” or “W,” a two-character FOO ID, and a two-digit serial for the orders. To view the entire 11-character PIIN, use the View PIIN Blocks setting, explained *in Module 14: 3in1 Device Tools & Settings, Lesson 1: Device Tools.* Note: the DoDAAC which are the first six digits are not displayed on the log. (“M” PIINs are generated by default on the device, while “W” PIINs are generated when the check box labeled **For Non-Device (Manual) Order Entry** is checked. Manual orders are executed as a backup, should the device be inoperable. The manual orders are then entered in the Workstation for electronic processing.)
Date	The order date
Vendor	The vendor name
Total	The total amount paid for the order

The bottom line displays the following information:

Bottom Line Information	Description
CCL (Clearance level)	The number of offices that have cleared the order, based on the clearance flow that has been set up in the Workstation. Zero indicates no offices have cleared it yet. The field changes to green when all offices have cleared the order, or red if any office has disapproved.
FG (Flagged)	An “N” in this field indicates the order has not been flagged. A “Y” indicates that the order has been flagged. If the order has been flagged, the FOO should go to the order and leave a response.
PB (Property Book Item)	A “Y” indicates that the order includes Property Book items. An “N” indicates that the order does not contain any Property Book items.
PC	Indicates the stage of order completion: O: Order has been placed R: Order has been received P: Order has been paid
LI (Line Item)	The number of line items in the order. This number is at least 1, because an order cannot be placed without line items.

Tap the **Help** button on the ***PIIN Log*** screen to view explanations of the fields listed above.



PIIN Log Help Screen

Printing the PIIN Log

Note the **Print** button in the lower-right of the *PIIN Log* screen. If a printer is plugged in, the **Print** button becomes active, and can print the table displayed on the *PIIN Log* screen. This is helpful to generate a printed overview of order status.

Controlling the Number of Orders Displayed

By default, orders are archived after 60 days and are removed from display on the *PIIN Log* screen. It is possible to change the archive interval by setting the Order Archive feature, which is explained in *Module 14: 3in1 Device Tools & Settings, Lesson 1*: *Device* Settings.

Logging Out of the Device Application

Multiple users can be assigned to one device. Each user logs in to use the device and then logs out when finished. Logging out returns to the *Consent Provision* screen.

Logging out locks the device. The user needs to log back in using a password. Users should log out upon completing their tasks, so that if the device is lost, information on the device will remain secure.

There are two ways to log out of the 3in1 application:

- Select the **Tools** tab on the device, tap **General Settings**, and then **Logout**.
- Or from the *Dashboard*, tap **Logout**.

Note that logging out does not power off the device. See *Module 2: Hardware/Application Setup, Lesson 1: Getting Started with the 3in1 Device and Printer* for instructions on powering off the device.

Lesson Summary

- ❑ Unlock the 3in1 device
- ❑ Log in to the 3in1 device application
- ❑ Describe the functions on the Status Bar
- ❑ Describe the features of the Dashboard
- ❑ Introduce the Purchase Details features
- ❑ Introduce the PIIN Log features
- ❑ Log out of the 3in1 device application

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Lesson 5: Going Offline with the 3in1 Workstation

Objectives

After completing this lesson, the participant will be able to:

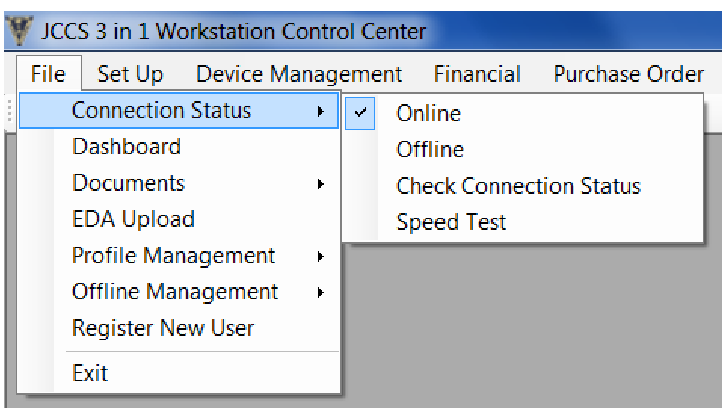
- ❑ Describe the differences between working online and offline using the 3in1 Tool Workstation
- ❑ Change from working online to working offline for the first time
- ❑ Subsequently switch between working in Online and Offline modes

Working Online or Offline

The 3in1 Tool Workstation application can run standalone (Offline) or online connected to the 3in1 prime database. An Internet connection is required to work in Online mode. However, you can work offline and then upload your work to the 3in1 prime database when a connection can be established. In situations when your connection is unreliable, you may want to purposely work offline and control when you go online to update your information.

Note: A pre-requisite for working offline is to initialize the local 3in1 Workstation database on your computer.

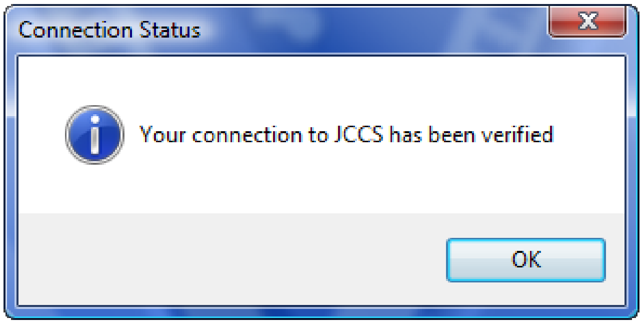
To check your current connection status, select **File**, **Connection Status**. The checkmark indicates whether you are working Online or Offline. The connection status is also displayed in the bottom left corner of the screen.



File, Connection Status Menu

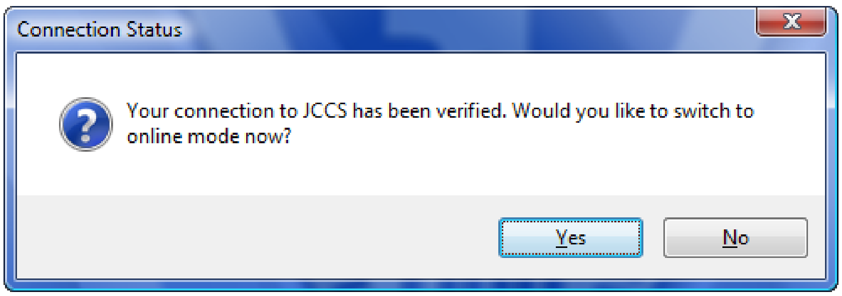
Checking Your Connection to the 3in1 Workstation

To verify a connection to the 3in1 prime database, select **File**, **Connection Status**, **Check Connection Status**. If a connection to the 3in1 Workstation exists and you are already online, the following message is displayed.



Connection Status Dialog Box

If you are working offline and a connection to the 3in1 prime database can be made, the following dialog is displayed. Click **Yes** to switch online. See the *Going Back Online* section for additional steps to synchronize data between your computer and the 3in1 prime database.



Connection Status Dialog Box

Checking Your Synchronization Settings

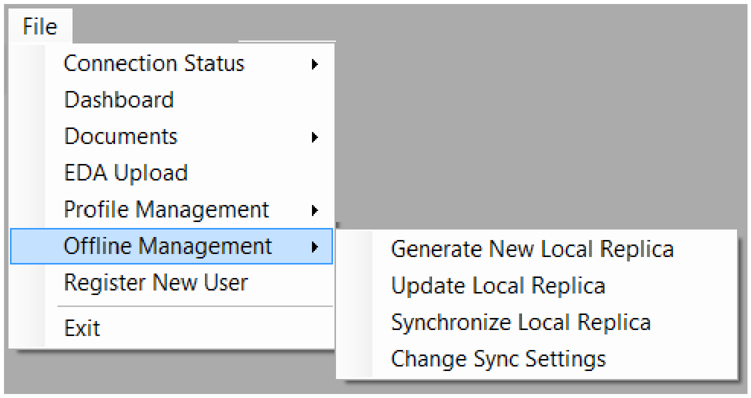
To ensure data is synchronized between your computer and the 3in1 prime database, check your personal data synchronization settings before working offline. Select **File**, **Profile Management**, **User Profile**. See *Module 3: Application Familiarization, Lesson 2: Managing User Account Information*.

Working Offline for the First Time

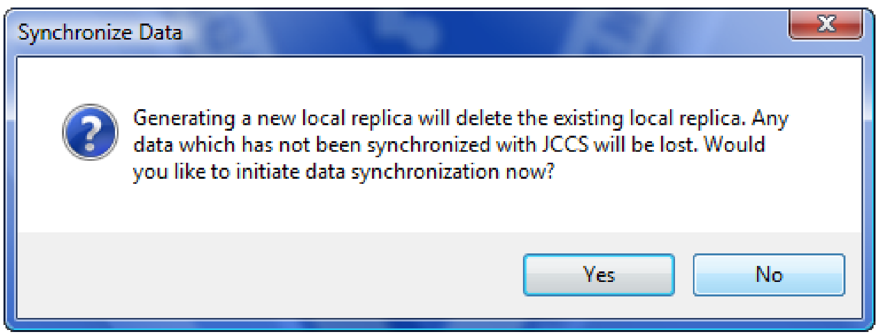
Switching from Online to Offline mode requires creating a copy of relevant data from the 3in1 prime database on your computer, called a ***local replica***. The process is slightly different the first time that you switch from online to offline mode.

Follow these steps the <u>first time</u> that you change from working online to working offline:

1. While working online, select **File**, **Offline Management**, **Generate New Local Replica**.

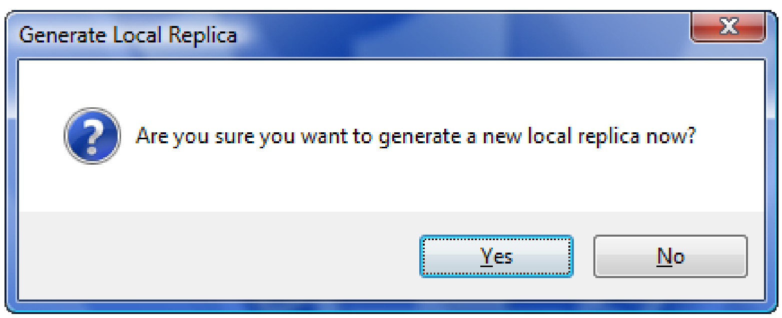


2. In the following dialog box, select **No** because there is no existing replica to synchronize, since this is the first time you are going to work offline.



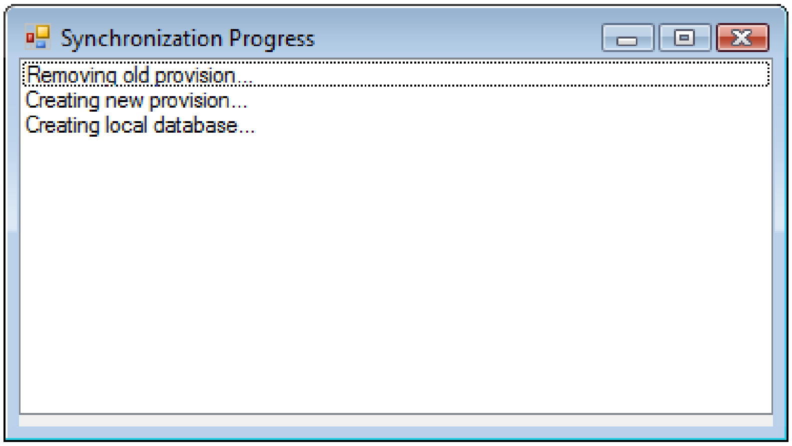
Synchronize Data Dialog Box

3. In the following dialog box, click the **Yes** button.



Generate Local Replica Dialog Box

   – A new window opens so you can follow the progress of generating a new local replica on your computer. When the process is complete, close the window.



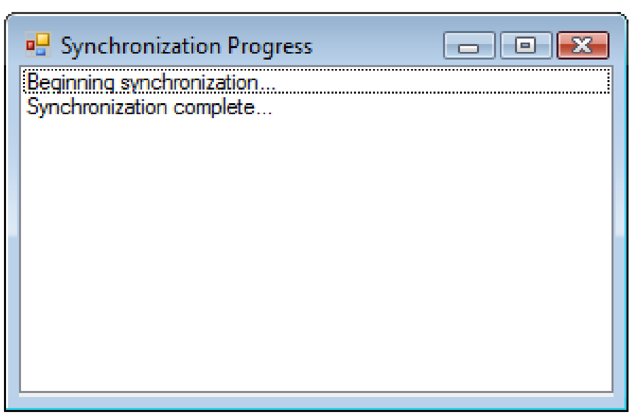
4. Select **File**, **Connection Status**, **Offline**.

You may now start working offline.

Going Back Online

If you work offline for a while, then want to switch to working online, you must synchronize your local database with the 3in1 prime database to upload changes to the 3in1 prime database. Follow these steps:

1. Select **File**, **Connection Status**, **Online**.
   – Now you need to upload to the 3in1 prime database all the data that you worked on while offline.
2. Verify that you have a working Internet connection.
3. Verify you are in Online mode. Select **File**, **Connection Status**, **Online** (should have a checkmark).
4. Select **File**, **Offline Management**, **Synchronize Local Replica**.
   – A new window opens, displaying the synchronization process in progress. The synchronization is bi-directional, meaning data from your local database is uploaded to the 3in1 prime database and data from the 3in1 prime database is downloaded to your local database.



5. A message is displayed to indicate when synchronization is complete. Close the window. You may continue working online.

Going Back Offline

Earlier instructions were provided for working offline for the first time. The steps are different if you have already worked offline once, then switched to working online, and subsequently want to switch back to working offline. You need to delete the existing replica and replace it with a more current database before going offline.

Follow these steps to switch from Online to Offline mode:

1. While still working online, select **File**, **Offline Management**, **Synchronize Local Replica**. This updates your local database with the most current data from the 3in1 prime database.
2. Select **File**, **Connection Status**, **Offline**.

You may start working offline.

When you are ready to work online again, follow the steps above in *Going Back Online*.

Tips for Working Offline

Users will have to synchronize data every time they make a change. Any changes to financial administration or order clearance will not be sent to the device until users go online and synchronize with the prime database.

FOOs and PAs can view all of their POs in offline mode. They can also do the following:

- Create a manual purchase order and synchronize it to prime database
- Look up all the orders they have placed

FOOs and PAs cannot look up orders assigned to other users.

Offline Conflict Resolution

When you work offline for a while, then re-connect to the 3in1 prime database, the system needs to synchronize your changes with the prime database, which may contain changes that were made since you went offline.

While it is not feasible to cover every scenario that may occur, clearance conflicts are the most likely. Specifically, if multiple users in the same clearance flow go offline and work on the same orders, then go back online at different times, with conflicting approval/disapproval of the same orders, the 3in1 system will resolve the conflict automatically and notify affected users.

As a general rule, the 3in1 system will give precedence to the Disapproved/Flagged command over the Approved command, and will return an order to the clearance level where the conflict originated.

Assume User 1 and 2 are in the same clearance flow. Both have the same clearance level and an order in their clearance queues. Both users create a local replica and go offline.

User 1 approves the order while offline, and then synchronizes when she goes back online a day later. The order moves to the next clearance level in the prime database.

User 2 disapproves the same order while offline, and then synchronizes when he goes back online a day after User 1 went back online.

This scenario will create a conflict in the 3in1 system. User 1 will receive an email stating that a conflict has been created regarding the specific purchase order. 3in1 will automatically resolve this conflict by negating User 1's approval (and any additional approvals made at higher levels of clearance for the order) and will return the order to User 1 and User 2's clearance level, and mark it as Disapproved. User 1 will receive another email when this conflict has been resolved.

To take the scenario farther, if other users in the clearance flow approved the order after User 1 went online, but before User 2 went back online, they will each receive two emails; one notifying them of the conflict, and another informing them of the conflict resolution. These users do not need to take any action, because the system resolved the conflict automatically.

After resolving the conflict, the system handles the order normally, and requires the order to be approved before sending it to the next level of clearance.

It is recommended that all users involved in the clearance process synchronize their offline replica to obtain the latest information regarding the conflict resolution that happened on the server. The latest result of conflict resolution that was created by the server will be available in online mode, but individual users are responsible for synchronizing their offline replicas and keeping them up-to-date.

Lesson Summary

In this lesson, you learned to:

- ❑ Describe the differences between working online and offline using the 3in1 Tool Workstation
- ❑ Change from working online to working offline for the first time
- ❑ Subsequently switch between working in Online and Offline modes

Lesson 6: Device and Workstation Direct Data Exchange

Objectives

After completing this lesson, the participant will be able to:

- ❑ Connect the handheld device to the Workstation computer for direct data transfer
- ❑ Transfer data from the device to the Workstation
- ❑ Work offline on the Workstation after the data exchange is completed

In situations where users decide to work offline for periods of time, it is possible for FOOs to connect the handheld device directly to the Workstation and transfer SF44s and associated data created while the device was disconnected. It is necessary to work on both the device and Workstation in order to properly set up the connection and data transfer, so make sure you have login credentials to both before following the steps below.

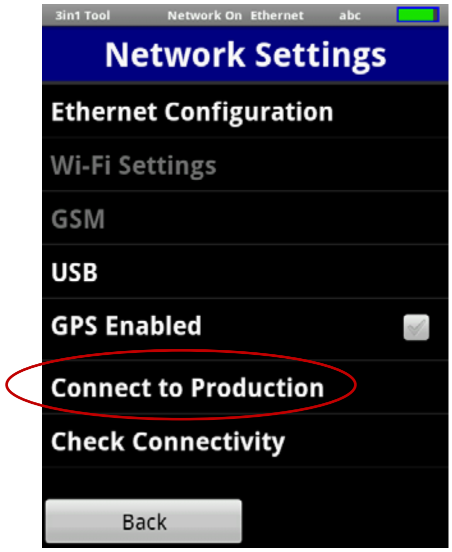
Step 1: Generate a Local Replica on the Workstation

The detailed steps to generate a local replica of the 3in1 prime database on the local Workstation computer were explained in the previous lesson. The steps are summarized below.

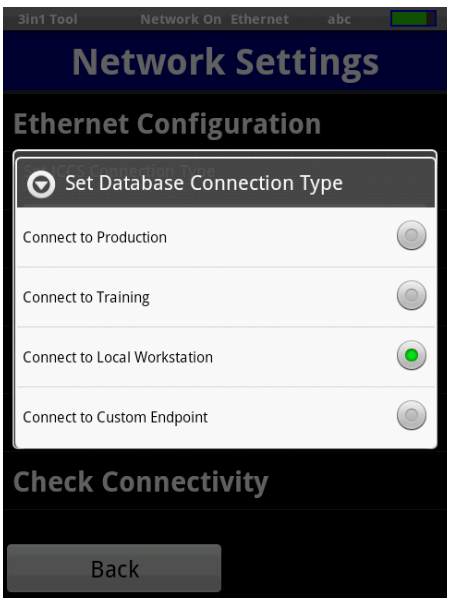
1. From the Workstation main menu, select **File**, **Offline Management**, **Generate New Replica**.
   - This command creates a replica of the current 3in1 database on the Workstation.
2. A message asks if you want to synchronize the local replica instead of creating a new replica. Click **No**.
3. Another message asks to confirm creating the local replica. Click **Yes**.
4. When a message indicates the local replica has been created, close the window.
5. On the computer desktop screen, ensure the 3in1 icon for 3in1 Service Manager appears in the System Tray by the clock. Do no close the 3in1 Service Manager. Always minimize when running the 3in1 workstation in offline mode.

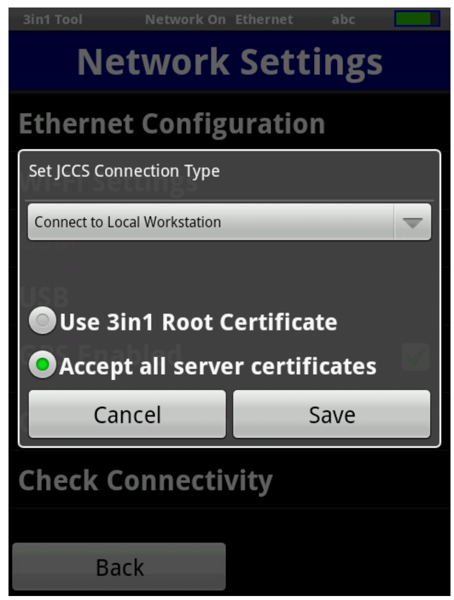
Step 2: Connect the Device to the Workstation and Transfer Orders

1. On the device, log in as a FOO.
   - You must log in to the device as a FOO to transfer order data from the device to the Workstation.
2. Tap the **Tools** tab.
3. Tap **Network Settings**.
4. Tap the **Connect..** setting (in the following screenshot, you would tap **Connect to Production**).

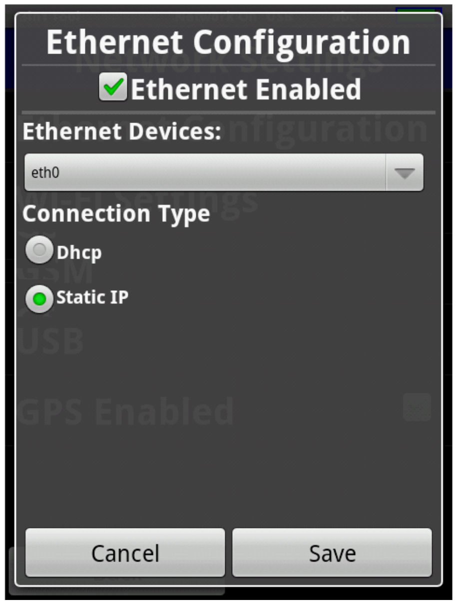


5. In the **Set Database Connection Type** field, click the drop-down and select **Connect to Local Workstation**.
6. Tap **Save** on the *Set JCCS Connection Type* popup.





7. On the *Network Settings* screen, tap **Ethernet Connection**.
8. On the *Ethernet Configuration* screen, tap to select the **Ethernet Enabled** checkbox.



9. Tap the **Static IP** radio button.
10. Tap **Save** to save the Ethernet settings.

Go to the Workstation and perform the following steps:

1. Ensure the FOO is logged on to the Workstation.
2. Connect the device to the computer where the FOO is logged in, using either an Ethernet or Crossover cable.
3. Reboot the handheld device while the 3in1 workstation is running in offline mode and the handheld device is connected via Ethernet cable.

The computer now attempts to acquire the IP address from the device. This can take more than a few minutes. Look for the network connection symbol to appear in the computer's System Tray.

Now return to the device and perform the following steps:

1. Tap the **Tools** tab.
2. Tap **Device and Database** to open the *Device and Database Status* screen.
3. Tap **Trigger Upload**. The device begins to send data to the Workstation.

Now return to the Workstation and verify the upload process has finished by looking up new orders using the Purchase Order Lookup menu.

Step 3: Synchronize the Local Replica

It is now necessary to synchronize the local database with the 3in1 prime database.

Perform the following steps on the Workstation:

1. Select **File**, **Offline Management**, **Synchronize Local Replica**.
   - A new window opens up and synchronization starts.
2. Once synchronization is completed, close the window. You can now work offline with the local replica.

During the synchronization, information that has changed on the local database is uploaded to the 3in1 prime database, and new information on the prime database is downloaded to the local database. However, note that the information downloaded pertains to only the authorized AOR for the logged-in user, and all downloaded user information is restricted to only those users in the clearance queue.

Lesson Summary

In this lesson, you learned to:

- ❑ Connect the handheld device to the Workstation computer for direct data transfer
- ❑ Transfer data from the device to the Workstation
- ❑ Work offline on the Workstation after the data exchange is completed

Part 2a: Execution: FOO/PA Team Setup

Module 4: Activating Devices for FOO/PA Teams

Lesson 1: Downloading Data to the 3in1 Device for the First Time

Objectives

After completing this lesson, the participant will be able to:

- ❑ Log in to the device for the first time
- ❑ Download assigned purchase requests, procurement controls, PIIN blocks, and other necessary data

Activating Devices

Devices can be activated for FOO/PA teams after they have been registered and approved in the Workstation. The process of provisioning sets up the devices for use by teams of FOOs and PAs. Many variables are assigned during device provisioning, including an order number called a Procurement Instrument Identification Number (PIIN) block, FOOs and PAs, purchase requests, procurement control policies, and clearance configuration. After the FOO has registered on the 3in1 Workstations, the KO can configure all these items in the Workstation on a single screen, using multiple tabs. All this data is downloaded to the device when the FOO logs in to the device.

First-Time Downloading of FOO Data

If this is the first time you are using the 3in1 Tool on this device, or after a software update, you will need to log in and download user data, assigned purchase requests, procurement controls, PIIN blocks, and all other necessary data to the device. This is referred to as *provisioning data* in the 3in1 Tool. Included in the downloaded is a list of FOO/PA teams authorized to use the device and their passwords, so that they can log in and use the 3in1 application.

It is assumed the KO has already registered and approved your device, and also assigned the device to a team consisting of the FOO and a PA.

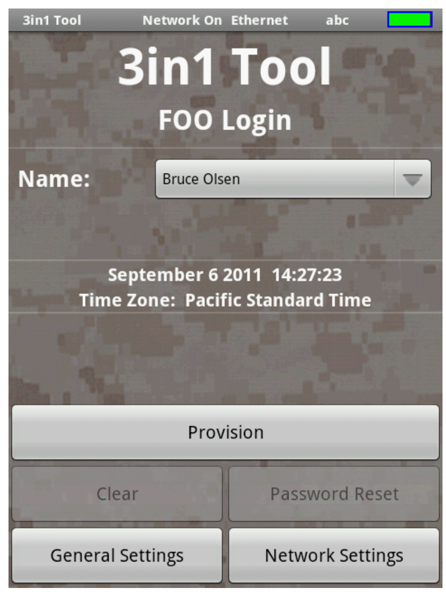
To log in to the device and download data from the Workstation:

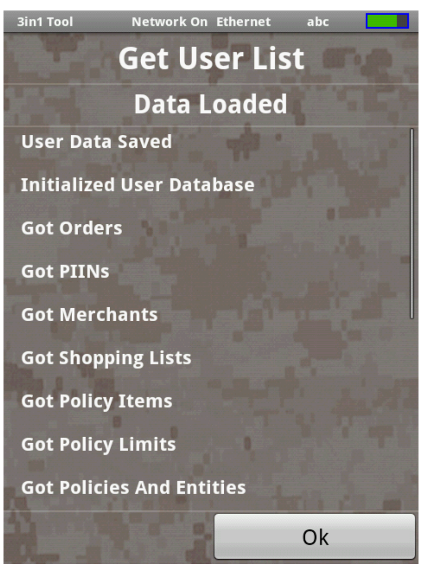
1. Power on and unlock the device, as described in *Module 3: Application Familiarization, Lesson 4: Navigating the 3in1 Device Application.*
2. Tap **Accept** on the *Consent Provision* screen.

– ***Note***: If the *Out of the Box* screen is displayed and **Register Device** or the **Get FOO List** button is visible, it has not completed the registration or provisioning process. See the section, *Complete Registration and Provision Process,* at the end of this lesson.

– The *Login* screen is displayed.

3. Select your name from the **Name** drop-down list.
4. On the *Login* screen, tap the **Provision** button. The *Get User List* screen is displayed as data is downloaded to the device.

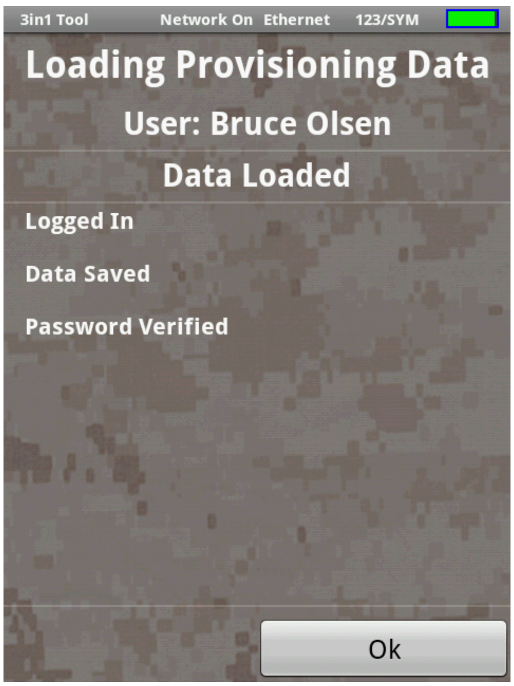




5. Enter your login password in the *Enter Password* pop-up screen. This is the password you created when you registered on the 3in1 Workstation. Tap OK.

6. The *Loading Provisioning Data* screen shows the password is verified. Tap **OK** to continue to the device *Dashboard*. Now the device is ready to begin making purchases.

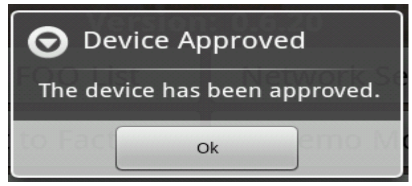
Note the user's role is displayed in the title bar of the *Dashboard* screen.



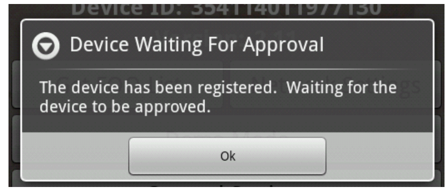
Completing the Registration and Provisioning Process

Usually, the Contracting Officer completes the registration process and initial provisioning. However, if the device is not ready for the FOO to log in (the **Register Device** button or **Get FOO List** button is displayed), **the FOO may need to perform the following steps**:

1. Tap the **Register Device** button to send the device certificate to the Workstation. (The device must be connected to the network.)
2. The KO registers and approves the device on the Workstation.



3. Once the KO uses the Workstation to provision the device to a FOO/PA, the **Register Device** button changes to **Get FOO List**. Tap the **Get FOO List** button to download the users assigned to the device.
4. The device approval status is checked first. If the device has been approved, a message is displayed. Tap **OK**.



   – If the device has been approved on the Workstation, but the *Device Waiting For Approval* message is displayed, verify that you are connected to a network and the correct environment. See *Module 14: 3in1 Device Tools & Settings, Lesson 1*: *Device Settings*.

5. The *Get User List* screen displays data as it is received from the Workstation. Tap **OK** when the download is finished.

Lesson Summary

In this lesson, you learned how to:

- ❑ Log in to the device for the first time
- ❑ Download assigned purchase requests, procurement controls, PIIN blocks, and other necessary data

Part 2b: Execution: Purchasing Process

Module 5: The Ordering Process

Lesson 1: Creating Vendors on the 3in1 Device

Objectives

After completing this lesson, the participant will be able to:

- ❑ Create a list of vendors on the device, to save time on future orders
- ❑ Edit vendor information

Creating a Vendor

FOOs making regular purchases from a known set of vendors are encouraged to enter vendor information all at once when using the 3in1 Tool for the first time. Creating a merchant list saves time at the vendor's location and reduces exposure to potential danger.

The device has the capability to store a directory of merchants. This directory is useful to the FOO for several reasons:

- The FOO doesn’t need to re-type the merchant’s information for every order. The merchant’s name, address, and other contact information are stored and can populate an order.
- The FOO can review a list of merchants, to see their addresses and contact information, which makes shopping easier.
- The FOO can view comments about merchants, such as, “has good prices”, or “fluent English speaker”, to make shopping easier.

The merchant directory can be edited and merchants can also be deleted from the list, if needed.

Once entered, a vendor’s information is stored on the device. To make subsequent purchases from the vendor, simply select the vendor from the *Select Merchant* screen.

To add a vendor from the Dashboard:

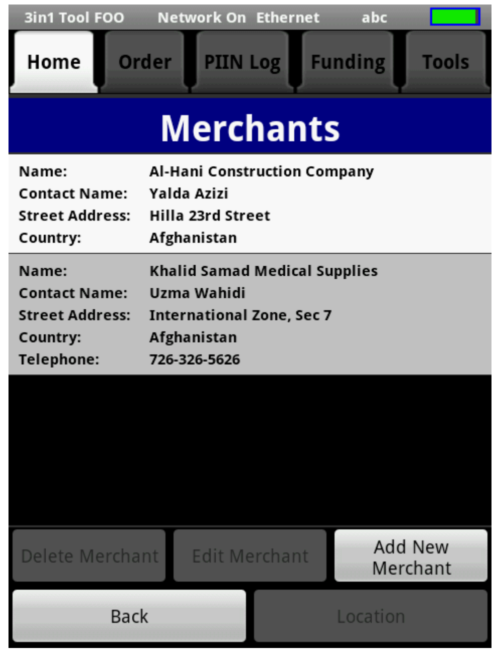
1. Tap the **Vendor List** button.
2. Tap the **Add New Merchant** button.
   – The *Add New Merchant* screen is displayed, as shown below.
3. Populate each of the fields with the vendor’s information.

4. Tap the **Save** button.

Required fields are marked by asterisks (*). The **Name** field should be populated with the name of the business. The **Contact Name** field should be populated with the name of the owner or point of contact. All of the fields are editable. Please note foreign addresses may not match the U.S. system.

The new vendor is displayed in the *Merchants* screen.

Add New Merchant Screen



Merchants Screen Shows Added Merchants

Editing Vendor Information

All vendor information is editable. To make updates and changes to vendor information, from the *Merchants* screen:

1. Tap a vendor. When a vendor is selected, the background color will change to blue and a green check mark will display.
2. Tap the **Edit Merchant** button.
3. Edit information as required.
4. Tap the **Save** button.

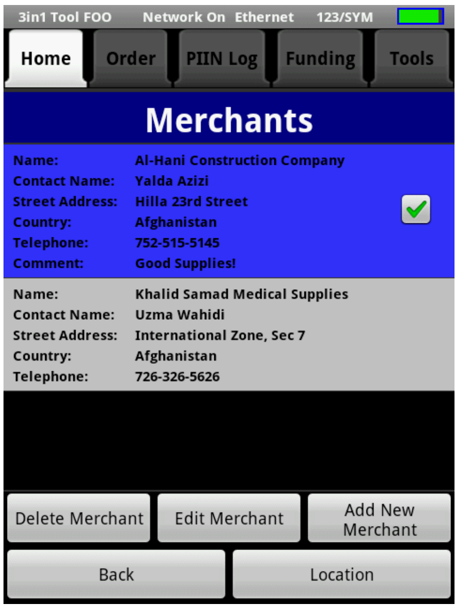
If it is easier to type using the onscreen keyboard, use the **Tools** tab to access the *General Settings* screen and select **Onscreen Keyboard**, which is shown to the right. (To disable the onscreen keyboard, press the F4 key on the device's keyboard.)

Deleting a Vendor

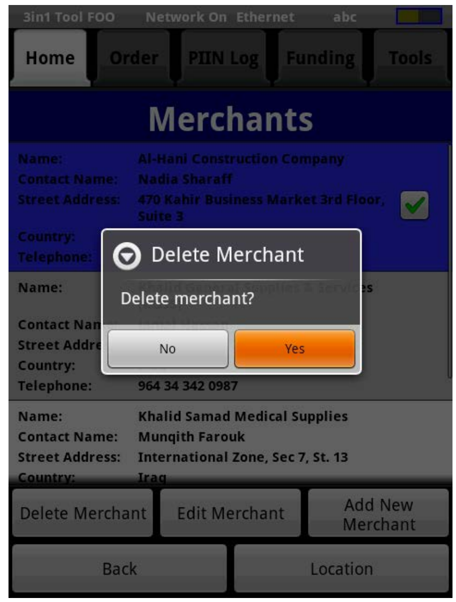
To delete a vendor:

1. On the *Merchants* screen, select the vendor.
2. Tap the **Delete Merchant** button.
3. Tap **Yes** on the *Delete Merchant* confirmation dialog.

Note that when a merchant is deleted, the merchant information is retained in all orders that have already been placed with that merchant. However the merchant will no longer display on the *Select Merchant* list.



Merchants Screen

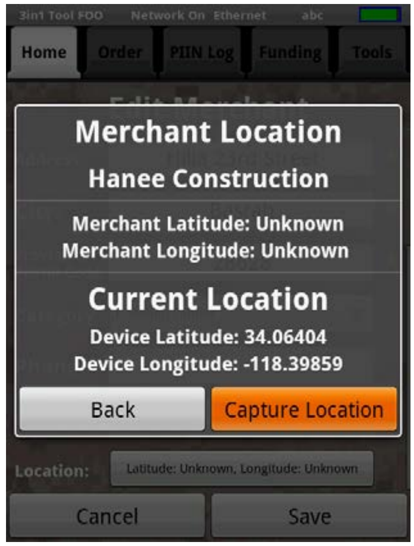


Delete Merchant Confirmation Dialog

Capturing Merchant Location

Use the Location button on the *Merchants* screen to capture the latitude and longitude of the merchant location. (Note that the device setting **GPS Enabled** must be selected in order to use this feature. Refer to *Module 14: 3in1 Device Tools & Settings, Lesson 1: Device Tools* for details.)

1. Tap the **Location** button on the *Merchants* screen to open the *Merchant Location* popup.



2. Verify the Current Location displays actual coordinates. If you are indoors, the Current and Order location will display as “Unknown” for both latitude and longitude. GPS generally does not work indoors.
3. Tap the **Capture Location** button. The coordinates can be viewed in the **Location** field on the *Edit Merchant* screen.

GPS Tips:

- The device must have an unobstructed view of a large portion of the sky to receive signals from a minimum of two GPS satellites.
- It can take several minutes to acquire a GPS signal, and up to a minute for the GPS location to update.
- GPS must be authorized to be available. The Capture Location feature is also available on the *Purchase Details* screen; see *Module 5: The Ordering Process*, *Lesson 2: Making a Purchase* for details.

Lesson Summary

In this lesson, you learned to:

- ❑ Create a list of vendors on the device, to save time on future orders
- ❑ Edit vendor information

Lesson 2: Making a Purchase

Objectives

After completing this lesson, the participant will be able to perform the following actions using the 3in1 handheld device:

- ❑ Use the Market Research tool to conduct price comparisons among vendors
- ❑ Select a Purchase Request (PR) to use for an order
- ❑ Enter information for the unit being furnished with purchased items
- ❑ Select a merchant to use for the order
- ❑ Add items to an order
- ❑ Add tax, shipping and discounts to orders
- ❑ Understand that procurement controls can trigger warnings or prevent some purchases
- ❑ Understand when a PIIN is assigned and know that a PIIN cannot be un-assigned.
- ❑ Name the parties that must sign the PIIN Log to verify the order transaction
- ❑ Print an SF44
- ❑ Take usable receipt pictures from the device, using the built-in camera
- ❑ Capture GPS coordinates if required

Recording purchase information (orders) is the heart of the 3in1 Tool system. Instead of using the paper SF-44, the 3in1 Tool records all the necessary purchase information.

It is important for FOOs to understand that completing a purchase on the device creates a contract between the government and the merchant. The FOO is acting as an authorized agent of the government in creating the contract. Only the FOO can place an order on the device.

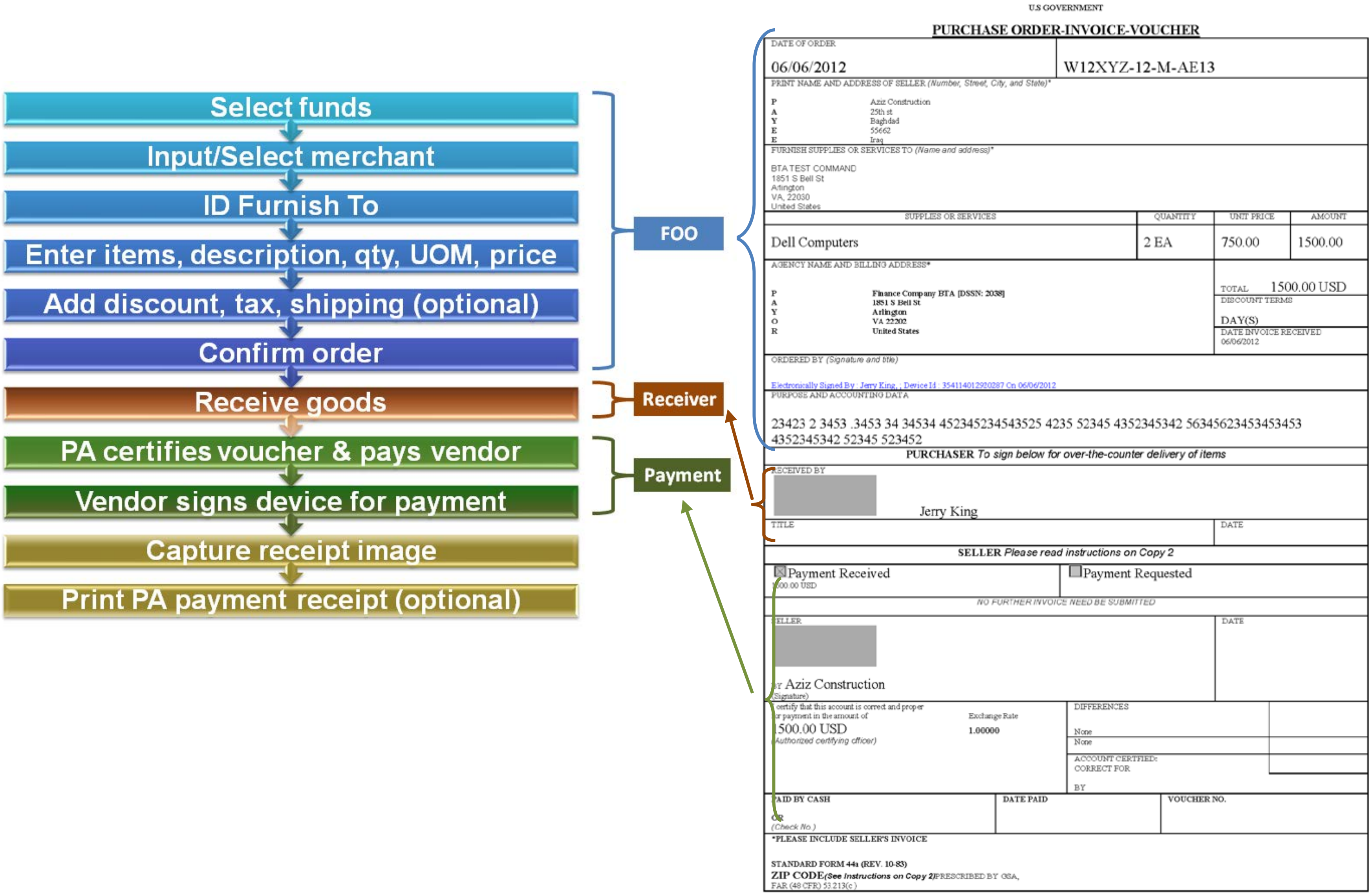
Due to the fact that this is a contract, it cannot be edited after it is agreed upon by the FOO and the merchant. In fact, the purchase data are cryptographically signed by a key on the microSD card in the device, so it is impossible to alter them.

However, the 3in1 application does provide tools to manage orders, such as cancelling or returning orders and correcting mistakes in an order. These tools are described in *Module 6: Ordering and Financial Features on the Device, Lesson 2: Returning and Rerunning Purchase Orders on the Device.*

It is also important to understand that when a purchase is finalized, it is assigned a PIIN. Once a PIIN is assigned, it cannot be unassigned and the order cannot be altered.

Ordering using the 3in1 Tool is based on filling out orders using the Standard Form 44 (SF44), as shown in the following figure. The three main functions are: FOO, Receiving, and Payment.

3in1 Ordering Process **SF44 Order Form**



Before Starting an Order

A procurement control to limit the total authorized purchase amount that a FOO can make on a single order can be established so that the device, once provisioned, will restrict purchases by that FOO to remain below that limit. Procurement controls can also be set up to display an alert to the FOO on the device when they try to procure an item that is restricted or requires special approval. A warning can also be applied to a line item total amount, such as requiring a review when an individual item is over a specified limit.

It may be helpful for the FOO to view procurement controls before starting orders. The FOO will know that certain items cannot be purchased, or require special authorization. View Procurement Controls is a feature available on the device **Tools** tab. See *Module 14: 3in1 Device Tools & Settings*, *Lesson 1: Device Tools* for more information.

The prerequisites to starting an order are to ensure an active cash advance exists for the purchase request that you plan to use and that one or more PIINS are available.

Note: If the date has been changed on the device, you will not be able to start or confirm an order; instead, you will see “Invalid x509 Certificate” error. If this happens, see *Module 13: Device Management Tools* to change the device date.

Market Research Tool

The Market Research tool is useful for price comparisons before making a purchase. Perform three types of Market Research:

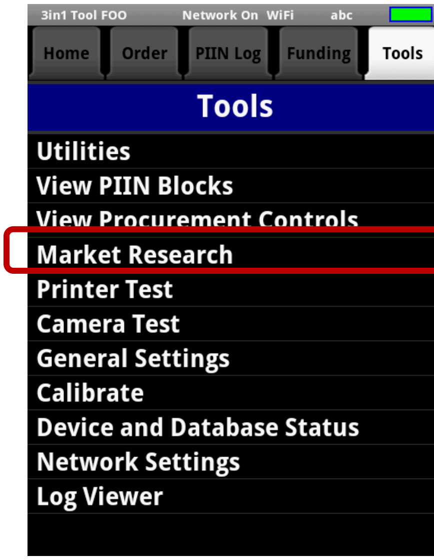
1. **Device only**. Compare items purchased from multiple vendors that were recorded on the local device only.
2. **Prime database only**. Search for purchase information within an entire contracting office. The advantage of this search is access to purchases made by other FOOs on other devices or on the Workstation. Save selected merchant information on your local device.
3. **Device and prime database**. A combination of search types 1 and 2.

Performing prime database searches (2 and 3 above) requires network connectivity. Performing research on the device requires users to log in to the device. **Market Research** can be selected only from the device **Tools** tab. It is not available under **General Setting** on the *Login* screen. This protects vendors; only authorized personnel can access their information.

Market Research on the Device

Perform market research by entering the name of the item to be purchased and searching for vendors who supply the item, and also view their prices. These are vendors from whom purchases have been made using the device.

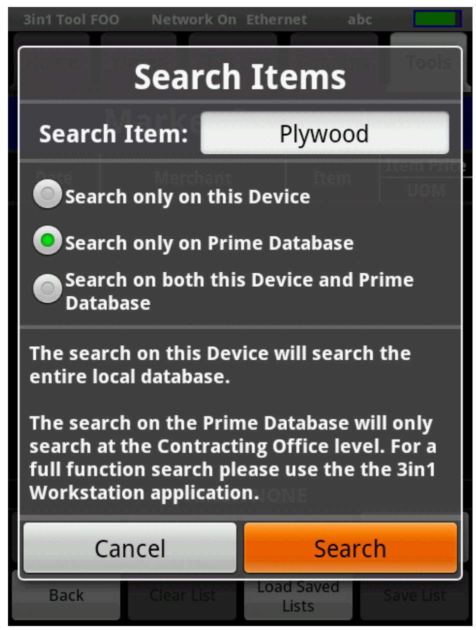
General Steps to Search for Vendors



To search for a vendor based on a purchase item:

1. Log in to the 3in1 Tool on the handheld device.
2. Tap the **Tools** tab.
3. Tap **Market Research** to open the *Market Research* screen.
4. On the *Market Research* screen, tap the **Search** button. The *Search Items* screen is displayed.
5. Enter the **Search Item** name.
6. Select the database you want to search (**Device, Prime Only, Both**)
7. Tap the **Search** button.

Market Research Screen



Search Items Screen – Search only the Prime Database

The search results include the date when each item was purchased, the vendor from whom the purchase was made, and the unit price of the item.

Market Research Screen Displays Search Results

The search results are displayed as line items. Browse the merchant names and prices. From this screen, you can 1) Save merchant information by tapping a merchant name, then selecting the **Save Merchant** button (assuming you did a prime database only search), or 2) View details about a merchant.

To add merchant information from the search results to the vendor list on the device:

1. Tap a line item on the *Market Research* screen. The **Save Merchant** button is enabled.
2. Tap the **Save Merchant** button.
3. The *Add New Merchant* screen is displayed with the merchant information filled in. Tap the **Save** button.

To view additional details about a merchant:

1. Tap a line item on the *Market Research* screen. The **View Item Details** button is enabled.
2. Tap the **View Item Details** button.

The *Market Research Item Details* screen displays. This screen displays the complete merchant address and phone number, and most recent transaction information. The buttons on this screen:

– **Back** - Returns to the *Market Research* screen
– **Print –** Prints vendor details, if a printer is connected to the device and powered on
– **Save Merchant** - Saves the merchant to the vendor list on the device
– **Start New Search –** Returns to the *Search Items* screen

Market Research Item Details Screen

Searching and Saving Results from the Prime Database

Searching and selecting merchants from the prime database enables FOOs within a contracting office, who make purchases in the same area, to share vendors. A new FOO can use this feature to become familiar with vendors from previous purchase orders. Prime database searches can be performed only while network connectivity is available. However, the search results can be saved to the local device and recalled later when no network connection is available.

To save the results from a prime database search as a list on the local device:

1. Conduct a search on the prime database only, following the steps above. The search results are displayed on the *Market Research* screen.
2. Tap the **Save List** button on the *Market Research* screen.
3. Enter a name in the **List Name** field of the *Market Research Save Results* screen.
4. Tap the **Save** button.

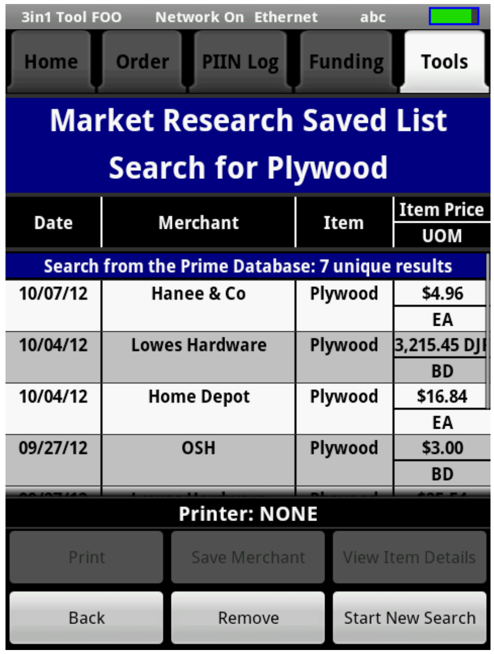
Market Research Screen – Search Results

Market Research Save Results Screen

A message states that the search results list will be saved for the next 90 days. Then the list will be deleted from the *Market Research Saved List* screen.

Save Results Message

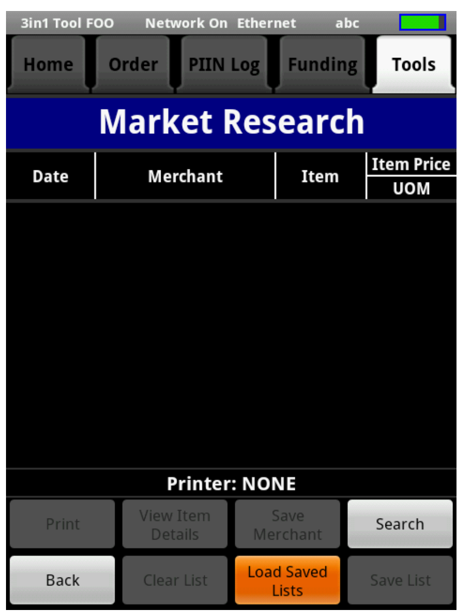
After you tap **Yes** on the *Save Results* popup, the list is added to the *Market Research Saved List* screen.



Market Research Saved List Screen

If there are too many saved lists, it is not necessary to wait 90 days before deleting a list. Select a list on the *Market Research Saved List* screen, and then tap the **Remove** button to delete the list.

To retrieve saved merchant lists, tap the **Load Saved Lists** button on the *Market Research* screen, as shown below.



Market Research Screen – Tap the Load Saved Lists button to view search results saved from the prime database

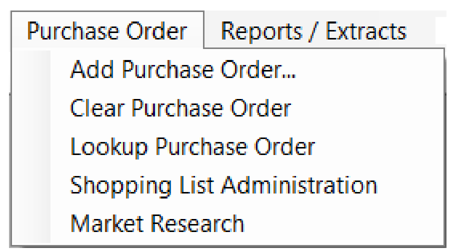
Printing Market Research Information

Both the *Market Research* and *Market Research Saved List* screens have a **Print** button. Enable the **Print** button by connecting the printer to the device and turning on the power. Tap the **Print** button.

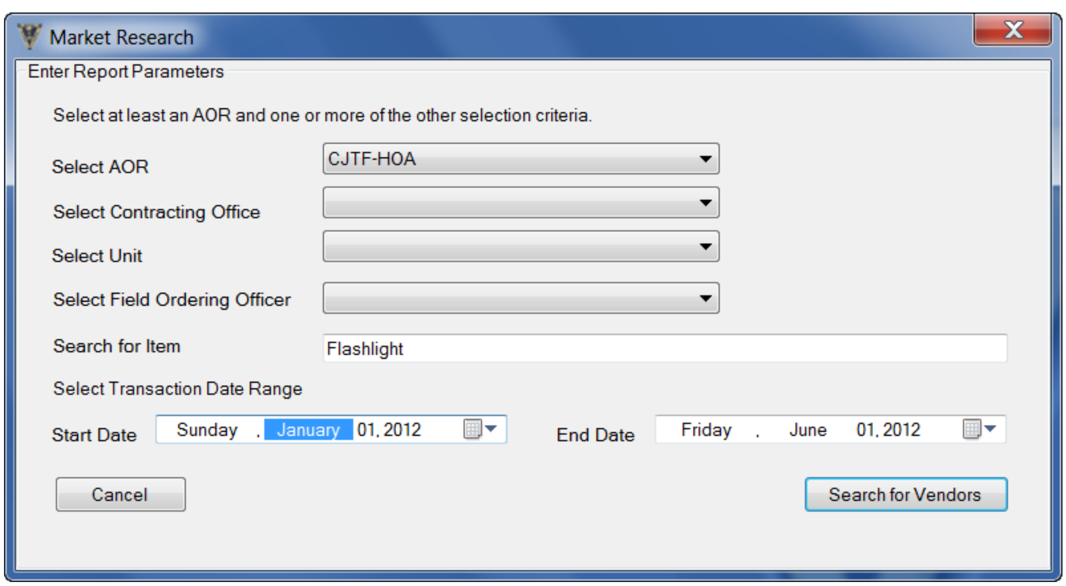
Market Research on the Workstation

The **Market Research** tool on the Workstation can be accessed through the **Purchase Order** menu. Enter the name of the item you want to purchase and search for vendors in the prime database who supply the item, and also view their prices. These are vendors from whom previous purchases were made by the AOR.

To use the Market Research feature on the Workstation:

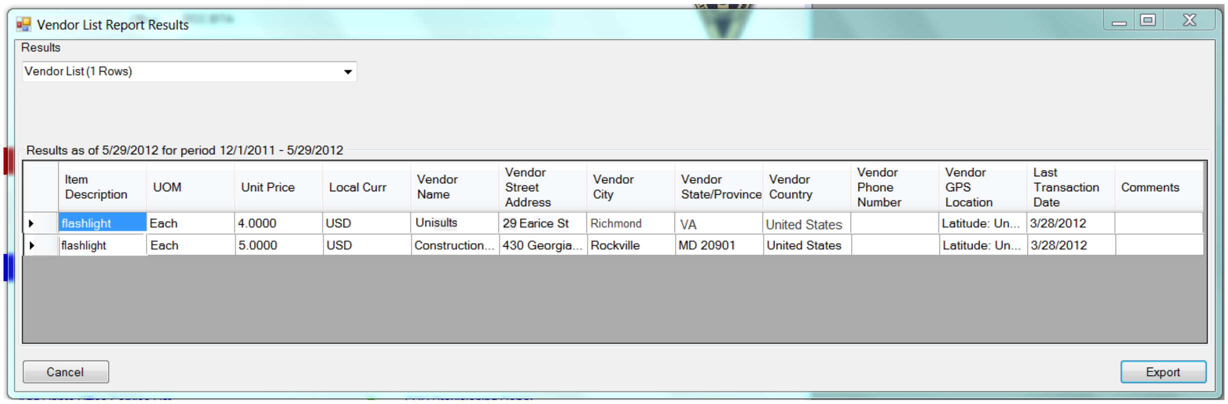


1. Select **Purchase Order**, **Market Research** to open the *Market Research* dialog box.
2. Select the AOR. The other search criteria drop-down fields are optional.
3. In the **Search for Item** field, type the full name of the purchase item.
4. Specify the **Start** and **End Dates** for the purchased item. The specified item must have been purchased within the specified date range in order to be displayed in the search results.
5. Click the **Search for Vendors** button.



Market Research Dialog Box

The search results are displayed in a new window, as shown below.



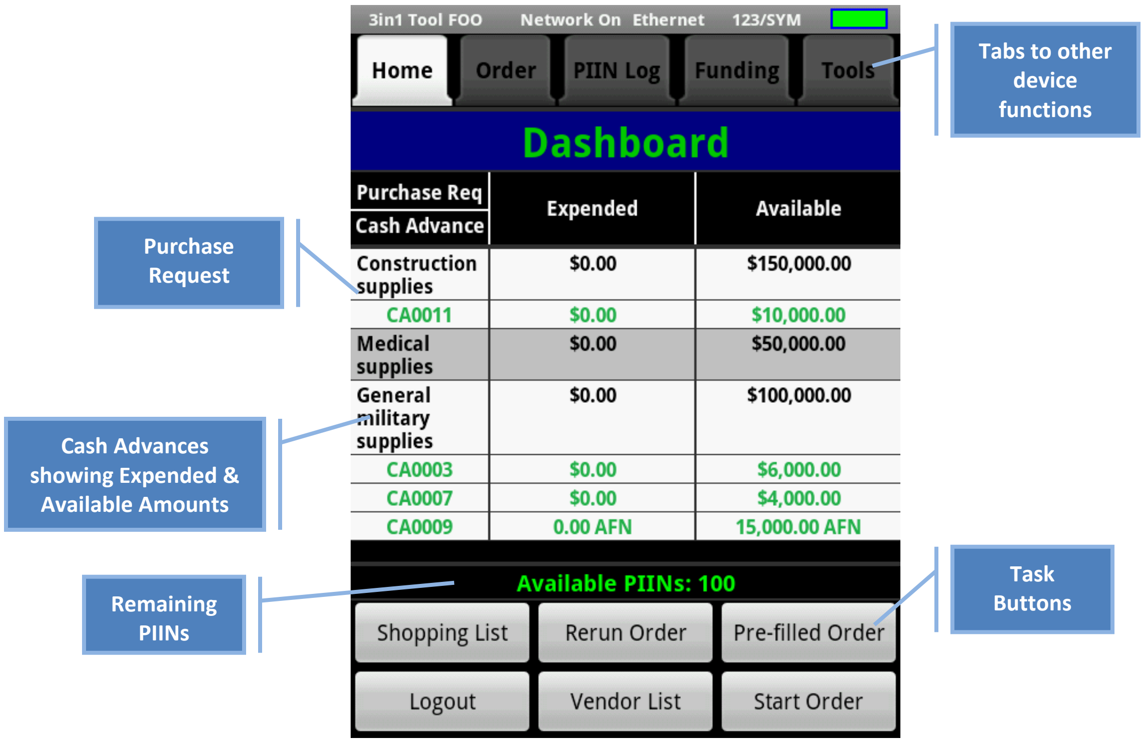
Item Description	UOM	Unit Price	Local Curr	Vendor Name	Vendor Street Address	Vendor City	Vendor State/Province	Vendor Country	Vendor Phone Number	Vendor GPS Location	Last Transaction Date	Comments
flashlight	Each	4.0000	USD	Unisults	29 Earice St	Richmond	VA	United States		Latitude: Un...	3/28/2012	
flashlight	Each	5.0000	USD	Construction...	430 Georgia...	Rockville	MD 20901	United States		Latitude: Un...	3/28/2012	

Vendor List Report Results

The search results show the specified item in the Item Description column. Other columns report the vendor name, address and GPS location, phone number, price information and last transaction date, as well as comments. Click the **Export** button to export the report to Microsoft Excel, where it can be edited and/or saved.

Starting an Order

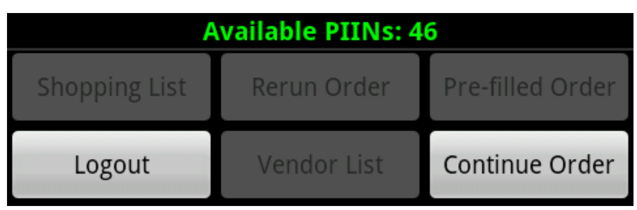
Purchases begin on the device *Dashboard* screen. The *Dashboard* provides helpful information before the purchase starts. For example, if there are not enough available PIINs, you may not be able to start an order. Likewise, you can see how much funding is available and which PRs are available. Finally, the **Shopping List, Rerun,** and **Pre-Filled** order buttons provide ways of saving time while preparing an order. When the user logs in to the device, the first screen displayed is the *Dashboard.*



FOO Dashboard Screen

For definitions of the tabs and buttons on the Dashboard screen, see *Module 3: Application Familiarization, Lesson 4: Navigating the 3in1 Device Application.*

Note: While an order is in process, some device function buttons are disabled. The **Start Order** button changes to **Continue Order**.



Only the absence of an active cash advance or insufficient PIINs can prevent starting an order. It is recommended, but not required, **to create a shopping list** and **enter the vendor information** before starting the order; this saves time during the ordering process, at the merchant location.

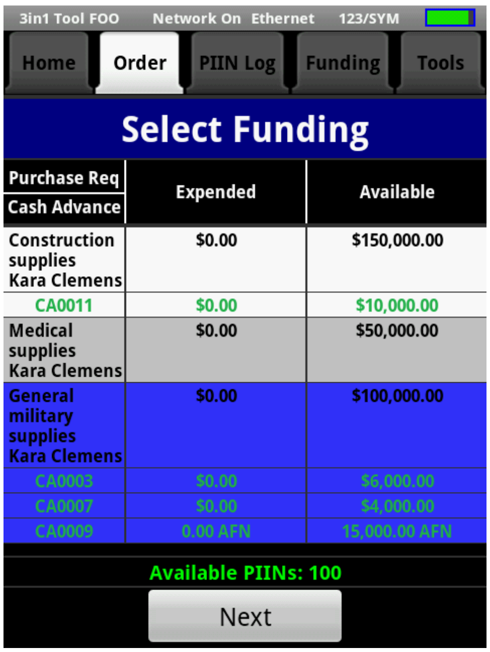
To start an order from the handheld device:

1. On the *Dashboard*, tap the **Start Order** button on the **Home** tab.
   - This advances to the **Order** (Select Funding) tab.
   - You can also start an order from a shopping list, which is explained in *Module 6: Ordering and Financial Features on the Device, Lesson 1: Shopping Lists.*
2. On the ***Order*** tab/ *Select Funding* screen, select a purchase request. Tap the **Next** button.

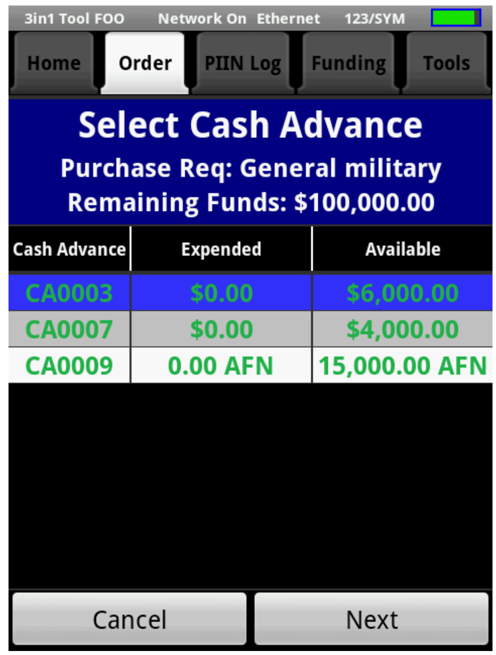
3. The *Select Cash Advance* screen is displayed if there is more than one cash advance associated with the PR. Tap a cash advance that has an available amount greater than zero (check the Available column). Tap the **Next** button.

   – The 3in1 application will track how much money is available to be spent. It will not allow the FOO to obligate more money than is available in the purchase request.

   FOOs should be aware that an RM and DA can update purchase request and cash advances on the Workstation. When the amount is changed, the device will acknowledge the action and the available amount will be changed as required. When a purchase request or cash advance amount is zero, it will be removed automatically from the funds display screen.



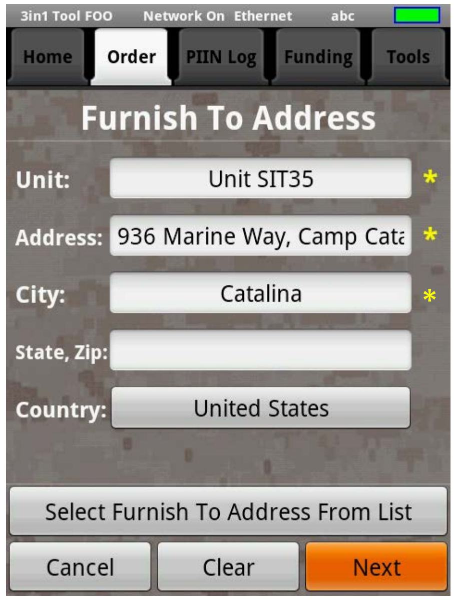
Select a Purchase Request first



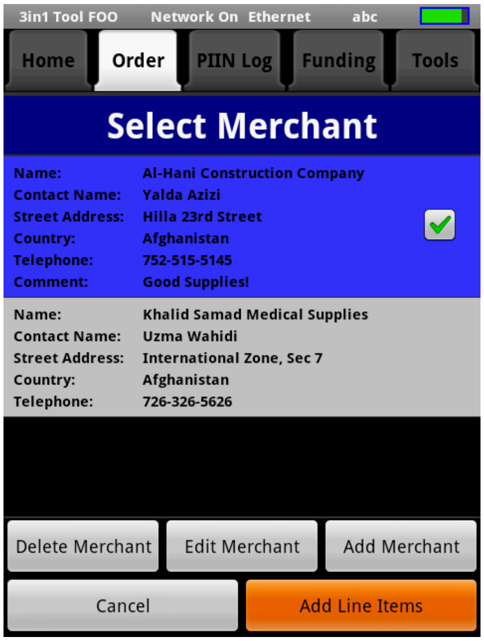
Select a Cash Advance (Green Text)

4. The *Furnish To* screen is displayed. This refers to the unit that will be furnished with the ordered supplies. Fill in the fields and then tap **Next**. Required fields are marked by an asterisk.

   – Each time a new address is entered on the *Furnish To Address* screen, it is saved by the device. This feature saves time by enabling users to select from a list of saved addresses.



5. Select a merchant by tapping one on the screen. (If a merchant has not been entered, tap the **Add New Merchant** button and add one.)
   – The background turns blue and a check mark is displayed, to indicate the merchant is selected. The **Edit Merchant** and **Add Line Items** buttons are enabled.
6. If the merchant information needs to be edited (for example, the phone number has changed), tap the **Edit Merchant** button and make changes on the *Edit Merchant* screen.
   – (If it is easier to type using the onscreen keyboard, use the **Tools** tab to access the *General Settings* screen and select **Onscreen Keyboard**, which is shown below.)



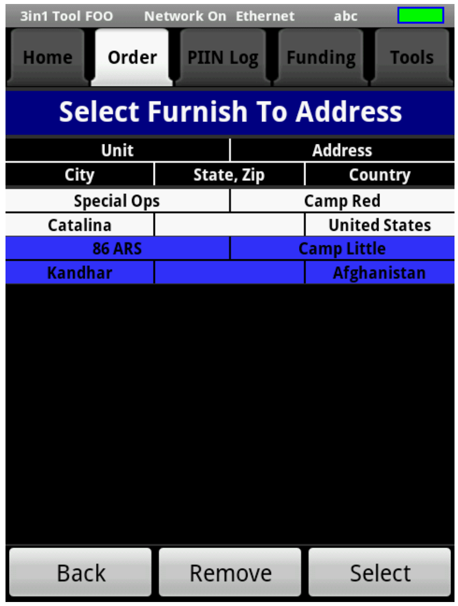
Selecting from a List of Furnish To Addresses

Each time a new address is entered on the Furnish To Address screen, it is saved by the device. This feature saves time by enabling users to select from a list of saved addresses.

1. On the *Furnish To Address* screen, tap the **Select Furnish To Address From List** button.

2. A list of previously entered addresses is displayed. Tap one of the addresses.
3. The selected address is highlighted and the **Select** and **Remove** buttons are enabled. Tap **Select** to select the address.

– To remove an address that is no longer needed, tap the **Remove** button.



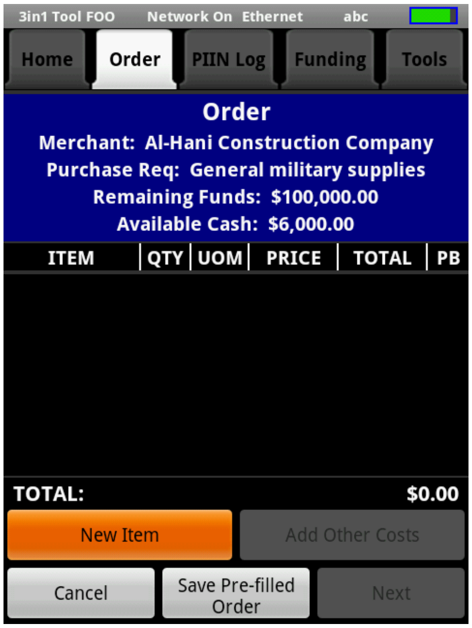
Adding Line Items to an Order

The next step is adding line items to an order. An order consists of a set of line items. Each line item includes a quantity, a description, a unit of measure, and a price. This is similar to the line items in an invoice or a receipt.

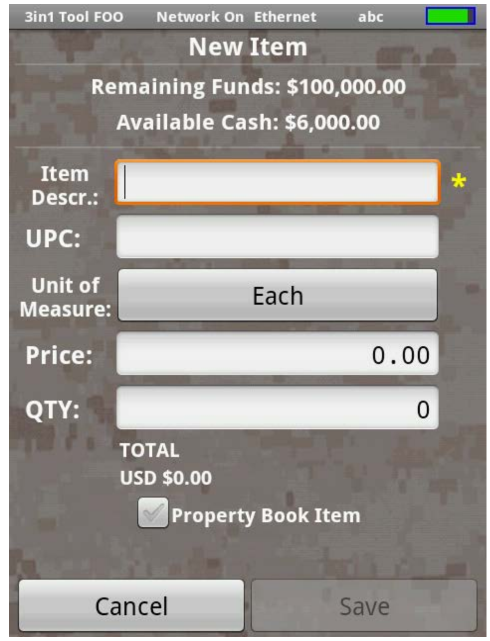
If a shopping list was not created earlier, items can be added during the ordering process. Once an item is added, the **Add Other Costs** and **Next** buttons will be enabled on the *Order* screen. (For information on creating shopping lists, see *Module 6: Ordering and Financial Features on the Device, Lesson 1: Shopping Lists*)

To add items to an order:

1. On the *Merchants* screen, tap the **Add Line Items** button.
   - The *Order* screen displays a summary at the top, consisting of the selected merchant name, PR description, remaining funds, and available cash. Remaining Funds refers to the amount of physical cash remaining in the PA's pocket. However, there may be orders that have been made, but not paid yet, so the Available Cash to spend may be less than the physical cash-in-pocket.
   - Beneath that are data columns associated each line item, such as ITEM (item description), QTY (quantity), UOM(Unit of Measure), PRICE(Cost of individual units), TOTAL (QTY multiplied by PRICE), PB (Property Book). Since this is a new order, the line item area is blank.
2. On the *Order* screen, tap the **New Item** button to add an item.



Order screen before items are added

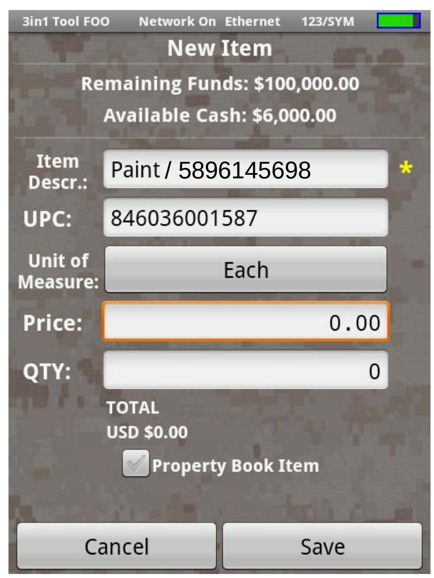


Add New Item Screen

3. The *New Item* screen displays the empty fields, ready to be filled in with information about the item. Enter the item **Name**, such as "Sandbags." If an item has been ordered previously then after the first two characters are entered it will appear in a drop-down list. If the item has a serial number that must be tracked, after entering the name of the item enter a "/" and then use the barcode scanner on the device to capture the serial number in the name field. (See details below on using the bar code scanner)

   – ***Note***: The **Save Pre-filled Order** button is discussed in *Module 6: Ordering and Financial Features on the Device, Lesson 3: Pre-filled Orders*.

   – The **UPC** field is optional. If the item has a bar code, tap the UPC field and scan the bar code by tapping one of the yellow buttons on the front or sides of the device. The scanned number will automatically populate the UPC field. See the notes below for details on scanning. A sample bar code is shown below. The figure on the right shows a populated UPC field.



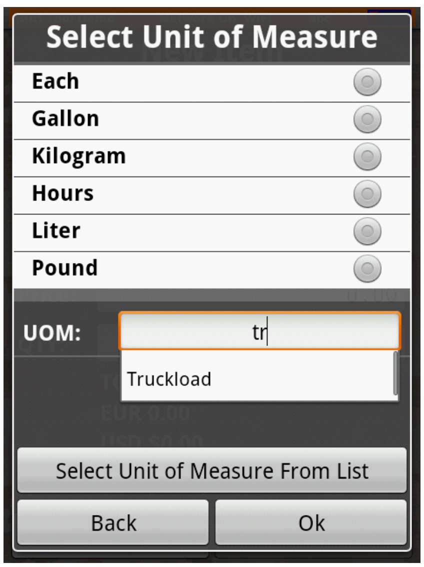
0 80196 30517 2

4. In the **Unit of Measure** (UOM) field, specify the unit of measurement using <u>one</u> of the following methods. Tap OK when you have finished.

    a. Tap inside the **Unit of Measure** field and select one of the standard units, such as Gallon or Pound, from the list shown on the right.

    b. Start typing a few letters in the **Unit of Measure** field, to view other types of units that have been used previously. For example, type "tr" to get "truckload." Select "Truckload" from the popup window and tap OK.

    c. Tap the **Select Unit of Measure** button and select from the list. The list can be scrolled down or up using the up/down arrow keys or touching the screen.

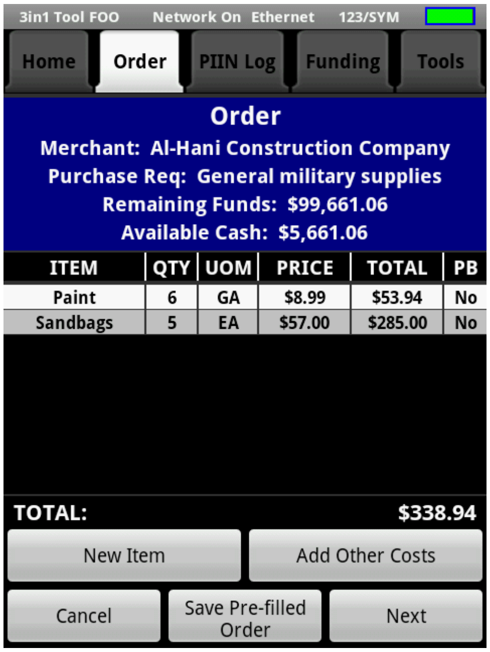


5. On the *New Item* screen, enter the **Price** per unit and **Quantity** information. Note the onscreen calculation of the total price in the pre-selected currency/currencies.

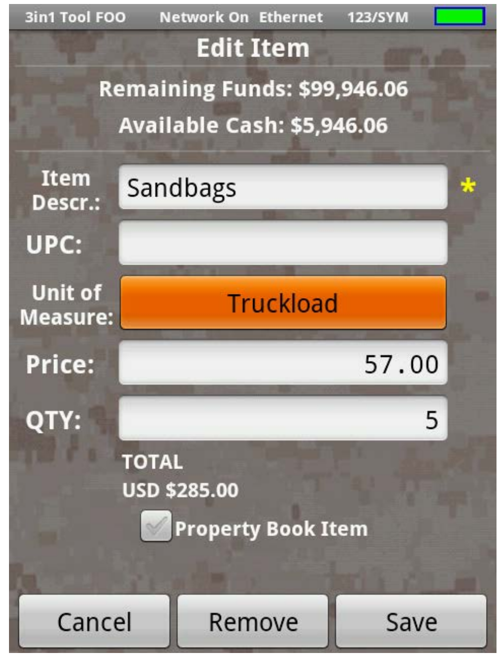
6. Mark the checkbox beside **Property Book Item** to flag the item for Property Book accounting. (Property Book items are listed in reports produced on the Workstation.)

7. Tap the **Save** button to return to the *Order* screen.

The following figure shows an order with line items added.



Order with Line Items



Edit Item Screen

To add another item, tap the **New Item** button. To correct a mistake for an existing item, tap the item on the *Order* screen, then make and save the edits on the *Edit Item* screen.

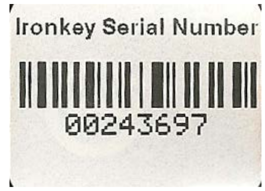
Notes on Scanning the UPC

When capturing the UPC field on the *New Item* screen or adding a serial number to the item description field, follow these guidelines:

1) Ensure the Bar Code Scanner is enabled before attempting to capture the code. (See *General Settings* under the **Tools** tab for more information in enabling and disabling the bar code scanner; *Module 14: 3in1 Device Tools & Settings*.)
2) Tap inside the field you want to store the number in before attempting to scan a bar code. When the bar code is scanned, it will populate the field that is currently selected ("in focus").
3) The bar code scanner is located at the top of the device. Position the top of the device, about 1 to 5 inches, over the bar code.

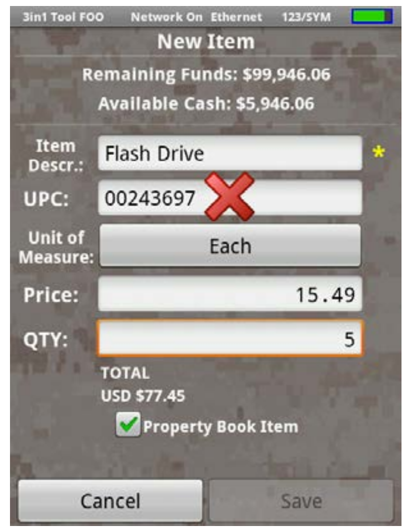
4) The UPC number can be 8, 12, 13 or 14 digits. Some items may have a UPC and a Serial number. Capture the correct bar code. The **Save** button will be de-activated if an incorrect bar code is captured.

Capture this Bar Code

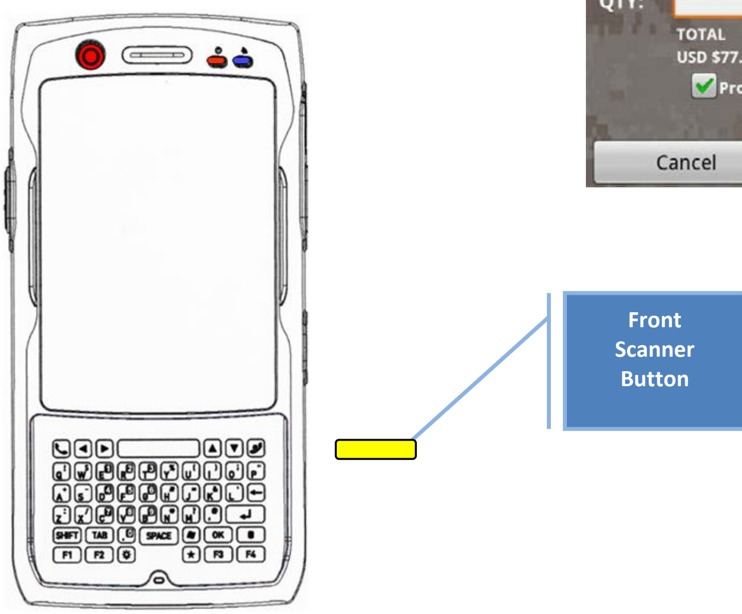


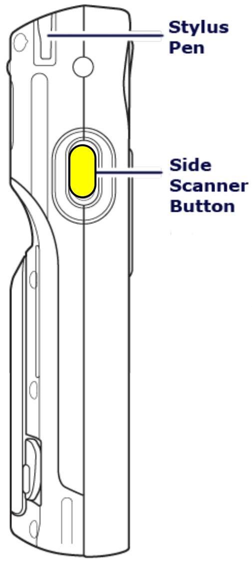
Serial Number

In the figure on the right, the product serial number was captured instead of the UPC number. Even though all other fields are correctly populated, the **Save** button is not enabled.

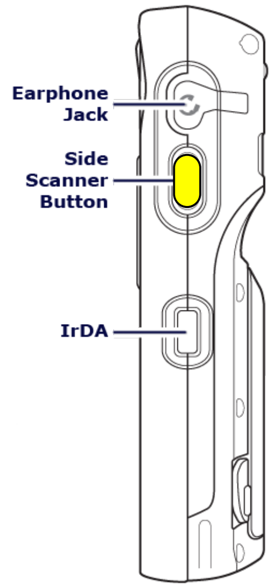


5) To scan bar code, tap one of the yellow buttons located on the front or sides of the device, as shown in the figures below.





Device Left Side View



Device Right Side View

6) Once the UPC field is captured, the **Price** field is automatically selected. Avoid pressing the bar code capture button twice as the UPC code will also populate the price field.

Notes on Entering the Unit of Measurement

The unit of measurement is set to **Each** by default. The device has a Conversion Calculator that converts units of measurement. Conversions can be performed in the categories of length, weight, area, volume and time. For more information on the Conversion Calculator, see *Module 14: 3in1 Device Tools & Settings, Lesson 1: Device Tools*.

The device has a standard mathematical Calculator and a Generic Currency Converter, which converts a specified amount from a foreign currency to USD or from USD to a foreign currency. Both of these are available through the device **Tools** menu; see *Module 14: 3in1 Device Tools & Settings, Lesson 1: Device Tools*.

Tips on Entering Quantities

In the **Quantity** field, enter the number of units of an item that will be purchased. Depending on the unit selected the Quantity field may or may not have decimals. For example, the unit, **Each**, does not have decimal places, while **Gallon** does.

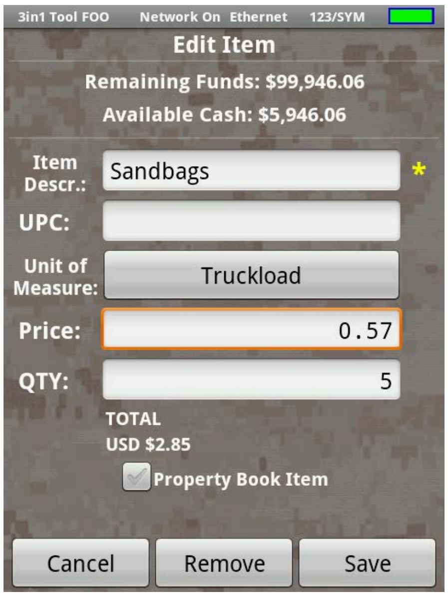
Some vendors may have items in bulk. The item may be sold in a unit, but is not delivered in that unit. For example, a vendor may have a tap which dispenses water. The water is sold in liters. The buyer brings a container and is billed according to the number of liters, including fractions, used to fill the container. Therefore, some fields allow decimals, while others do not.

If decimal places are allowed, the quantity is precise to three decimal places. For example, to enter 20 gallons, type 20000.

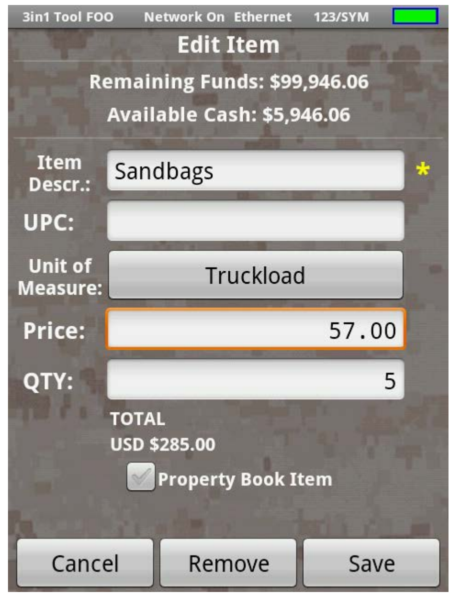
Entering Decimal Amounts on the Device

The device uses "ATM-style" number entry. This means that it is never necessary to enter the decimal point. Instead, enter enough digits to represent the correct amount. For example, in the figure to the left below, the user has typed "5" "7" which displays as "0.57" – the decimal is added automatically.

If the user types two more zeros, the price changes from "0.57" to "57.00" as shown in the figure below.



Entering "5 7"



Entering "5 7 0 0"

Price and Quantity

The unit cost of an item is entered in the **Price** field. Prices are precise to two decimal places.

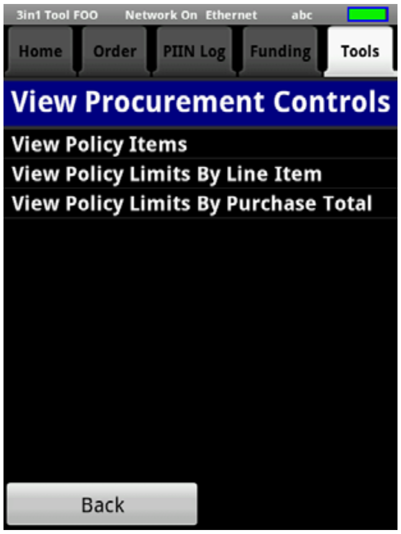
The value shown above the Price fields is the product of the price and quantity. When entering the price, ensure the **Quantity** field is blank or 1, so that the correct unit price displays above the price field.

If the cash advance is in a currency other than USD, the equivalent amount in USD will also display above the Price field.

Note: Be sure to double-check the amounts before saving, especially for correct placement of decimals.

Procurement Controls

Procurement controls defined on the Workstation are downloaded from the prime database during provisioning. FOOs can view their procurement controls on the **Tools** tab.



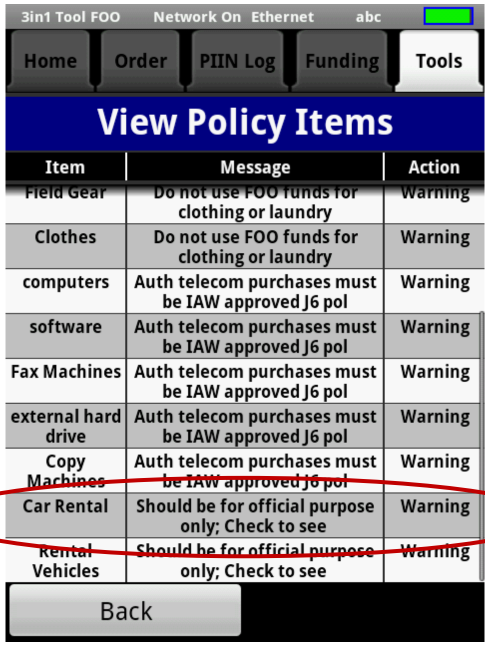
Procurement Controls Screen

Examples of Procurement Control Policy

Policy Type	Cause	Control Applied
Item	Unexpected Item, e.g., Beer or Cigarettes	Warning
Price	Price Too High, even if Price × Quantity does not exceed Remaining Cash	Prevent or Warning
N/A or None	Price × Quantity exceeds Remaining Cash	Prevent

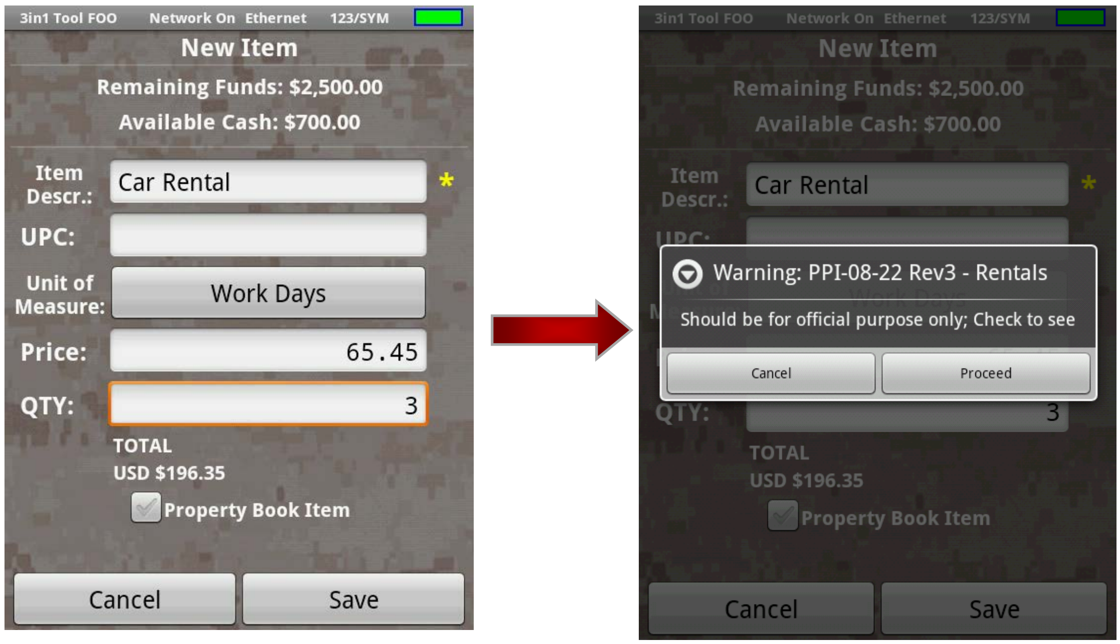
View Policy Items

Items with restrictions can be viewed by selecting **View Policy Items**.



View Policy Items Screen

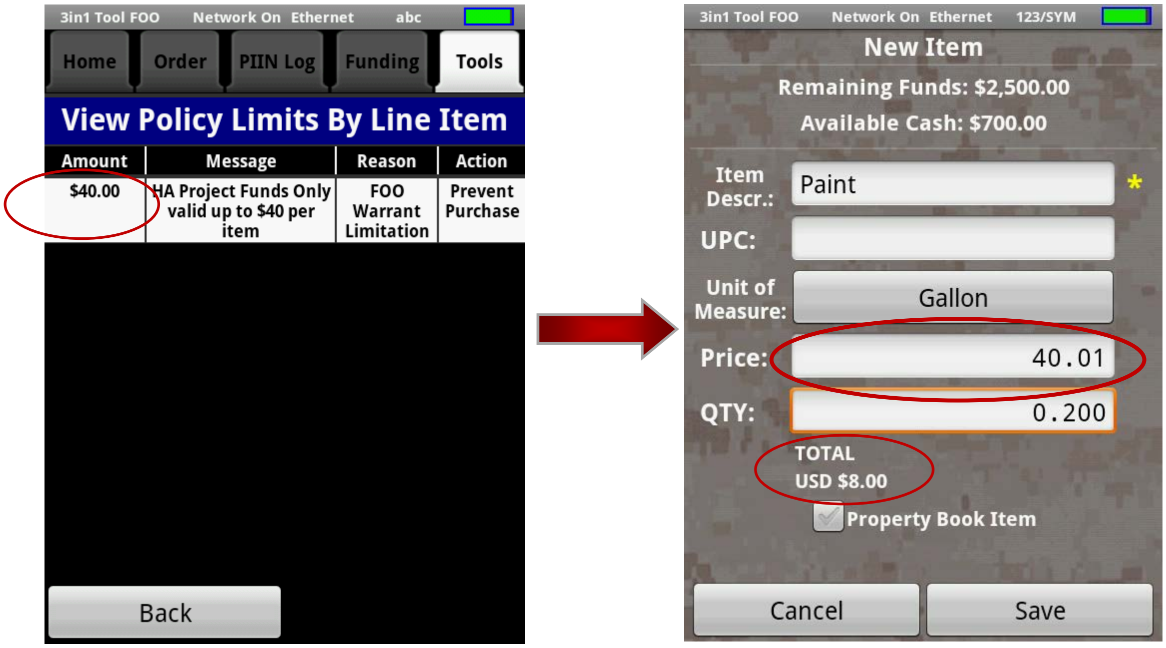
A warning is issued when an attempt is made to purchase any of the items on this list, as shown in the figure below.



When an attempt is made to purchase an item that is on the View Policy Items list, a warning is displayed. The FOO should check for compliance, then tap Proceed or Cancel.

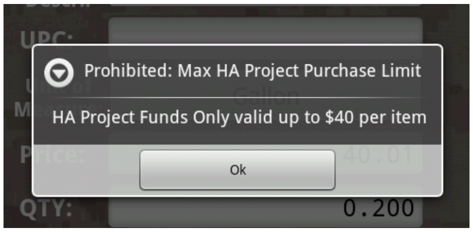
View Policy Limits by Line Item

FOOs can review price-based procurement limits for line items by selecting **View Policy Limits by Line Item** on the **Tools** tab - **View Procurement Controls** screen. Line item price controls regulate the amount entered in the **Price** field at the time of adding a line item. A warning may be issued or purchase of the item may be prevented altogether, depending on how the policy was configured. Note that a purchase can be prevented even if the line item total is less that the policy amount. In the example shown below, the policy limit for a line item is $40. When a new item is added, the line item total is only $8, but the **Price** amount is exceeds $40, so the purchase is prevented.



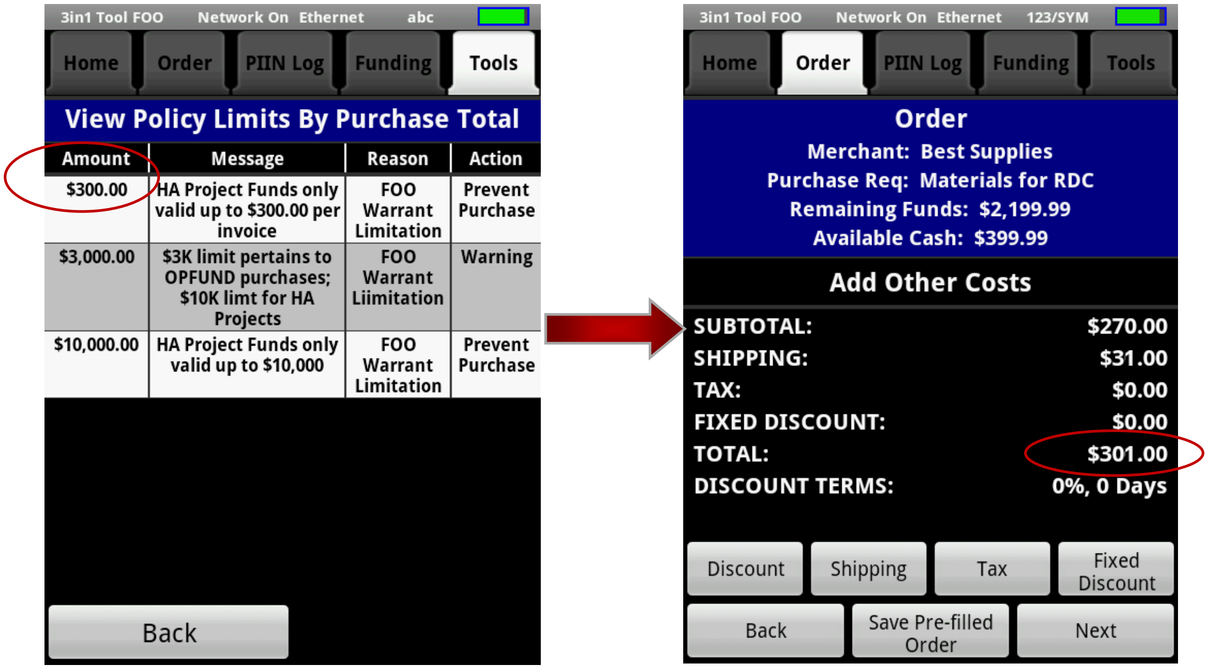
Although the line item total shown is only $8, the Price amount exceeds the policy amount, so the line item policy is enforced; either a warning is displayed or the purchase is prevented.

When the user taps **Save**, the following message is displayed.



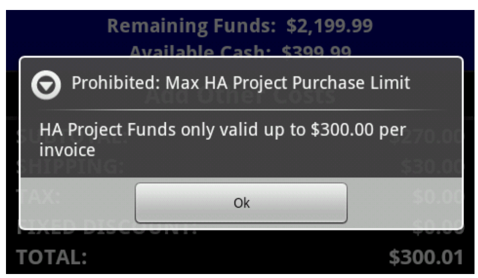
View Policy Limits by Purchase Total

FOOs can also review procurement limits for purchase totals, which regulate the amount spent on an order, inclusive of additional costs such as shipping. Select **View Policy Limits by Purchase Total** on the **Tools** tab - **View Procurement Controls** screen. A warning may be issued or the purchase may be prevented altogether, depending on how the policy was configured.



The policy states the purchase total cannot exceed $300. The purchased items total $270, but the shipping cost of $31 pushes up the total to $301, which triggers enforcement of the procurement control policy.

The following message is displayed when the total purchase amount exceeds the amount defined in the procurement control policy.



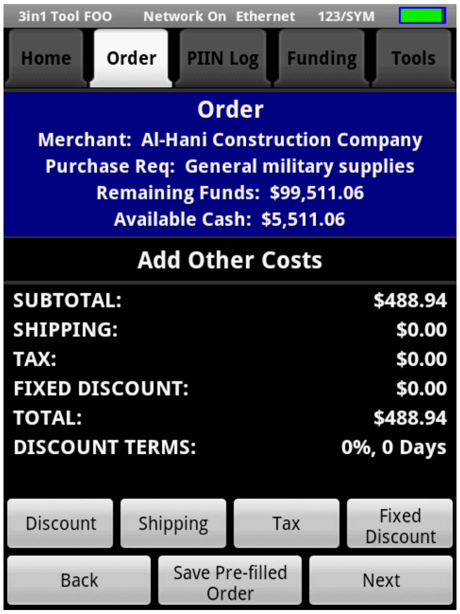
Additional Fields: Tax, Shipping, and Discounts

Discounts, shipping costs and taxes can be applied to an order as a whole, but not to individual items. Shipping is a fixed cost, while tax and discount are specified as a percentage of the order total or a fixed discount amount. Not all orders will have tax, shipping, and/or discounts.

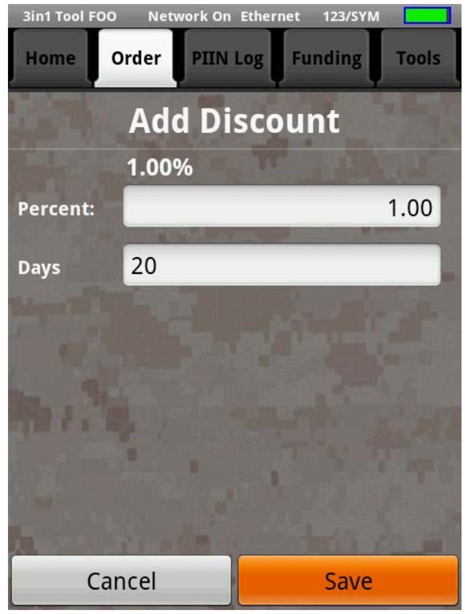
To add discounts from the *Order* screen:

1. Tap **Add Other Costs**.
2. On the *Add Other Costs* screen, tap **Discount** to add a discount percentage. . This may be called the “terms discount” because it is the way the payment terms are expressed.
3. Enter the required discount information.

- Discounts are based on the number of days in which the government pays. This feature can also be used if the vendor offers a general discount not tied to payment days. You would enter the percentage and specify 1 as the number of days.
- Another example is if a vendor offers a 1% prompt payment discount on bills paid within 20 days, it is entered as follows:



Add Other Costs Screen



Add Discount to an Order - 1% prompt payment discount on bills paid within 20 days

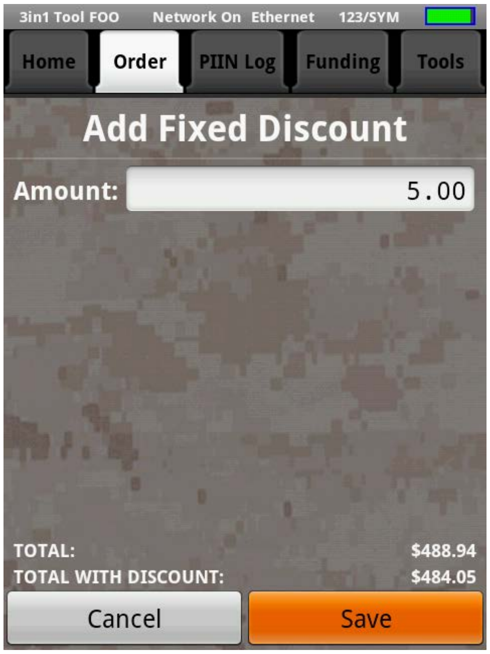
If the discount is offered for immediate payment, simply enter 1 day as the term.

As with currency, the percent is entered "ATM-style": to enter 1.00%, enter "1", "0", "0". Discounts will not be applied until item is paid for. Also, discounts display at the bottom of the SF44, in the Payment section.

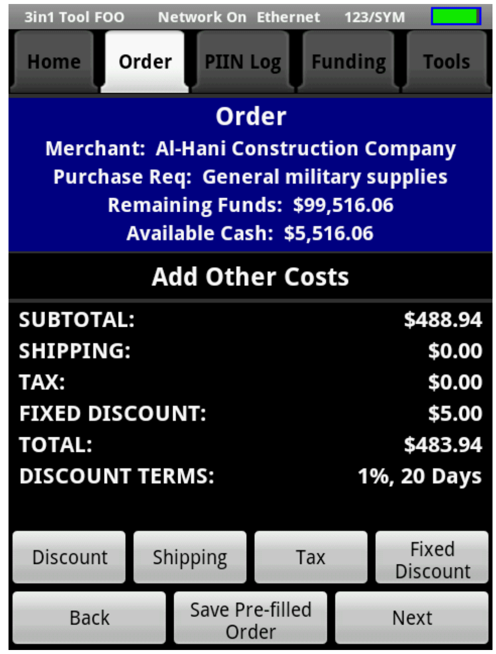
In some situations, a fixed discount amount is applicable. For example, merchants often do not take change, so they may discount the change. Also, a merchant might offer a fixed discount as a coupon: "$10 off if you buy today".

To apply a fixed discount:

1. Tap **Fixed Discount** on the *Add Other Costs* screen.
2. Type the discount amount and tap **Save**.
    - The discount amount is displayed in the **Fixed Discount** field on the *Add Other Costs* screen.



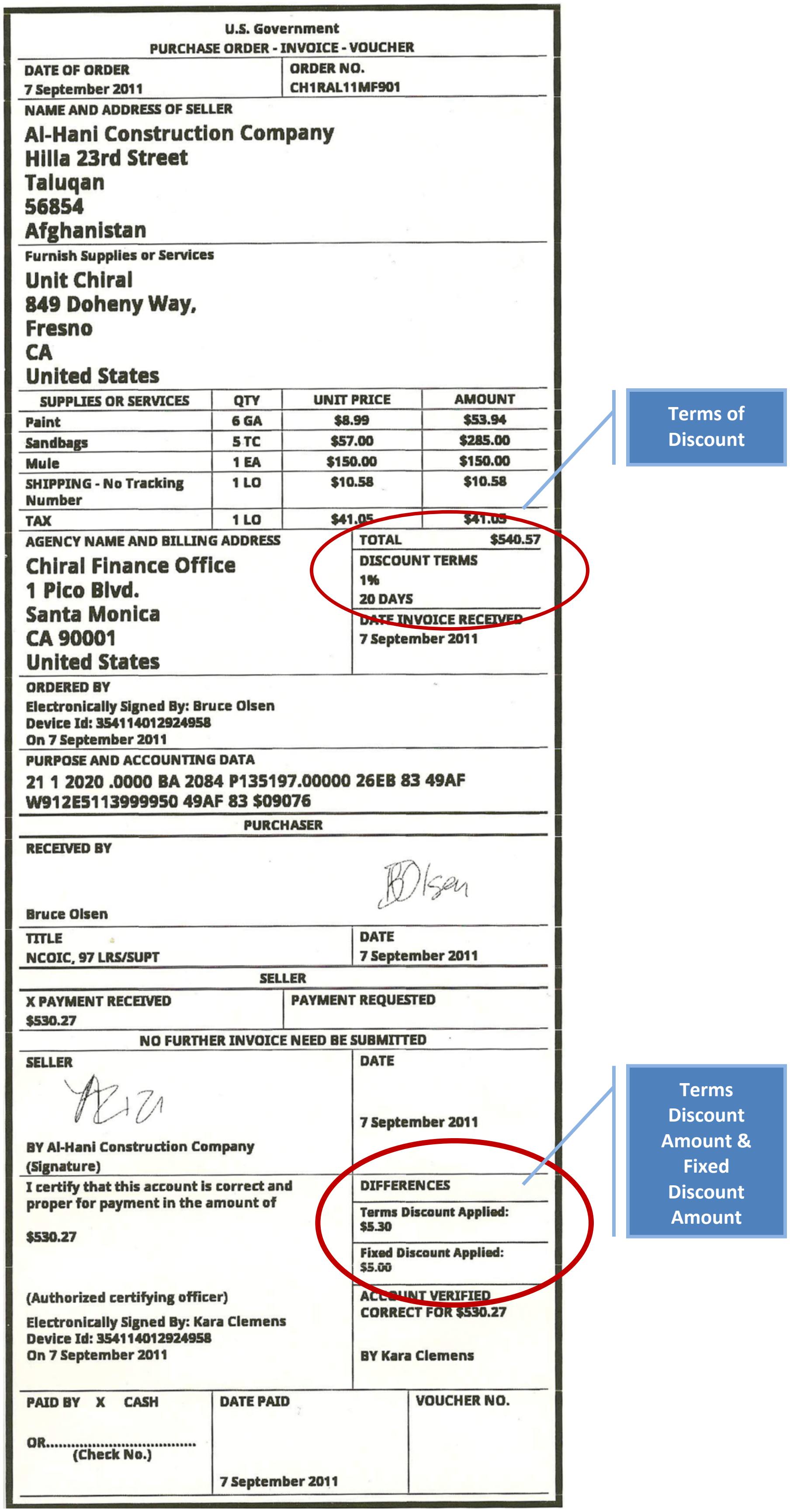
Add Fixed Discount Screen



Add Other Costs Screen

Note that when a foreign currency is used, the Total amounts are displayed showing both the foreign currency and USD.

When an SF44 order is printed, the discount amount is displayed in the Differences box, as shown in the following figure.



U.S. Government
PURCHASE ORDER - INVOICE - VOUCHER

DATE OF ORDER
7 September 2011

ORDER NO.
CH1RAL11MF901

NAME AND ADDRESS OF SELLER
Al-Hani Construction Company
Hilla 23rd Street
Taluqan
56854
Afghanistan

Furnish Supplies or Services
Unit Chiral
849 Doheny Way,
Fresno
CA
United States

SUPPLIES OR SERVICES	QTY	UNIT PRICE	AMOUNT
Paint	6 GA	$8.99	$53.94
Sandbags	5 TC	$57.00	$285.00
Mule	1 EA	$150.00	$150.00
SHIPPING - No Tracking Number	1 LO	$10.58	$10.58
TAX	1 LO	$41.05	$41.05

AGENCY NAME AND BILLING ADDRESS
Chiral Finance Office
1 Pico Blvd.
Santa Monica
CA 90001
United States

TOTAL $540.57
DISCOUNT TERMS
1%
20 DAYS
DATE INVOICE RECEIVED
7 September 2011

ORDERED BY
Electronically Signed By: Bruce Olsen
Device Id: 354114012924958
On 7 September 2011

PURPOSE AND ACCOUNTING DATA
21 1 2020 .0000 BA 2084 P135197.00000 26EB 83 49AF
W912E5113999950 49AF 83 $09076

PURCHASER

RECEIVED BY
BOlsen
Bruce Olsen

TITLE
NCOIC, 97 LRS/SUPT

DATE
7 September 2011

SELLER

X PAYMENT RECEIVED
$530.27

PAYMENT REQUESTED

NO FURTHER INVOICE NEED BE SUBMITTED

SELLER
Azizi
BY Al-Hani Construction Company
(Signature)

DATE
7 September 2011

I certify that this account is correct and proper for payment in the amount of
$530.27

(Authorized certifying officer)
Electronically Signed By: Kara Clemens
Device Id: 354114012924958
On 7 September 2011

DIFFERENCES
Terms Discount Applied:
$5.30
Fixed Discount Applied:
$5.00

ACCOUNT VERIFIED
CORRECT FOR $530.27
BY Kara Clemens

PAID BY X CASH
OR.................................
(Check No.)

DATE PAID
7 September 2011

VOUCHER NO.

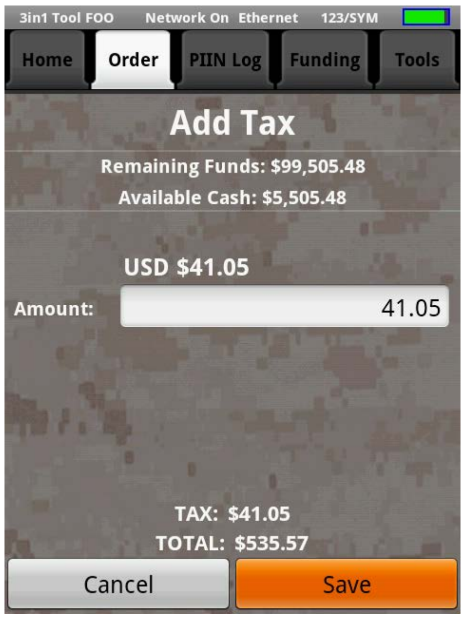
To add shipping costs:

1. Tap **Shipping** on the *Add Other Costs* screen.
2. Enter the shipping cost and, if known, the tracking number (i.e., FedEx tracking number). The tracking number field can be left blank if the number is unknown.

Adding Shipping Costs to an Order

To add tax:

1. Tap **Tax** on the *Add Other Costs* screen.
2. Enter the tax amount in the **Amount** field.
3. Tap **Save**.
4. Tap **Next** to continue to check out.



Notes on tax, shipping and discount calculation*:* The rules for how the tax, shipping, and discount impact the price:

1. Shipping is *never* discounted. If a merchant is charging $50.00 for shipping, and then offers a 10% terms discount on the order, the shipping is still $50.00.
2. Terms discounts apply based on specifying a number of days between when the order is placed and when the order is paid. The device will calculate whether the discount applies by using its clock and its record of when the order was placed. The discount applied depends on when the order is paid for.
3. If an order has a terms discount and the order is paid early, the amount paid will be less than the order total. This means that additional money will become available

on the PR. You cannot use a terms discount to spend more than is available on the PR, even if you know that you will pay early and get the discount.

4. Terms discount does apply to taxes. For example, if a person buys a $10.00 item, and there is a 10% sales tax, the total cost is $10.00 + $10.00 * 10% = $11.00. If the merchant then gives a 25% discount, the discount is applied to the total price: total = $11.00 - $11.00 * 25% = $8.25.
5. Tax does not apply to shipping.

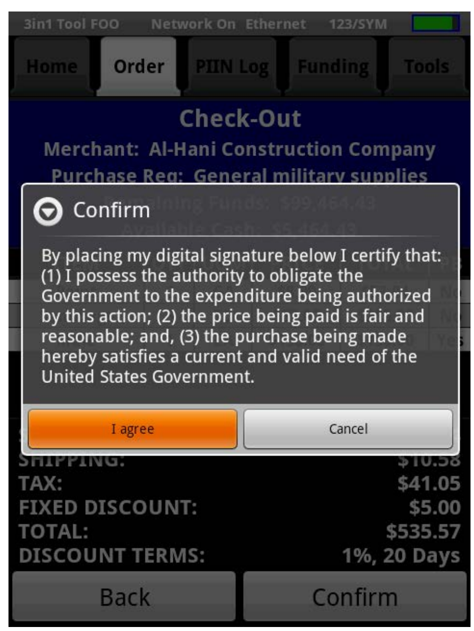
Confirming the Order

The *Check Out* screen is a summary of the order, with options to go back and make edits or confirm and continue. The order summary consists of:

- The vendor name
- Purchase Request description
- The remaining funds and available cash after this order
- Line items being purchased, with quantity unit and total price
- Whether each item is flagged for Property Book accounting
- Other costs associated with the order

To complete the checkout process:

1. Review the order summary, then tap the **Confirm** button to check out.
   – If the order requires edits, tap **Back**.
2. In the Confirmation popup, tap **I Agree** to digitally sign and verify the order.
3. After the FOO taps **I agree**, the next screen is the *Receiver* screen, which is described in below.



If the FOO taps **Cancel** instead of **I agree**, the Check Out screen is displayed. From there, the FOO may modify the order, or decide not to place the order.

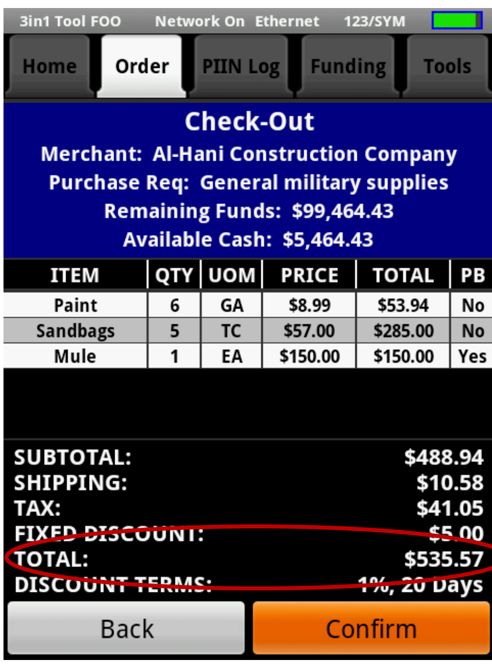
Once the FOO taps **I agree**, a unique PIIN/Order number is assigned to the order. The PIIN/Order number is assigned and cannot be un-assigned. The FOO has obligated the government to the merchant according to the items entered in the order.

Note: Once an order has been executed on the device, it cannot be changed.

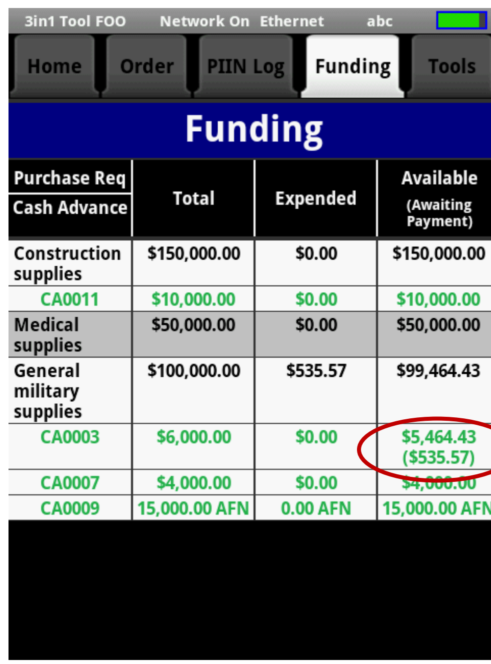
After confirming the order, the device should be connected to a network as soon as is practical. Until the order is sent to the prime database, there is no backup of the order, and the order would be lost if the device is lost or destroyed. If the device has GSM networking installed and activated, it will upload automatically as soon as GSM service becomes available. If Wi-Fi networking is enabled, the device will transmit as soon as it connects to its Wi-Fi network. If the device is configured for Ethernet or USB connection, the device will only transmit orders when it is physically connected. Due to the nature of the data, it is important that they are transmitted to the prime database at the earliest opportunity.

Awaiting Payment Amounts

Once an order is placed, the order amount is categorized as “Awaiting Payment” in the Available Funding column of the *Funding* screen. In the example below, an order has been placed for the sum of $535.57. However, payment has not been made yet, nor have the items been received. On the *Funding* screen, the order amount is displayed in the Available column, but as a separate “Awaiting Payment” amount.



Order total is considered Available, but Awaiting Payment



Awaiting Payment is separated in Available Column

Completing an Order on the Device

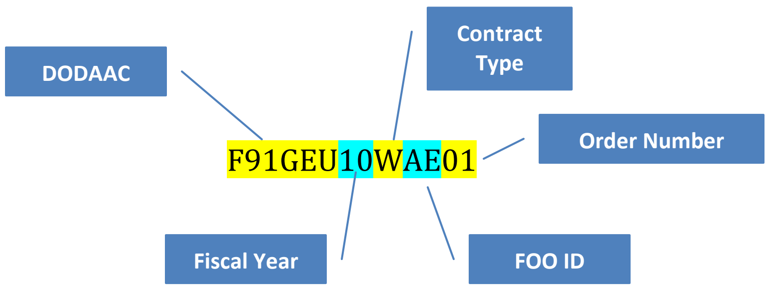
If You Make a Mistake…

An order may be cancelled after confirmation, but before payment is made by the Receiver or Paying Agent tapping the Cancel button on their signature screens, or by using the Return Order feature, which is described in *Module 6: Ordering and Financial Features on the Device, Lesson 2: Returning and Rerunning Purchase Orders on the Device*. Then use the

Rerun Order feature to place the order with corrections and minimal re-typing. Rerunning the order gives the FOO the opportunity to make corrections, such as adjusting a line item price or quantity. See *Module 6: Ordering and Financial Features on the Device, Lesson 2: Returning and Rerunning Purchase Orders on the Device*.

About PIINs and Ordering

The PIIN is comprised of 13 characters: The Contracting Office DODAAC, fiscal year, contract type “M” or “W,” a two-character FOO ID, and a two-digit serial for the orders.



Two types of PIINs can be generated. “M” PIINs are generated for orders placed on the device, while “W” PIINs are for manual orders that are executed as a backup, should the device be inoperable. The information from the manual orders are then entered in the Workstation for electronic processing.

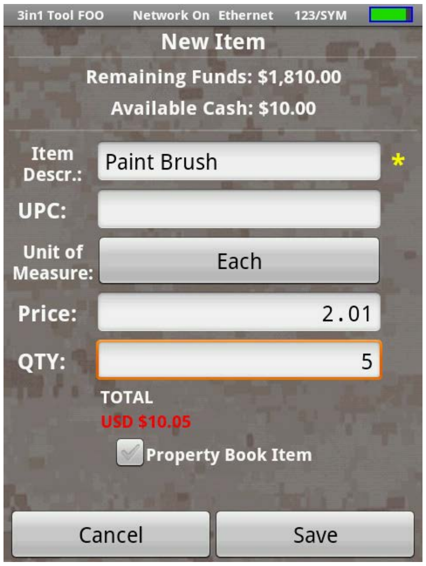
PIIN blocks are received with provisioning data. The 3in1 Tool automatically assigns the next available PIIN number to a purchase order once the FOO digitally signs the order by tapping “I Agree.”

Once a PIIN number is issued, the order cannot be changed. However, the order can be cancelled. If you have completed the process by collecting all relevant signatures and confirmations, then realize a mistake has been made, you may return the order by tapping the **Return Order** button on the *Purchase Details* screen. You can also tap the Cancel button on the signature screens described below, which has the same effect as Return Order. Note the PIIN number is still considered used if either the **Return Order** or **Cancel** button is selected.

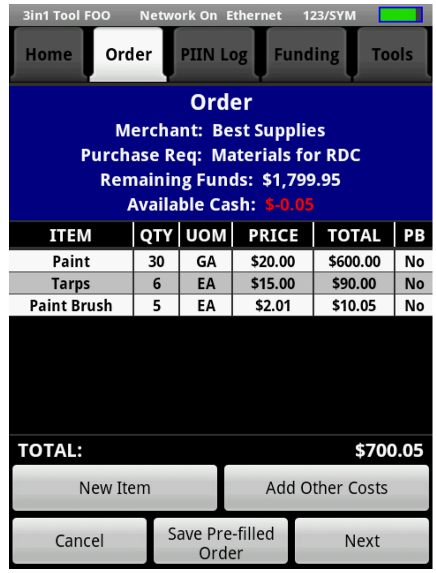
PIIN numbers are unique and cannot be recycled if an order is returned. The last seven digits of the PIIN number can be seen on the *PIIN Log* screen, in the column labeled PIIN. See *Module 6: Ordering and Financial Features on* the Device, *Lesson 2: Returning and Rerunning Purchase Orders on the Device* for more information on the PIIN Log.

Insufficient Cash Notification

The 3in1 Tool is designed to monitor available cash. As line items are added to an order, the available cash amount decreases. An order will be blocked at the time of check out, if the order total exceeds the available cash on hand. If the order subtotal exceeds the available cash, the line item(s) are flagged in red.

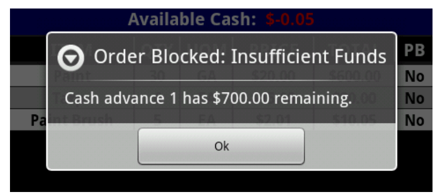


The total amount is red when an item added to an order exceeds the available cash



The order total exceeds the available funds

A message blocks the attempted check out.



The FOO must take corrective action in order to balance the numbers, such as adjusting the item price or applying a discount.

Reviewing Orders

Once the order has been placed, the ***Receiver*** screen is displayed. From this screen, press the **PIIN Log** button, in the lower left of the screen, to view a list of all the orders stored on the device. You may perform additional operations on these orders, which are explained in, *Module 6: Ordering and Financial Features on the Device, Lesson 2: Returning and Rerunning Purchase Orders on the Device*.

Obtaining Signatures

After an order is successfully placed, each party verifies the transaction. The parties include:

Receiver: The person receiving the goods on behalf of the government

Paying Agent: The person who certifies the voucher for the government

Vendor: The person from whom the goods are being purchased

Signatures are captured in the above sequence; however, other device functions are not locked until the sequence is complete. At any time in the sequence, the PIIN Log can be viewed by tapping the **PIIN Log** button.

If Items Are Received and Paid for Later

There may be situations where ordered items are not received and paid for on-the-spot, but are received at a later date, such as hiring a contractor to perform a service that will not be signed for as received until the work is completed. In this case, the procedure is to print an SF44 (explained later in this lesson) and give it to vendor at the time the order is placed.

On the device, skip the receiver signature by pressing the **PIIN Log** button to return to the PIIN Log. Later, when the items are received, select the order in the PIIN Log and add the receiver signature.

Receiver Signature

The receiver acknowledges receipt of goods by signing the **Receiver** screen. In some cases, the receiver may be the FOO or PA. The name of the receiver must be entered before entering a signature. The government cannot release payment for an order until after the order has been received. Therefore, the paying screen and vendor signing screens are not active until after the Receiver has signed.

To sign the Receiver screen:

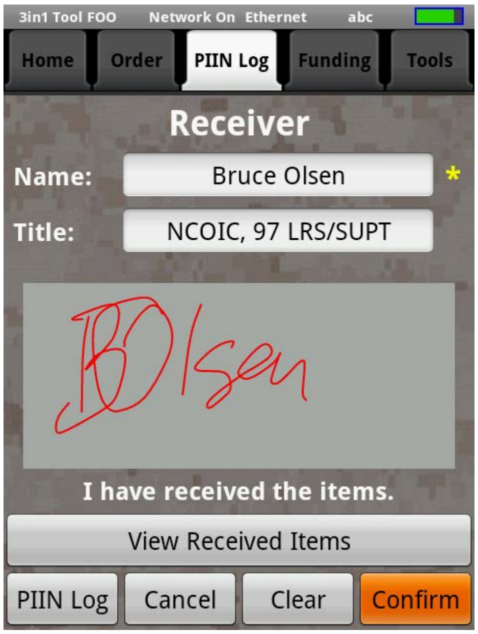
1. On the *Receiver* screen, tap **Select Receiver**.
2. On the *Select Receiver* popup screen, the drop-down lists the FOO and PA names. Select one of these as the Receiver, or select **Other** if someone other than the FOO or PA is receiving the supplies or services on behalf of the government.
   – If you select **Other**, enter the person's name in the **Name** field.
3. Tap **Save**.

4. On the *Receiver* screen optionally enter the title of the receiver.
5. Using the stylus pen, sign in the Signature block.
6. Tap the **Confirm** button to save and continue. (The Confirm button should become enabled when a signature is entered.)

To re-do the signature, tap the **Clear** button. To cancel the order, tap the **Cancel** button.

Note: None of the receiver information can be edited after confirmation has occurred.

The Receiver can view the items being receiving by tapping the **View Received Items** button. This brings up a summary view of the order.



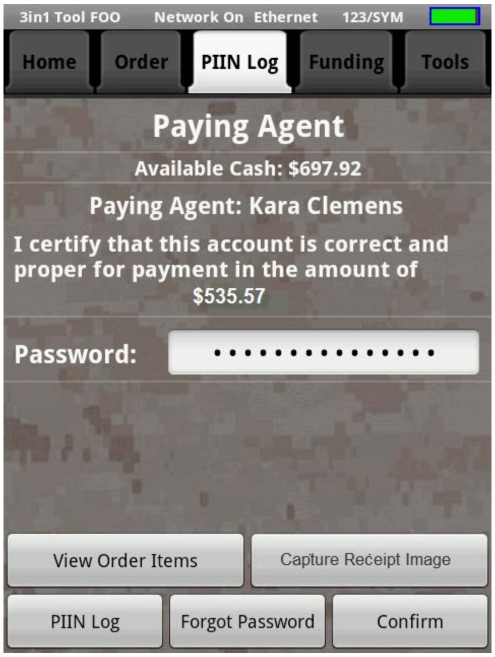
Receiver Signature Screen

View Received Items Screen

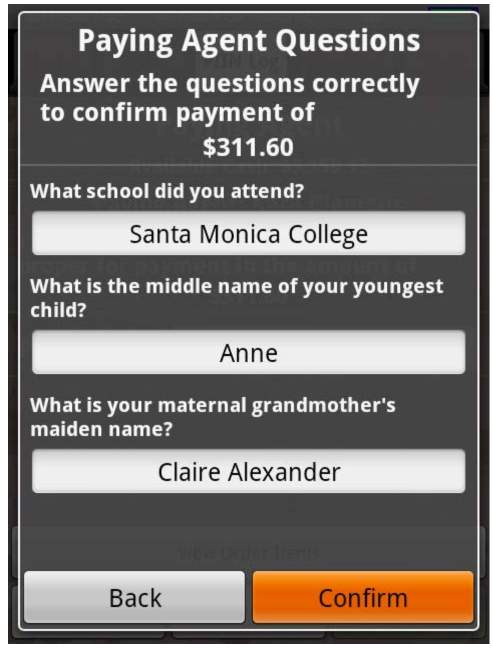
Paying Agent Signature

The PA pays for the items by first verifying that the correct amount is displayed on the *Paying Agent* screen, then entering his/her password and tapping the **Confirm** button. . Like the Receiver, the PA can also view the items being purchased and paid for, by pressing the **PIIN Log** button.

If the PA has forgotten the password, tap the **Forgot Password** button. On the *Paying Agent Questions* screen, answer the security questions set at the time of registration.



PA Password Screen



PA Security Questions

Note: If the Paying Agent is not paying for the order on-the-spot, the Paying Agent does not need to sign. The order could be paid later, on the 3in1 Workstation or by a Paying Agent at the Finance Office. If the order is not to be paid immediately, tap the **PIIN Log** button to return to the list of orders, or tap the **Home** tab to go back to the *Dashboard*.

Taking Pictures of Receipts

The **Capture Receipt Image** button on the Paying Agent signature screen enables PAs to capture photos of merchant receipts. After tapping the **Capture Receipt Image** button to activate the camera, focus and take the picture. For instructions on using the camera, see the *Capturing Receipt Images and GPS Coordinates for an Order* section later in this lesson.

Vendor Signature

The last step in the ordering process is for the vendor to sign that he or she has received the money from the paying agent (if this was a cash payment). The vendor simply enters a signature on the *Vendor* screen to verify the amount received. Note that it is not mandatory that the vendor sign, and in fact, some vendors may be unwilling to sign. The FOO could write "Refused" on the screen so the reviewers will know the situation and add comments to the order. Follow local procedures in these situations.

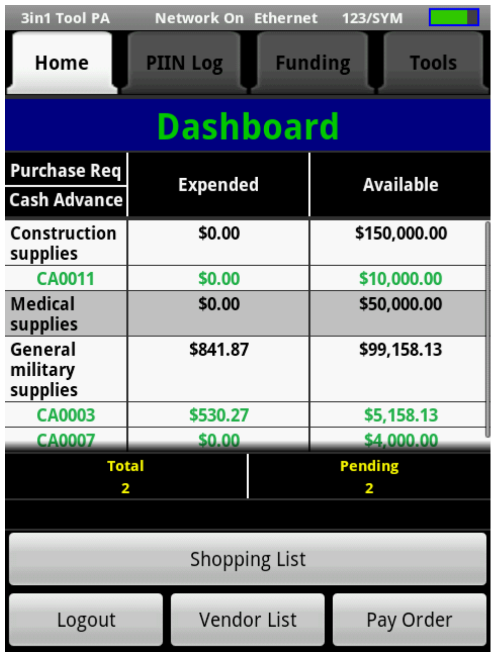
The order is complete. Tap the **Confirm** button to advance to the *Purchase Details* screen.

Paying for an Order while Logged In as a Paying Agent

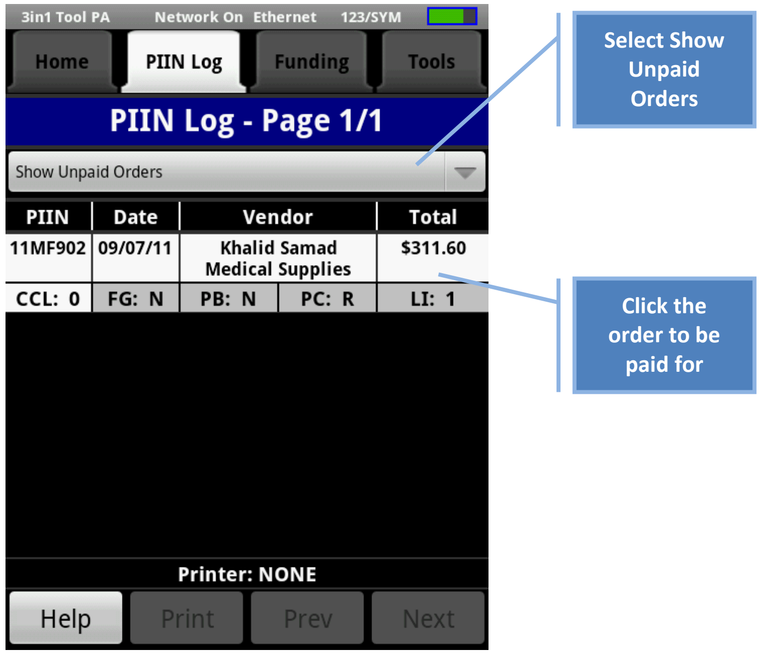
If the payment is made at a later time, such as after the services are performed, the FOO does not need to log in; instead the PA can log into the device and make the payment under his/her own account.

The Paying Agent follows these steps to confirm payment:

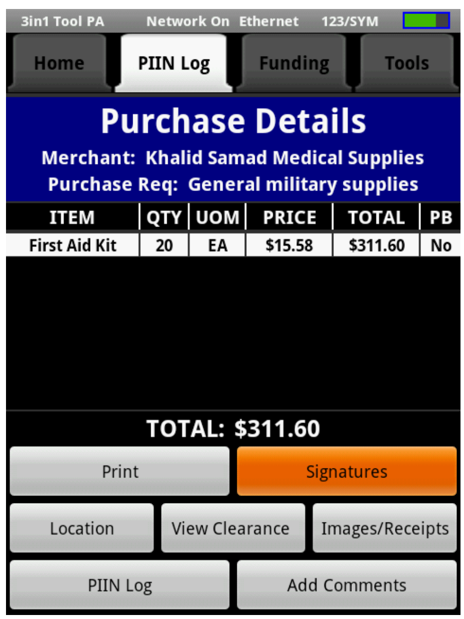
1. Log in as a Paying Agent.
2. From the *PA Dashboard,* tap the **Pay Order** button.
   – The *PIIN Log* screen is displayed.



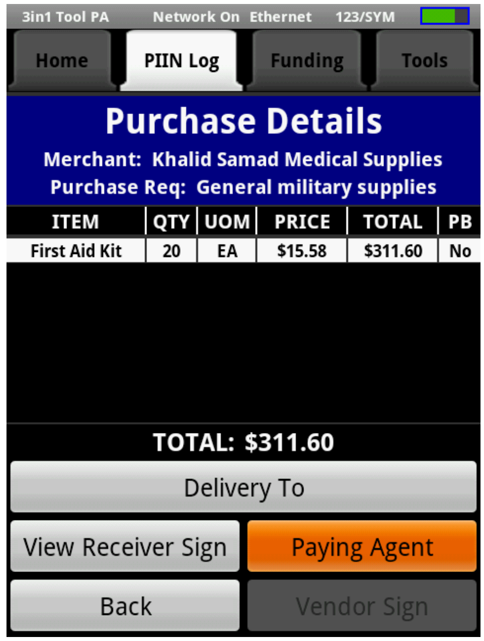
3. On the *PIIN Log* screen, choose to **Show Unpaid Orders**.
4. Tap the order you would like to pay for.
   – The *Purchase Details* screen for that order is displayed.



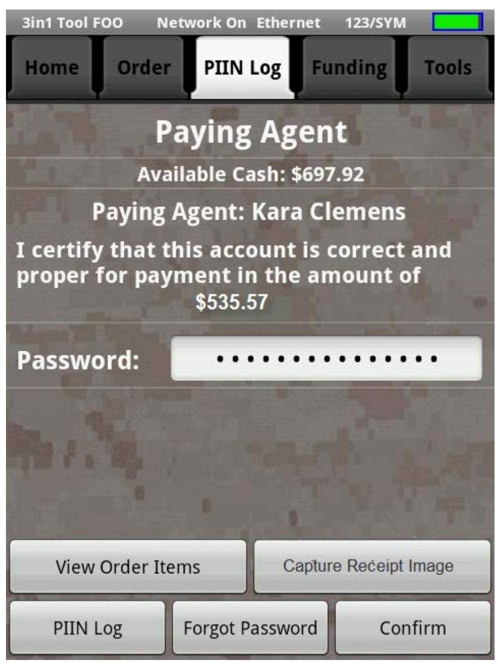
5. On the *Purchase Details* screen, tap the **Signatures** button.



6. Tap the **Paying Agent** button to sign for the Paying Agent.
   – The *Paying Agent* screen is displayed.



7. Tap the **Confirm** button on the *Paying Agent* screen.
   – A *Confirm Payment* pop up verifies your intent to pay for the order.

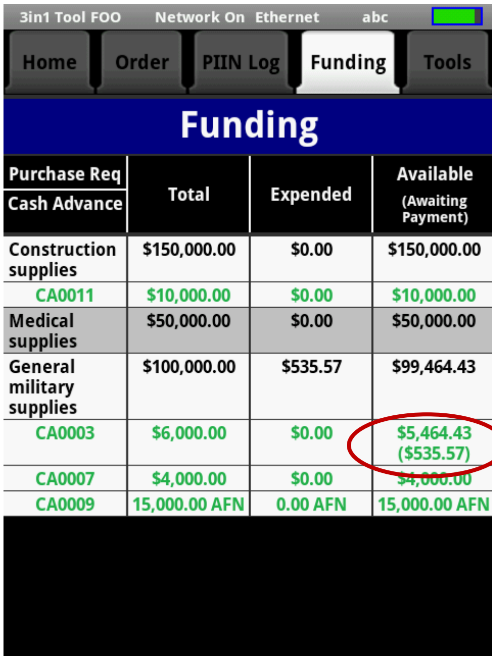


8. Tap **Yes** on the *Confirm Payment* pop-up screen.

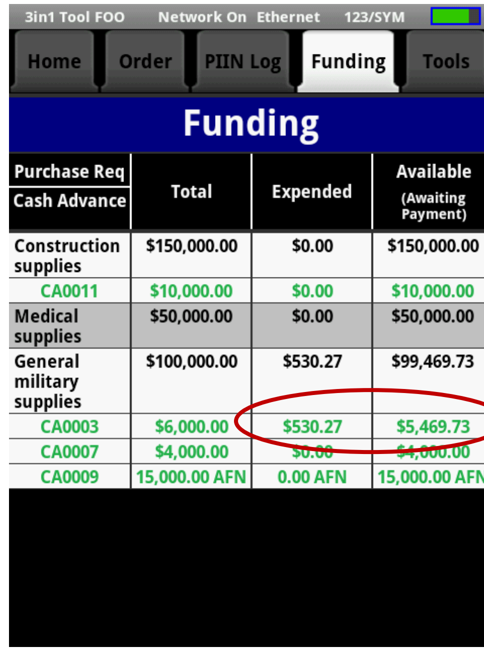
From this point on, the user role does not make a difference. Either the FOO or PA role can complete the ordering process and obtain the Vendor's signature.

Funding Screen after Payment is Made

After the Paying Agent pays for the order, on the *Funding* screen, the order amount is subtracted from “Awaiting Payment” in the Available column and added to the Expended column.



Post-Order/Pre-Payment Funding Screen



Post-Payment Funding Screen

Viewing Purchase Details

The *Purchase Details* screen lists the ordered items. Use the buttons on this screen to perform the following actions:

- **Return Order** - Return a purchase order
- **Print** - View and print an SF44 (See *Module 5: The Ordering Process, Lesson 2: Making a Purchase*)
- **Signatures** - View the signatures and confirmation of all parties who participated in the transaction. None of this information can be edited. The final Receiver’s signature can also be obtained from this screen. (See *Module 5: The Ordering Process, Lesson 2: Making a Purchase*)
- **Location** - Capture the GPS coordinates (See *Module 5: The Ordering Process, Lesson 2: Making a Purchase*)
- **View Clearance** – View the approval status of orders; review and respond to order flags

- **Images/Receipts** - Take a picture of a receipt and other items. Multiple images can be taken for an order to record the receipt, pictures of the items, or approval letters for the order. (See *Module 5: The Ordering Process, Lesson 2: Making a Purchase*)
- **PIIN Log –** Return to the PIIN Log screen**.**
- **Add Comments –** Enter remarks about an order. If purchasing an accountable item, enter the model and serial number in the Comments section.

Comments about the order can also be added from the *Purchase Details* screen. Tap **Add Comments** and enter remarks about the order. If purchasing an accountable item, enter the model and serial number in the Comments section.

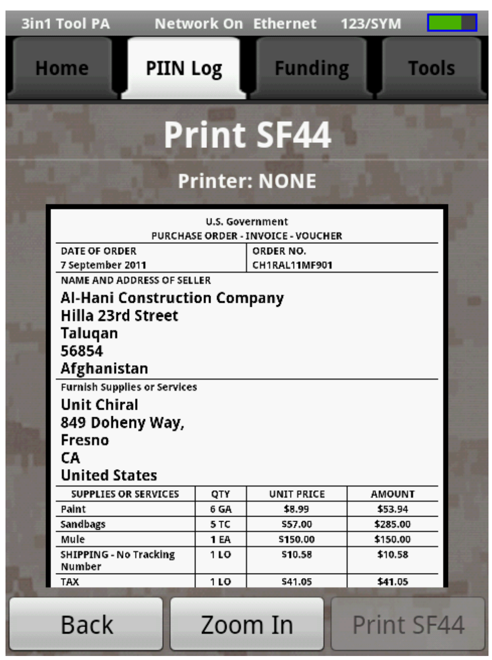
Printing and Viewing an SF44 on the Device

Note: Refer to *Appendix G, FieldPro RT43 Printer Information* for detailed instructions on the use of the printer.

Use the **Print** button on the *Purchase Details* screen to view the SF44 on the device screen and print the SF44.

Viewing Tips:

- The displayed SF44 is scrollable because the form, in its entirety, cannot fit on the screen.
- Use the stylus pen to move the form around on the screen.
- Tap the **Zoom In** button to see details more clearly. The Zoom In button changes to **Zoom Out**. Tap **Zoom Out** the return to normal view.



The 3in1 Tool will automatically detect the printer when it is connected to the handheld device. The Print button is automatically enabled on all screens when the printer is connected; the Print button is automatically disabled when the printer is disconnected.

Typically the receipt is printed for the PA's records after the PA has made the payment and entered his/her password on the device.

Printing from the Handheld Device to the FieldPro RT43 Printer

A USB cable is fixed to the printer. **To connect to the device:**

1. Connect the printer USB cable to the device USB adapter.
2. Plug the USB adapter into the device.
3. Turn on the printer.
4. Ensure the printer has paper.

The printer is now connected to the device and ready for printing the SF44 or any other screen that has a Print button.

To print from the device:

1. After all the signatures have been recorded, the *Purchase Details* screen becomes available. On the *Purchase Details* screen, tap the **Print** button.
   - The *Print SF44* screen is displayed. There are two buttons at the bottom of the screen: **Zoom in** and **Print SF44**.
2. Tap the **Print SF44** button.

The printer may take a few seconds to start printing. You may print multiple copies by tapping **Print SF44** again.

Note: If the **Print** button is active, but nothing is printing, make sure the printer is turned on. The **Print** button will become active as soon as the printer cable is detected, regardless of whether the printer is on or off. When the device detects the printer it will display it at the top of the screen.

Capturing Receipt Images and GPS Coordinates for an Order

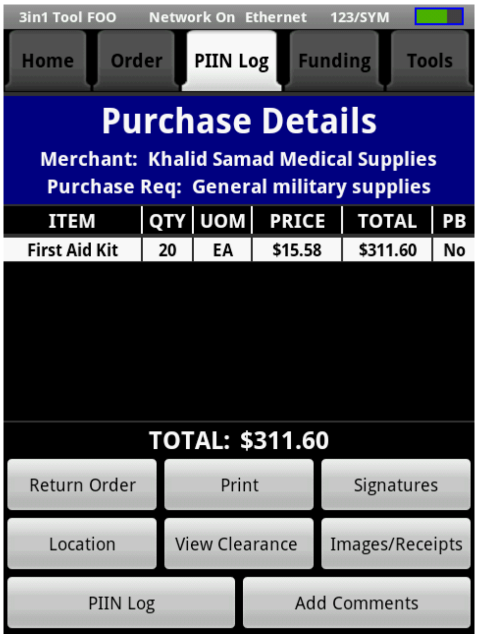
Taking a Picture of a Receipt

If a vendor provides a paper receipt for records, you can use the handheld device to take a picture of the receipt using the handheld device's built-in camera. Multiple images can be taken for an order. This function can be accomplished at any time and will be uploaded to the order in the prime database.

Receipt images taken by the device camera are uploaded to the prime database. Receipt images are deleted from the device after they have been uploaded, to save storage space. Therefore, a FOO cannot view receipt images on the device after they have been uploaded.

To take a picture from the *Purchase Details* screen:

1. Tap the **Images/Receipts** button. The Image Gallery is displayed.



Purchase Details Screen – Tap Images/Receipts

Image Gallery

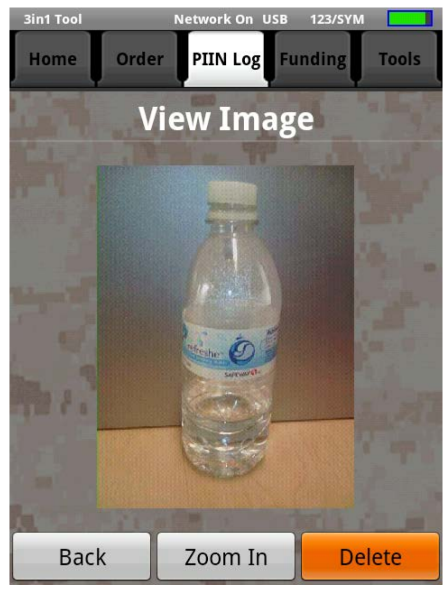
2. Tap **Take Picture**.

3. The camera lens on the back of the device lights up. Place the receipt in front of the camera on a flat surface like a table. The receipt image will appear in the display.
4. Hold the device still for a few seconds while the lens automatically focuses.
5. Tap **Capture**.
6. Select a radio button to specify whether the image is a Receipt or an Image. The receipt is needed for the clearance process. Item images may be useful for additional documentation, to capture a serial number or model number, or capture the approval letter for the purchase is a scanner is not available.
7. To save the image, tap **Accept**, or tap **Retake** to take another image.

Tips:

1. Place the receipt on a table or similar flat surface and hold the camera parallel to the receipt. Move the camera close to the text and allow it to autofocus. Then move the camera back to capture the entire receipt.
2. Hold the camera with both hands. If possible, stabilize the camera, by sitting down, placing your elbows on the table.
3. Rather than using the on-screen **Capture** button, you can take a picture with less movement by using the P button on the keyboard. Position your thumb on the P button, get the image stable and sharp, and then press P.
4. If the merchant does not provide a receipt, you can capture a picture of something else related to the purchase, such as a picture of the goods.

It is important to get a high-quality, clear, image. The order may not be cleared if the receipt cannot be seen clearly.



Deleting Images

Unwanted pictures may be deleted from the Image Gallery.

1. In the Image Gallery, double-tap a picture to open it in the viewer.
2. Tap **Delete**.

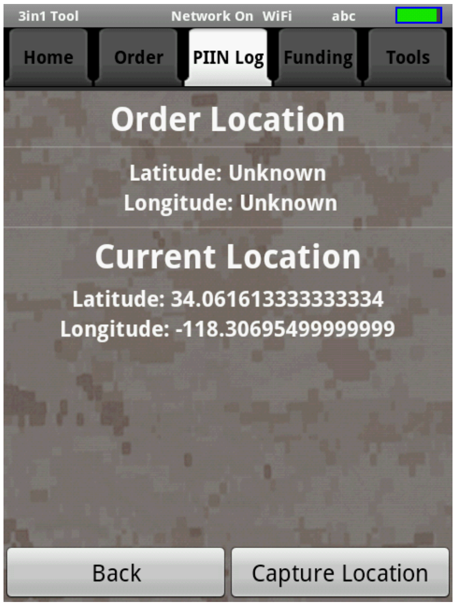
Capturing GPS Coordinates

The device also has the ability to capture the GPS coordinates of the vendor's location. This data can also be captured from the *Merchants* screen as described in *Module 5: The Ordering Process, Lesson 1: Creating Vendors on the 3in1 Device*.

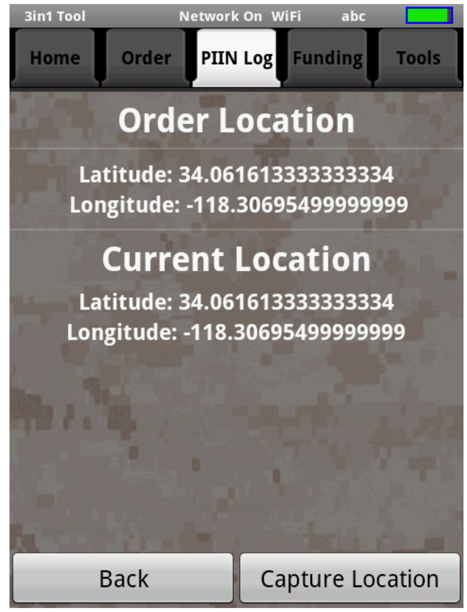
From the *Purchase Details* screen, tap **Location**. Two location items are shown: **Order** and **Current**. GPS relies on an unobstructed line of sight to four or more GPS satellites. If you are indoors, the Current and Order location will display as "Unknown" for both latitude and longitude.

To capture a location:

1. Go outdoors to a location with a clear view of the sky. GPS generally does not work indoors.
   – The Current Location latitude and longitude should automatically update. The Order location will still display as "Unknown."
2. Tap **Capture Location**. The Order Location will update with the just captured current location.



GPS location found, but yet not saved

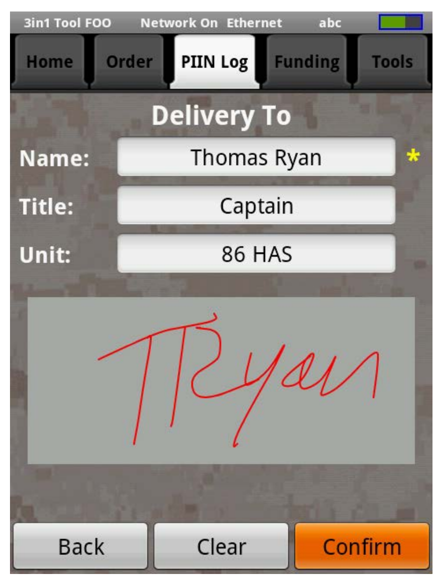


GPS location captured on an order, after using the Capture Location button

GPS Tips:

- The device must have an unobstructed view of a large portion of the sky to receive signals from a minimum of two GPS satellites.
- It can take several minutes to acquire a GPS signal, and up to a minute for the GPS location to update.
- GPS must be authorized to be available.

Using the Delivery To Screen



Using the *Delivery To* screen is optional, if the FOO wants to record the final receiver of the goods. The person who actually needs the goods becomes accountable for them. The Receiver acknowledges that the government has received the goods prior to payment. The Delivery To signer acknowledges that his/her unit or activity has received the goods from the Receiver.

To populate the *Delivery To* screen:

1. Enter the name, title and unit of the Delivery To signer.
2. Sign in the Signature Block.
3. Tap the **Confirm** button.

Lesson Summary

In this lesson, you learned to:

- ❑ Select a Purchase Request (PR) to use for an order

- ❑ Enter information for the unit being furnished with purchased items
- ❑ Select a merchant to use for the order
- ❑ Add items to an order
- ❑ Add tax, shipping and discounts to orders
- ❑ Understand that procurement controls can trigger warnings or prevent some purchases
- ❑ Understand when a PIIN is assigned and know that a PIIN cannot be un-assigned.
- ❑ Name the parties that must sign the PIIN Log to verify the order transaction
- ❑ Print an SF44
- ❑ Take usable receipt pictures from the device, using the built-in camera
- ❑ Capture GPS coordinates if required

Lesson 3: Uploading Orders to the 3in1 Workstation

Objectives

After completing this lesson, the participant will be able to:

- ❑ Upload orders from the device to the Workstation
- ❑ Describe when orders are uploaded automatically to the Workstation and when they need be manually transmitted

The Importance of Uploading Orders from the Device

The 3in1 device is designed to both capture order information and upload it to the prime database. This lesson explains the importance of uploading orders, and the two ways in which uploads can happen.

When the FOO enters an order, the FOO is using his authority to obligate government funds. Orders form a contract between the merchant and the government. The Paying Agent processes the payment to the vendor from the government.

It is very important that order and payment information be recorded in the prime database as soon as possible, so that the contract can be recorded and also provide backup of the data, should the device be damaged.

When Does the Device Upload Orders?

The device both uploads and downloads information from the prime database or locally connected workstation. Data uploaded from the device:

- Orders
- Currency exchanges
- Images (receipts, exchange memos, order images)
- Merchant and shopping list backups
- Response to clearance flags

Data downloaded to the device:

- Provisioning data (adding and removing users)
- Software updates
- New PRs and disbursements
- Decommits of PR value
- Check for clearance status of orders

All of these actions are collectively called an “upload” within this manual.

The device attempts to connect to the prime database at regular intervals, when the device detects an active network connection (Ethernet, USB, Wi-Fi or GSM network). When the device does not have any active network connection, it has no way of uploading orders.

The device adjusts its connection frequency depending on the type of connection. For a Wi-Fi or GSM connection, the device connects once every ten minutes to attempt to find new data to download and to send data it may need to upload. It uses this slow connection interval of ten minutes to save battery life.

When the device is connected over Ethernet or USB, it greatly increases the speed of the network thread to take advantage of the physical network connection. On an Ethernet or USB connection, the device will normally complete all of its upload and download tasks in under one minute, if the network speed is good enough, and depending on the amount of data and images to transfer.

Users can also use a *trigger upload* feature if desired.

After the FOO confirms the order, if the device can connect to the prime database, it will upload the order. Later in the process, when the receiver signs the order, the device attempts to upload the new information. Information entered on the device is uploaded as each stage of the process is completed: order, receiving, payment, vendor acknowledgement, and image of receipt.

If the device has GSM or Wi-Fi networking installed and activated, it will upload automatically as soon as network service becomes available. See *Module 14: 3in1 Device Tools & Settings, Lesson 1: Device Settings*, for instructions on various types of network connections.

If the device is configured for Ethernet or USB connection, the device will only transmit orders when it is physically connected, as described in *Module 2: Hardware/Application Setup, Lesson 1: Getting Started with the 3in1 Device and Printer.*

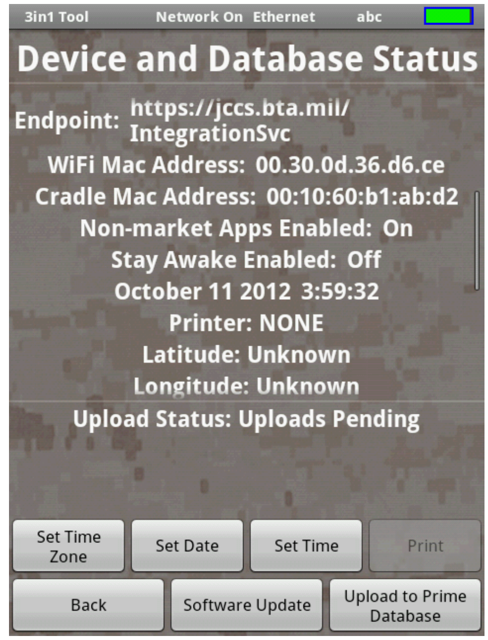
The device must be powered on in order for transmitting to occur. However, a FOO does not have to log in to the device in order for the data transmission to occur.

Manually Uploading Orders

If you connect the device to a network, but do not want to wait for up to ten minutes for the device to contact the prime server, it is possible to manually upload pending orders by following these steps:

1. On the device, tap the **Tools** tab, then tap **Device and Database Status**.
   - The *Device and Database Status* screen displays key information about the device: the device ID, device name, device chip ID, software version, hardware version, IP and Wi-Fi Mac addresses, FOO user name, date, type of printer connected to the device, latitude, longitude and upload status.
2. Tap the **Upload to Prime Database** button to prompt uploading pending orders.
3. A dialog box confirms that the upload has been triggered. Tap OK.
   - The status screen shows that upload is in progress.

Confirmation that data upload has been triggered



Upload Progress Bar

4. ***Confirm the orders have been transmitted to the Workstation***. As order information is transmitted in several sessions, it may take more than one upload to send all of the data from the device to the prime database. Check the *Dashboard* screen for the number of orders that have moved from the status of "Not Sent" to "Pending."

Note: This command does not automatically turn on a network. A network connection must be set in order to trigger an upload. Confirm that you have an active connection by checking the status on the top display bar. If the device timed out while connected, you may need to turn the Ethernet connection on and off again to re-establish the connection.

Lesson Summary

In this lesson, you learned how to:

- ❑ Upload orders from the device to the Workstation
- ❑ Describe when orders are uploaded automatically to the Workstation and when they need be manually transmitted

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Lesson 4: Post-Order Actions

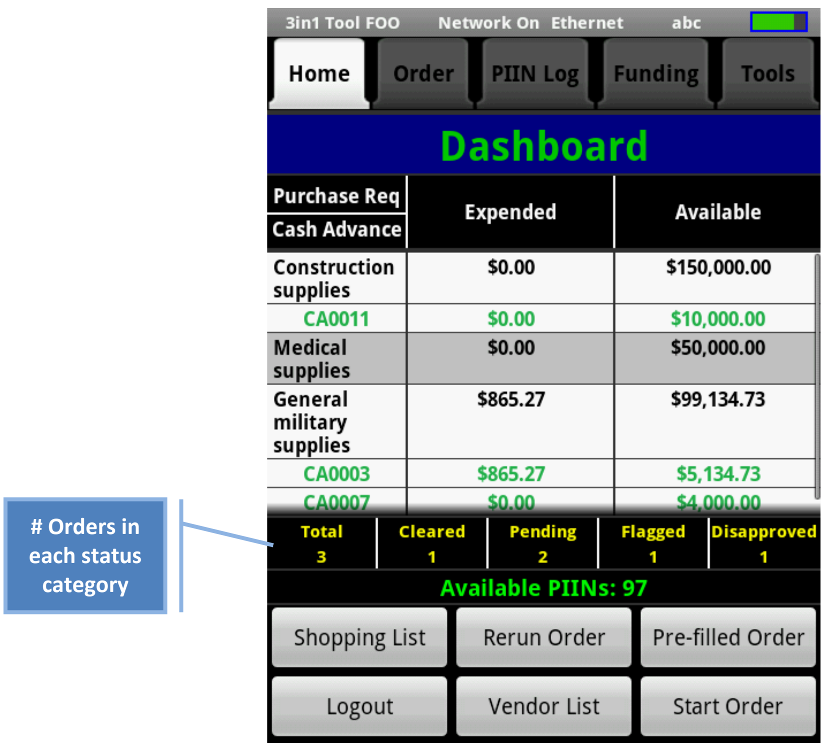
Objectives

After completing this lesson, the participant will be able to:

- ❑ View clearance status of a purchase order on the device
- ❑ Respond to order flags from the device

Clearance and Response to Flags

Once orders are placed, the *Dashboard* displays the total number of orders and the status of orders in the clearance process. Depending on local policy, reviewers and clearance officials will reviewing/clearing the orders on the Workstation as required. The FOO/PA can track the status of this process on the *Dashboard*.



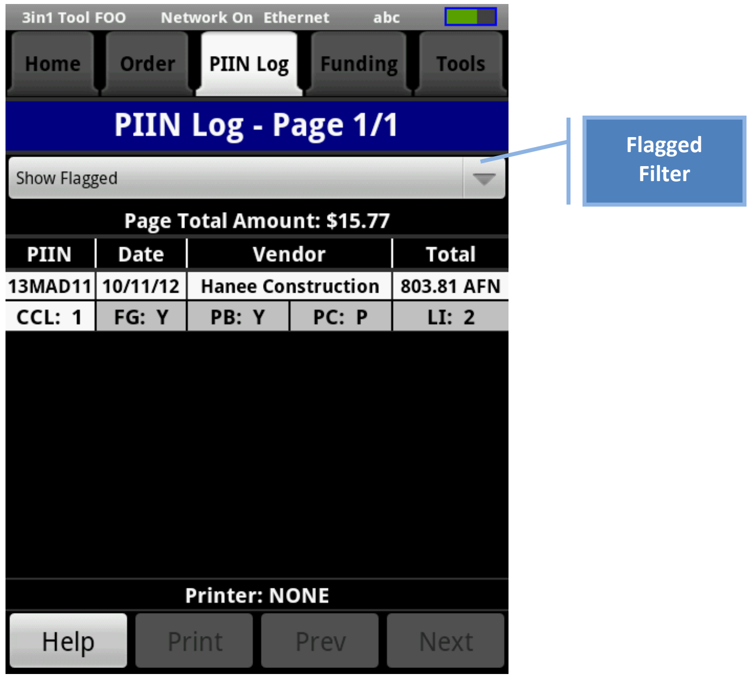
Dashboard showing status of orders

Responding to Flagged Orders

Orders that have been flagged indicate a reviewer has found an issue or has a question about the order. The FOO should review the comments and send a response, as required.

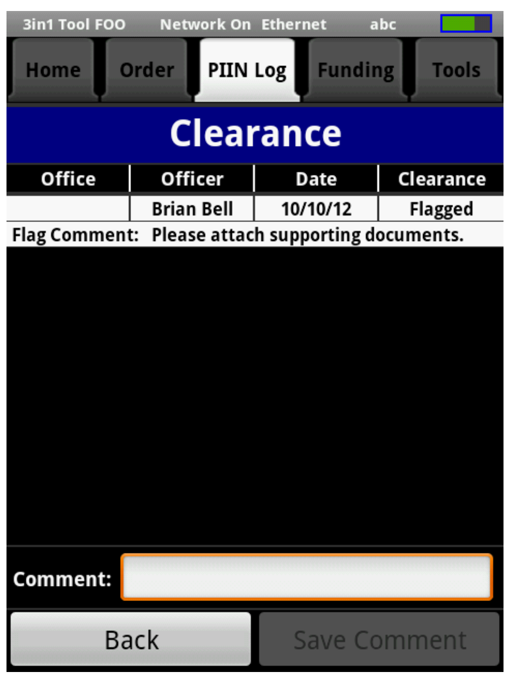
To review and respond to flagged orders:

1. Select the **PIIN Log** tab.
2. At the top of the screen use the drop-down filter to select **Show Flagged.** Only flagged orders display.



PIIN Log Screen

3. View the details of a purchase by tapping an order on the *PIIN Log* screen. This opens the *Purchase Details* screen.
4. From the *Purchase Details* screen, tap the **View Clearance** button.
5. The *Clearance* screen is displayed. Review the **Flag Comment** to determine your response.



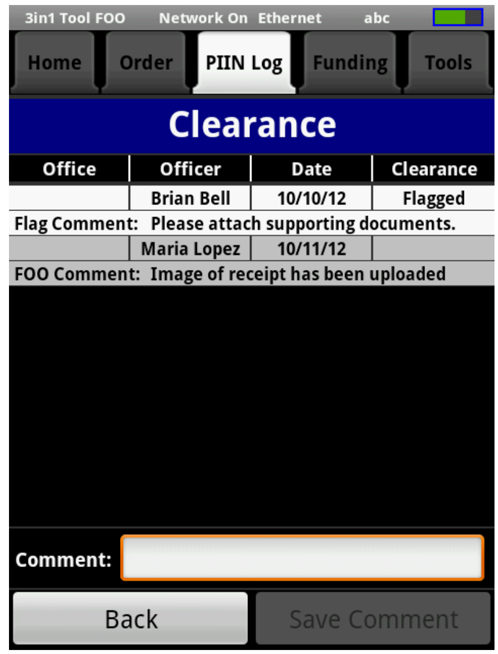
Clearance screen displays Flag comments from a reviewer

To respond to a flag:

1. Enter your response in the **Comment** field at the bottom of the screen.
2. Tap the **Save Comment** button.

The response is displayed on the *Clearance* screen as a FOO comment on the device and will be uploaded to the 3in1 Workstation, where it can be viewed on the purchase order **FOO Responses and Clearance Status** tab.

Entering the comment

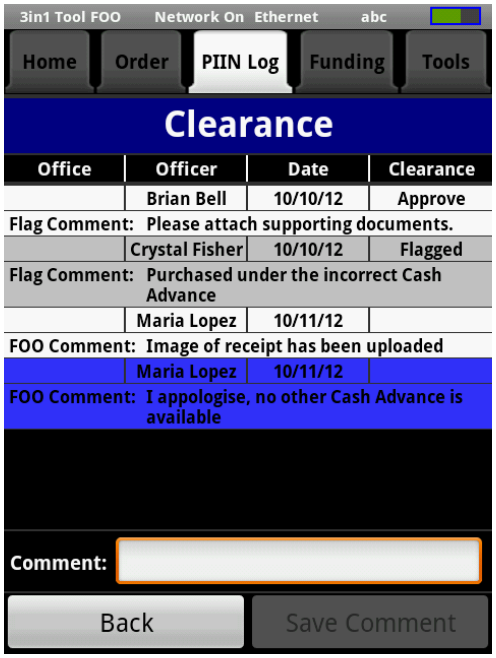


Saved comment

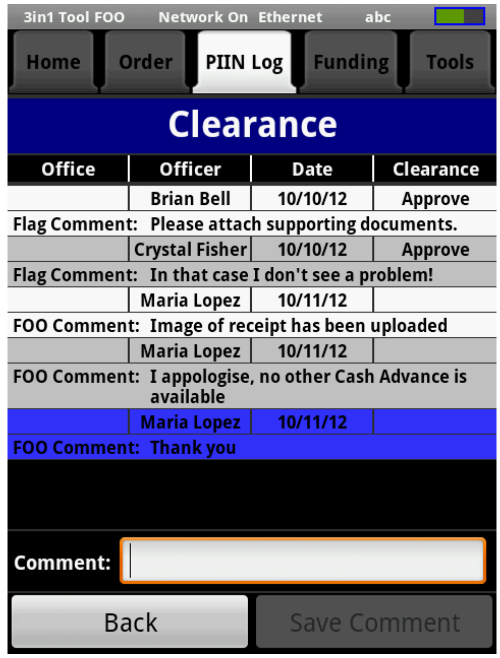
Adding General Clearance Comments

The ability the add clearance comments is not restricted to responding to Flags and Approvals. The FOO can add clearance comments as desired. The device first lists all the comments entered on the Workstation by clearance reviewers, and then the FOO responses.

Comments entered by clearance reviewers overwrite their previous comment. For example a comment entered by the Finance Officer, Crystal Fisher, when she flagged an order, was overwritten by the comment she entered when she approved the order. However, FOO comments cannot be overwritten or edited; once entered, they become part of the permanently record.



1. **Note the initial Flag Comment by Finance Officer Crystal Fisher. The FOO, Maria Lopez, responded with two comments.**



2. **When Crystal Fisher enters a second comment, it replaces her first comment. However, all of FOO Maria Lopez's comments are retained.**

Lesson Summary

In this lesson, you learned how to:

- ❑ View clearance status of a purchase order on the device
- ❑ Respond to order flags from the device

Module 6: Ordering and Financial Features on the Device

Lesson 1: Shopping Lists on the Device and Workstation

Objectives

After completing this lesson, the participant will be able to:

- ❑ Create a Shopping List on the device
- ❑ Edit and delete a Shopping List
- ❑ Start an order based on a Shopping List
- ❑ Create and manage Shopping Lists on the Workstation

Shopping Lists

Shopping Lists can be created and stored on the device and Workstation. This is helpful for remembering items, and also saves time in the market by automatically populating the order. For each line item on a Shopping List, specify the Item Name, Unit, Quantity and Property Book. Only Name is a required field.

Creating a Shopping List on the Device

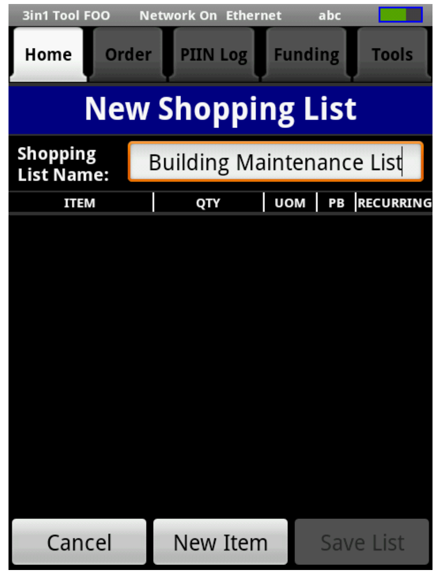
To create a shopping list from the *Dashboard*:

1. Tap **Shopping List**.

Dashboard Screen

2. From the *Shopping List* screen, tap the **Add New List** button.
3. On the *New Shopping List* screen, enter the shopping list name and tap **New Item**.

New Shopping List Screen

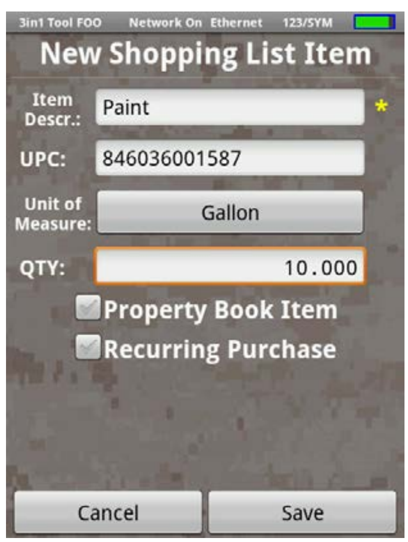


Enter name for new list

Notice the **Save List** button is disabled until the shopping list name is entered and items are added.

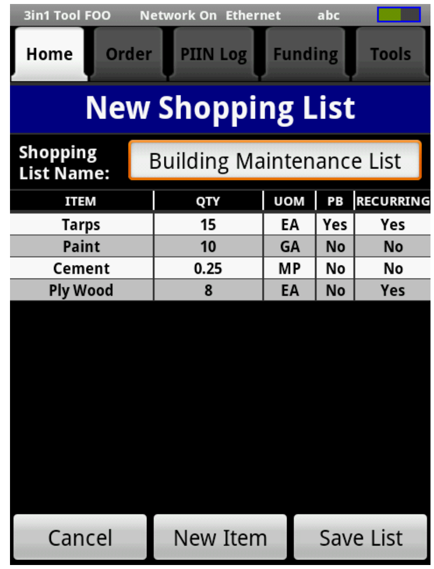
To add items to the shopping list on the *New Shopping List Item* screen:

1. Enter the name of the item in the **Name** text field.
2. If known, select the **Unit**, enter the **Quantity** and mark as a **Property Book** item.
3. Tap the **Save** button to save the item and return to the *Shopping List* screen. (The **Save** button will be enabled after the item name is entered.)



New Shopping List Item Screen

Property Book Item - The status of property book items can change. Mark or unmark the **Property Book Item** checkbox as shown in the figure above.



Note: An item can be marked as a Property Book Item only if the specified Unit is Each.

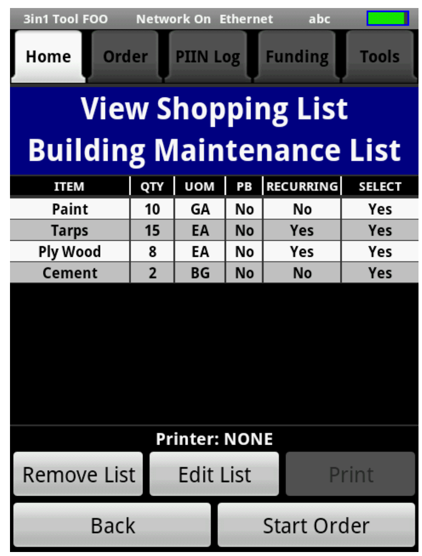
Recurring Purchase – After an item from a shopping list is included in an order, the item is removed from the shopping list. To keep the item in the shopping list for repeat purchases in the future, mark the **Recurring Purchase** check box.

Continue adding items to the shopping list as necessary.

Saving the Shopping List

When you have finished adding items, tap the **Save List** button to save the shopping list.

Printing a Shopping List



A printer must be connected to the device in order for the Print feature to be enabled.

To print a shopping list:

1. On the *Shopping List* screen, tap a shopping list to open the *View Shopping List* screen.
2. Tap the **Print** button to print the shopping list. (The **Print** button is disabled if a printer is not connected to the device.)

Editing or Deleting a Shopping List

Both the shopping list and items within a shopping list can be edited or deleted.

To edit or delete a shopping list from the *Shopping List* screen:

1. Tap a shopping list to open the *View Shopping List* screen.
2. Tap the **Edit List** button to edit the shopping list.
   – To change the Shopping List name, enter a new name on the *Edit Shopping List* screen. Tap the **Save List** button.

Edit Shopping List Screen

To remove a shopping list:

1. On the *View Shopping List* screen, tap the **Remove List** button.
2. Tap **Yes** to confirm the deletion.

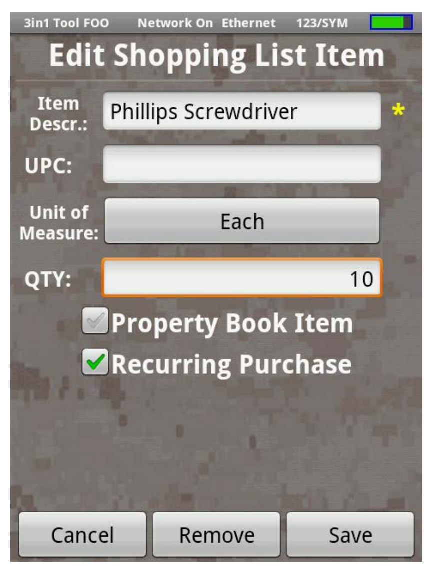
Adding, Editing, or Deleting Items in a Shopping List

To add a new item to the shopping list:

1. Tap the **New Item** button on the Edit Shopping List screen. The *New Shopping List Item* screen is displayed.
2. Fill in the information for the new item, then tap the **Save** button.

To edit a shopping list item:

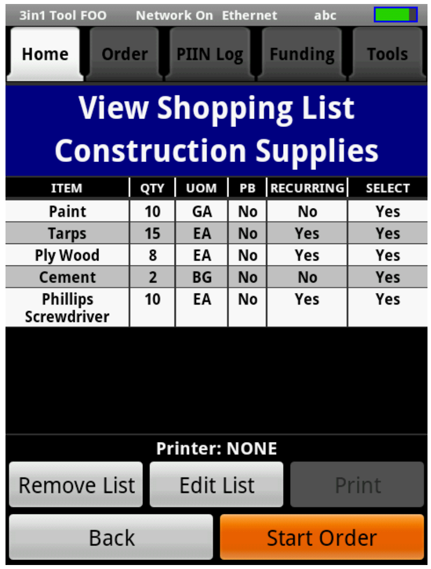
1. Tap the item on the *View Shopping List* screen.
2. On the *Edit Shopping List Item* screen, edit the fields as needed.
3. Tap **Save**.
4. To delete an item, tap the **Remove** button on the *Edit Item* screen. Tap **Yes** when asked to confirm the removal.



Starting an Order from a Shopping List

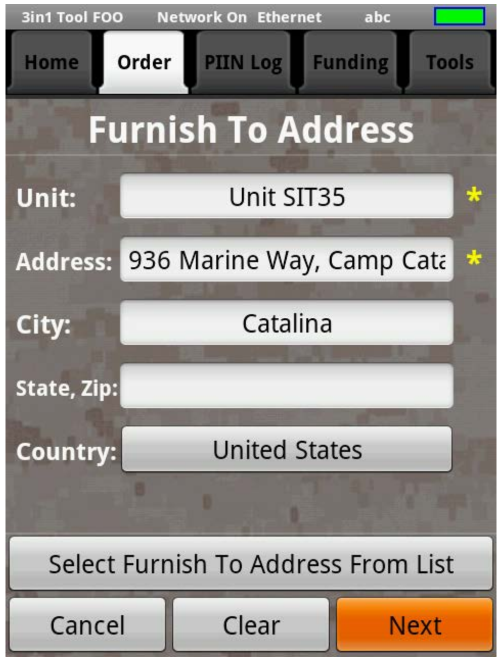
To start an order from a Shopping List:

1. Tap **Start Order** on the *View Shopping List* screen.



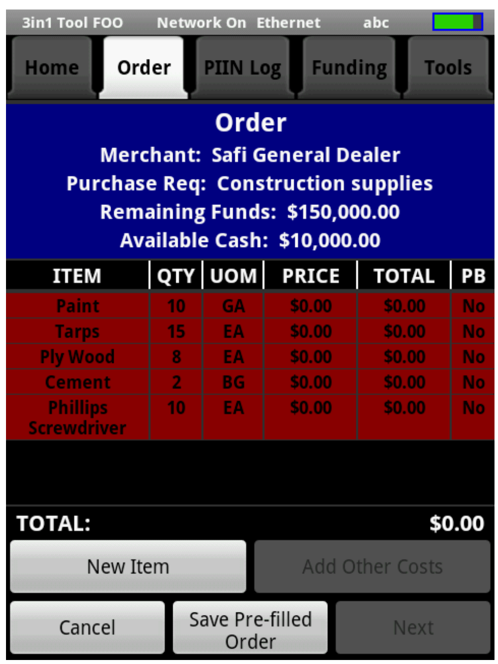
2. On the *Select Funding* screen, select a purchase request. Tap **Next**.

3. On the *Select Cash Advance* screen, select a cash advance funding source (green text) and then tap **Next**.
4. On the *Furnish To Address* screen, select from a list of existing addresses or type a new address that will receive the order, and then tap **Next**.



5. On the *Select Merchant* screen, select a vendor and tap **Add Line Items**.

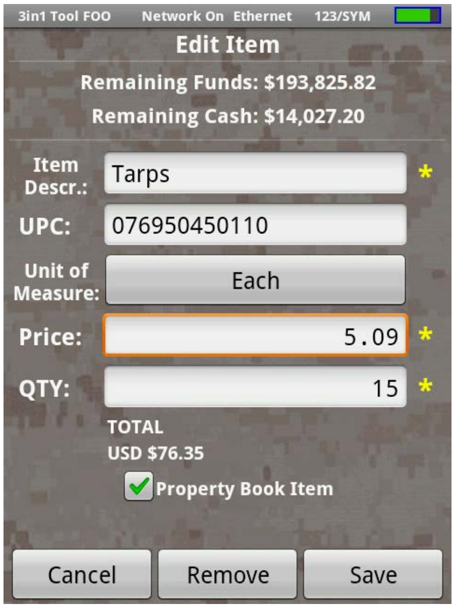
On the *Order* screen, items from the shopping list display with a red background. The background is red because the price has not been entered.



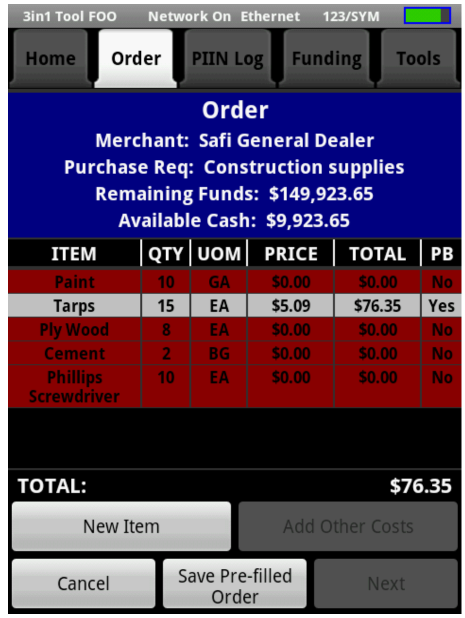
Order Screen – Prices have not been entered

To enter the price:

- Tap a line item on the *Order* screen and enter the price or edit any of the other fields. Tap **Save**.



Edit Item Screen



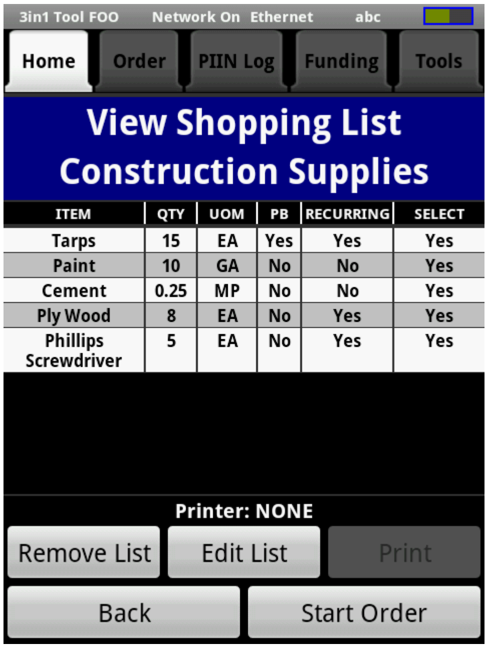
Order Screen – White line item indicates price has been entered

Note that all items on the shopping list will appear on the order. If necessary, remove unnecessary items from the order by following the instructions provided earlier in this lesson.

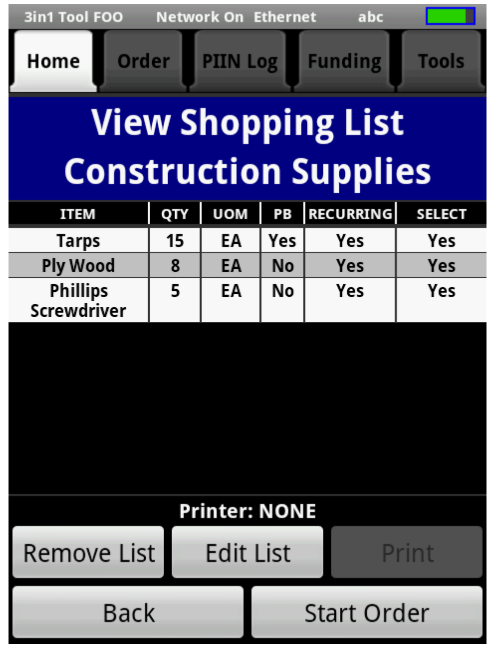
To add items that are not on the shopping list to the order:

1. Tap the **New Item** button on the *Order* screen.
2. Follow the instructions to add new items as described in *Module 5: The Ordering Process, Lesson 2: Making a Purchase.*

To complete the order, follow the instructions described in *Module 5: The Ordering Process, Lesson 2: Making a Purchase*.



Shopping List before an order



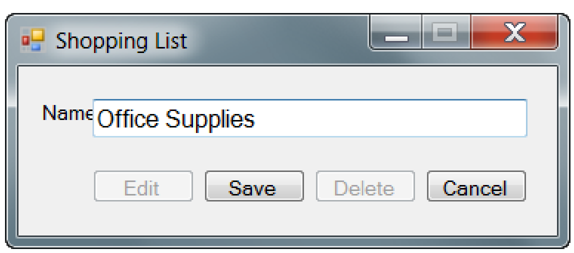
Shopping List after an order – only recurring items remain on the list

Creating and Managing Shopping Lists on the Workstation

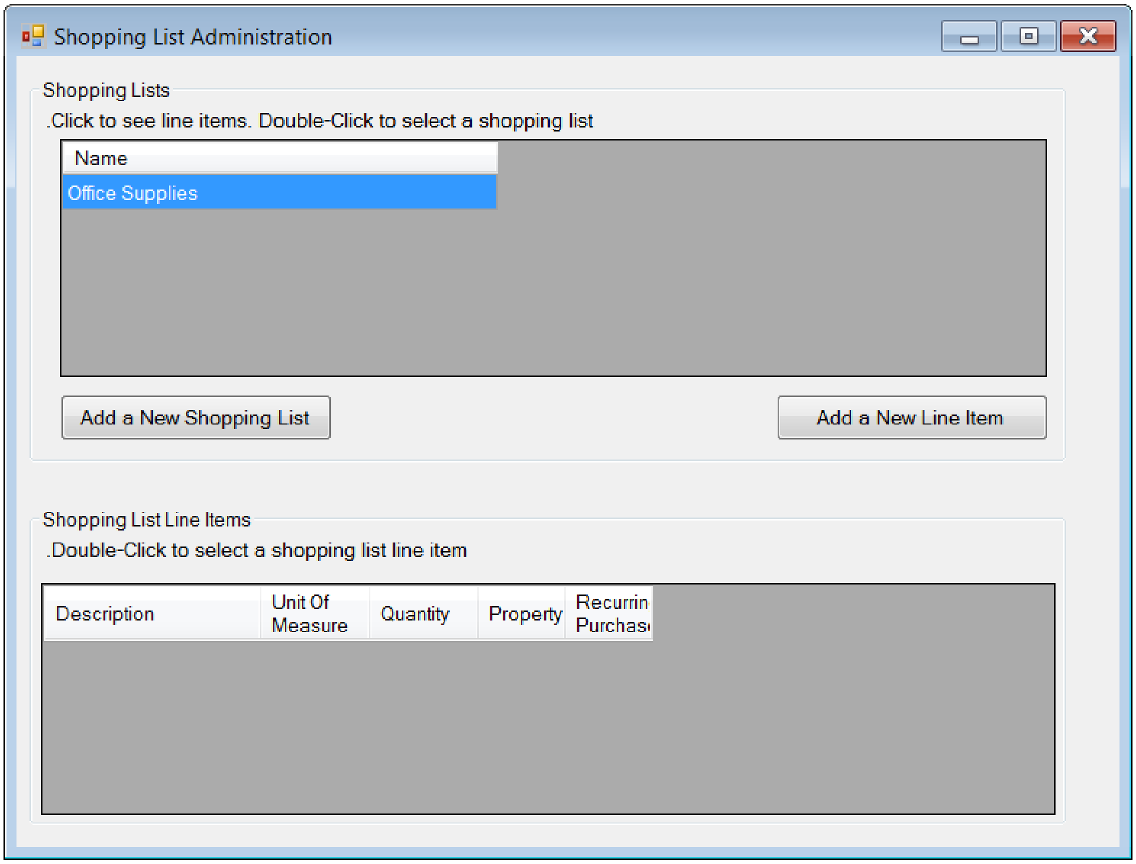
FOOs can create and administer shopping lists on the Workstation as well as on the device. Shopping lists are synchronized between the device and Workstation.

To create a shopping list on the Workstation:

1. From the Workstation main menu, select **Purchase Order**, **Shopping List Administration.**
   – The *Shopping List Administration* window is displayed.
2. Tap the **Add a New Shopping List** button.
3. In the *Shopping List* window, type the new list name and tap the **Save** button.

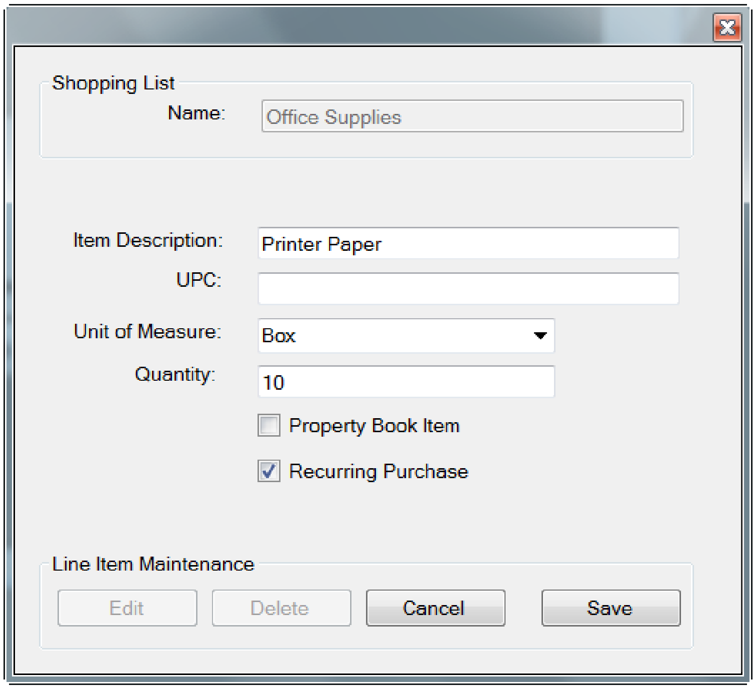


The Shopping List name is displayed in the Shopping Lists table.



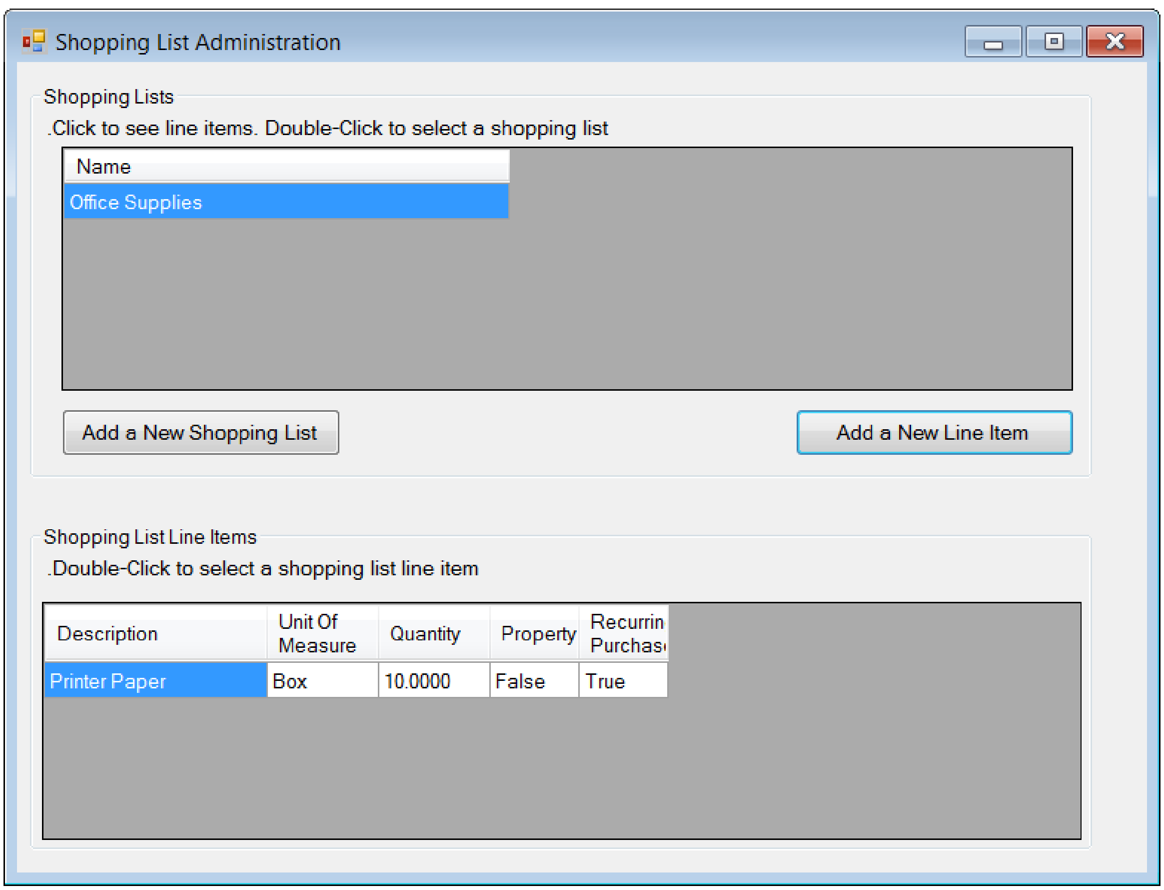
Next, add items to the shopping list:

1. Tap the **Add a New Line Item** button.
2. In the *List Item* window, enter the item name, description, UPC code if applicable, select a unit of measure and specify the quantity purchased each time.
3. If the item is a **Property Book Item**, mark the check box.
4. If the item is purchased on a regular basis, mark the **Recurring Purchase** check box.



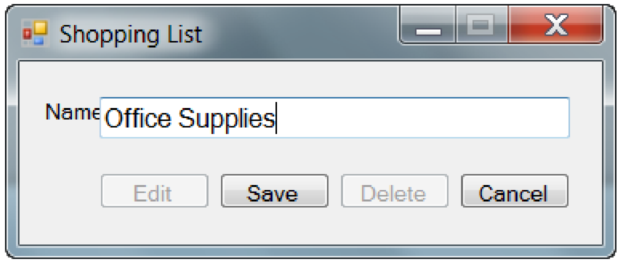
5. Tap the **Save** button.

The new item is displayed in the Shopping List Line Items table.



Editing and Deleting Shopping Lists

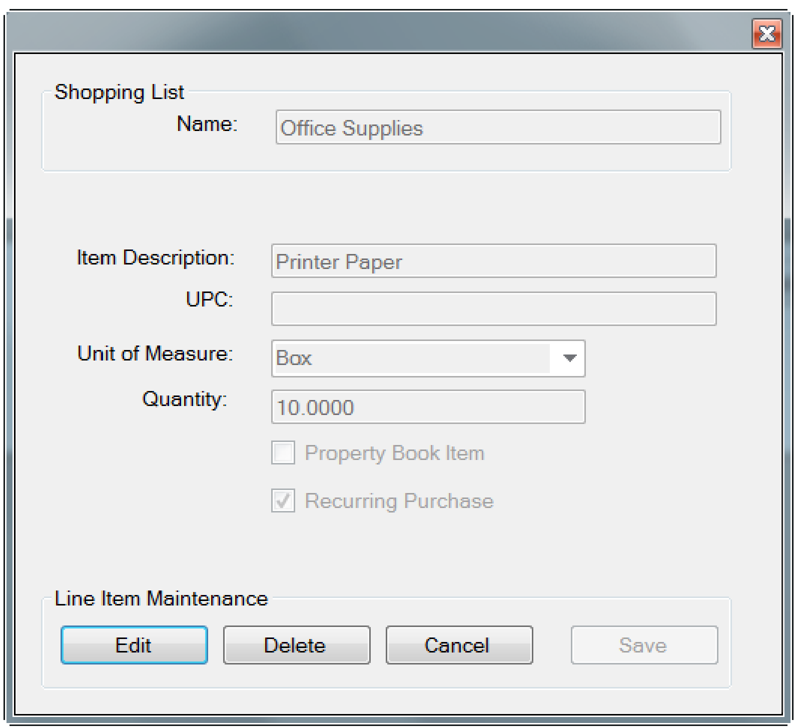
To edit the name of a shopping list, double-tap the list name. In the *Shopping List* window, tap the **Edit** button and then edit the name. Tap the **Save** button. To abandon changes without saving, tap the **Cancel** button.



Shopping List Window – Used to edit or delete a shopping list

To delete a shopping list, double-tap the list name. In the *Shopping List* window, tap the **Delete** button. Tap **Yes** when asked to confirm the deletion.

To edit a shopping list item name, double-click the item name. In the *Shopping List Item* window, tap the **Edit** button and make the changes. Tap the **Save** button. To abandon changes without saving, tap the **Cancel** button.



Shopping List Item Window – Used to edit or delete an item on a shopping list

To delete a shopping list item, tap the **Delete** button in the *Shopping List Item* window. Tap **Yes** when asked to confirm the deletion.

Lesson Summary

In this lesson, you learned to:

- ❑ Create a Shopping List on the device
- ❑ Edit and delete a Shopping List
- ❑ Start an order based on a Shopping List
- ❑ Create and manage Shopping Lists on the Workstation

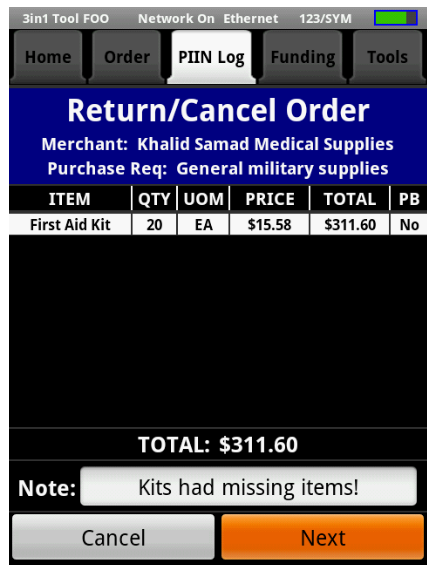
Lesson 2: Returning and Rerunning Purchase Orders on the Device

Objectives

After completing this lesson, the participant will be able to:

- ❑ Cancel (return) a purchase order
- ❑ Describe the advantages of rerunning an order from the handheld device
- ❑ Understand how to use the rerun order feature to make changes to an order after the order has been placed
- ❑ Rerun an order that appears in the PIIN Log

Returning a Purchase Order



As mentioned earlier, once a PIIN number is assigned, an order cannot be edited or deleted, but can be returned. The Return Order feature is designed to work in conjunction with the Rerun Order feature. However, both these features work equally well independently.

Assume that you confirmed a purchase order. A PIIN has been assigned, but then you realize the incorrect quantity or item was purchased, or an item is of poor quality. Instead of going through the entire ordering process again, simply return the faulty order and rerun it, as described in the following section. When you rerun, enter the correct information.

To return an order:

1. From *Purchase Details* screen, tap **Return Order**.
2. Add an appropriate return note.
3. Tap **Confirm**.
4. Tap **Yes** to verify your confirmation.

On the *PIIN Log* screen, the order will display a red watermark: *Order Returned*.

About Rerunning an Order

The main objective of rerunning an order is to save time and make the ordering process quick and efficient. Any order, including a returned order, that appears in the PIIN Log can be rerun. While rerunning an order, vendor information cannot be changed, but other order attributes can be modified, and a new PIIN will be assigned. Orders can be rerun from the same vendor only.

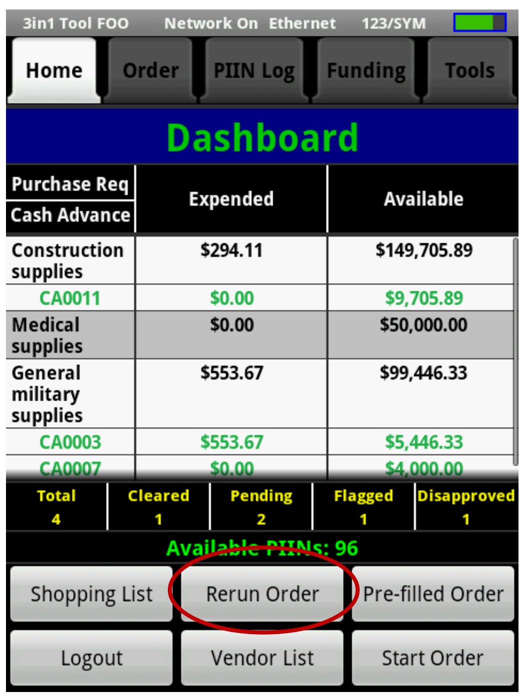
Possible scenarios for rerunning orders:

- A set of items is purchased repeatedly. Rerun a previous order instead of entering each item every time. If many items are purchased, the time saved is significant.
- After you digitally confirm an order, a PIIN number is issued and the order cannot be altered. If you need to edit the order after confirming, return the order, edit it, and then rerun the order.

This point is essential to understanding how to fix ordering mistakes. Orders cannot be changed after they are confirmed by the FOO. If a FOO realizes a mistake has been made after entering an order, the correct procedure is to *cancel* (return) the order, use the *rerun order* feature to start the order again, make the necessary changes, and then place the order again.

Each PIIN is unique and once issued, cannot be recycled. When an order is rerun, a new PIIN is issued after confirmation. Rerun order creates an order that is a copy of the items and quantities in the old order. It is much like a copy-and-paste of the entire order.

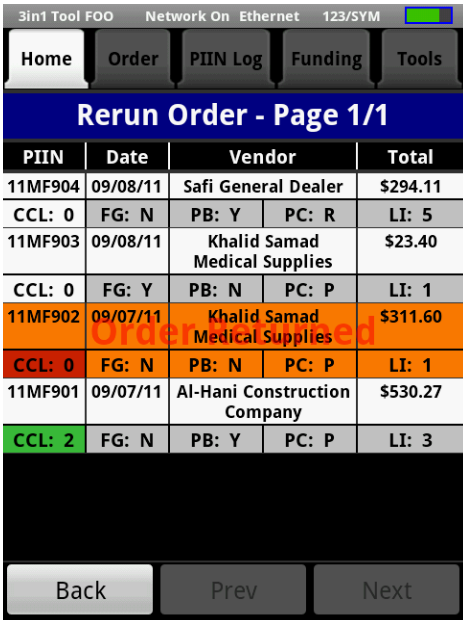
The **Rerun Order** button is on the *Dashboard*.



Dashboard

To commence rerunning an order:

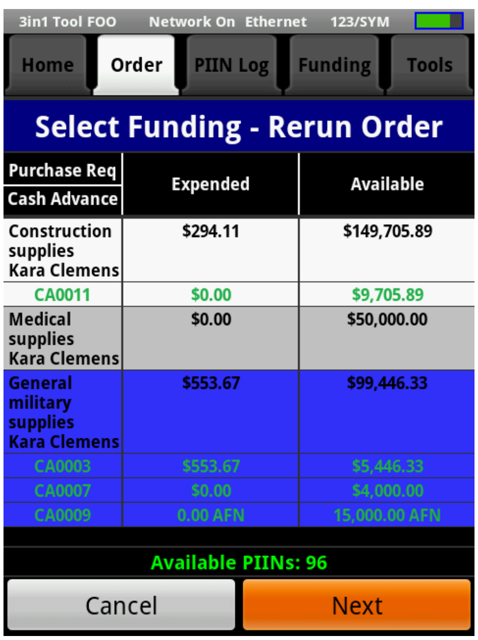
1. Tap the **Rerun Order** button on the *Dashboard*.
2. On the *Rerun Order* screen, select an order.
3. Order details are displayed. If this is the correct order to rerun, tap the **Rerun Order** button. If it is not correct, tap the **Back** button to return to the *Dashboard*.



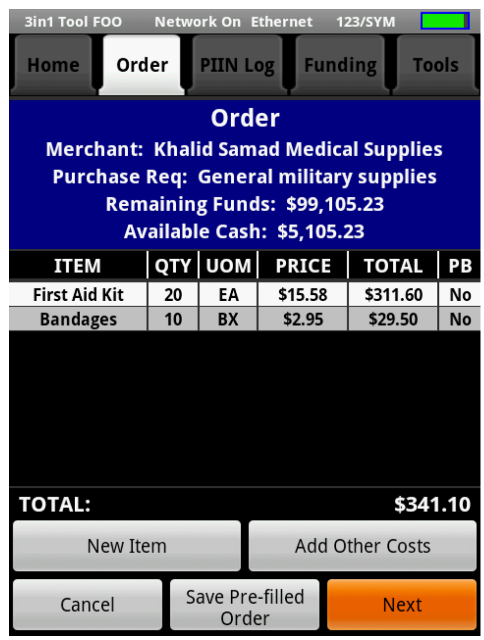
Rerun Order Screen

Rerun Order Details Screen

4. On the *Select Funding* screen, select the funding for the order that is being rerun. Tap the **Next** button.
5. The **Order** screen displays the items from the order that is being rerun.



Select Funding Screen – Select the Cash Advance



Order Screen Displays Order Items

While rerunning an order, vendor information cannot be changed, but other order attributes can be modified. Orders can be rerun from the same vendor only.

If needed, tap the **New Item** and **Add Other Costs** buttons to complete the order. Then follow the standard check out procedures described in *Module 5: The Ordering Process, Lesson 2: Making a Purchase*.

Lesson Summary

In this lesson, you learned to:

- ❑ Cancel (return) a purchase order
- ❑ Describe the advantages of rerunning an order from the handheld device
- ❑ Understand how to use the rerun order feature to make changes to an order after the order has been placed
- ❑ Rerun an order that appears in the PIIN Log

Lesson 3: Pre-filled Orders

Objectives

After completing this lesson, the participant will be able to:

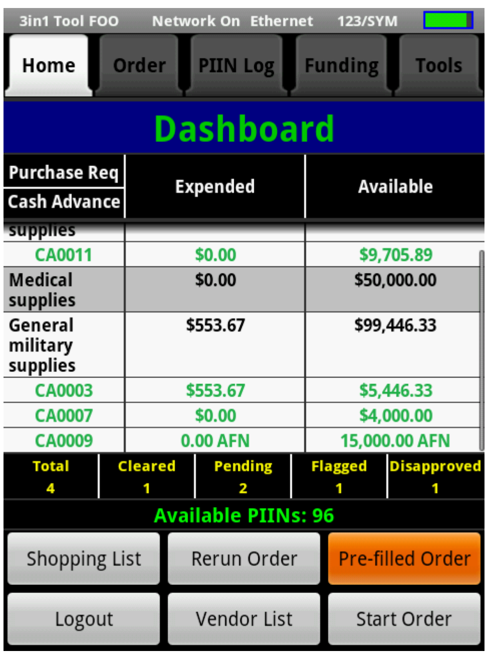
- ❑ Start an order, save it and complete it later using the Pre-Filled Orders feature
- ❑ Delete incomplete orders

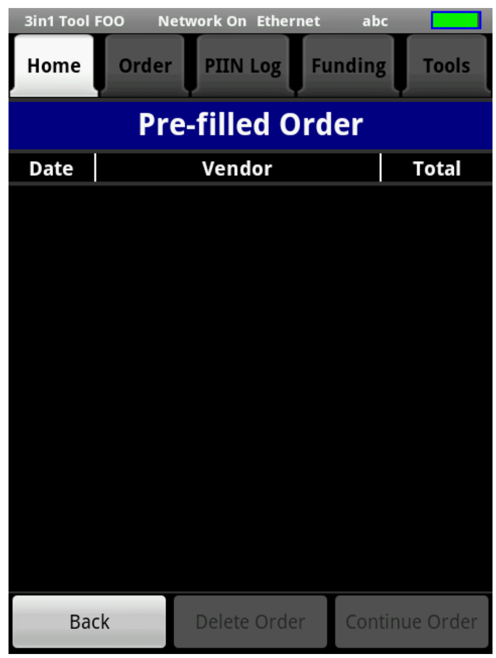
Using Pre-Filled Orders

The Pre-Filled Order feature can be used to minimize the time spent by FOO/PA teams at vendor locations. While on base or en route to the vendor, a FOO can start an order, complete as much information as possible, and then save it as a pre-filled order. Upon arrival at the merchant location, the order can be completed.

To access the *Pre-filled Order* screen:

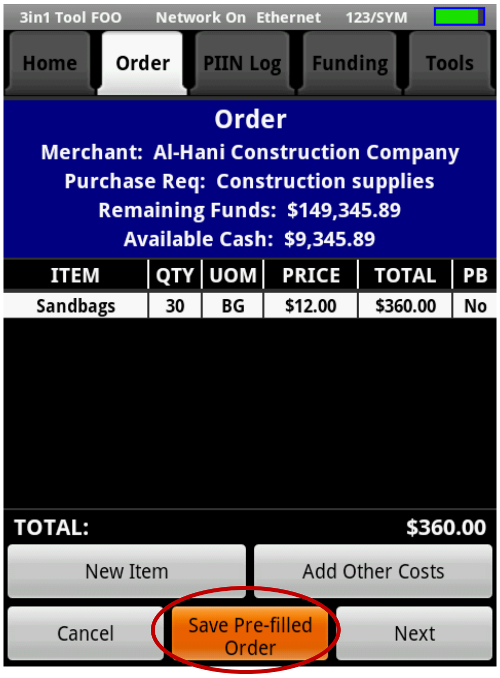
- From the *Dashboard*, tap the **Pre-filled Order** button.



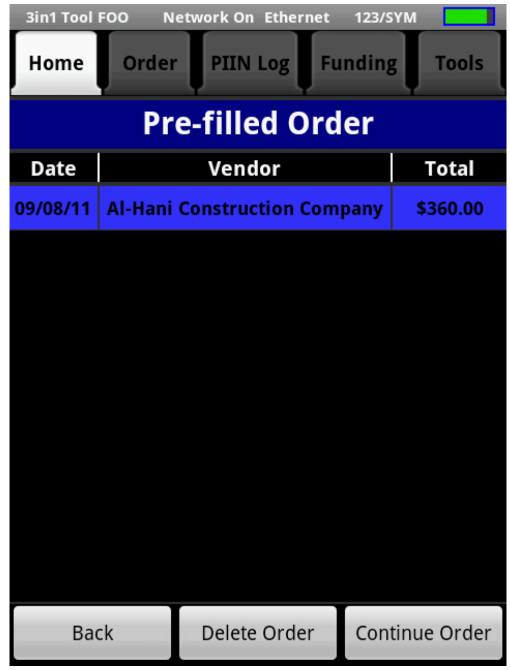


To add an order to the *Pre-filled Order* screen:

- Start an order, then at any time, tap the **Save Pre-filled Order** button on the *Order* screen.
- The order is saved on the Pre-filled Order screen and can be identified by the creation date, vendor name and total amount.
- Multiple orders can be saved.



Select an order on the screen, then tap the button to use it as a pre-filled order in the future



The pre-filled order is saved and can be continued later.

To continue filling out a pre-saved order:

1. From the *Dashboard*, tap the **Pre-filled Order** button.
2. Select an order on the *Pre-filled Order* screen, then tap the **Continue Order** button.
3. Continue completing the order from the point where you saved it.

Note an order can be saved as a prefilled order and continued more than once.

If you decide that a pre-filled order will not be completed, select the order and tap the **Delete Order** button.

Lesson Summary

In this lesson, you learned to:

- ❑ Start an order, save it and complete it later using the Pre-Filled Orders feature
- ❑ Delete incomplete orders

Module 7: Managing Purchase Orders on the Workstation

Lesson 1: Manually Adding Purchase Orders

Objectives

After completing this lesson, the participant will be able to:

- ❑ Manually add a purchase order
- ❑ Add line items to a new purchase order
- ❑ Upload supporting documents to a purchase order

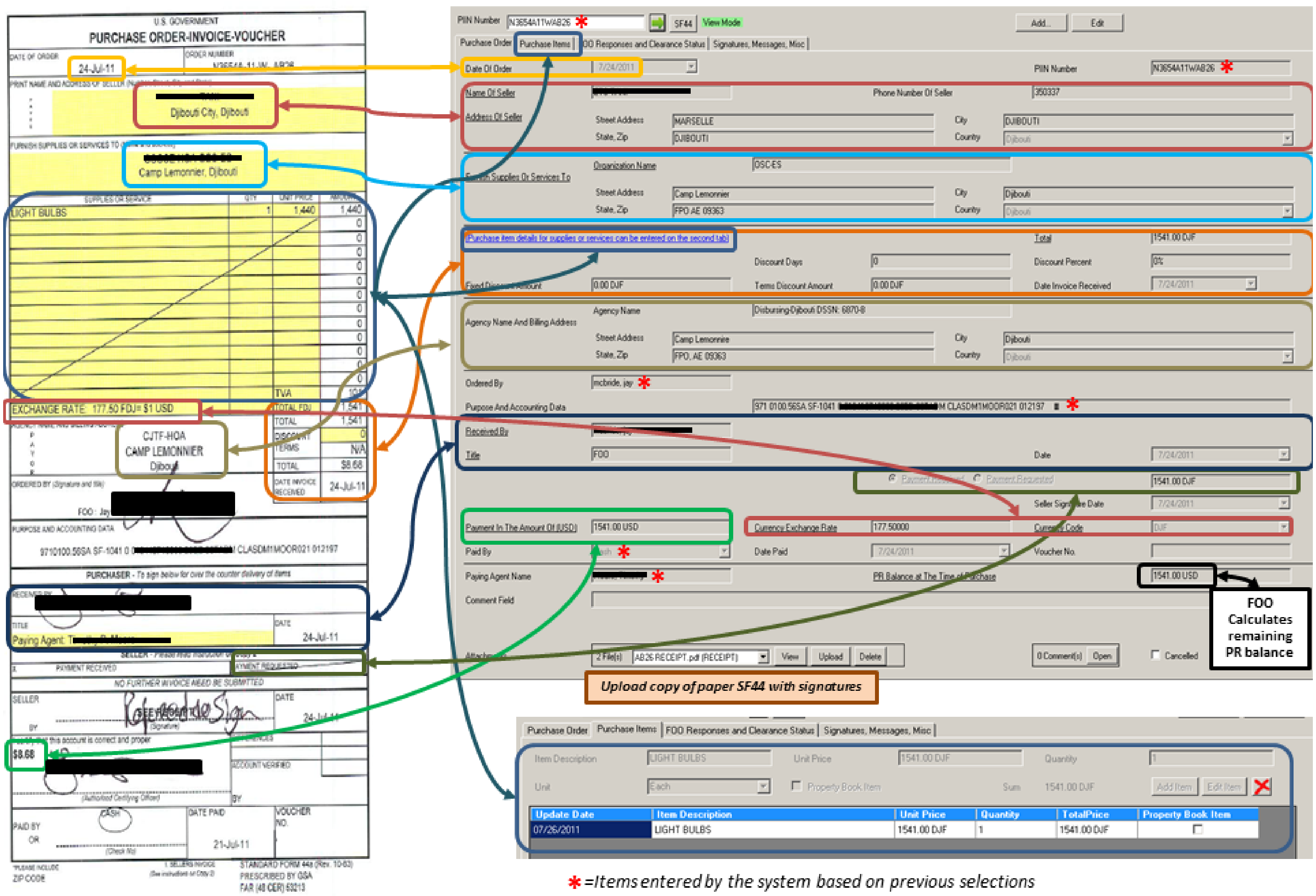
Manually Adding Purchase Orders in the Workstation

If a device becomes inoperable in the field, the FOO and PA will have to revert to the manual process until the device can be used again. During the initial setup, the Contracting Officer should assign PIINs to be used by the device ("M") and, in case of an emergency, special PIINs for use with paper SF44s ("W"). It is necessary to manually add the data from the paper SF44 to the 3in1 system for tracking and clearing purposes.

Tip: Fill out the *Add Purchase Order & Items Worksheet* in *Appendix B* to ensure you have all the required information for entering data in the 3in1 Tool Workstation. You will also want to refer to the paper version of the SF44 for information to enter in the manual PO.

The graphic on the following page shows how fields on the paper SF44 correspond to fields in the Workstation's electronic purchase order.

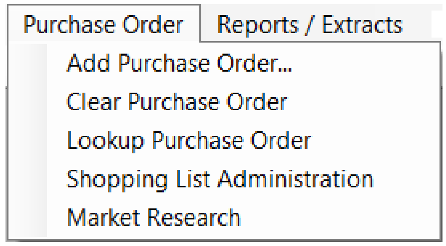
Entering data from a manual SF44 into the 3in1 Tool Order Look Up Screen



*=Items entered by the system based on previous selections

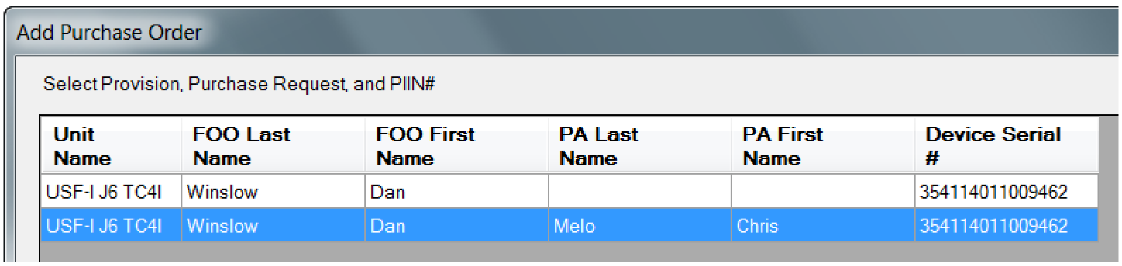
To manually add a purchase order on the Workstation:

1. Select **Purchase Order**, **Add Purchase Order** from the menu.



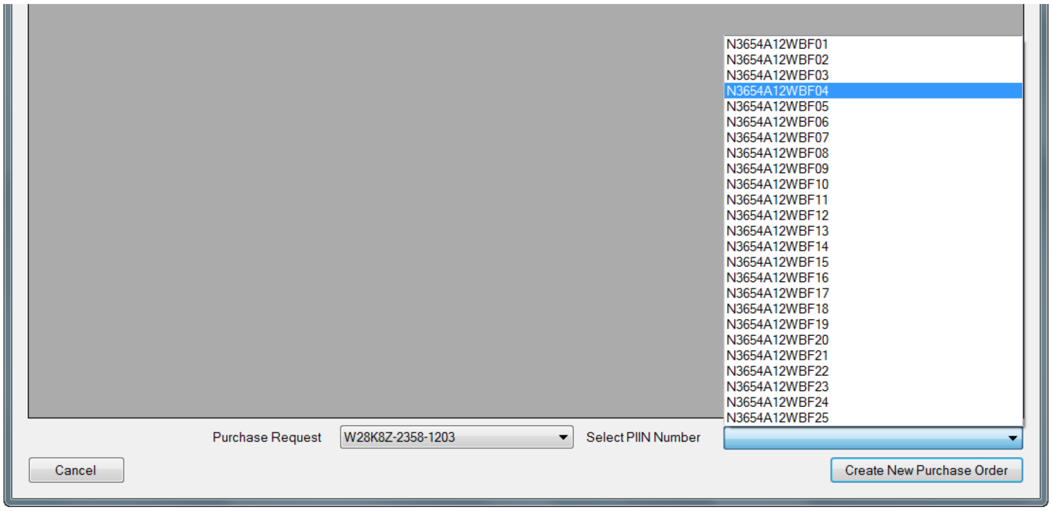
Add Purchase Order Menu Command

   – The *Add Purchase Order* window opens.



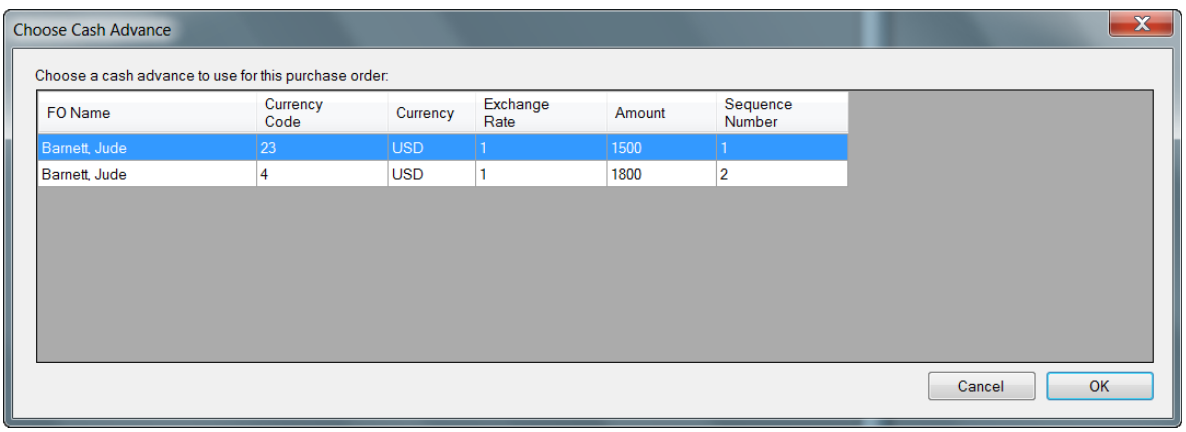
Add Purchase Order Window

2. In the table, click a row that represents the appropriate combination of FOO and PA that the manual PO should be assigned to.
3. At the bottom of the window, select a **Purchase Request** from the drop-down list.
4. Select a **PIIN Number** with “W” as the contract type to associate with the new purchase order.
   – The PIIN number is 13 digits, comprised of the six-digit Contracting Office DODAAC, two-digit fiscal year, contract type “M” or “W,” a two-character FOO ID, and a two-digit serial for the orders.
5. Click the **Create New Purchase Order** button.



Add Purchase Order Window – Select a PIIN

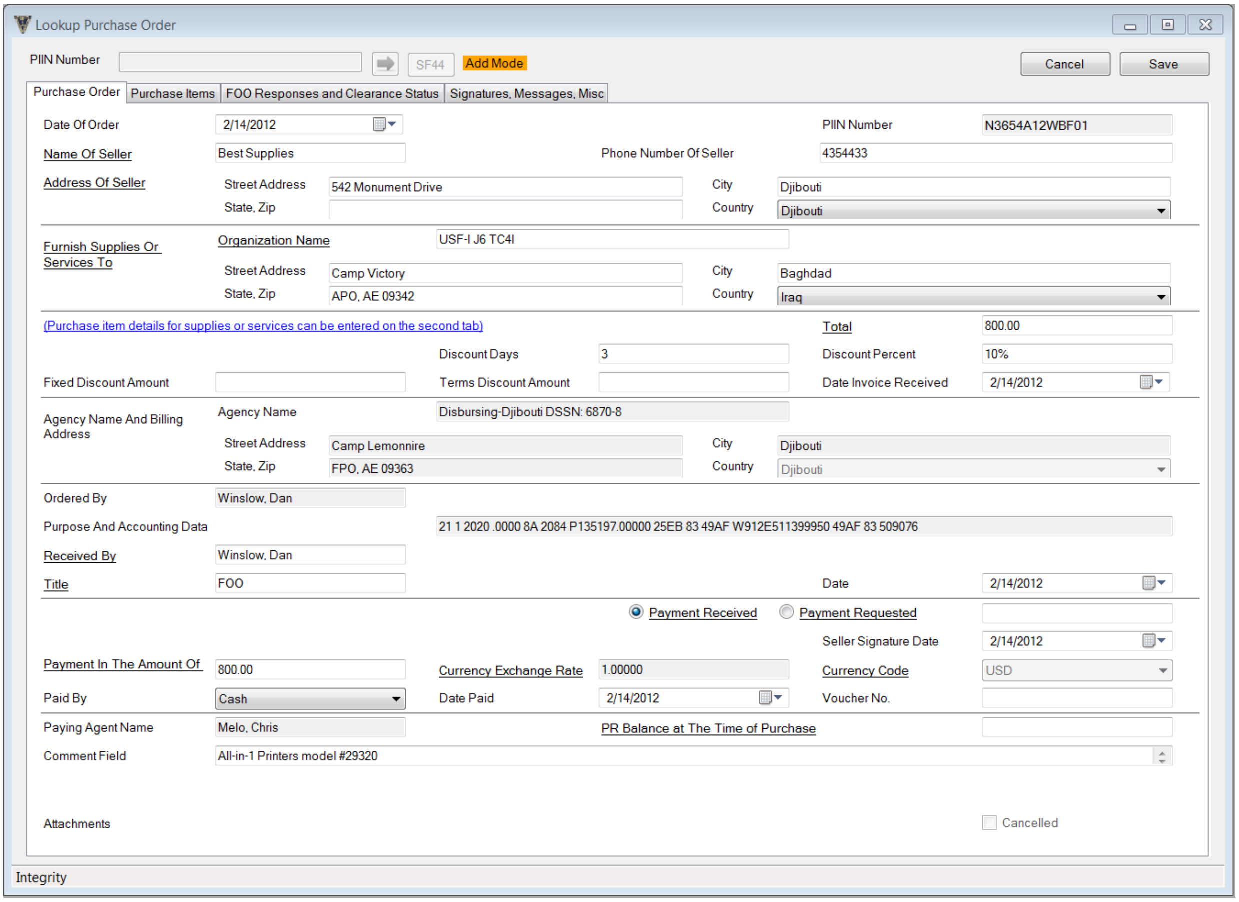
6. In the **Choose Cash Advance** dialog box, select a cash advance to use for the new purchase order. Click OK. (If there is only one cash advance available, the following screen will not be displayed; the *Purchase Order* window will be displayed instead.)



Choose Cash Advance Dialog Box

7. The new *Purchase Order* window is displayed. You may edit any of the white fields. Gray fields may not be edited. At this time, only fill in the information you would normally fill on the SF44. Only fill in the voucher number, if one has been assigned by the finance office. If another individual will be accountable for the items, put their information in the Final Receiver block on the fourth tab, *Signatures, Messages, Misc.* See the next lesson for more information on this tab.

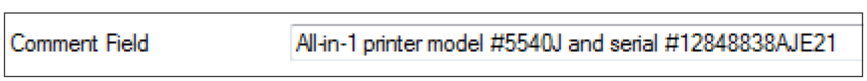
8. Click the **Save** button in the top right of the window.



Add Purchase Order

– Some fields are mandatory. If you attempt to save the purchase order without completing these fields, a red exclamation symbol identifies the mandatory field. Place the mouse over the symbol to display the message.

– If purchasing an accountable item, enter the model and serial number in the **Comment Field**.

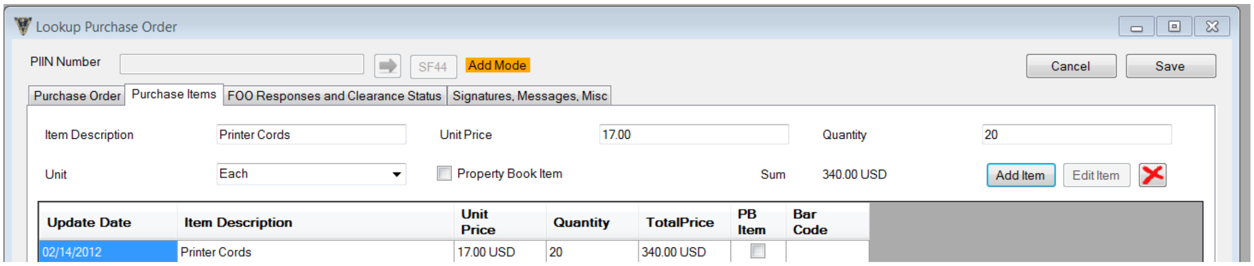


Comment Field

9. Click the **Save** button in the top right of the window, then proceed to adding the individual purchased items in the next tab.

Adding Purchase Items

Description of the items purchased are added on the **Purchase Items** tab. If the FOO uses the device bar code scanner to scan a UPC for a purchase item, the UPC/bar code is displayed in the Bar Code column. This field is optional.



Purchase Items Tab

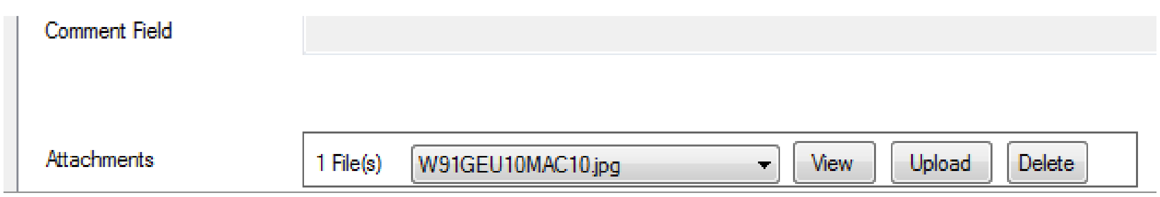
To add a purchase item:

1. In the top section of the window, fill in the **Item Description**, **Unit Price**, and **Quantity**. Also select the **Unit Type** and optionally mark the item as a Property Book Item by selecting the check box if applicable.
2. Click the **Add Item** button. The new item is added to the table.
   - Add another item by typing the information at the top of the screen, then clicking the **Add Item** button.
   - To remove an item, select it in the table and then click the **Delete** button.
3. When all **purchase** items have been added, click the **Save** button at the top of the window.

Uploading Supporting Documents

The last step is to upload a scanned version of the original, paper SF44 to support the data entered for electronic processing. At the bottom of the *Purchase Order* window, locate the Attachments area. Use the **Upload** button to locate and upload the scanned SF44 file.

Multiple files can be uploaded to a purchase order. Click the drop-down arrow to select a different attachment. Use the **View** button to open the selected document. Click the **Delete** button to remove the attachment. It is important to select the appropriate document type so the system can properly identify each document.



Attachments area of Purchase Order Window

Completing Purchases on the Workstation

After creating the purchase order on the Workstation, you may return to edit some fields, such as entering payment information and voucher numbers. Use the **Look Up Purchase Order** command to locate the purchase order, which is described later in this module, in *Lesson 2: Looking Up and Completing Purchase Orders*.

Lesson Summary

In this lesson, you learned to:

- ❑ Manually add a purchase order
- ❑ Add line items to a new purchase order
- ❑ Upload supporting documents to a purchase order

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Lesson 2: Looking Up and Completing Purchase Orders on the Workstation

Objectives

After completing this lesson, the participant will be able to:

- ❑ Look up a purchase order on the Workstation
- ❑ Add voucher numbers, record payments, receiver information to purchase orders
- ❑ Monitor data integrity in purchase orders
- ❑ View attachments
- ❑ View FOO and Clearance comments and signatures associated with a purchase order
- ❑ Print a SF44 from the Purchase Order screen

Looking Up Purchase Orders

At times, a user may need to view the details of a specific purchase order or complete post-purchase actions such as adding voucher numbers or processing a payment. There are two ways to look up purchase orders: by user name or by PIIN number.

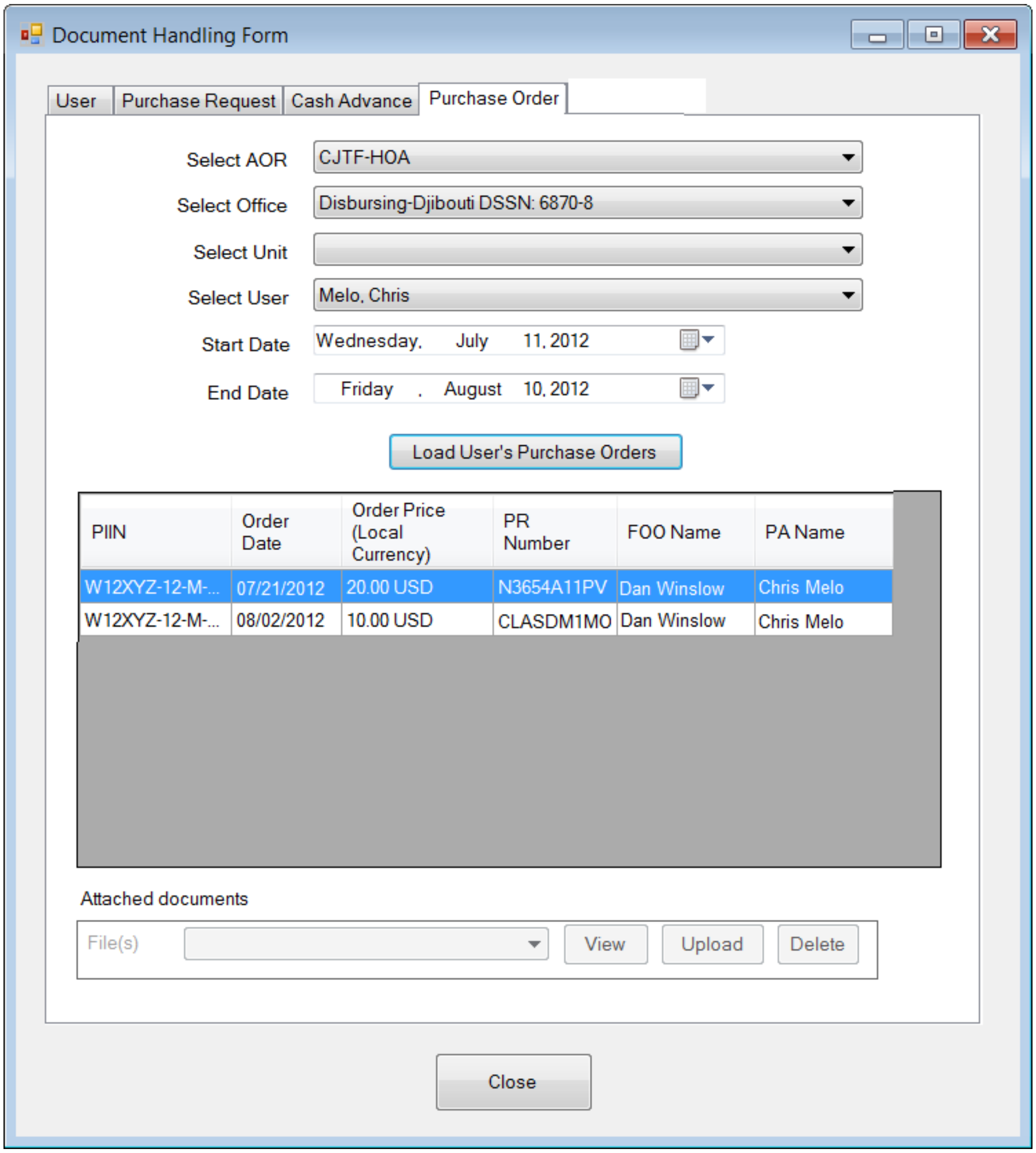
Looking Up POs by User

To view purchase orders by user assignment:

1. Select **File**, **Documents**, **Document Handling**, and the **Purchase Order** tab.
2. Select the **AOR**, **Office**, **Unit** (optional), and **User**. Also specify the date range for the PO.
3. Click the **Load User's Purchase Orders** button.

A summary of each purchase order is displayed in the table. The PO information cannot be edited on this screen.

Select a row to view attachments associated with the PO. Attachments can be viewed, uploaded, or deleted.

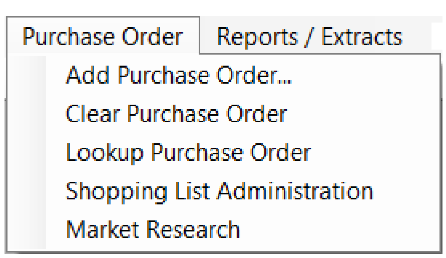


Purchase orders associated with the selected user are listed in the table

Looking Up POs by PIIN

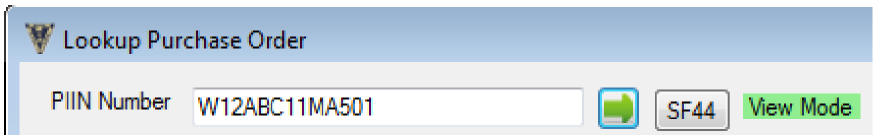
Detailed information about a purchase order can be viewed by looking up a purchase order by PIIN.

1. From the Workstation main menu, select **Purchase Order**, **Lookup Purchase Order**.



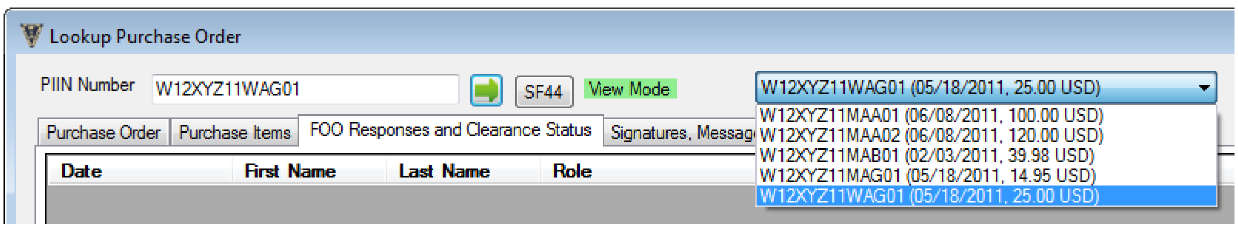
– The *Lookup Purchase Order* window opens.

2. Select the purchase order from the list of orders in the drop-down list or look up a purchase order by specifying a PIIN in the **PIIN Number** field at the top of the screen. Then click the **Lookup** button .

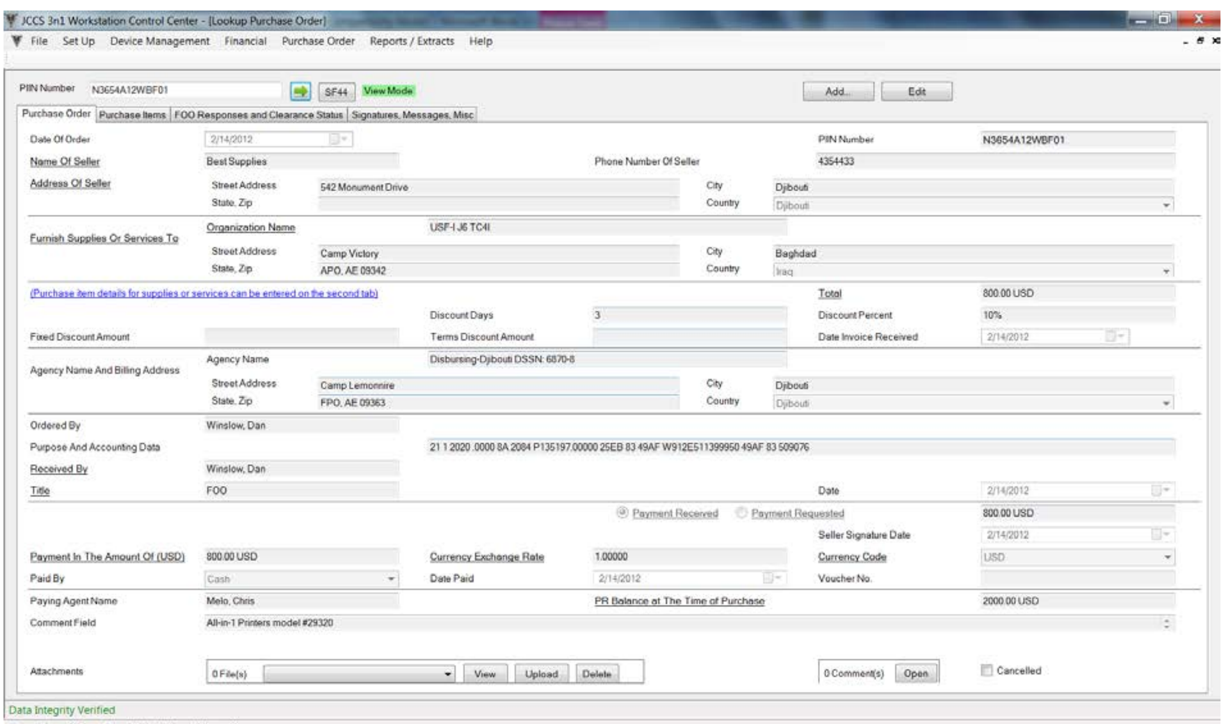


Specify PIIN to look up the Purchase Order

– FOOS and PAs can use the PO drop-down list to easily access all the POs that they have entered. Select one from the drop-down list.



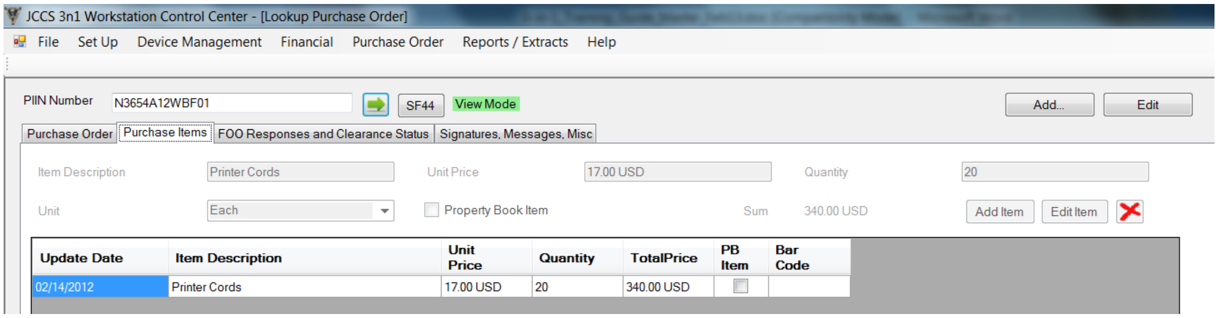
– The screen updates with the purchase order (PO) information.



Purchase Order Window

Viewing Purchase Items

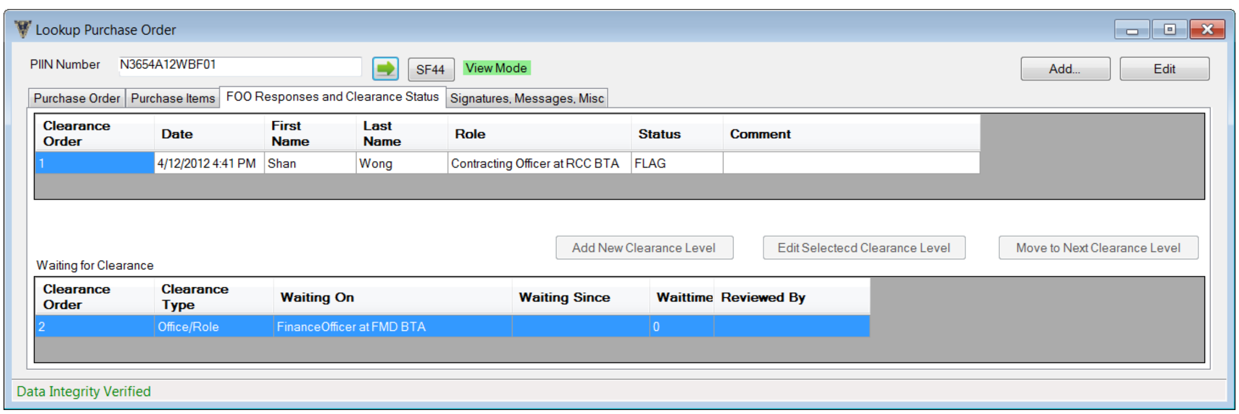
To view a list of the items purchased on the PO, click the **Purchase Items** tab on the *Purchase Order* window.



Purchase Items Tab

Viewing FOO Responses and Clearance Status

To view comments made by various reviewers during the clearance process, as well as FOO responses, and view the next person to clear the order, click the **FOO Responses and Clearance Status** tab.



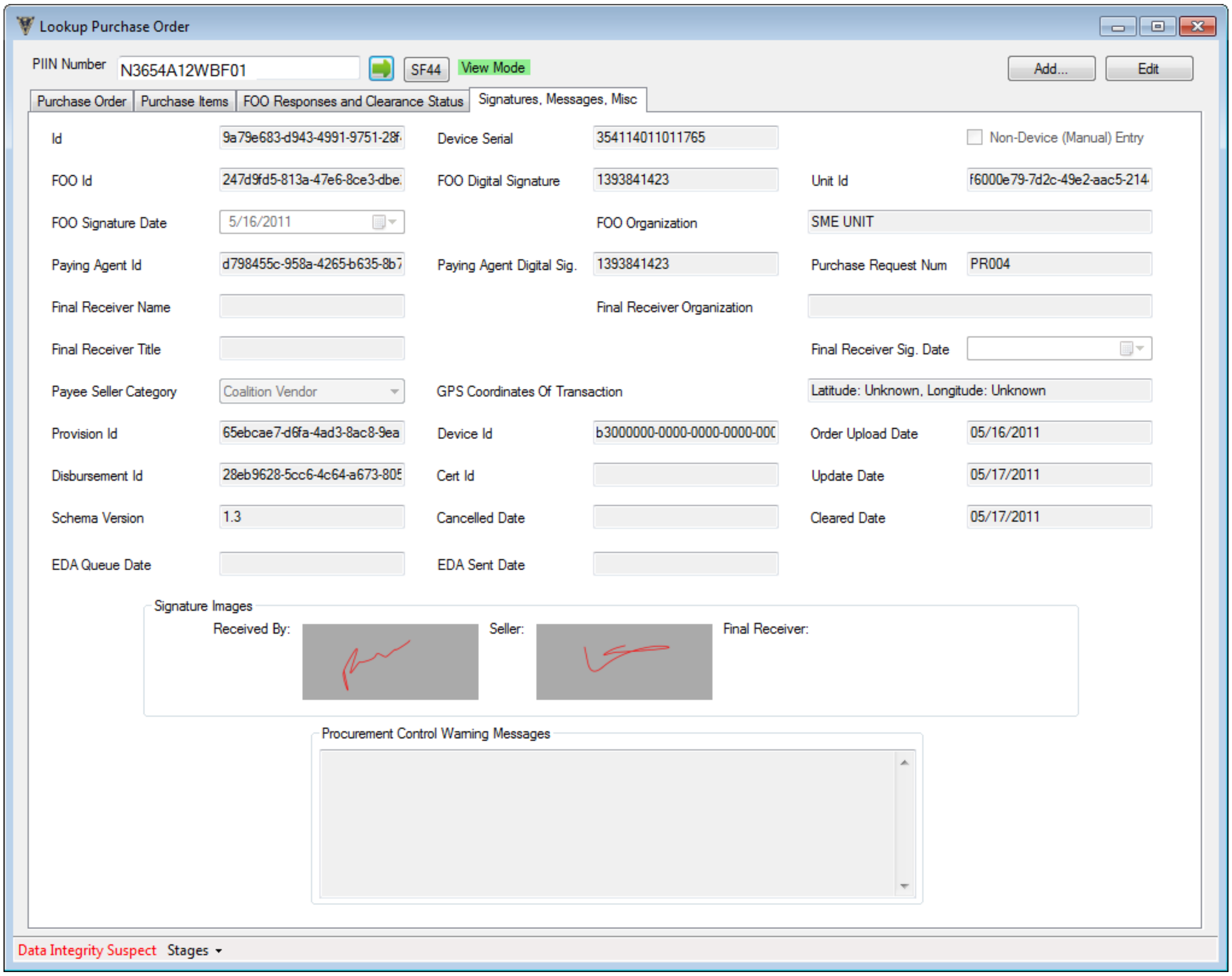
FOO Responses and Clearance Status Tab

In the top table of the **FOO Responses and Clearance Status** tab, the Clearance Order column lists the clearance levels that have reviewed the PO. The other columns provide information on the reviewer and the status. In the figure above, the first level (1) reviewer has flagged the PO.

The second table, **Waiting for Clearance,** identifies the next level(s) of reviewer(s) waiting to review the PO.

Viewing Signatures and Messages

The last Tab, "Signature, Messages, Misc." displays key individuals who participated in the purchase process and any procurement warning messages that may have been issued by the order.



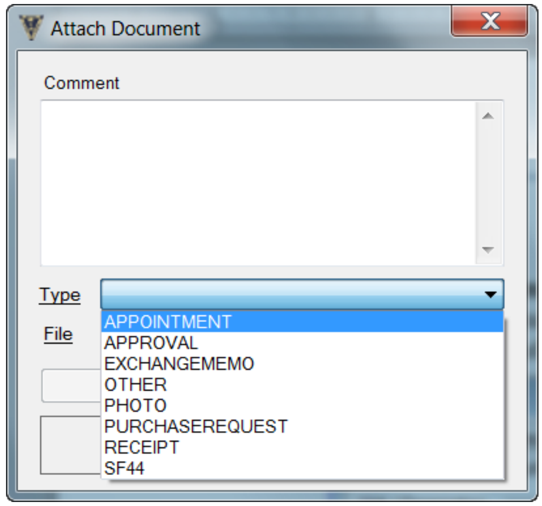
Signatures and Messages Tab

Adding Attachments to a Purchase Order

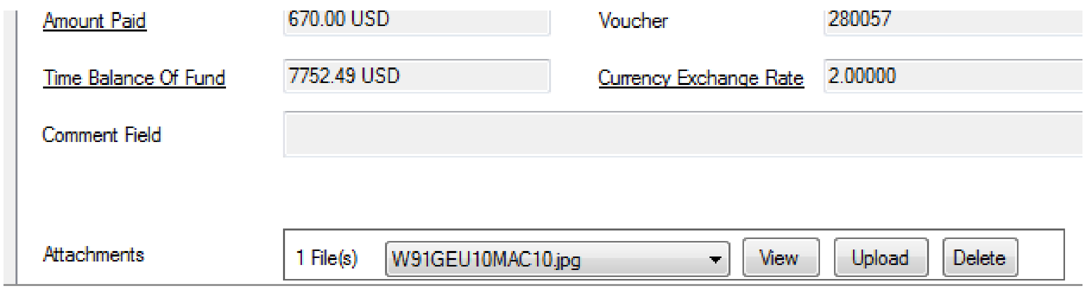
A purchase order may require an approval or justification letter to support the order and for it to be cleared. You can upload documents to attach to an order on this screen.

To upload a document:

1. At the bottom of the *Purchase Order* window, locate the **Attachments** area and click the **Upload** button.
2. The *Attach Document* dialog box opens. Click the **Browse** button and locate and select the file.
3. Provide a comment about the attachment.



4. Select the file Type (i.e., Appointment Letter)
5. Click the **Upload File** button.
6. Close the *Attach Document* dialog box. The attached file is displayed in the **Attachments** section.



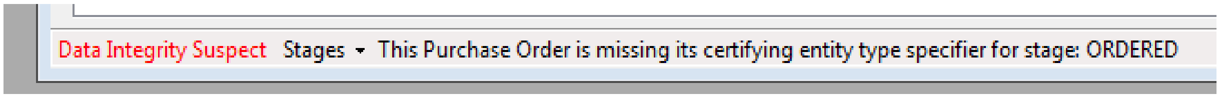
Purchase Order Window Attachments Section

Checking Order Data Integrity

When you look up a purchase order, be sure to verify the data integrity by referring to the bottom left corner of the *Purchase Order* window. If a red "Data Integrity Suspect" flag exists, it means the order has data integrity issues and the original order may have been altered. The Workstation includes a validation feature to issue a warning if the SF44 data received from the device has been altered. This feature is explained in detail in the following lesson.

Click the **Stages** drop-down menu to select a stage in which the order is "locked down" on the device. For example, if an order was not altered during the Ordered or Paid stage, the message "Data Integrity OK" is displayed. But if the order was altered during the Received stage, the message "Data Integrity Suspect" is displayed. This means that the purchase order was valid during the Ordered and Paid stage, but was altered during the Received stage. A reason is usually provided for Suspect orders, such as "The signed content of the order is suspect at stage: RECEIVED".

If the line of accounting (LOA) is corrected after the order is executed, the data will be identified as suspect and a comment will be automatically created by the system, stating who changed the LOA and when it was done.



Verifying Purchase Order Data Integrity

Completing Purchases

Click the **Edit** button on the **Purchase Order** tab to edit the following fields in existing purchase orders:

- Final Receiver Person/Title
- Voucher Number
- Payment amount for payments not accomplished in the field by the PA on the device

Typically, the Disbursing Agent will assign the voucher number and the payment amount if the payment was not made on the device or by the Paying Agent.

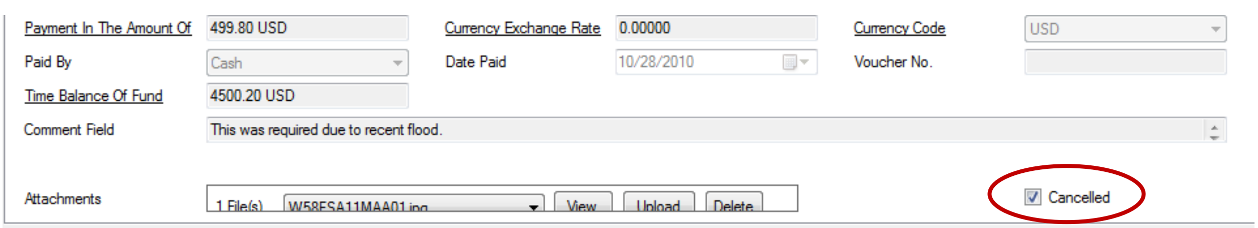
Cancelling Purchase Orders

Purchase order may be cancelled on the device or on the Workstation by the FOO.

To cancel a PO:

1. Mark the **Cancelled** check box in the bottom right corner of the **Purchase Order** tab.
2. State the reason in the **Cancellation Reason** field.
3. Click the **Save** button at the top of the window.
4. Click **Yes** when asked to confirm the cancellation.

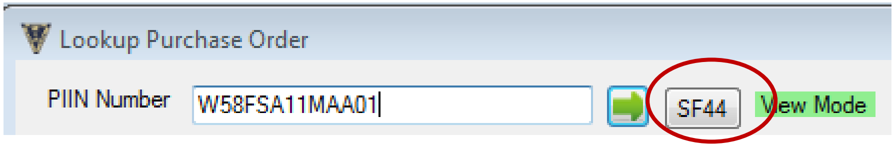
Note: Cancelling a purchase order returns the funds, but the PIIN remains expended. A cancelled purchase order can be retrieved using the Lookup feature, but cannot be edited. Orders cancelled on the Workstation will be transmitted to the device during the next data upload.



Cancelled Purchase Order

Printing the SF44

An image of the SF44 can also be displayed and printed on the workstation. Use the **SF44** button at the top of the *Lookup Purchase Order* window to produce a Standard Form 44 report.



Generate SF44 Button

When you click the **SF44** button, the report is displayed and can be printed or saved to the hard drive.

If the purchase order was entered manually on the Workstation, the official copy is a scanned, handwritten SF44 which will be displayed if it has been uploaded. If the scanned image has not been uploaded, a message will be displayed stating the image is not available. It is important to properly assign the document type to each uploaded document, so the system can appropriately catalog them.

U.S GOVERNMENT

PURCHASE ORDER-INVOICE-VOUCHER

DATE OF ORDER
06/06/2012
W12XYZ-12-M-AE13

PRINT NAME AND ADDRESS OF SELLER *(Number, Street, City, and State)**

P
A
Y
E
E

Aziz Construction
25th st
Baghdad
55662
Iraq

FURNISH SUPPLIES OR SERVICES TO *(Name and address)**

BTA TEST COMMAND
1851 S Bell St
Arlington
VA, 22030
United States

SUPPLIES OR SERVICES	QUANTITY	UNIT PRICE	AMOUNT
Dell Computers	2 EA	750.00	1500.00

AGENCY NAME AND BILLING ADDRESS*

P
A
Y
O
R

Finance Company BTA [DSSN: 2038]
1851 S Bell St
Arlington
VA 22202
United States

TOTAL 1500.00 USD
DISCOUNT TERMS
DAY(S)
DATE INVOICE RECEIVED
06/06/2012

ORDERED BY *(Signature and title)*

Electronically Signed By : Jerry King, ; Device Id : 354114012920287 On 06/06/2012

PURPOSE AND ACCOUNTING DATA

23423 2 3453 .3453 34 34534 452345234543525 4235 52345 4352345342 56345623453453453
4352345342 52345 523452

PURCHASER *To sign below for over-the-counter delivery of items*

RECEIVED BY
Jerry King

TITLE
DATE

SELLER *Please read instructions on Copy 2*

☒ Payment Received
1500.00 USD

☐ Payment Requested

NO FURTHER INVOICE NEED BE SUBMITTED

SELLER
BY Aziz Construction
(Signature)

DATE

I certify that this account is correct and proper for payment in the amount of
1500.00 USD
(Authorized certifying officer)

Exchange Rate
1.00000

DIFFERENCES
None
None

ACCOUNT CERTIFIED:
CORRECT FOR
BY

PAID BY CASH
OR
(Check No.)

DATE PAID

VOUCHER NO.

***PLEASE INCLUDE SELLER'S INVOICE**

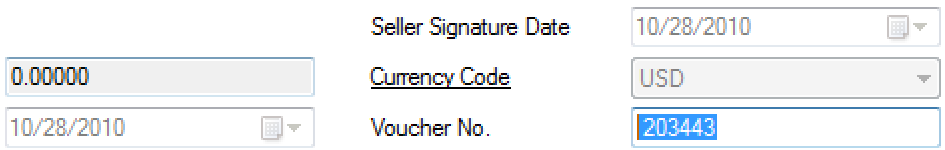
STANDARD FORM 44a (REV. 10-83)
ZIP CODE*(See Instructions on Copy 2)*PRESCRIBED BY GSA,
FAR (48 CFR) 53.213(c)

Printed SF44

Voucher Numbers and Payment Processing

If your finance office uses the Deployable Disbursing System (DDS), purchase orders created in 3in1 can be uploaded to DDS for payment processing and assigning voucher numbers. Typically the Disbursing Agent uploads this data using the Workstation DDS Extract feature.

After voucher numbers are assigned to purchase orders outside the 3in1 Tool system, it is necessary to add these voucher numbers to purchase orders in the 3in1 Workstation. There are two ways to do this. If your finance office uses DDS, the voucher numbers can be imported. Alternatively, the Disbursing Agent can look up individual purchase orders and manually enter the voucher number for each one.



Voucher Number Field on Purchase Order Screen

Orders Moved to EDA for Permanent Storage

Field Ordering Officers should note that after voucher numbers have been issued, the 3in1 prime database automatically transmits the SF44 order/voucher information and receipt images for official document storage to Electronic Data Access (EDA). This eliminates the need for FOOs or PAs to retain paper copies of the SF44s.

Lesson Summary

In this lesson, you learned to:

- ❑ Look up a purchase order on the Workstation
- ❑ Add voucher numbers, record payments, receiver information to purchase orders
- ❑ Monitor data integrity in purchase orders
- ❑ Review attachments
- ❑ View FOO and Clearance comments and signatures associated with a purchase order
- ❑ Print a SF44 from the Purchase Order screen

Module 8: Viewing Purchase Requests, Cash Advances and Purchases on the Workstation

Lesson 1: Viewing Financial Information

Objectives

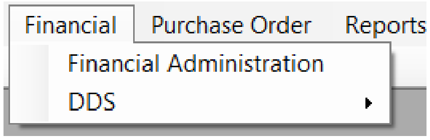
After completing this lesson, the participant will be able to:

- ❑ View purchase requests, cash advances and purchases for a selected FOO or PA

Accessing the Financial Administration Feature

FOOs and PAs can view purchase requests, cash advances and purchases on the *Financial Administration* screen. However, they cannot perform any functions or modify any of the data.

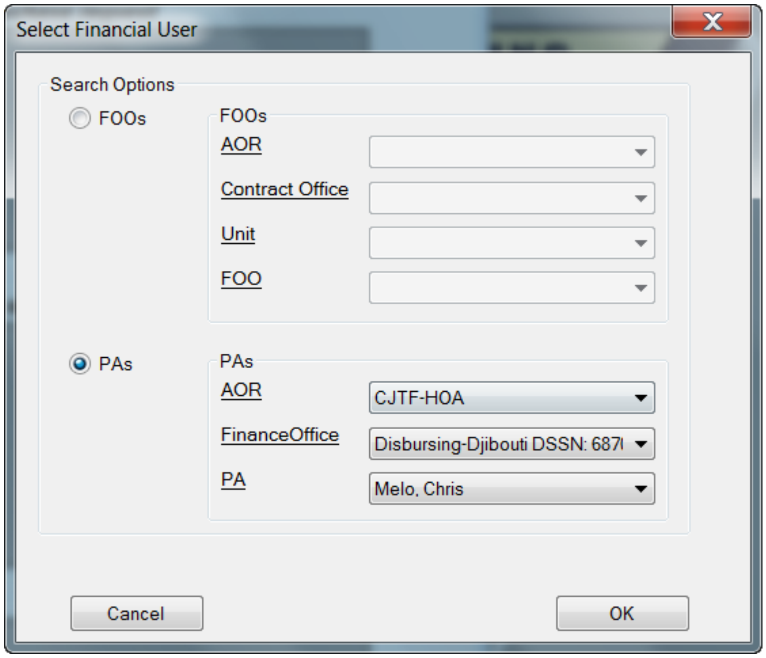
1. From the main menu, select **Financial**, **Financial Administration**.



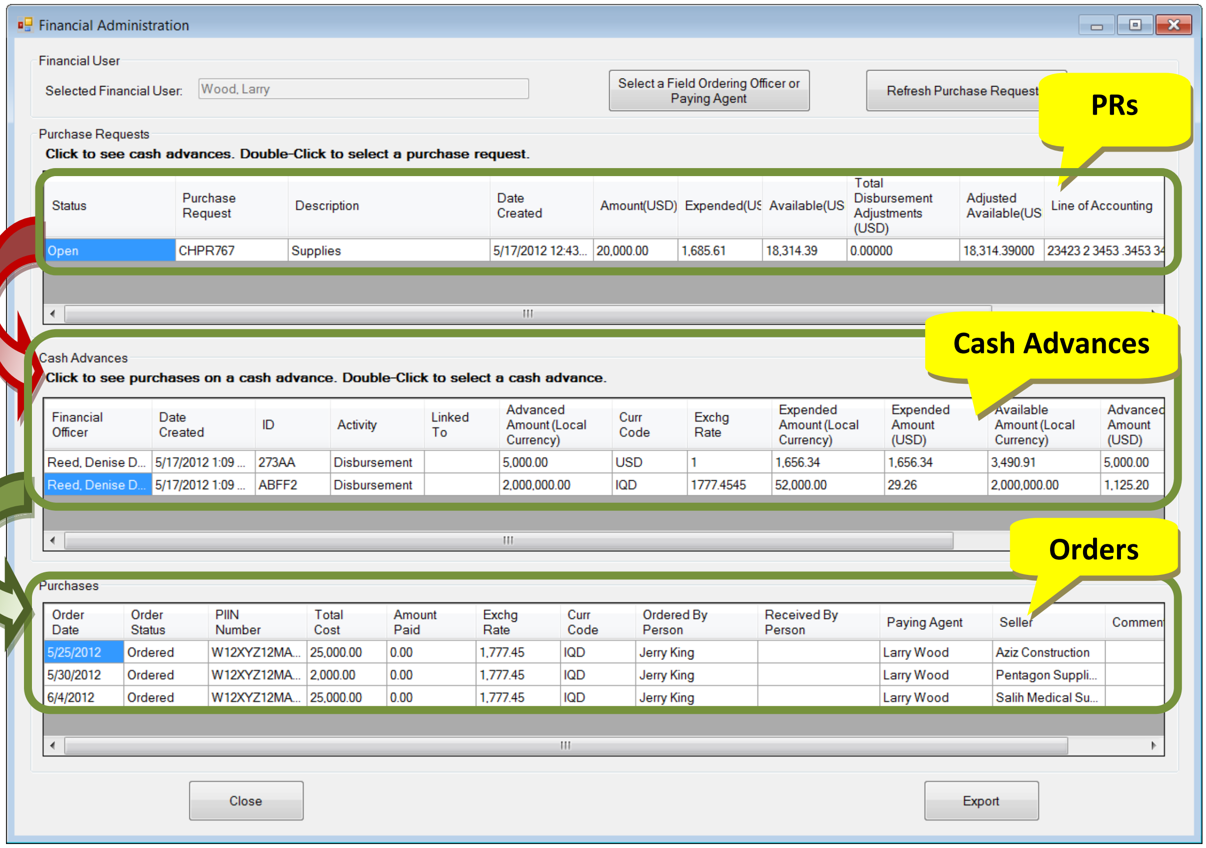
   – The *Financial Administration* window is displayed.

2. The first task is selecting the FOO or PA. Click the **Select a Field Ordering Officer or Paying Agent** button.

   – The *Select Financial User* window is displayed.



3. Select the **FOO** or **PA** whose purchase requests should be accessed. Select the FOOs or PAs radio button, then select the appropriate AOR and office. Then select a name from the FOO or PA drop-down list.
4. Click OK.
   - Purchase requests associated with the selected paying agent or FOO are displayed in the top table.
5. Click a purchase request in the **Purchase Requests** table.
   - All cash advances associated with the selected PR display in the **Cash Advances** table.
6. Select a cash advance to display the associated orders in the **Purchases** table.
   - Information about each order includes the order date and status, PIIN, total cost, and amount paid. Use the horizontal scroll bar to view additional columns. Re-sort the orders by clicking any column heading, such as Order Status.



Financial Administration Window

Viewing Cash Advances by User

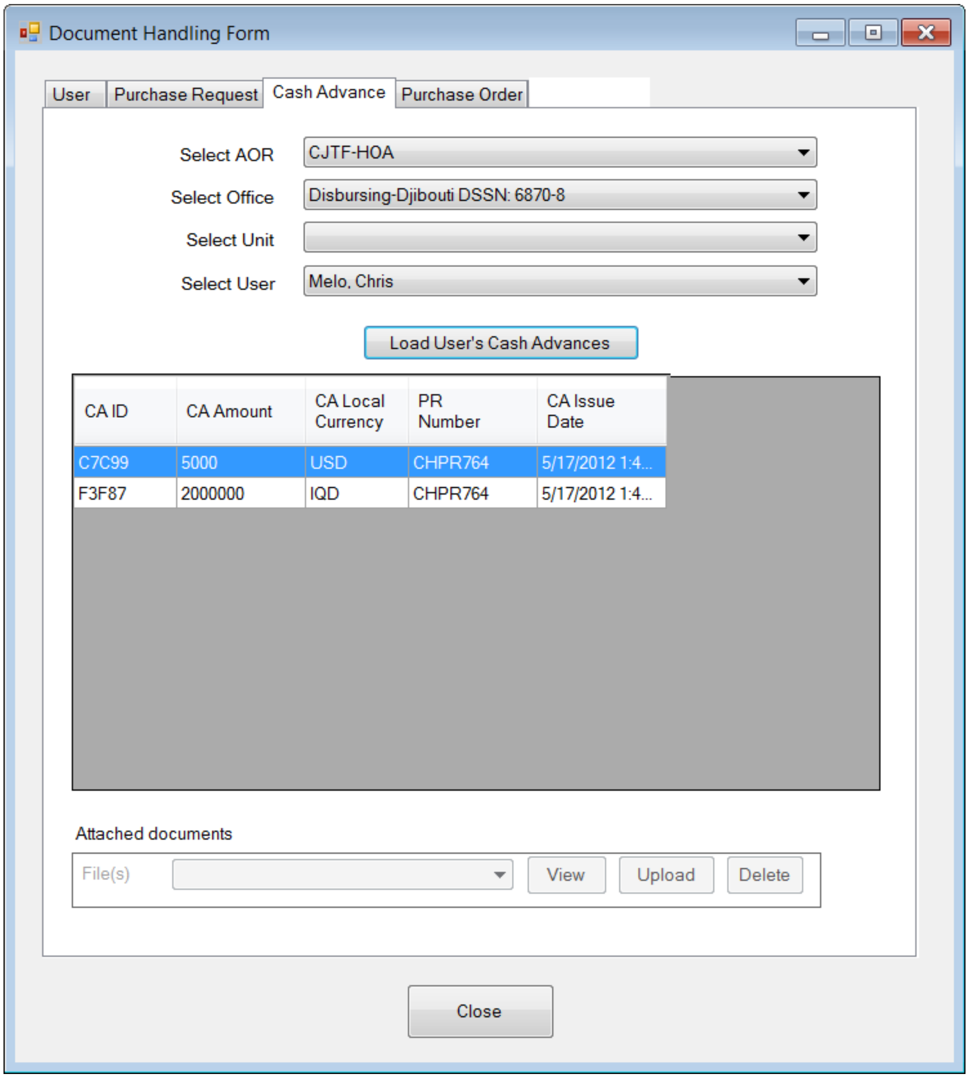
To view cash advances by user:

1. Select **File**, **Documents**, **Document Handling**, and the **Cash Advance** tab.
2. Select the AOR, Office, Unit (optional) and User.
3. Click the **Load User's Cash Advances** button.

Cash advances associated with the user are displayed. Cash advance data cannot be edited in this window.

Select a cash advance in the table; all attached files are listed in the **Attached Documents** section. If multiple files are attached, select one using the drop down list.

Click the **View** button to view the attachment. Click the **Delete** button to delete the attached file. Use the **Upload** button to attach a new document.



View cash advances associated with the selected user

Lesson Summary

In this lesson, you learned to:

- ❑ View purchase requests, cash advances and purchases for a selected FOO or PA

Module 9: Clearing Purchase Orders

Lesson 1: Clearing Orders from the Workstation

Objectives

After completing this lesson, the participant will be able to:

- ❑ Locate purchase orders that require review and approval
- ❑ Monitor data integrity in purchase orders
- ❑ Flag orders and add comments for FOO review and response
- ❑ Clear purchase orders and submit them to the next reviewer

Clearing Purchase Orders

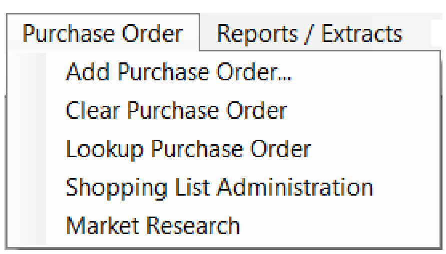
Clearance is the process of reviewing or approving purchase orders by multiple people, usually based on their roles in the procurement process. When the devices are connected to the Internet, SF44 information is transmitted to the prime database and is immediately available for review and clearance on the Workstation.

The Contracting Officer may appoint a FOO as an initial reviewer of batches of orders, to verify they contain all the required information and attached supporting documents. Once the FOO has verified the orders are complete, they can be sent to the assigned reviewers for approval.

The clearance process for orders established during the provisioning process. Orders will move through the clearance process in the order the reviewers were assigned. An email notification will be sent to the next reviewer based on the email address provided in the user's profile.

To access the purchase orders that require your review and approval:

1. Select **Purchase Order**, **Clear Purchase Order** from the main menu.

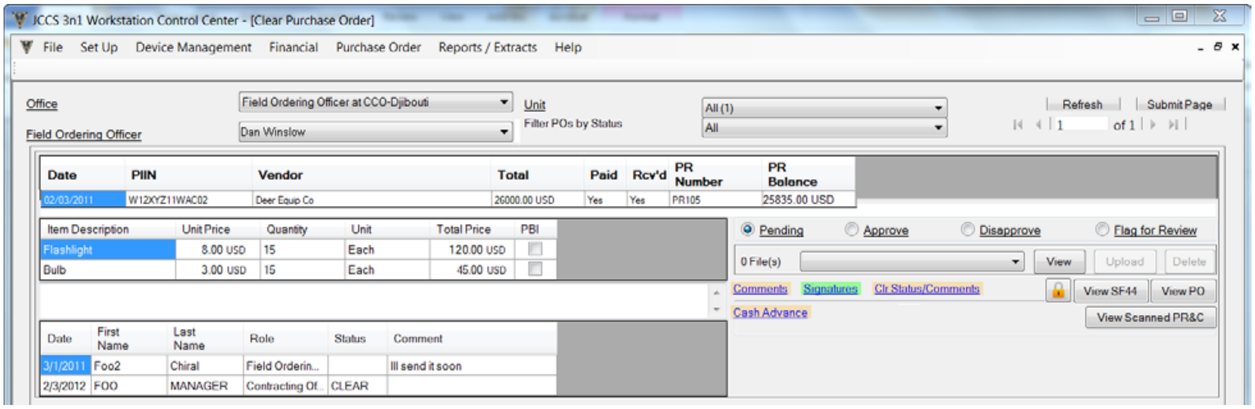


Purchase Order Menu

   – The *Clear Purchase Order* window is displayed. Your name and role display at the top of the window.

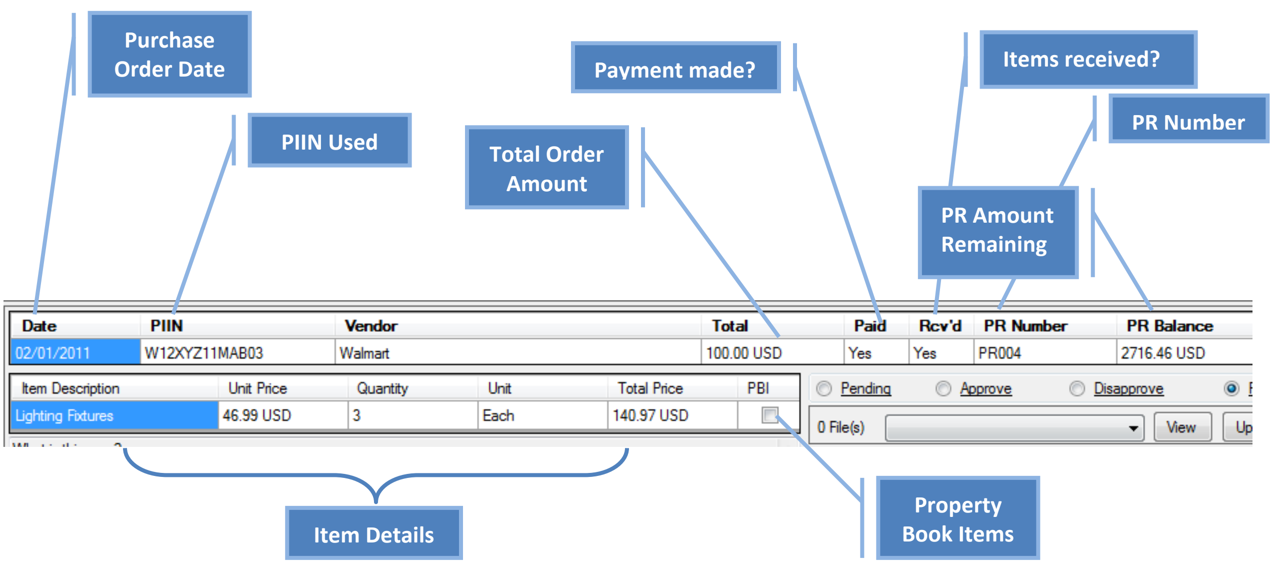
2. Select an **Office** and **Unit** from the drop-down lists. (To select all units, select the **All** option. This enables viewing orders associated with FOOs in all units.)

3. Select the **FOO** whose purchase orders you would like to review.
4. If there are many orders, use the **Filter POs by Status** field to filter them by status: **Pending**, **Disapproved** or **Approved.**
   – The list of purchase orders updates to match the criteria you specified.



Clear Purchase Order Window

Each order is displayed in a separate block, with associated purchase items displayed beneath.



Reviewing and Responding to Comments

Comments regarding purchase orders may be exchanged between a FOO, using the handheld device, and a reviewer who types in the **Comments** section on the Clearance screen.

To view comments made by FOOs, click the **Clr (Clearance) Status/Comments** link. The status of the order provides context for the comments. For example, a FOO may have responded to an order that had a Flag for Review status.

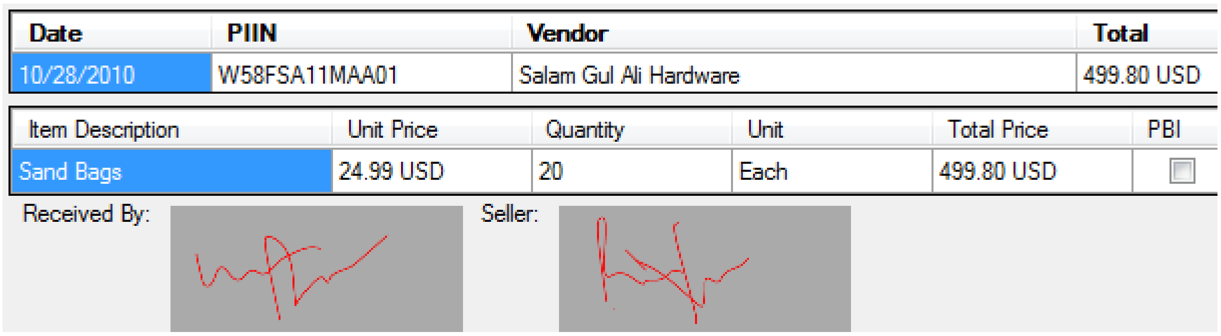
Date	First Name	Last Name	Role	Status	Comment
10/25/2010	Noah	Wilson	FieldOrderingOffi...	Disapproved	Order Comment: This was required due...
10/27/2010	Noah	Wilson	FieldOrderingOffi...	Flagged for Re	Order Comment: This was required due...

Clr Status/Comments Table

If the reviewer has a question or if the file is incomplete, the reviewer can flag the file for review and send a comment to the FOO via the device. To write comments about an order to a FOO, click **Flag for Review** radio button and enter comments in the **Comments** text area. (All of the links toggle between show and hide.)

Reviewer Comments Text Area

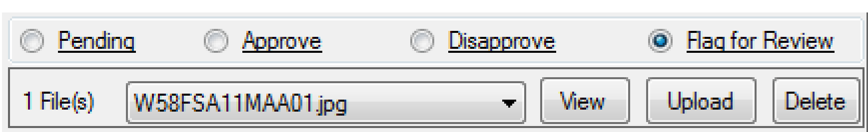
In addition to the item details, you can view or hide reviewer comments and signatures by clicking the **Signatures** links.



Signature Block

Viewing Attached Files

All attached files associated with the PO are listed in the files drop-down. Use the **View** button to open the file.



Monitoring Data Integrity in Purchase Orders

The Workstation includes a validation feature to issue a warning if the SF44 data received from the device has been altered.

The device locks the purchase order with encryption, making it unchangeable, during three stages:

(1) Ordered Phase: When the FOO commits to placing the order on the device.

(2) Paid Phase: When the PA agent enters the password on the device and agrees to pay the amount stated on the SF44.

(3) Received Phase: When the receiver signs on the device to acknowledge the items received.

The device transmits to the Workstation each instance of the SF44 during each phase, and the Workstation checks its validity.

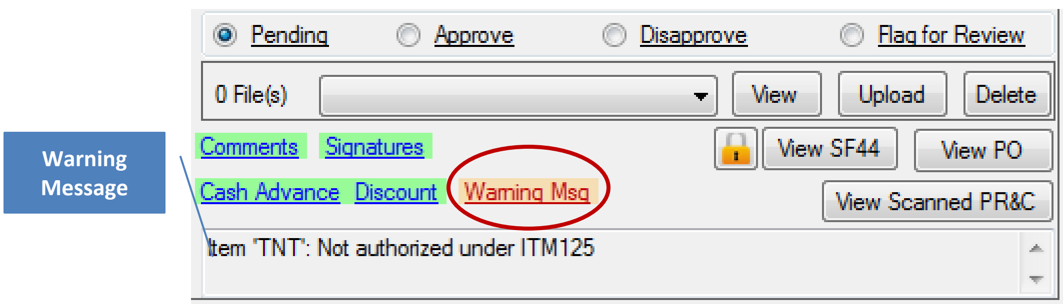
On the *Clearance* screen, reviewers check if the purchase order is valid or it has been altered in some way. To do this, click the Lock icon shown in the following figure.

If the purchase order has not been altered, a confirmation message ("OK") is displayed beside the Lock icon. However, if the purchase order has been altered in some way, a "Suspect" message is displayed.

If the order is flagged as Suspect, click the **View PO** button to review the entire purchase order in the *Look Up Purchase Order* window, which is explained in the previous lesson.

Verify Data Integrity

If a FOO attempted purchase triggers a procurement control, a **Warning** link is displayed. Click the link to view the warning message.

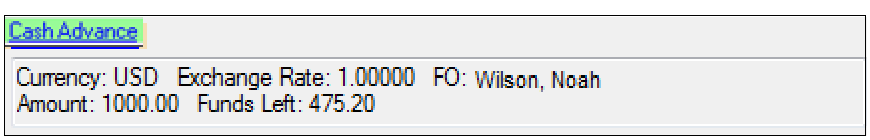


Viewing the SF44, Cash Advance and Discount

Two other features on the Clearance screen are viewing the SF44 associated with the purchase order, and viewing the cash advances associated with the purchase request.

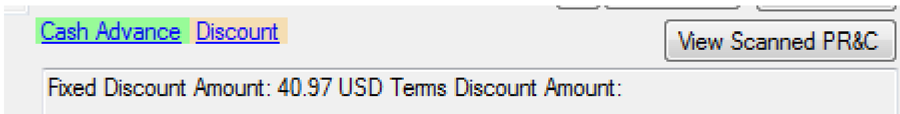
Click the **View SF44** button to open the SF44 in a separate window.

Click the **Cash Advance** link to view the cash advance(s) associated with the purchase request and the remaining funds.



Viewing Cash Advances

Click the **Discount** link to view fixed and/or terms discount amounts.



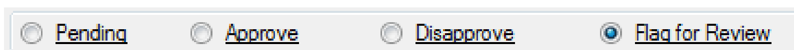
Viewing Discount Amounts

Viewing Scanned Purchase Request

To view the scanned purchase request associated with an order, click the **View Scanned PR&C** button. If there is no scanned document, a message will display.

Completing Review of Purchase Orders

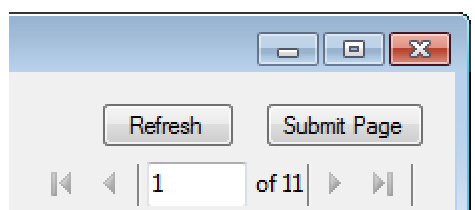
After the reviewer has finished reviewing an order, he or she can mark the order as Approve, Disapprove, or Flag for Review.

The selected 

radio button represents the appropriate action for the selected PO.

- **Approve** - order will automatically go to the next person in the clearance process for review. An email notification will be sent to the next reviewer based on the email address provided in the user's profile.
- **Disapprove** - order will stop the review process for necessary actions to be taken outside of the 3in1 system. Comments must be added when an order is disapproved.
- **Flag for Review –** order will stop the review process and the reviewer can send comments or questions to the FOO via the device for follow up (i.e. order required approval letter, need to upload image of receipt)

If there are multiple purchase orders that require review and action, complete your review and update the status of each one, then click the **Submit Page** button.



Refresh the display at any time by clicking the **Refresh** button.

A maximum of 10 orders can be displayed on one page. If more than one page of orders exists, click the right double-arrow to advance to the next page.

Note: If you are in an area with inconsistent connectivity, it is recommended that you submit your clearance/review status regularly.

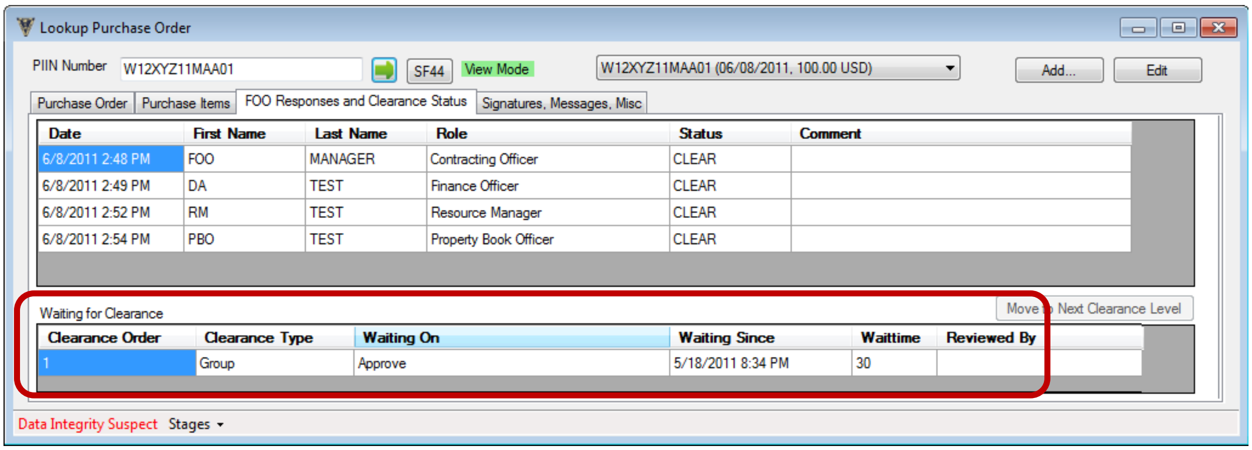
In the event a reviewer flags or disapproves the order, an automatic email notification is sent to the order owner (FOO), stating that the order has been flagged or disapproved and notifies the user to take appropriate actions. An example of an email notification is as followed.

SF44 Purchase Order, W12ABC11MAH07 has been rejected by "Blockwell, Doug", email address is "doug.blockwell@abc.commailto:mihir.patel.ctr@bta.mil", from office "RCC Baghdad". Comments provided by reviewer are: "This purchase order requires J6 approval *letter, please upload the approval letter". Please log into the 3in1 Tool application to accomplish the necessary tasks.*

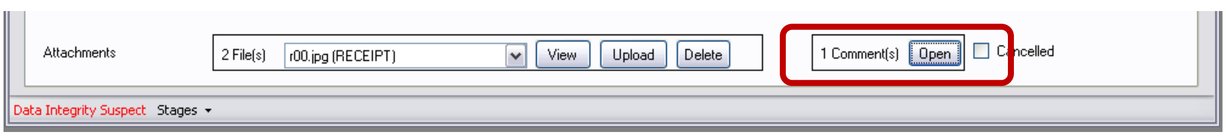
In order to receive email notification, users must provide valid email addresses in their Workstation user profiles, which should be reviewed and updated on a regular basis.

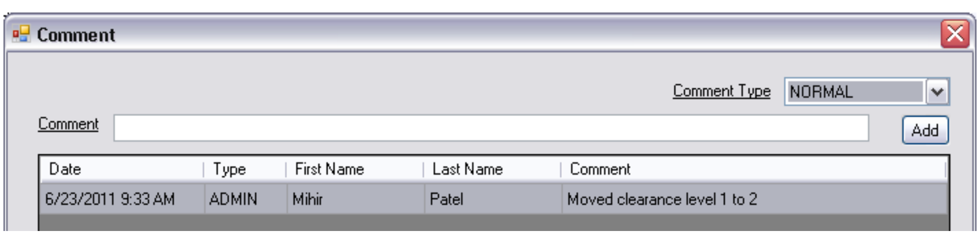
Viewing Review Status

In the *Lookup Purchase Order* window, on the **FOO Responses Clearance Status** tab, the Waiting for Clearance section identifies the next reviewer.



In some situations, a System Administrator may need to manually move an order to the next level by clicking the **Move to Next Clearance Level** button. The PO is then moved to the next clearance level. A comment is added automatically to the purchase order that states that the Sys Admin has moved an order from one level to another. Click the **Open** button to view the comment.

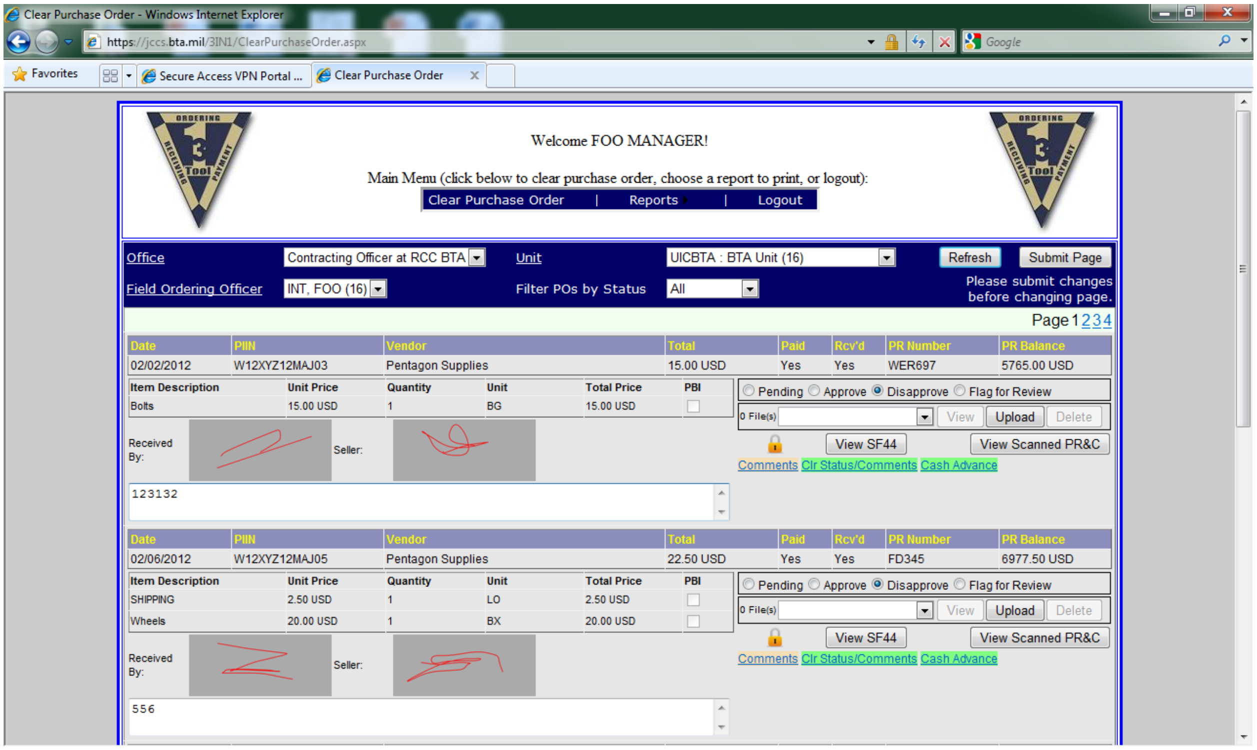




Comment added to an order that has been manually moved to the next clearance level

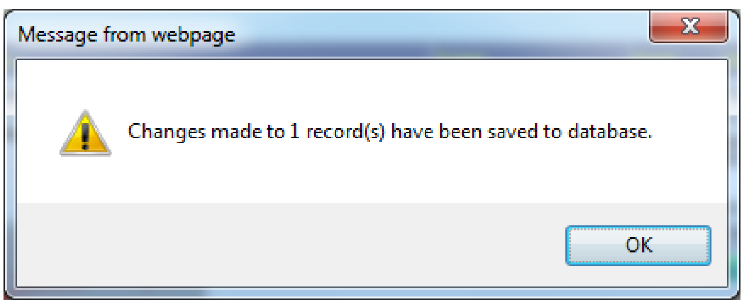
Web-Based Clearance

Users who log in to the web-based 3in1 system, via JCCS, view the *Clear Purchase Orders* screen by default. To view purchase orders in their queue, users select an Office, Unit, FOO, and Status Filter. When they click the **Refresh** button, the clearance items are updated.



Clear Purchase Orders Screen

Users can review and approve clearance as they do using the standard Workstation version. The web site displays an acknowledgement message, shown below and the order is removed from the user's clearance queue. For other order status changes, such as flagging or disapproving an order, the web site also displays a message confirming an acknowledgment of the change.



Web Site Acknowledges Approval of a Purchase Order on the Clearance Screen

Lesson Summary

- ❑ Locate purchase orders that require review and approval
- ❑ Monitor data integrity in purchase orders
- ❑ Flag orders and add comments for FOO review and response
- ❑ Clear purchase orders and submit them to the next reviewer

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Module 10: Managing Cash Advances on the Device

Lesson 1: Working with Cash Advances

Objectives

After completing this lesson, the participant will be able to:

- ❑ Review cash advance details for a purchase request
- ❑ Increase, return, or exchange cash advances
- ❑ Attach document images to cash advances

The Funding tab on the device enables the Paying Agent, when authorized, to manage cash disbursements on the handheld device. Typically, cash advances are made on the Workstation by the Disbursing Agent and received on the device with provisioning data. The PA, when authorized by the Disbursing Agent, can use the device to add a cash advance, return funds to the finance office, exchange cash into a different currency, and/or record the receipt of another cash advance.

When network connectivity is available, all cash advances changes made on the device will be uploaded to the Workstation.

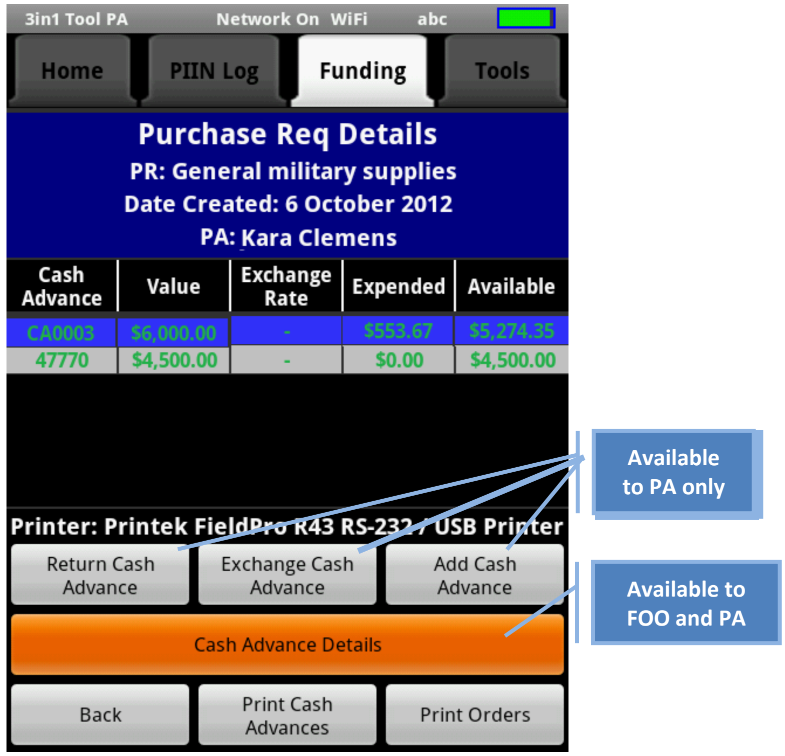
Note: Paying Agents may initiate cash advances from the handheld device only if they have permission. The KO provides this permission on the *User Profile Management* window.

Review Cash Advance Details on the Device

Use the device *Cash Advance Details* screen to view and print details of a particular cash advance.

To view cash advance details:

1. Tap the **Funding** tab.
   – The *Funding* screen displays a list of purchase requests.
2. Tap a purchase request to select it.
   – The *Purchase Request Details* screen is displayed, showing a list of cash advances.



Purchase Request Details Screen

3. Tap a cash advance.
4. Tap the **Cash Advance Details** button.
   - The *Cash Advance Details* screen shows the history of the cash advance. It lists purchases, returns and exchanges against a cash advance. The disbursement is displayed as a positive amount, while returns and exchanges are displayed as negative amounts (negative amounts are displayed in brackets). The value of the cash advance, minus the sum of the purchases, returns and exchanges should equal the remaining cash.
   - Use the **Documents** button on the *Cash Advance Details* screen to photograph documents associated with the cash advances. For tips on using the camera, see the section, *Attach Document Images.*

Cash Advance Details Screen

– See the section, *Printing Reports from the Device*, for details on using the Print **Details** and **Print Ledger** buttons.

5. Tap the **Back** button to return to the *Purchase Request Details* screen.

Add a Cash Advance

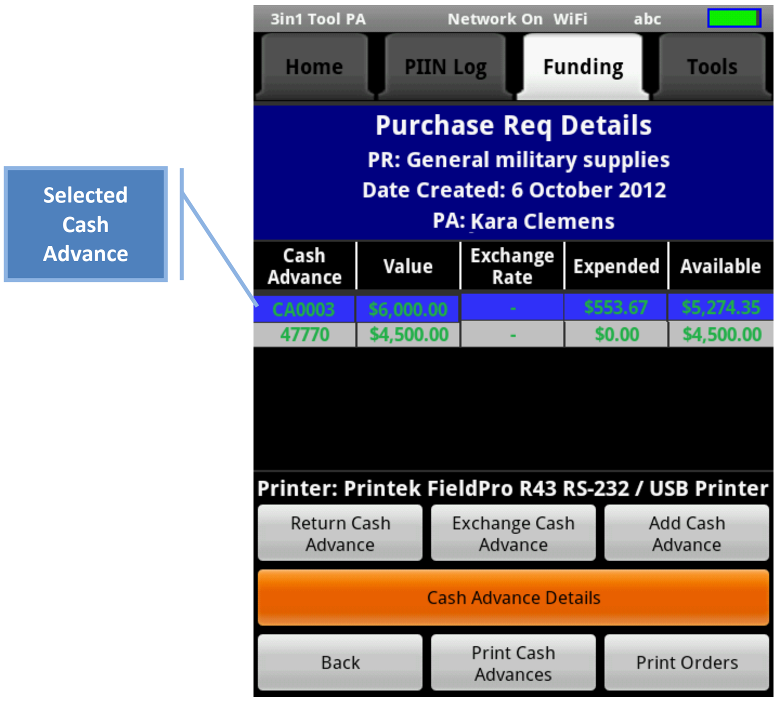
The PA follows these steps **to add a cash advance**:

1. On the **Funding** tab, tap a purchase request to select it.
2. On the *Purchase Request Details* screen, tap the **Add Cash Advance** button.
   – The *Enter Cash Advance* screen is displayed.
3. Specify the cash advance amount. Verify the disbursement currency code (the Disbursing Agent should tell you what code to use if one is not available), enter a disbursement number/description to differentiate it from other advances and currency type are correct. Optionally add a comment.
   – The currency code is used by the Deployable Disbursing System and would be provided by your Disbursing Agent if it is used.
4. Tap the **Save** button.

Return a Cash Advance

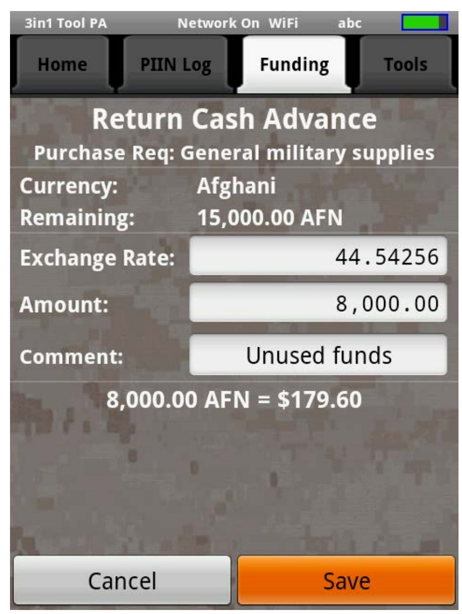
To return a cash advance:

1. On the *Purchase Request Details* screen, the PA can select a cash advance.



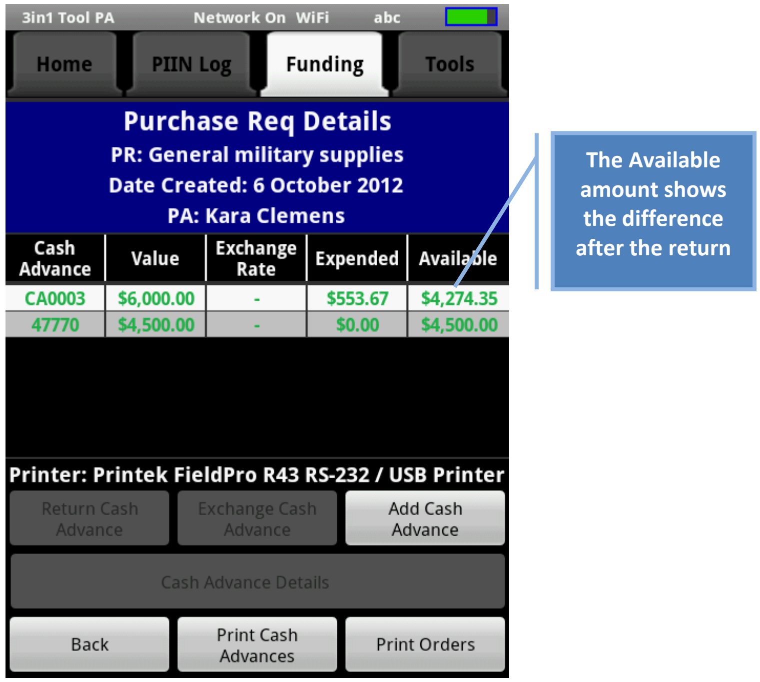
2. Tap the **Return Cash Advance** button.
3. Enter the amount you want to return. Optionally enter a comment.

For USD amounts, simply enter the amount to return.



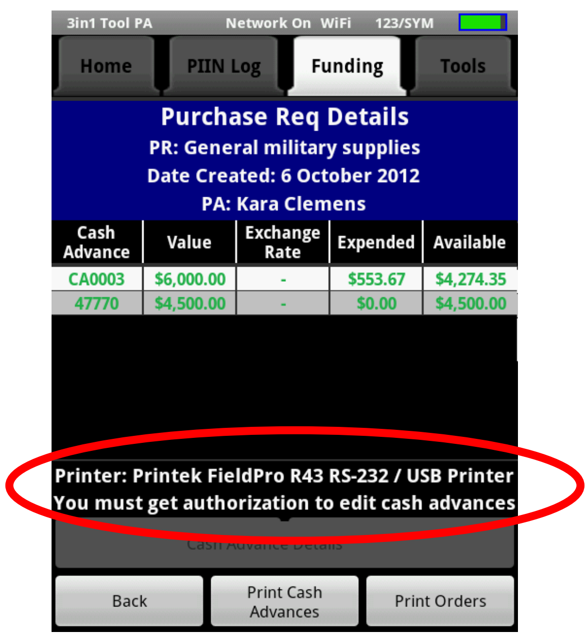
For foreign currencies, enter the current exchange rate.

4. Tap the **Save** button.



Message for Unauthorized PAs

If a Paying Agent is unauthorized to make cash advances, a message is displayed on the *Purchase Request Details* screen, as shown below.



Exchange a Cash Advance

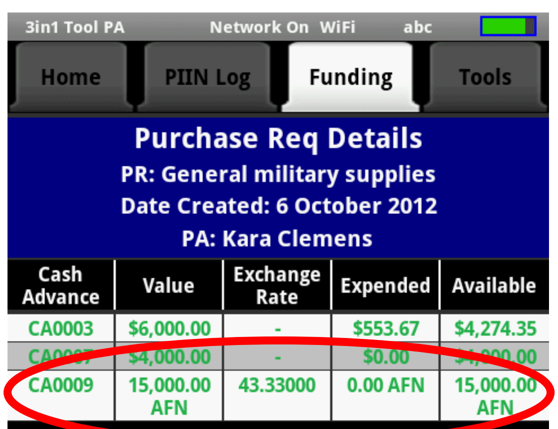
A cash advance in a foreign currency may be changed to USD, and a cash advance in USD may be changed to a foreign currency. A foreign currency cannot be changed to another foreign currency. The entire remaining cash advance amount or part thereof may be exchanged into a different currency.

To exchange cash into a different currency:

1. On the *Purchase Request Details* screen, select a cash advance.
2. Tap the **Exchange Cash Advance** button.
   - The *Exchange Cash Advance* screen is displayed.
   - The top of the screen shows the current currency, exchange rate at the time the cash was received, and the remaining funds.

3. Enter the **Disbursement Currency Code**.
4. Enter the Disbursement Number.
5. The "convert to" **Currency** field is set to US Dollar. It cannot be edited.
6. Enter the current exchange rate in the **Current Exchange Rate** field.
   - The exchange rate is the rate on the day of the return. The rate is expressed as the ratio of foreign currency units to one US dollar. For example, if there are 1,544 Iraqi Dinars to one US dollar, then the exchange rate entered is 1544.0000.
7. Enter the amount to convert to USD in the **Amount** field.
   - The value in USD is shown at the bottom of the Exchange Cash Advance screen.
8. Tap the **Save** button.

The amounts are updated in the Expended column on the *Purchase Request Details* screen.



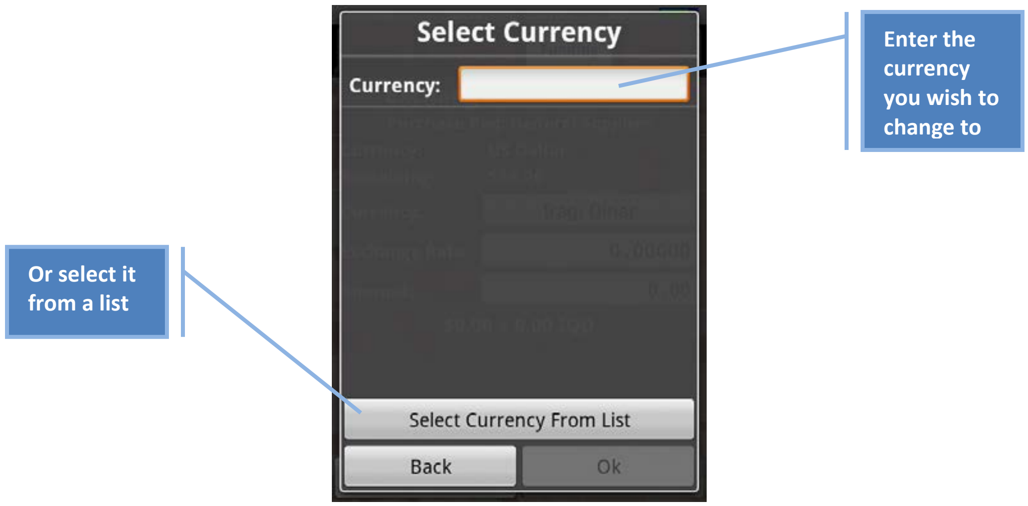
Before the Exchange

After the Exchange

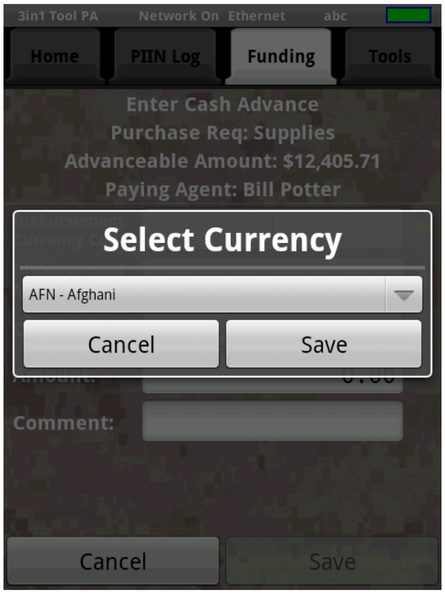
Exchanging cash from USD to a foreign currency is similar; the difference is that the foreign currency must be selected.

To exchange from USD to a foreign currency:

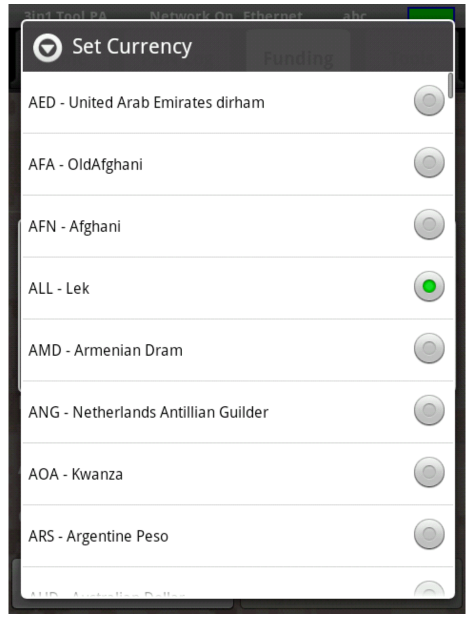
1. On the *Exchange Cash Advance* screen, tap the **Currency** field.
   - On the **Select Currency** screen, there are two ways to set the currency. You can enter the new currency in the Currency field at the top of the screen, or select it from a list.



   - If you choose to enter the currency directly into the **Currency** field, the auto-complete feature will suggest possible matches from the currency list on the device.
   - If you choose to select the currency, tap inside the field of the *Select Currency* pop-up shown below, then scroll to and select a currency. Note the list is sorted alphabetically by three-letter currency codes.
   - Tap **Save** on the *Select* Currency pop up.



Start typing the currency name to use the auto-complete feature



Alternatively, select a currency from the list

2. On the *Exchange Cash Advance* screen, enter the amount to convert and the exchange rate.
3. Tap the **Save** button.

The cash advance amount that was exchanged displays as a new line item on the *Purchase Request Details* screen. A supporting receipt is usually issued by the bank or change bureau to verify the currency exchange. Use the Attach Document feature to capture the receipt.

Attach Document Images

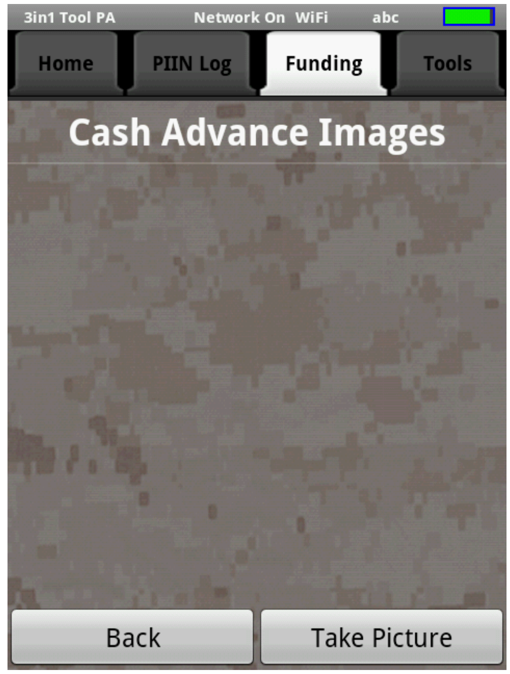
Use the device camera to photograph documents associated with cash advances. Currency exchange services usually provide an Exchange Memo, which is a document of a currency exchange transaction. The Exchange Memo includes the date, the exchange rate, and the amount of money. PAs should attach an Exchange Memo, if one is available, to document the transaction. The 3in1 device provides the ability to capture and store the Exchange Memo or other disbursement documents using the onboard camera. This image will be viewable on the Workstation or device.

To attach an image to a purchase request:

1. Tap the **Documents** button on the *Cash Advance Details* screen.
2. On the *Cash Advance Images* screen, tap the **Take Picture** button.

– All previously taken photos will be displayed on this screen.

Cash Advance Details Screen



Cash Advance Images Screen

3. Use the device camera to capture an image of the document. (See *Module 5: The Ordering Process, Lesson 2: Making a Purchase* for details on using the camera.)
4. When you tap the **Take Picture** button, the captured image is displayed on the *View Document Image* screen.
5. Select a radio button to identify the image as a **Disbursement Image** or as an **Exchange Memo**.
6. If you are satisfied with the captured image, tap the **Accept** button.
   – When you tap the **Accept** button, the camera takes the picture and the image will be attached to the cash advance.
   – If you are not satisfied with the captured image, tap the **Retake** button. Use the **Zoom In** button to capture a closer view of the document.

View Document Image Screen

Once images are taken, they are listed on the *Cash Advance Images* screen. To view an image, tap one. The *View Document Image* screen then displays options to delete, print (if a printer is connected), or view the image in detail.

If the device is not connect to a network while capturing images of cash advance documents, all the images are stored on the device. Once an image is uploaded to the prime database, it will be removed from the device. After that, the only way to delete the image is from the Workstation.

Lesson Summary

In this lesson, you learned to:

- ❑ Review cash advance details for a purchase request
- ❑ Increase, return, or exchange cash advances
- ❑ Attach document images to cash advances

Part 3: Reporting from the Device & Workstation

Module 11: Reporting from the Device

Lesson 1: Printing Reports from the Device

Objectives

After completing this lesson, the participant will be able to print the following items from the device:

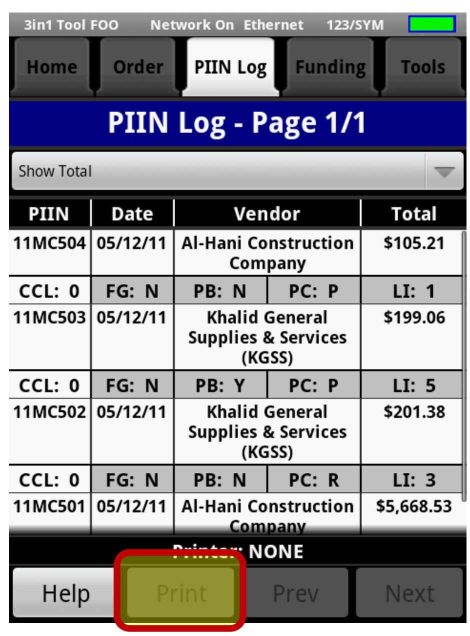
- The PIIN Log
- Shopping lists
- SF44s
- Cash Advance Details
- Cash Advance Ledger Report

The handheld device provides a Print button on numerous screens to enable printing PIIN Logs, shopping lists, SF44 forms and cash advance details and ledger reports.

The Print button is enabled only when the device detects that a printer is connected. If the Print button is active, but nothing is printing, make sure the printer is turned on. The Print button will become active as soon as the printer cable is detected, regardless of whether the printer is on or off. When the device detects the printer it will display it at the top of the screen.

Printing the PIIN Log

The **Print** button is located on the *PIIN Log* screen. It prints the table displayed on the *PIIN Log* screen. This is helpful to generate a printed overview of order status.



PIIN Logs
User: Edward Anderson
23 June 2011 14:35:43

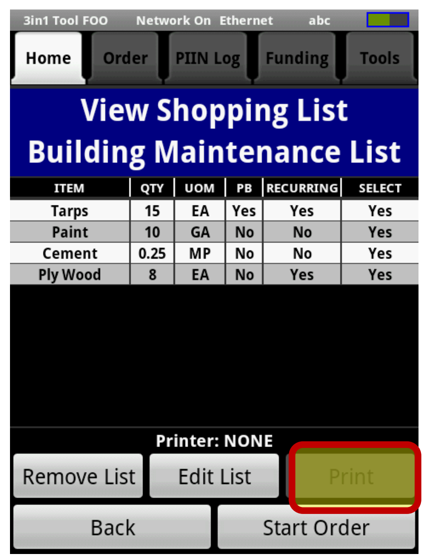
PIIN	CH1RAL11MC502
Date	12 May 2011
Merchant	Khalid General Supplies & Services (KGSS)
Total Price	$201.38
PIIN	CH1RAL11MC501
Date	12 May 2011
Merchant	Al-Hani Construction Company
Total Price	$5,668.53
PIIN	CH1RAL11MC504
Date	12 May 2011
Merchant	Al-Hani Construction Company
Total Price	$105.21
PIIN	CH1RAL11MC503
Date	12 May 2011
Merchant	Khalid General Supplies & Services (KGSS)
Total Price	$199.06

Printed PIIN Log

Printing Shopping Lists

To print a shopping list from the *Shopping List* screen:

1. Tap a shopping list to open the *View Shopping List* screen.
2. Tap the **Print** button to print the shopping list.



Shopping List
Construction Supplies
Today's Date: 23 June 2011

ITEM	QTY	PB	LOCKED
Tarps	15 EA	Yes	Yes
Ply Wood	8 EA	No	Yes
Phillips Screwdriver	5 EA	No	Yes

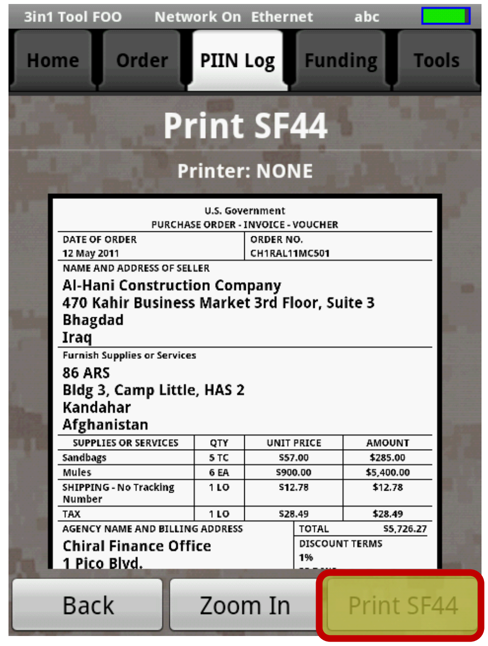
Printed Shopping List

Printing SF44s

Use the **Print** button on the *Purchase Details* screen to view the SF44 on the device screen and print the SF44.

When you tap **Print**, the SF44 is displayed on the screen. Tap the **Print SF44** button. The printer may take a few seconds to start printing. You may print multiple copies by tapping **Print SF44** again.

Purchase Details Screen



SF44 Form Displayed on the Device

A sample printed SF44 is shown below.

U.S GOVERNMENT

PURCHASE ORDER-INVOICE-VOUCHER

DATE OF ORDER	
06/06/2012	W12XYZ-12-M-AE13

PRINT NAME AND ADDRESS OF SELLER *(Number, Street, City, and State)**

PAYEE
Aziz Construction
25th st
Baghdad
55662
Iraq

FURNISH SUPPLIES OR SERVICES TO *(Name and address)**

BTA TEST COMMAND
1851 S Bell St
Arlington
VA, 22030
United States

SUPPLIES OR SERVICES	QUANTITY	UNIT PRICE	AMOUNT
Dell Computers	2 EA	750.00	1500.00

AGENCY NAME AND BILLING ADDRESS*

PAYOR
Finance Company BTA [DSSN: 2038]
1851 S Bell St
Arlington
VA 22202
United States

TOTAL 1500.00 USD

DISCOUNT TERMS
DAY(S)

DATE INVOICE RECEIVED
06/06/2012

ORDERED BY *(Signature and title)*

Electronically Signed By : Jerry King, ; Device Id : 354114012920287 On 06/06/2012

PURPOSE AND ACCOUNTING DATA

23423 2 3453 .3453 34 34534 452345234543525 4235 52345 4352345342 56345623453453453 4352345342 52345 523452

PURCHASER *To sign below for over-the-counter delivery of items*

RECEIVED BY
Jerry King

TITLE | DATE

SELLER *Please read instructions on Copy 2*

☒ Payment Received
1500.00 USD

☐ Payment Requested

NO FURTHER INVOICE NEED BE SUBMITTED

SELLER
BY Aziz Construction
(Signature)

DATE

I certify that this account is correct and proper for payment in the amount of
1500.00 USD
(Authorized certifying officer)

Exchange Rate
1.00000

DIFFERENCES
None
None

ACCOUNT CERTFIED:
CORRECT FOR
BY

PAID BY CASH OR *(Check No.)*	DATE PAID	VOUCHER NO.

***PLEASE INCLUDE SELLER'S INVOICE**

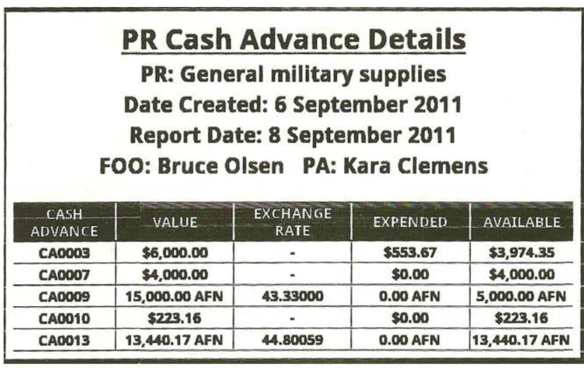
STANDARD FORM 44a (REV. 10-83)
ZIP CODE ***(See Instructions on Copy 2)*** PRESCRIBED BY GSA,
FAR (48 CFR) 53.213(c)

Printed SF44

Printing Cash Advance Details

From the *Purchase Request Details* screen, tap the **Print Orders** button to print the Cash Advance Ledger, which shows the activity history of a cash advance and a running balance. Tap the **Print Cash Advances** button to print a detailed list of cash advances placed against the selected purchase request. A printer must be connected to the device in order for these two buttons to be active.

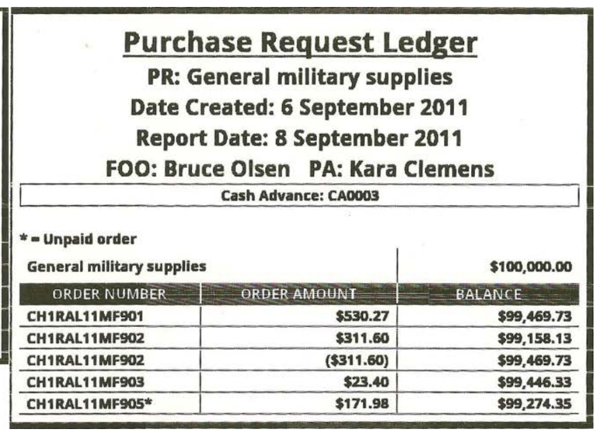
The following figure shows sample printouts of both reports.



PR Cash Advance Details

PR: General military supplies
Date Created: 6 September 2011
Report Date: 8 September 2011
FOO: Bruce Olsen PA: Kara Clemens

CASH ADVANCE	VALUE	EXCHANGE RATE	EXPENDED	AVAILABLE
CA0003	$6,000.00	-	$553.67	$3,974.35
CA0007	$4,000.00	-	$0.00	$4,000.00
CA0009	15,000.00 AFN	43.33000	0.00 AFN	5,000.00 AFN
CA0010	$223.16	-	$0.00	$223.16
CA0013	13,440.17 AFN	44.80059	0.00 AFN	13,440.17 AFN



Purchase Request Ledger

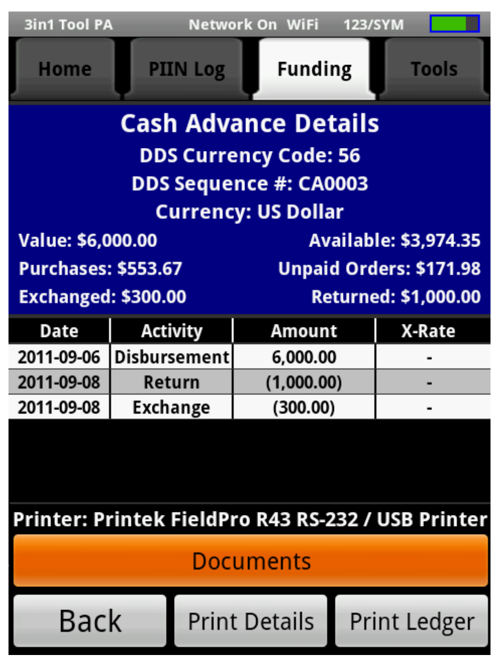
PR: General military supplies
Date Created: 6 September 2011
Report Date: 8 September 2011
FOO: Bruce Olsen PA: Kara Clemens

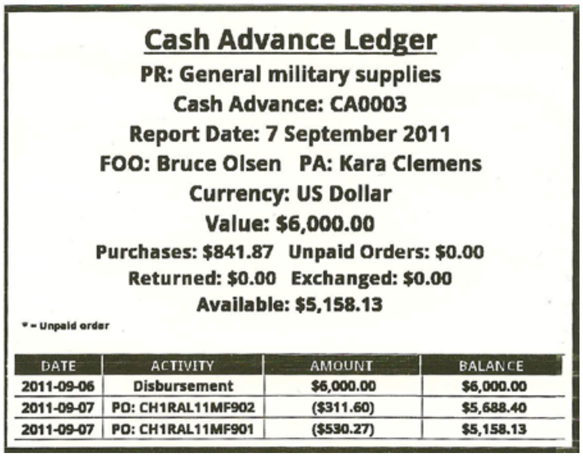
Cash Advance: CA0003

* = Unpaid order

General military supplies		$100,000.00
ORDER NUMBER	ORDER AMOUNT	BALANCE
CH1RAL11MF901	$530.27	$99,469.73
CH1RAL11MF902	$311.60	$99,158.13
CH1RAL11MF902	($311.60)	$99,469.73
CH1RAL11MF903	$23.40	$99,446.33
CH1RAL11MF905*	$171.98	$99,274.35

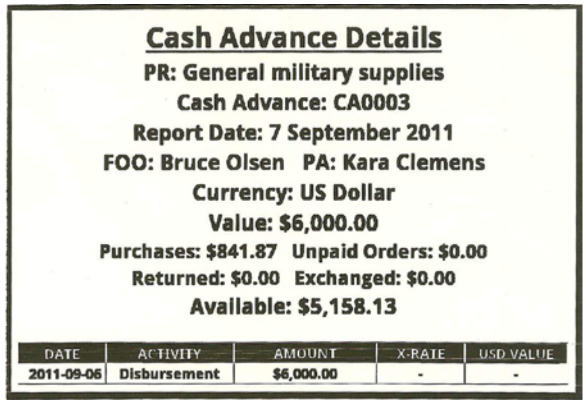
The *Cash Advance Details* screen shows a listing of all cash activity (returns, exchanges, advances) for a specific cash advance. Tap the **Print Details** button to print the Cash Advance Details report and or tap the **Print Ledger** button to print a Cash Advance Ledger report, which shows the activity history of a cash advance.





Cash Advance Ledger
PR: General military supplies
Cash Advance: CA0003
Report Date: 7 September 2011
FOO: Bruce Olsen PA: Kara Clemens
Currency: US Dollar
Value: $6,000.00
Purchases: $841.87 Unpaid Orders: $0.00
Returned: $0.00 Exchanged: $0.00
Available: $5,158.13
* = Unpaid order

DATE	ACTIVITY	AMOUNT	BALANCE
2011-09-06	Disbursement	$6,000.00	$6,000.00
2011-09-07	PO: CH1RAL11MF902	($311.60)	$5,688.40
2011-09-07	PO: CH1RAL11MF901	($530.27)	$5,158.13



Cash Advance Details
PR: General military supplies
Cash Advance: CA0003
Report Date: 7 September 2011
FOO: Bruce Olsen PA: Kara Clemens
Currency: US Dollar
Value: $6,000.00
Purchases: $841.87 Unpaid Orders: $0.00
Returned: $0.00 Exchanged: $0.00
Available: $5,158.13

DATE	ACTIVITY	AMOUNT	X-RATE	USD VALUE
2011-09-06	Disbursement	$6,000.00	-	-

Lesson Summary

In this lesson, you learned to:

- ❑ The PIIN Log
- ❑ Shopping lists
- ❑ SF44s
- ❑ Cash Advance Details
- ❑ Cash Advance Ledger Report

Module 12: Reporting from the Workstation

Lesson 1: Generating Reports

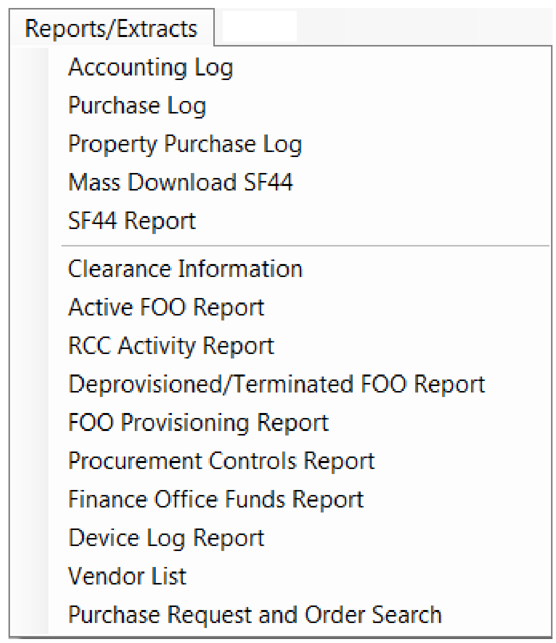
Objectives

After completing this lesson, the participant will be able to:

- ❑ Identify the various reports and extracts available in 3in1 Tool Workstation
- ❑ Generate each type of report
- ❑ Print and save each type of report

Reporting Overview

The following reports are available through the **Reports/Extracts** menu in the 3in1 Tool Workstation. Generated reports display in MS Word or Excel or on the screen, so they can be viewed and/or printed. Also save the report as a separate file in Word or Excel, for future reference.

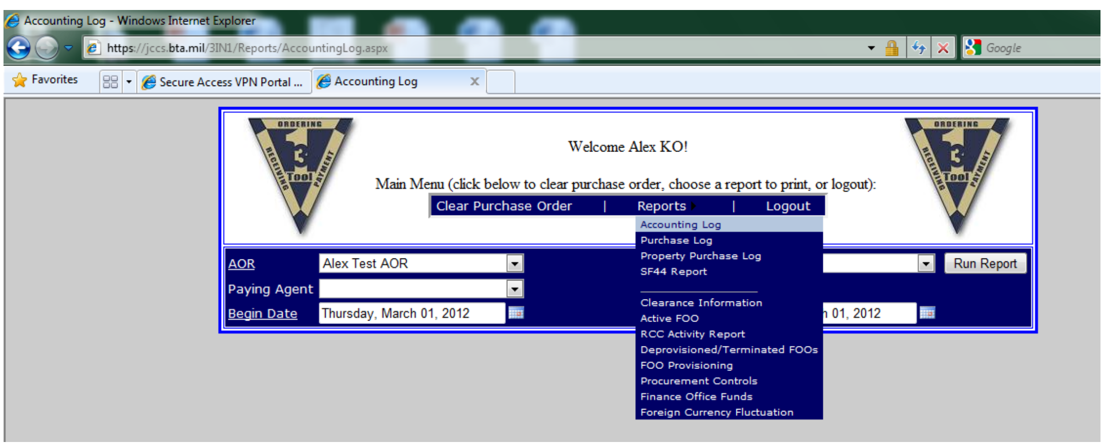


- **Accounting Log**: Enables an analysis of purchase requests and cash advances associated to each order/voucher placed during a period, for a selected paying agent.
- **Purchase Log:** Report showing orders placed by a FOO, unit, RCC, or AOR during a specified period. This report is similar to a PIIN Log.
- **Property Purchase Log**: Identifies accountable items purchased, quantities and prices, for a specific AOR office, unit, and FOO, within a defined time period.
- **Mass Download SF44s**: Provides the capability to download and save a batch of SF44s and receipts executed by a FOO/PA, based on a date range or purchase request. This is explained in the next lesson.
- **SF44 Report**: Prints an electronically generated SF44 that was created on the device or entered on the Workstation.
- **Clearance Information**: Provides a detailed report on the clearance status for all orders associated with an RCC. The report includes the current status of each order, the wait time, individual/office the order is awaiting clearance, and the name of the last reviewer.
- **Active FOO Report**: Management report used by the KO that prints detailed information on all active FOOs in a specified AOR contract office.

- **RCC Activity Report**: Management report used by the KO to view Clearance information, total number of orders and dollar value, and active FOOs.
- **Deprovisioned/Terminated FOO Report**: Prints a list of FOOs who have been deprovisioned/terminated at a specified AOR contract office. Used by KOs.
- **FOO Provisioning Report**: Reports the provisioning setup parameters for each FOO, including assigned PIIN blocks, procurement control policies and purchase requests.
- **Procurement Controls**: Provides a summary of all item and limit type of procurement control policies that apply to a selected AOR Contracting Office.
- **Finance Office Funds Report**: Two management reports are used by the DA to view the funds (cash) information for all of the PAs who still have cash on hand, and the RM to view the status of open Purchase Requests.
- **Device Log Report**: Used for troubleshooting problems with the device. Tracks actions performed by the 3in1 device.
- **Vendor List**: Identifies vendors with whom an AOR has conducted business during a specific time period. The report provides vendor contact information, last transaction date, and comments.
- **Purchase Request and Order Search**: Enables searching for purchase requests by user name or PR number. The found PRs and POs may be exported to Excel.

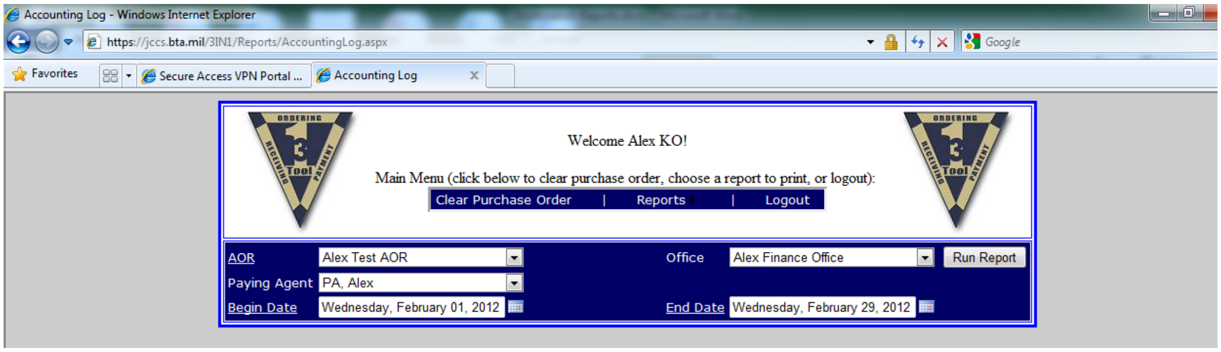
Web-Based Reporting

Workstation reports can be generated by users who log in to web-based version of 3in1. After logging into 3in1 (within JCCS), users can select **Reports** from the menu, then select a specific report.



3in1 Web-based Reports Menu

Users fill in the report parameters, which are exactly the same as the standard Workstation version, then click the **Run Report** button. The report displays either directly in Excel or in a browser, depending on the report type.

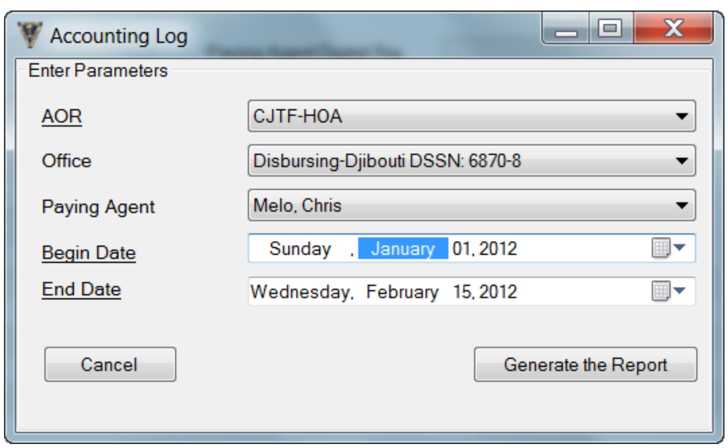


Accounting Log Report Parameters

Accounting Log

The Accounting Log lists orders placed against purchase requests assigned to a selected paying agent, in a selected AOR office, during a specified time period.

1. Select **Reports/Extracts**, **Accounting Log** from the main menu.
   – The *Accounting Log* window opens.
2. Select the **AOR**, **Office**, and **Paying Agent** from the drop-down lists.
3. Specify the **Begin** and **End Dates** to include in the report. Click the calendar  icon to select dates.
4. Click the **Generate the Report** button.



Accounting Log Setup Window

5. The report is displayed in MS Excel. You may print the report from Excel.
6. Save the report as an Excel file before exiting.

The Accounting Log shows all executed SF44 information for a PA. This log also shows the total amount, expended amount, and remaining amount for each purchase request. It also shows the purchase orders made by the selected PA. If foreign currency is used, the report also shows the foreign currency amount, exchange rate, and US dollar conversion.

Accounting Log

PA: Chris Melo
Period: 01/01/2012 - 02/15/2012
Report As Of: 2/15/2012

PR Number	PR Total	Remaining PR Amount	Total Expended
N3654A12PV009SB	$3,000.00	$3,000.00	$0.00
N3654A12PV008SB	$300.00	$165.35	$134.65
N3654A12PV003SB	$1,250.00	$723.76	$526.24
N3654A12PV007SB	$3,000.00	$559.44	$2,440.56
Total	$7,550.00	$4,448.55	$3,101.45

PR Number	Currency	Exchange Rate	Amount	Expended	Remaining
N3654A12PV003SB	DJF	177.50000	213,000.00	93,407.55	119,592.45
N3654A12PV003SB	USD	1.00000	-1,200.00	0.00	0.00
N3654A12PV003SB	USD	1.00000	1,250.00	0.00	50.00
N3654A12PV007SB	USD	1.00000	-3,000.00	0.00	0.00
N3654A12PV007SB	DJF	177.50000	532,500.00	433,200.00	99,300.00
N3654A12PV007SB	USD	1.00000	3,000.00	0.00	0.00
N3654A12PV008SB	USD	1.00000	300.00	0.00	0.00
N3654A12PV008SB	DJF	177.50000	53,250.00	23,900.00	29,350.00
N3654A12PV008SB	USD	1.00000	-300.00	0.00	0.00
N3654A12PV009SB	USD	1.00000	3,000.00	0.00	3,000.00

Order Date	PR Number	PIIN	Vendor	Item Description	Qty	UOM	Unit Price	Extended Price	Order Total	Amount Paid	Discount Terms

PBI = Property Book Item, LC = Level Cleared, PC = Process Completed

Accounting Log Report

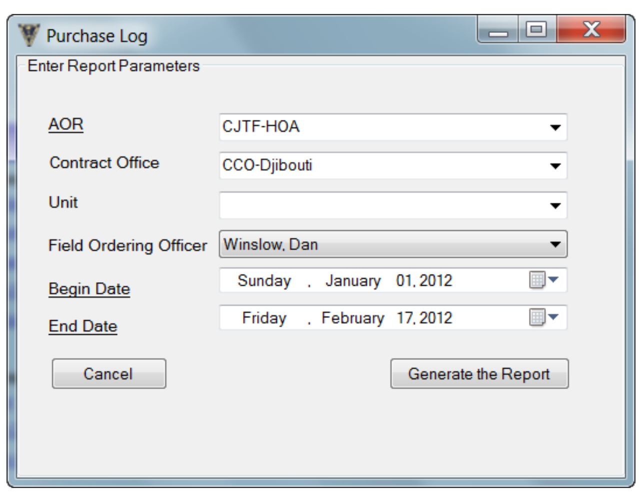
PBI = Property Book Item. Identifies items that have been flagged as accountable

LC = Level Cleared. Displays the sequence number the order is currently awaiting clearance/review, based on the clearing workflow

PC = Purchase Level. Identifies how complete the purchase is. O=only an order has been executed, R=order has been received, P=order has been paid.

Purchase Log

The Purchase Log shows orders placed during a specified time period for a FOO, Unit, Contract Office, or AOR. To facilitate analysis, details about purchase requests assigned to the FOO/PA are also listed in the report.



1. Select **Reports/Extracts**, **Purchase Log** from the main menu.
   – The *Purchase Log* window opens.
2. Select the **AOR**, **Contract Office**, and/or **Unit** from the drop-down lists. (Note: To view all SF44s for an RCC, leave the Unit and FOO blank.)
3. Select the **Field Ordering Officer**.
4. Specify the **Begin** and **End Dates** to include in the report. Click the

calendar icon to select dates.

5. Click the **Generate the Report** button.
   - The report is displayed in MS Excel. You may print the report from Excel.
6. Save the report as an Excel file before exiting.

The report identifies the purchase requests assigned to the FOO/PA, as well as the details for each order placed, including the vendor, quantity, unit price, and order totals/balance.

Purchase Log

FOO: Winslow, Dan

Period: 07/11/2012 - 08/10/2012
Report As Of: 8/10/2012

PR Number	PR Total	Remaining PR Amount	Total Expended
PR2435	$5,000.00	$4,990.00	$10.00
Total	$5,000.00	$4,990.00	$10.00

Order Date	PR Number	PIIN	Vendor	Item Description	Qty	UOM	Unit Price	Extended Price	Order Total	Amount Paid	Discount Terms	Terms Discount Amount	Fixed Discount Amount	Running Total	PBI	LC	PC
7/20/2012	PR2435	W12XYZ12WAM01	Best Buy	Cat 5 Cable	1	[STWC	$10.00	$10.00	$10.00	$10.00				$10.00	N	0	P

PBI = Property Book Item, LC = Level Cleared, PC = Process Completed

Purchase Log

Notes:

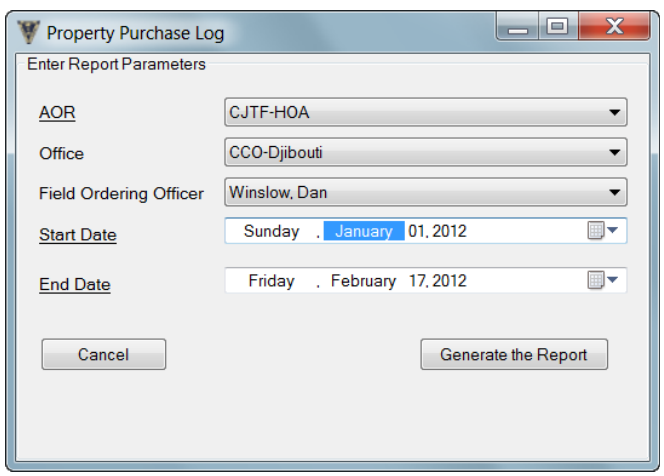
PBI = Property Book Item. Identifies items that have been flagged as a accountable

LC = Level Cleared. Displays the sequence number the order is currently awaiting clearance/review, based on the clearing workflow

PC = Purchase Level. Identifies how complete the purchase is. O=only an order has been executed, R=order has been received, P= order has been paid.

Property Purchase Log

The Property Purchase Log identifies purchased items that were flagged for property book accountability, quantities and prices, for a specific AOR office and FOO, within a defined time period.



1. Select **Reports/Extracts**, **Property Purchase Log** from the main menu.
   - The *Property Purchase Log* window opens.
2. Select the **AOR**, **Office**, and **FOO** from the drop-down lists. Also specify a start and end date for the report content. Click the calendar icon to select a date.
3. Click the **Generate the Report** button.

4. The report is displayed in MS Excel. You may print the report from Excel.
5. Save the report as an Excel file before exiting.

Property Purchase Log

FOO: Winslow, Dan **Period:** 12/01/2011 - 02/17/2012

Report As Of: 2/17/2012

Order Date	PR number	PIIN	Vendor	Item Description	Qty	UOM	Unit Price	Extended Price	Currency	Receiver/ Delivered To	Unit Delivered	UPC
12/16/11	WER346	W12XYZ12MAJ01	Pentagon Supplies	Desk	1		751.00	751.00	USD	FOO INT	BTA Unit	

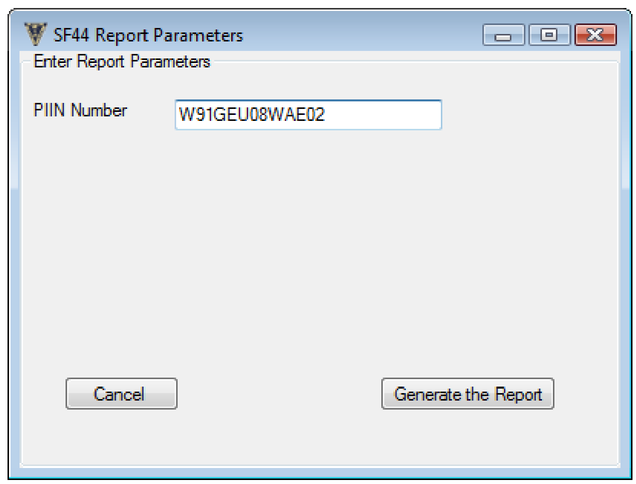
Property Purchase Log

The report identifies purchased items by PR number, PIIN, and order date. Vendor names are listed. Quantities purchased along with the unit price/extended price are also listed. The next two columns identify the receiving individual and unit. UPC codes (optional) scanned using the 3in1 handheld device are listed in the last column.

SF44 Report

Standard Form (SF) 44 is an electronic version of the long-used paper form for on-the-spot, over-the-counter, purchases of supplies services.

1. Select **Reports/Extracts**, **SF44 Report** from the main menu.
   – The *SF44 Report Parameters* window opens.
2. Type the PIIN associated with the order, then click the **Generate the Report** button.
3. The SF44 report is displayed as a PDF file.
4. Select **File**, **Save As** to save the report before exiting.



U.S GOVERNMENT

PURCHASE ORDER-INVOICE-VOUCHER

DATE OF ORDER	
06/06/2012	W12XYZ-12-M-AE13

PRINT NAME AND ADDRESS OF SELLER *(Number, Street, City, and State)**

P A Y E E

Aziz Construction
25th st
Baghdad
55662
Iraq

FURNISH SUPPLIES OR SERVICES TO *(Name and address)**

BTA TEST COMMAND
1851 S Bell St
Arlington
VA, 22030
United States

SUPPLIES OR SERVICES	QUANTITY	UNIT PRICE	AMOUNT
Dell Computers	2 EA	750.00	1500.00

AGENCY NAME AND BILLING ADDRESS*

P A Y O R

Finance Company BTA [DSSN: 2038]
1851 S Bell St
Arlington
VA 22202
United States

TOTAL 1500.00 USD

DISCOUNT TERMS

DAY(S)

DATE INVOICE RECEIVED
06/06/2012

ORDERED BY *(Signature and title)*

Electronically Signed By : Jerry King, ; Device Id : 354114012920287 On 06/06/2012

PURPOSE AND ACCOUNTING DATA

23423 2 3453 .3453 34 34534 452345234543525 4235 52345 4352345342 563456234534534534352345342 52345 523452

PURCHASER *To sign below for over-the-counter delivery of items*

RECEIVED BY

Jerry King

TITLE

DATE

SELLER *Please read instructions on Copy 2*

☒ Payment Received
1500.00 USD

☐ Payment Requested

NO FURTHER INVOICE NEED BE SUBMITTED

SELLER

BY Aziz Construction
(Signature)

DATE

I certify that this account is correct and proper for payment in the amount of
1500.00 USD
(Authorized certifying officer)

Exchange Rate
1.00000

DIFFERENCES
None
None

ACCOUNT CERTFIED:
CORRECT FOR

BY

PAID BY CASH	DATE PAID	VOUCHER NO.
OR *(Check No.)*		

***PLEASE INCLUDE SELLER'S INVOICE**

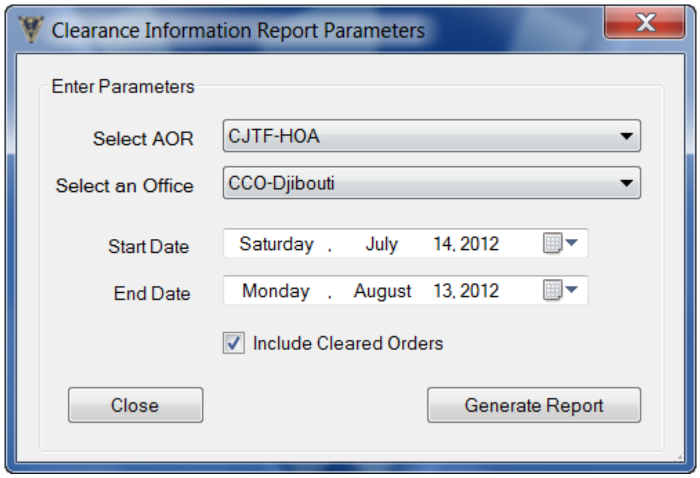
STANDARD FORM 44a (REV. 10-83)
ZIP CODE ***(See Instructions on Copy 2)*** PRESCRIBED BY GSA,
FAR (48 CFR) 53.213(c)

SF44 Report

Clearance Information

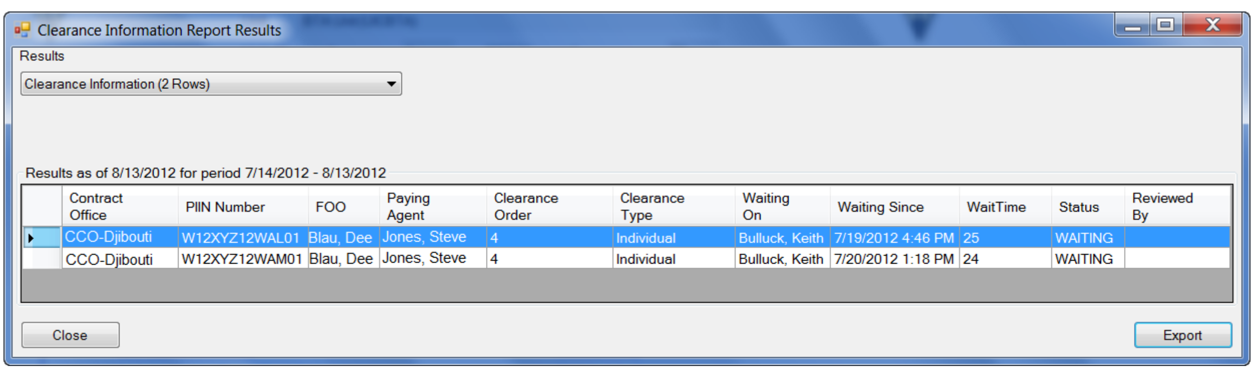
The Clearance Information report is a management tool that provides detailed clearance status information for each purchase order associated with a specified Contract Office.

1. Select **Reports/Extracts**, **Clearance Information** from the main menu.
   – The *Clearance Information Report Parameters* window is displayed.
2. Select an **AOR** and **Office** from the drop-down lists.
3. To include cleared orders in the report, mark the **Include Cleared Orders** checkbox. To report on uncleared orders only, leave the checkbox unmarked.
4. Specify a date range for the report.
5. Click the **Generate Report** button.



Clearance Information Report Parameters Dialog Box

The report is displayed in a separate window. Manually expand the window to view additional data columns. Re-sort the data by clicking a column heading, such as PIIN Number, or current status. Each order is displayed by PIIN number and associated FOO/Paying Agent team. Review the current status, the wait time, the office/role or individual who needs to take the next action, and who last cleared each order.

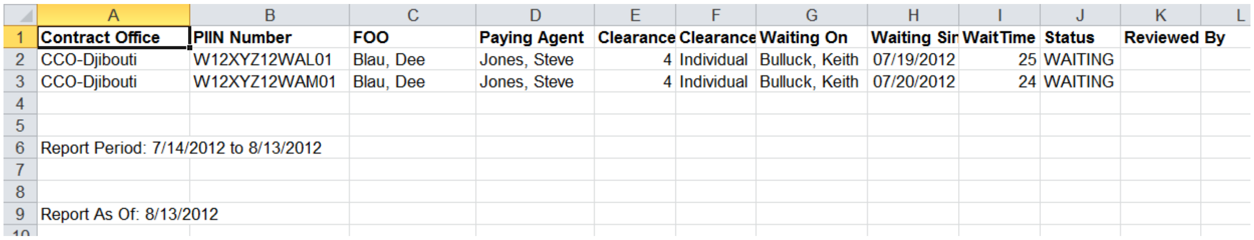


Clearance Information Report Results

You can export the file to MS Excel for further data analysis or printing. To export the data to Excel:

1. Click the **Export** button.
   – The *Save As* dialog box is displayed.

2. Click the **Save** button.
   – The report is displayed in Excel.



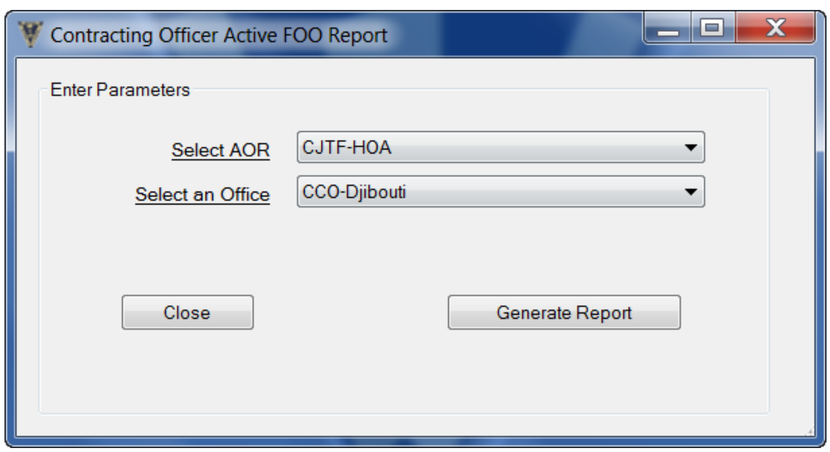
	A	B	C	D	E	F	G	H	I	J	K	L
1	Contract Office	PIIN Number	FOO	Paying Agent	Clearance	Clearance	Waiting On	Waiting Sir	WaitTime	Status	Reviewed By	
2	CCO-Djibouti	W12XYZ12WAL01	Blau, Dee	Jones, Steve	4	Individual	Bulluck, Keith	07/19/2012	25	WAITING		
3	CCO-Djibouti	W12XYZ12WAM01	Blau, Dee	Jones, Steve	4	Individual	Bulluck, Keith	07/20/2012	24	WAITING		
4												
5												
6	Report Period: 7/14/2012 to 8/13/2012											
7												
8												
9	Report As Of: 8/13/2012											

Clearance Information Report in Excel

Active FOO Report

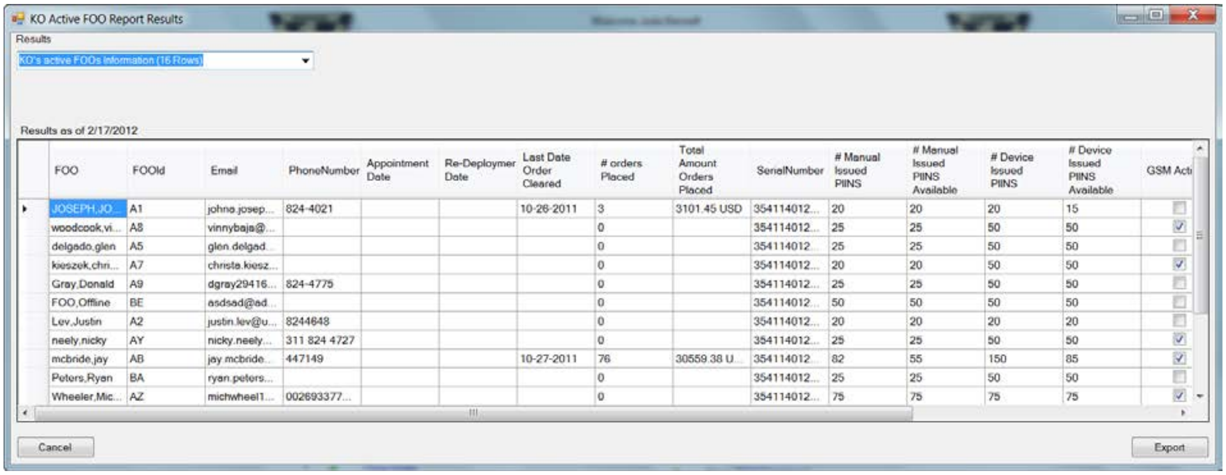
The Active FOO report prints a list of active FOOs at a specified AOR contract office. A FOO is considered active if they are currently assigned to a device. The FOO contact information, appointment date, associated PA, and latest order information, including PIINs and device ID numbers, are listed in spreadsheet format.

1. Select **Reports/Extracts**, **Active FOO Report** from the main menu.
   – The *Active FOO Report* window is displayed.
2. Select an AOR and Office.



Contracting Officer Active FOO Report Window

3. Click the **Generate Report** button.
   – The report is displayed in a new window. Use the horizontal scroll bar to view additional columns.
   – The columns in the report are: FOO, FOO ID, Email, Phone #, Appointment Date, Re-Deployment Date, Last Date Order Cleared, # Orders Placed, Total Amount Orders Placed, Serial Number, # Manual Issued PIINs, # Manual Issued PIINs available, # Device Issued PIINs, # Device Issued PIINs Available, GSM Active, Wi-Fi Active, FOO Unit, FOO UIC, Paying Agent.


KO Active FOO Report Results

Results

KO's active FOOs Information (16 Rows)

Results as of 2/17/2012

FOO	FOOId	Email	PhoneNumber	Appointment Date	Re-Deploymer Date	Last Date Order Cleared	# orders Placed	Total Amount Orders Placed	SerialNumber	# Manual Issued PIINS	# Manual Issued PIINS Available	# Device Issued PIINS	# Device Issued PIINS Available	GSM Acti
JOSEPH,JO...	A1	johna.josep...	824-4021			10-26-2011	3	3101.45 USD	354114012...	20	20	20	15	☐
woodcook,vi...	A8	vinnybaja@...					0		354114012...	25	25	50	50	☑
delgado,glen	A5	glen.delgad...					0		354114012...	25	25	50	50	☐
kieszek,chri...	A7	christa.kiesz...					0		354114012...	20	20	50	50	☑
Gray,Donald	A9	dgray29416...	824-4775				0		354114012...	25	25	50	50	☐
FOO,Offline	BE	asdsad@ad...					0		354114012...	50	50	50	50	☐
Lev,Justin	A2	justin.lev@u...	8244648				0		354114012...	20	20	20	20	☐
neely,nicky	AY	nicky.neely...	311 824 4727				0		354114012...	25	25	50	50	☑
mcbride,jay	AB	jay.mcbride...	447149			10-27-2011	76	30559.38 U...	354114012...	82	55	150	85	☑
Peters,Ryan	BA	ryan.peters...					0		354114012...	25	25	50	50	☐
Wheeler,Mic...	AZ	michwheel1...	002693377...				0		354114012...	75	75	75	75	☑

Cancel

Export

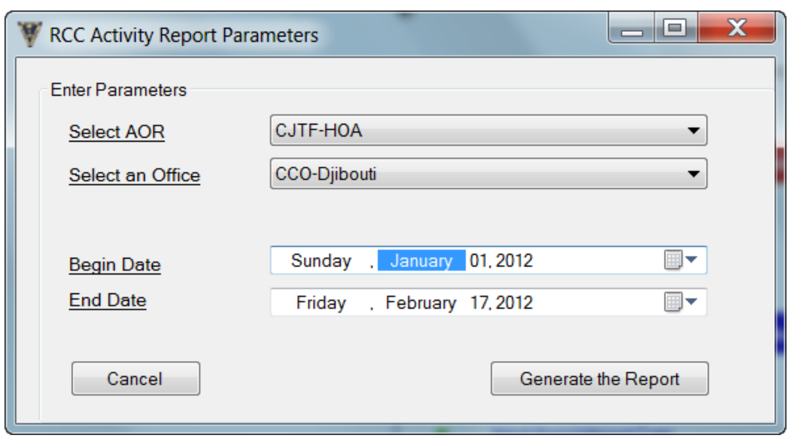
KO Active FOO Report Results

4. Click the **Export** button to export the report to Excel.

RCC Activity Report

The RCC Activity report is used by the KO/ Admin to view clearance information, by total number of orders and dollar value and FOOs, and also list of active FOOs.

1. Select **Reports/Extracts**, **RCC Activity Report** from the main menu.
   - The *RCC Activity Report Parameters* window is displayed.
2. Select an **AOR** and **Office** from the drop-down lists.
3. Specify a **Begin** and **End Date** for the report.

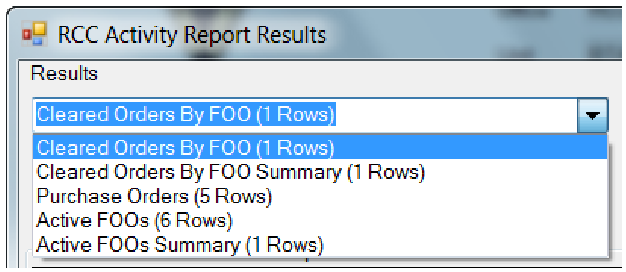


RCC Activity Report Parameters

4. Click the **Generate the Report** button.
   - The report is displayed in a separate window.
5. Select a report format from the drop-down list near the top of the window.
   - **Cleared Orders by FOO** who have cleared orders during the specified item period, lists the total number of orders cleared, total expenditures and the date

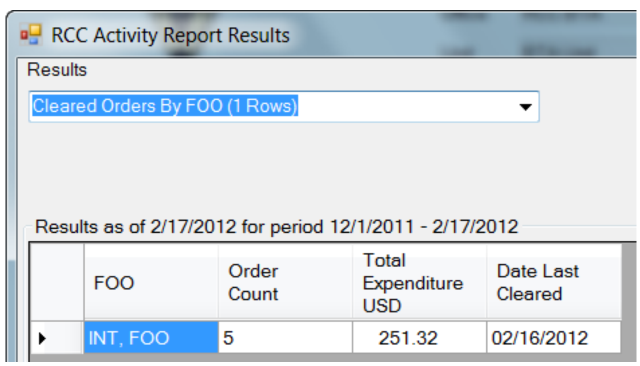
of the last cleared order. Note: these only show orders that have completed the clearance cycle.

- **Cleared Orders by FOO Summary**: Lists the total number of FOOs in the RCC who have cleared orders during the specified time period, along with the total number of orders cleared and amount expended.
- **Purchase Orders**: Lists the POs created during the specified reporting period. Information includes order date, PIIN, Status, associated FOO name, PIIN, and total amount. Additional information is Payee and Receiver names, currency code and exchange rate.
- **Active FOOs**: Lists the names of active FOOs and their assigned handheld device ID numbers. A FOO is considered active if they are currently assigned to a device. Also indicates whether the assigned device is GSM and/or Wi-Fi enabled.
- **Active FOOs Summary**: Lists only the number of active FOOs and the number of active devices.



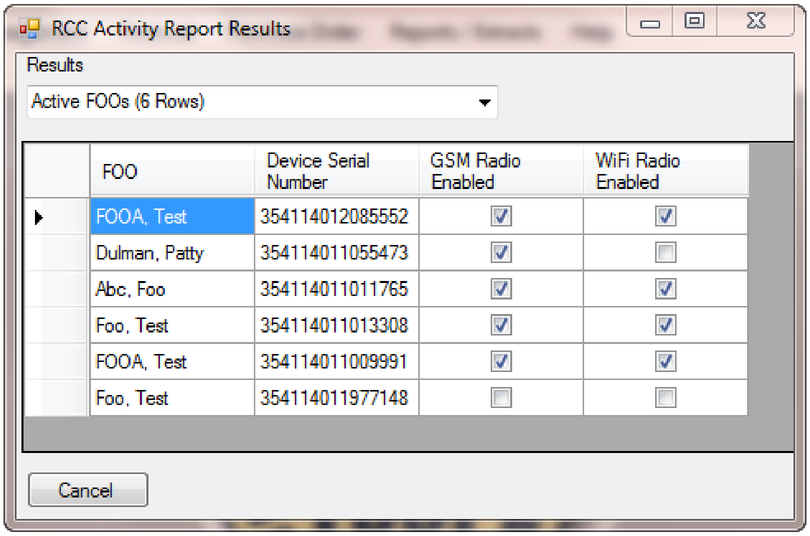
RCC Activity Report Options

- The selected report is displayed.



RCC Activity Report Results – Cleared Orders by FOO

The following report shows the list of active FOOs.



RCC Activity Report Results – Active FOOs

You can export the file to MS Excel for further data analysis or printing. To export the report data to Excel:

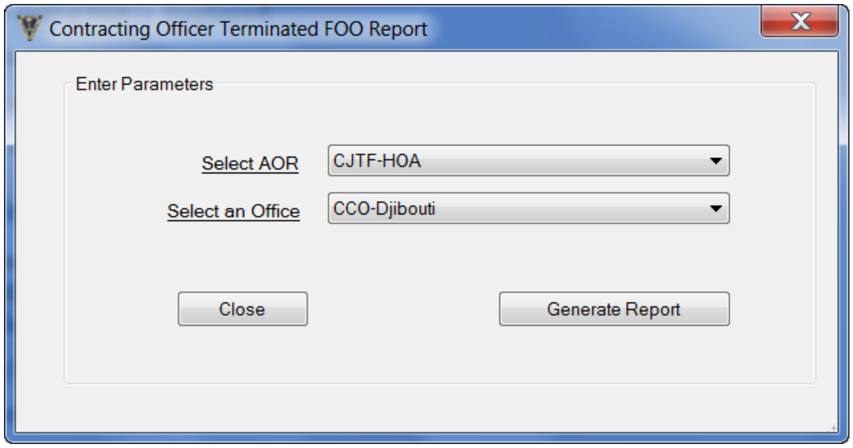
1. Click the .
   – The *Save As* dialog box is displayed.
2. Click the **Save** button.
   – The report is displayed in Excel.

Note that each type of report is displayed on a separate tab in Excel.

Deprovisioned/Terminated FOO Report

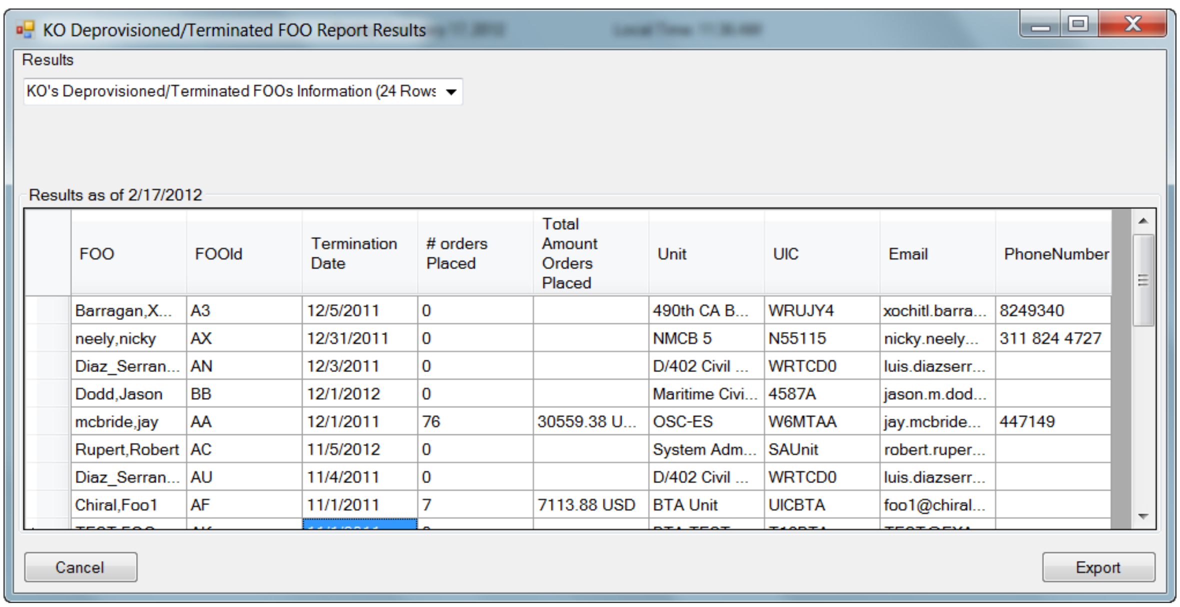
The Deprovisioned/Terminated FOO report prints a list of inactive FOOs at a specified AOR contract office. The FOO contact information, termination date, order information, and associated PA list are displayed in spreadsheet format.

1. Select **Reports/Extracts**, **Deprovisioned/Terminated FOO Report** from the main menu.
   – The *Terminated FOO Report* window is displayed.
2. Select an AOR and Office.



Contracting Officer Terminated FOO Report Dialog Box

3. Click the **Generate Report** button.
   - The report is displayed in a new window. Use the horizontal scroll bar to view additional columns.



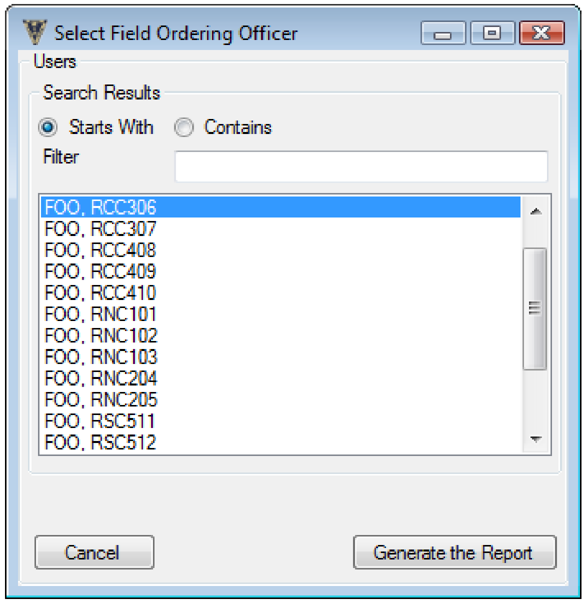
KO Deprovisioned/Terminated FOO Report Results

4. Click the **Export** button to export the report to Excel.

FOO Provisioning Report

The FOOs Provisioning report lists the provisioning setup parameters for each FOO, including assigned PIIN blocks and procurement control policies.

1. Select **Reports/Extracts**, **FOO Provisioning Report** from the main menu.
   - The *Select Field Ordering Officer* window opens.

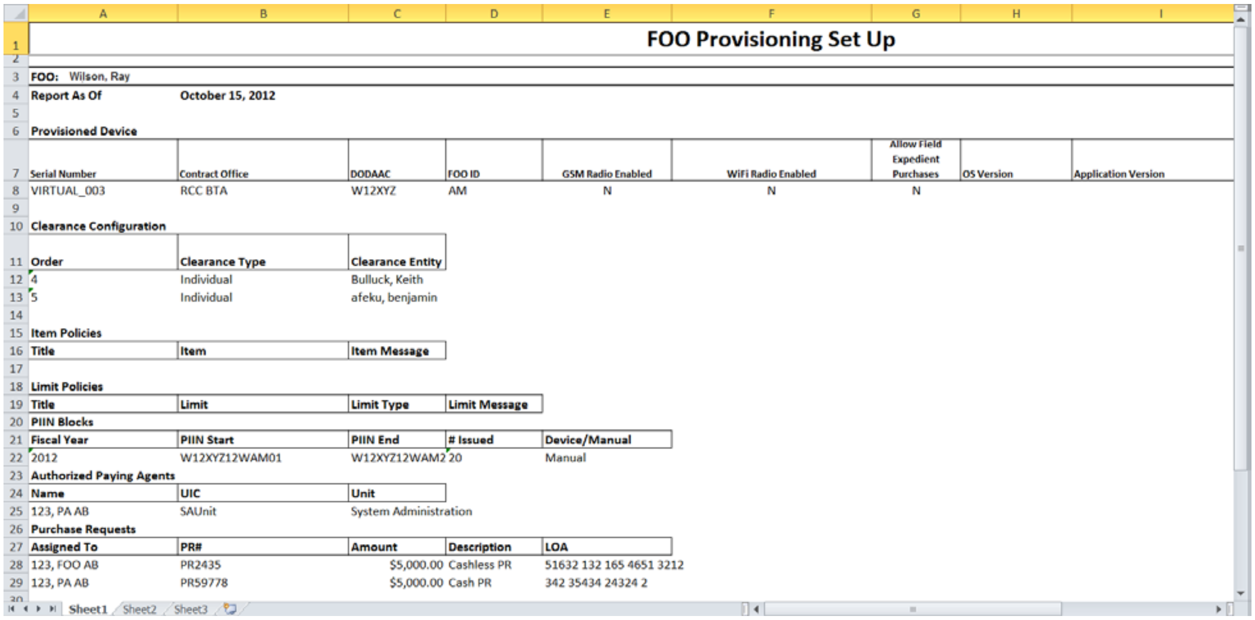


Select Field Ordering Officer Window

2. Select a FOO name and click the **Generate the Report** button.
   – If the list is long, filter it by typing a character string in the FOO name and selecting the **Starts With** or **Contains** radio button.
3. The report is displayed in MS Excel. You may print the report from Excel.
4. Save the report as an Excel file before exiting.

The report lists the FOO name, followed by:

-
- Clearance order and procurement policies in effect
- PIIN blocks assigned to the FOO
- Authorized Paying Agent information
- Purchase requests associated with the FOO, along with the PR LOAs, descriptions and amounts
- Line Item and Purchase Total limit procurement policies that are applied to the FOO

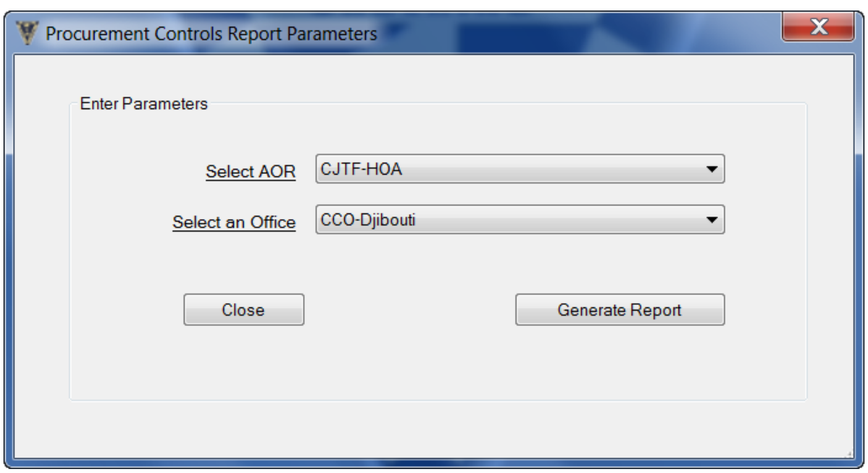


FOO Provisioning Report

Procurement Controls Report

The Procurement Controls report provides a summary of all item and limit type procurement policies that apply to a specified AOR Contracting Office.

1. Select **Reports/Extracts**, **Procurement Controls Report** from the main menu.
   - The *Procurement Controls Report Parameters* window opens.



Procurement Controls Report Parameters

2. Select the **AOR** and **Office**, then click the **Generate Report** button.
3. The report is displayed in MS Excel. You may print the report from Excel.
4. Save the report as an Excel file before exiting.

The report lists the item and limit procurement policies applied to the selected Contracting Office. These policies were applied using the Set Up, AOR/RCC Procurement Control Policies feature.

Procurement Controls

RCC: CCO-Djibouti
Report As Of: 8/13/2012

Item Policies:

Policy Title	Policy Message	Item	Item Message
PPI-08-22 Rev3 - Clothing/Laundry	Do not use FOO funds for clothing or laundry	Laundry	Do not use FOO funds for clothing or laundry
		OCIE	Do not use FOO funds for clothing or laundry
		Field Gear	Do not use FOO funds for clothing or laundry
		Clothes	Do not use FOO funds for clothing or laundry
PPI-08-22 Rev3 - Med/Dent Care	Do not use FOO Funds for Medical or Detal Care	Dental Care	Do not use FOO Funds for Medical or Detal Care
		Medical Care	Do not use FOO Funds for Medical or Detal Care
PPI-08-22 Rev3 - Rentals	Rentals should be placed against DTS orders	Car Rental	Should be for official purpose only; Check to see
		Rental Vehicles	Should be for official purpose only; Check to see
PPI-08-22 Rev3 - Telecommunications	Auth telecom purchases must be IAW J6 policies	computers	Auth telecom purchases must be IAW approved J6 pol
		software	Auth telecom purchases must be IAW approved J6 pol
		Fax Machines	Auth telecom purchases must be IAW approved J6 pol
		external hard drive	Auth telecom purchases must be IAW approved J6 pol
		Copy Machines	Auth telecom purchases must be IAW approved J6 pol

Limit Policies:

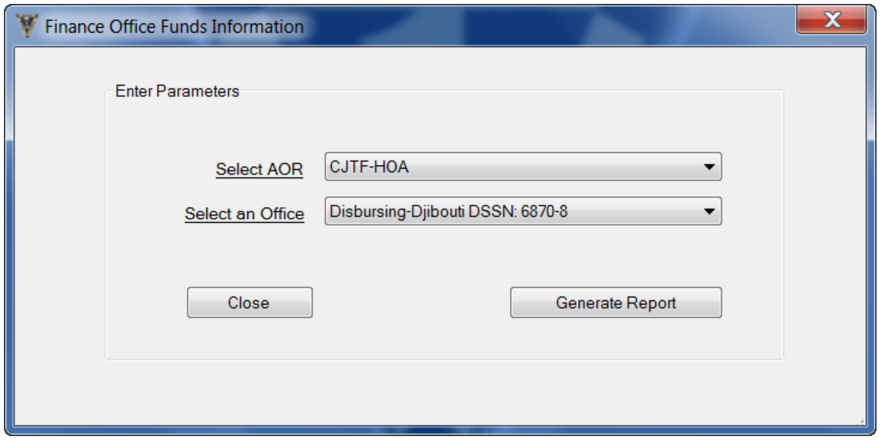
Policy Title	Policy Message	Limit	Limit Type	Limit Message
Max HA Project Purchase Limit	Max HA Project Limit- $10K	$10,000.00	PURCHASETOTAL	HA Project Funds only valid up to $10,000
		$40.00	LINEITEM	HA Project Funds Only valid up to $40 per item
Max OPFUND Purchase Limit	Not auth over $3000 (Tm support/life essential)	$3,000.00	PURCHASETOTAL	$3K limit pertains to OPFUND purchases; $10K limt for HA Projects

Procurement Controls Report

Finance Office Funds Report

The **Finance Office Funds** report is a management report used by the DA to view a list of PAs who currently have cash on hand.

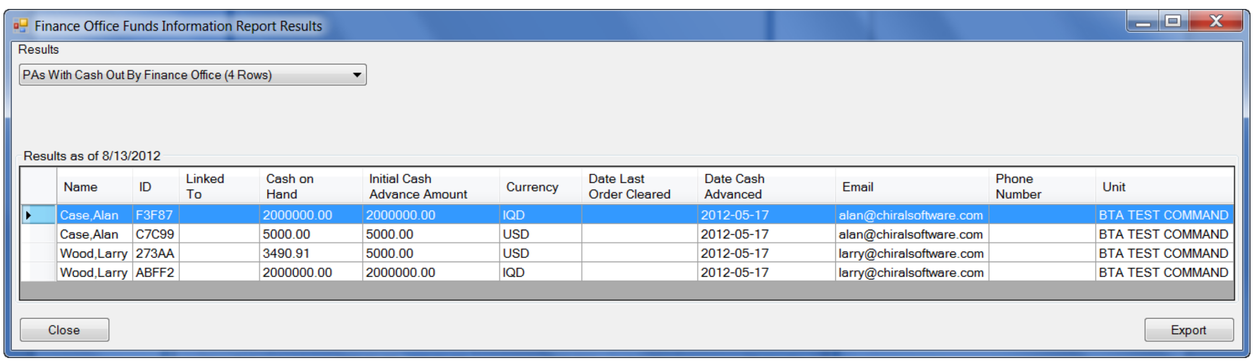
1. Select **Reports/Extracts**, **Finance Office Funds Report** from the main menu.
   – The *Finance Office Funds Information* window is displayed.
2. Select the **AOR** and **Office** from the drop-down lists.



Finance Office Funds Information Dialog Box

3. Click the **Generate Report** button.

The report is displayed in a separate window. Manually expand the window to view additional data columns. Re-sort the data by clicking a column heading, such as Date Cash Advanced.

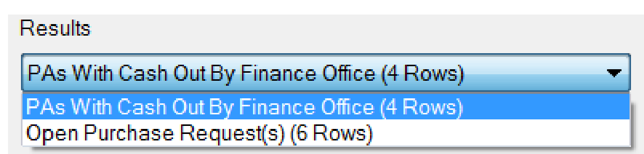


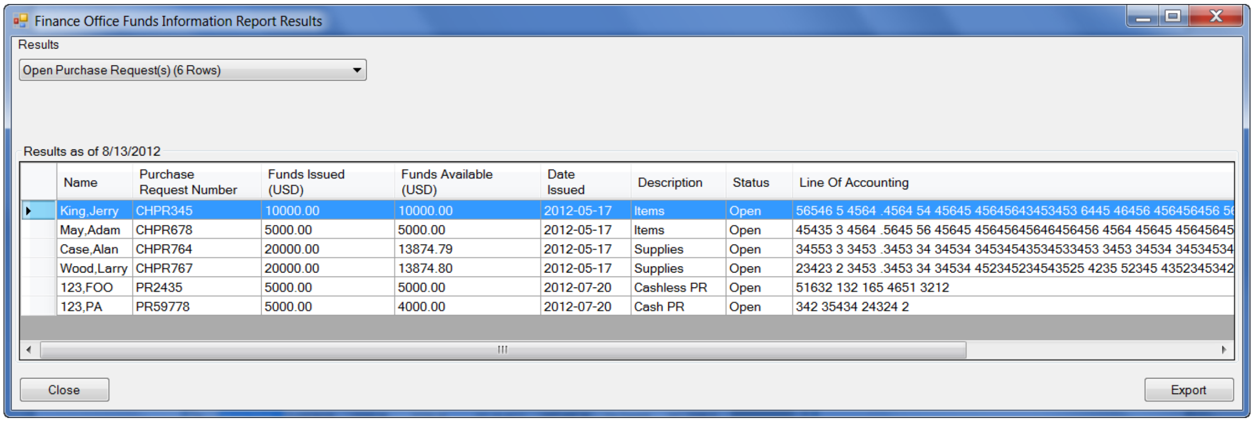
Name	ID	Linked To	Cash on Hand	Initial Cash Advance Amount	Currency	Date Last Order Cleared	Date Cash Advanced	Email	Phone Number	Unit
Case,Alan	F3F87		2000000.00	2000000.00	IQD		2012-05-17	alan@chiralsoftware.com		BTA TEST COMMAND
Case,Alan	C7C99		5000.00	5000.00	USD		2012-05-17	alan@chiralsoftware.com		BTA TEST COMMAND
Wood,Larry	273AA		3490.91	5000.00	USD		2012-05-17	larry@chiralsoftware.com		BTA TEST COMMAND
Wood,Larry	ABFF2		2000000.00	2000000.00	IQD		2012-05-17	larry@chiralsoftware.com		BTA TEST COMMAND

Finance Office Funds Report Results – PAs with Funds Out by Finance Office

There are two views for the report. Select **PAs with Funds Out by Finance Office** to view the PA names, email addresses, phone numbers and assigned units, amounts of unobligated cash, dates of cash advancement, total amounts advanced, and dates of the last orders cleared.

Select **Open Purchase Requests** to view a list of PAs, their open PR numbers, amount of funds issued and available, issue dates, descriptions, status and line of accounting numbers.





Name	Purchase Request Number	Funds Issued (USD)	Funds Available (USD)	Date Issued	Description	Status	Line Of Accounting
King,Jerry	CHPR345	10000.00	10000.00	2012-05-17	Items	Open	56546 5 4564 .4564 54 45645 45645643453453 6445 46456 456456456 5
May,Adam	CHPR678	5000.00	5000.00	2012-05-17	Items	Open	45435 3 4564 .5645 56 45645 456456456456456 4564 45645 45645645
Case,Alan	CHPR764	20000.00	13874.79	2012-05-17	Supplies	Open	34553 3 3453 .3453 34 34534 3453454353453453 3453 34534 34534534
Wood,Larry	CHPR767	20000.00	13874.80	2012-05-17	Supplies	Open	23423 2 3453 .3453 34 34534 452345234543525 4235 52345 4352345342
123,FOO	PR2435	5000.00	5000.00	2012-07-20	Cashless PR	Open	51632 132 165 4651 3212
123,PA	PR59778	5000.00	4000.00	2012-07-20	Cash PR	Open	342 35434 24324 2

Finance Office Funds Report Results –Open Purchase Requests

You can export the file to MS Excel for further data analysis or printing. **To export the data to Excel:**

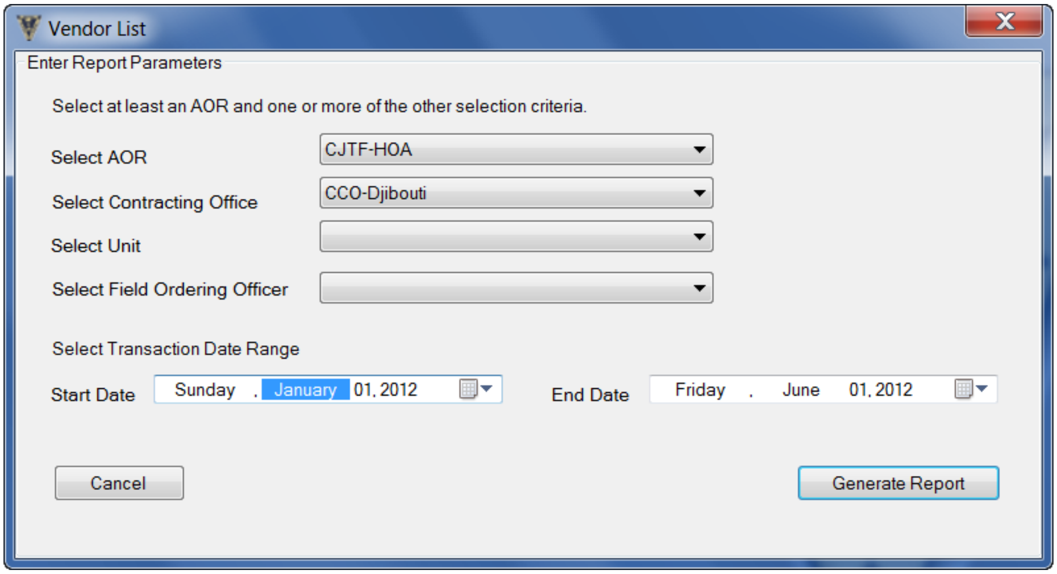
1. Click the **Export** button.
   – The *Save As* dialog box is displayed.
2. Click the **Save** button.

The report is displayed in Excel.

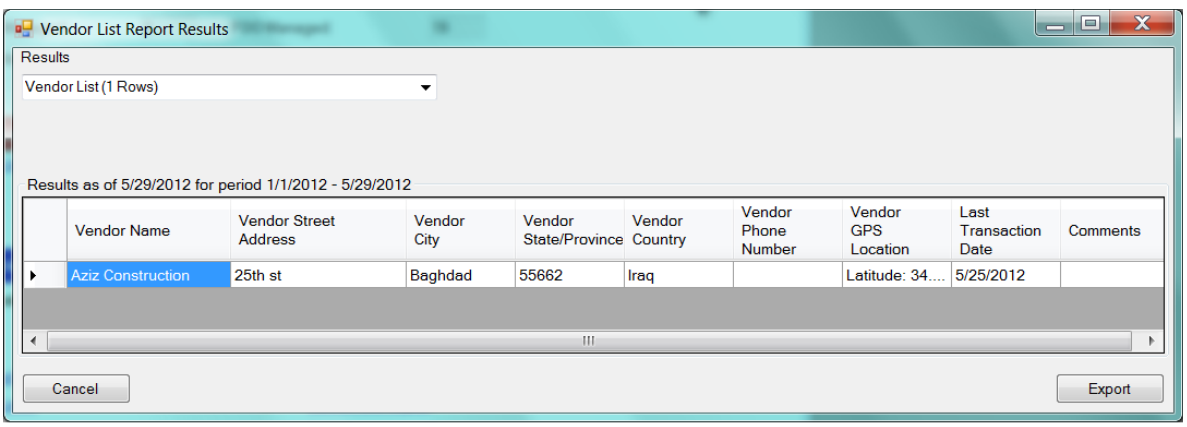
Vendor List

The Vendor List report identifies a list of vendors with whom an AOR has conducted business during a specific time period. The report provides vendor contact information, last transaction date and comments.

1. Select **Report/Extracts**, **Vendor List**. The *Vendor List* dialog box opens.
2. On the *Vendor List* dialog box, specify the AOR. The other drop-down fields are optional.
3. Specify the **Start** and **End Dates** for selecting vendor transactions. The resulting report displays only the vendors who completed a transaction with the AOR during the specified date range.
4. Click the **Generate Report** button.



The *Vendor List Report Results* window is displayed. Vendor names are listed, as well as addresses and phone numbers, most recent transaction dates, and comments.



To export the report to Microsoft Excel, where it can be edited and/or saved, click the **Export** button.

Purchase Request and Order Search Report

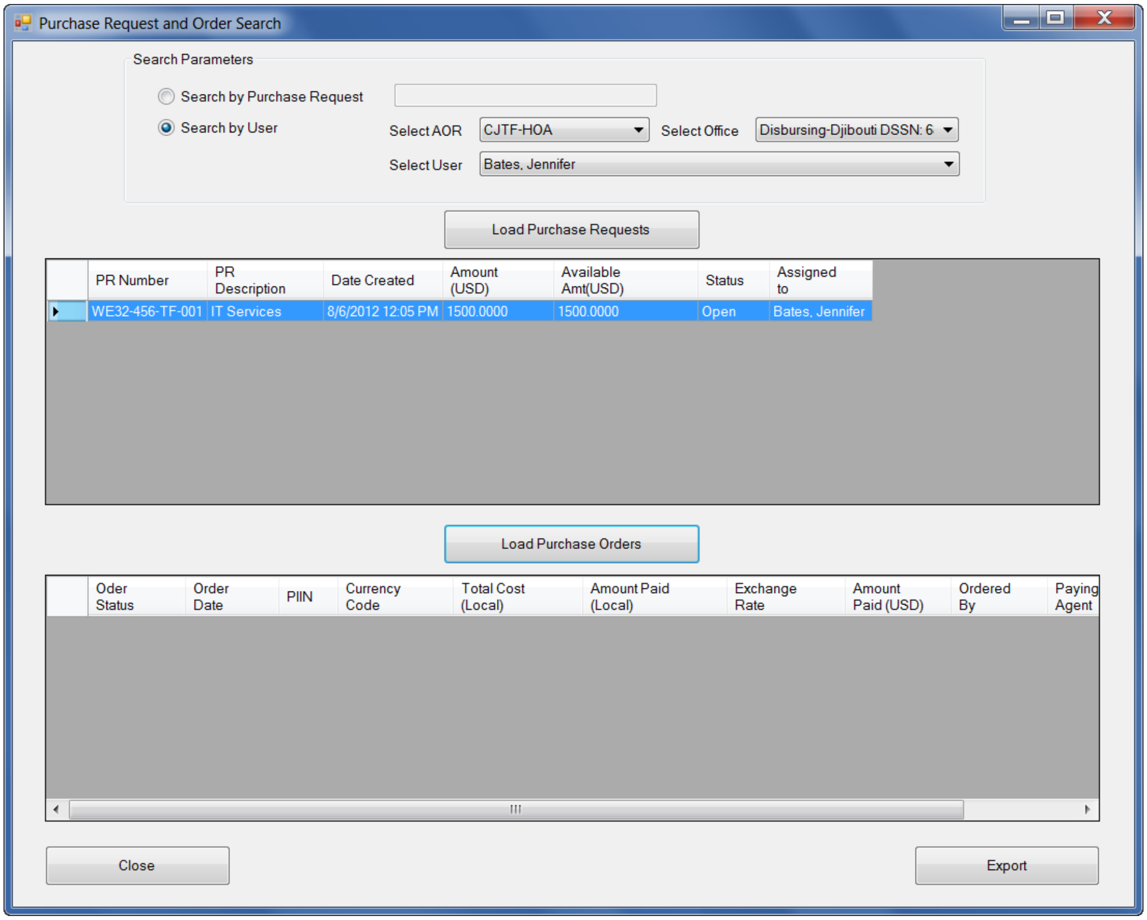
The Purchase Request and Purchase Order Search report enables searching for PRs by user or PR number.

To search by PR number:

1. Select **Report/Extracts**, **Purchase Request and Purchase Order Search**. The *Purchase Request and Purchase Order Search* dialog box opens.
2. Select the **Search by Purchase Request** radio button and enter the PR number.
3. Click the **Load Purchase Orders** button to view the POs associated with the PR.

To search by user:

1. Select the **Search by User** radio button and then specify the AOR, Office and User, using the drop-down lists.
2. Click the **Load Purchase Requests** button to view the PRs associated with the user in the top table.



Purchase Order and Search Request Window

3. Select a purchase request in the table.
4. Click the **Load Purchase Orders** button to view the POs associated with the purchase request.

Lesson Summary

In this lesson, you learned how to:

- ❑ Identify the various reports available in 3in1 Tool Workstation
- ❑ Generate each type of report
- ❑ Print and save each type of report

Lesson 2: Downloading Orders/Vouchers

Objectives

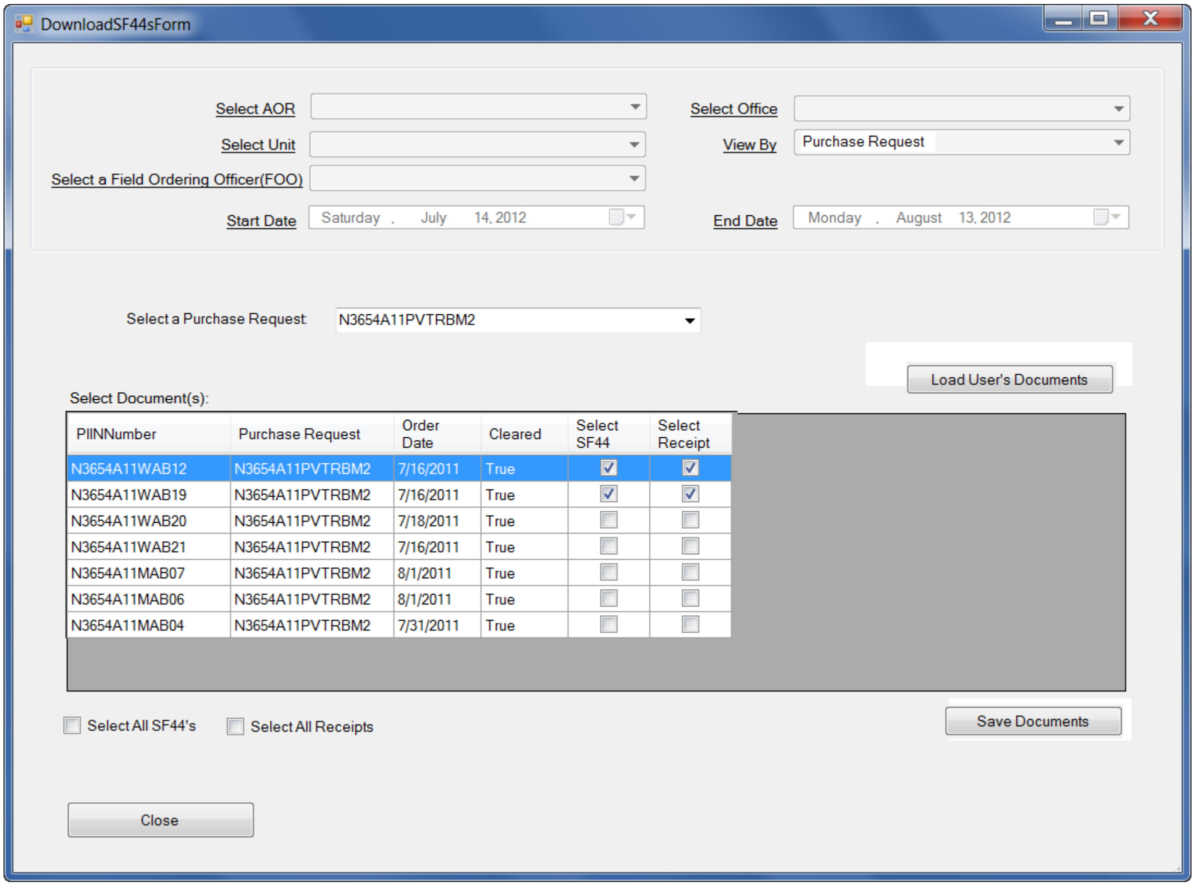
After completing this lesson, the participant will be able to:

- ❑ Download orders/vouchers

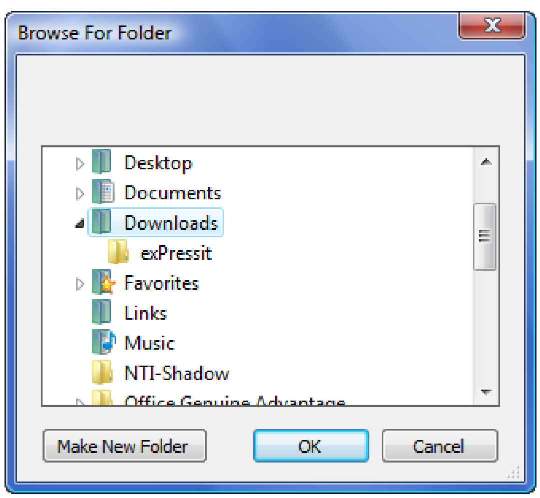
Download SF44s

The Mass Download SF44s command enables a user to easily download a batch of SF44s and receipts a FOO/PA has executed or scanned into the 3in1 system, as a backup.

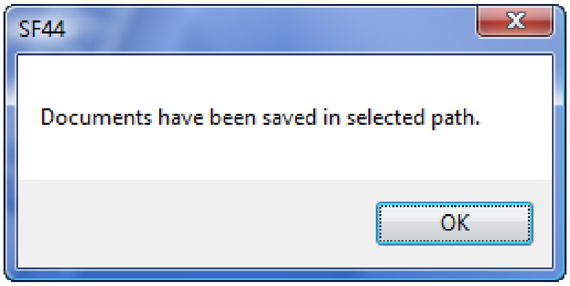
1. Select Mass **Download SF44s** from the **Reports/Extracts** menu.
   - The *Download SF44 Form* window opens.
   - FOOs and PAs can only select their own documents, so they cannot select a different AOR, Office, Unit, or FOO.
2. In the **View By** field, select SF44 documents based on a specific Purchase Request or by a specified date range.
   - To view all SF44s created within a certain timeperiod, select **By Date**. Then use the **Start Date** and **End Date** fields to specify the date range for selecting a purchase request.
   - To view SF44s associated with a specific PR, select **By Purchase Request**.
3. Click the **Load User's Documents** button.
   - Executed orders will be listed for the specified user within the above parameters.
4. Mark the check box to select the SF44 or receipts to download.
   - To download all the SF44s that are listed, select the **Select All SF44s** check box. To download all receipts that are listed, select the **Select All Receipts** check box.



5. Click the **Save Documents** button.
   – The *Browse for Folder* dialog box is displayed.



6. Locate the folder to store the downloaded documents, or create a folder.
7. Click OK.
   – A confirmation dialog box is displayed.
8. Click OK.



Confirmation Dialog Box

Lesson Summary

In this lesson, you learned how to:

- ❑ Download orders/vouchers

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Part 4: Reference Information

Module 13: Device Management Tools

Lesson 1: Resetting a Password on the Device and Workstation

Objectives

After completing this lesson, the participant will be able to:

- ❑ Understand that user login passwords are initially synchronized between the Workstation and handheld device, but must be reset individually later
- ❑ Reset a user password on the 3in1 Workstation
- ❑ Reset a user password for a 3in1 handheld device

Device and Workstation Passwords

When a FOO or PA registers to become a user of the 3in1 Workstation and creates a password, he or she will use this same password to log on to a provisioned 3in1 device. The Workstation and device passwords are synchronized initially.

However, if there is a need later to reset either the device or Workstation password, you will need to manually change the password. You should change the password on both the device and Workstation so that you have only one password to remember.

For example, according to the password rules described in below, users must change their password every 60 days. When the user changes the Workstation password, the user should also change the device password.

If only the Workstation password is changed, the user logs on to the Workstation using the new password, but must log on to the device using the old password.

Password Rules

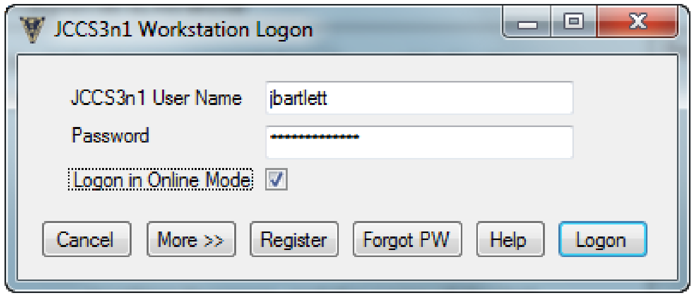
The following rules apply to creating passwords in the 3in1 Tool Workstation:

- Passwords must contain a minimum of 15 characters:
  - Include at least one uppercase alphabetic character
  - Include at least one lowercase alphabetic character
  - Include at least one non-alphanumeric (special) character
- When resetting passwords:
  - The new password must be different from the previous 10 passwords used
  - A user can change a password only once in a 24-hour period
  - Users are forced to change their passwords after 60 days
- Additional password rules:
  - Only the affected user and administrator can change a user's password
  - An administrator can reset a user's password should they get locked out

Resetting User Workstation Passwords

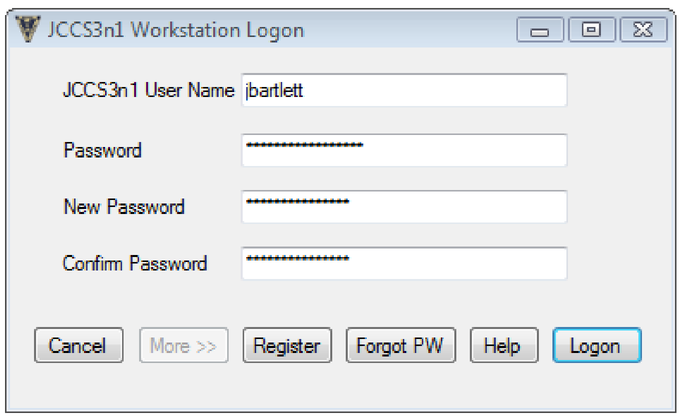
Any Workstation user can change his or her password using the following steps:

1. Start the 3in1 Workstation.
2. In the *Logon* window, type your user name and current password.



3in1 Workstation Logon Screen

3. Click the **More** button to display the ***New Password*** fields.
4. Type the new password twice.



3in1 Workstation Logon Screen with New Password Fields

5. Click the **Logon** button. A confirmation dialog indicates the password change was successful.

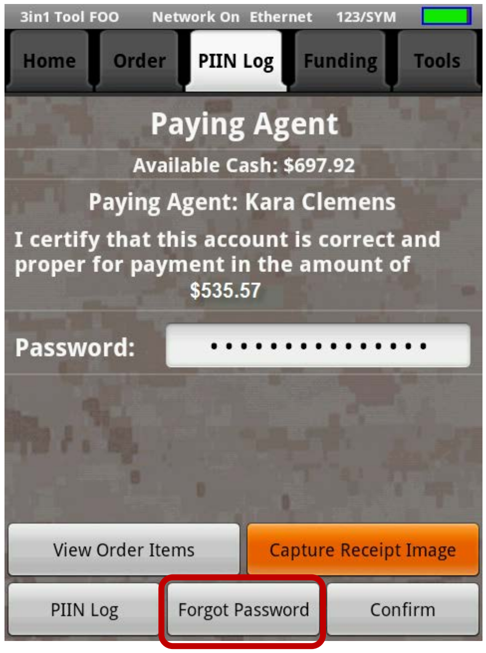
Resetting FOO/PA Device Passwords

FOOs may reset the device password using either of the following methods on the device when they are logged in as the primary user:

1. The **Reset Password** button on the login screen. See *Module 14: 3in1 Device Tools & Settings, Lesson 1: Device Settings.*
2. The **Change Password** command accessed through the device **Tools** tab, under **General Settings**. See *Module 14: 3in1 Device Tools & Settings, Lesson 1: Device Settings.*

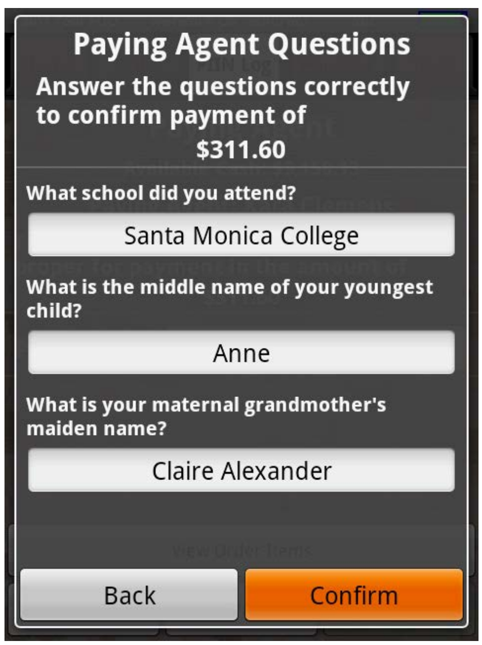
If the PA has forgotten the password used on the *Order Signature* screen:

1. Tap the **Forgot Password** button. This opens the *Paying Agent Questions* screen.



Paying Agent Signature Screen

2. On the *Paying Agent Questions* screen, answer the security questions set at the time of registration.



Paying Agent Security Questions Screen

3. PAs who forget their passwords must correctly answer all the security questions in order to confirm payment.

4. The KO/sys admin can reset the PA's device password later using the *Account Security* window.

Locked Out of the Device or Workstation

Users who become locked out of the device or Workstation should ask the 3in1 system administrator to temporarily reset their password. The system administrator will reset the device password and send a temporary password to the user that can be used to unlock the device. The temporary password can only be used once and the user will be forces to reset their password. They should also go to the Workstation to reset their three security questions. The security questions can only be changed on the Workstation.

To understand the circumstances under which a lock out can occur after entering incorrect passwords, see *Module 3: Application Familiarization, Lesson 1: Navigating the 3in1 Workstation Application* and *Lesson 4: Navigating the 3in1 Device Application.*

Lesson Summary

In this lesson, you learned to:

- ❑ Understand that user login passwords are initially synchronized between the Workstation and handheld device, but must be reset individually later
- ❑ Reset a user password on the 3in1 Workstation
- ❑ Reset a user password for a 3in1 handheld device

Lesson 2: Recovery Operations: Retrieving Data/Rebuilding Databases from Damaged Devices

Objectives

After completing this lesson, the participant will be able to:

- ❑ Understand the procedures available to restore data from a non-functional device to a new device.
- ❑ Understand the procedure for moving a FOO to a new device if the original device is lost or destroyed

Device Restoration

If a device in the field becomes inoperable, destroyed, or lost, the FOO should contact their contracting officer as soon as possible. Until the device is restored, the FOO can use the paper SF44s and PIIN numbers ("W") issued during set up.

In the event a handheld device is only damaged, it may be possible to salvage the small chip inside that contains the FOO-related and ordering information. (See *Module 14: 3in1 Device Tools & Settings, Lesson 4: Device Software Updates & Other Information* for pictures of the chip.) In this case, the procedure is to remove the chip from the damaged device and place it in a new device. Complete the process by instructing the 3in1 Tool Workstation to recognize the association ("bind") between the data on the chip and the new device. This process is called **Rebinding** and is performed by the KO or system administrator, who needs the ID numbers from both devices to complete the rebinding process.

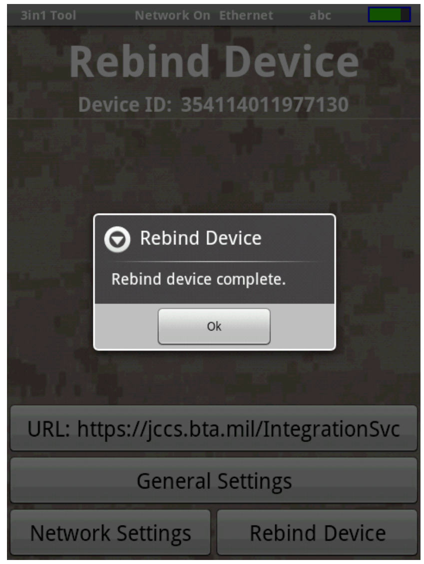
If the device is completely destroyed or lost, some order information may have been lost. As much as possible, the FOO should determine what orders have not been uploaded to the Prime Database and obtain any copies of those SF44s that may have been printed as those orders can be manually entered on the workstation for data recovery. The contracting officer will provide further direction.

If the device is lost or destroyed, and the microSD chip is also lost or destroyed, it will be necessary for the FOO to be moved to a new device with a new microSD. This is called reconstituting the device. Note the distinction between reconstitute and rebind: when rebinding, the microSD chip is moved from one device to another. In that case, the device IDs would be different, but the GD Chip ID would be the same. Reconstitution is required when both the original microSD chip and device must be replaced.

Rebinding the Device

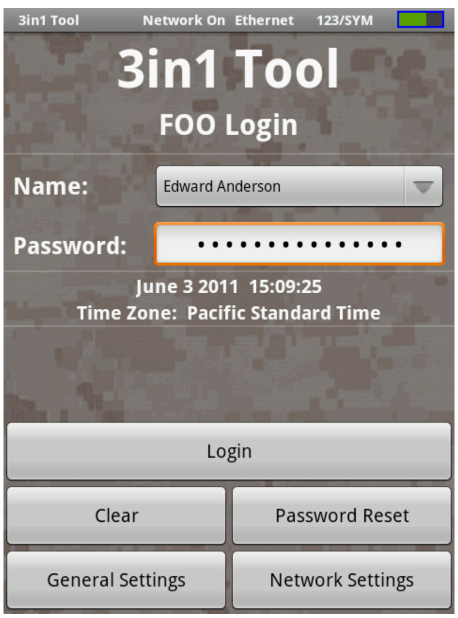
After the chip has been placed in a new device and the Contracting Officer or System Administrator performs the function of rebinding the device on the workstation, the FOO should then turn on the new device; the Rebind Device screen is displayed. After ensuring they have network connectivity, the FOO presses the **Rebind Device** button.

This screen is displayed as soon as the new device is powered on



This message is displayed when the rebinding process is complete

After receiving the message that the rebinding process has finished, the FOO can log in to the device using his or her password. All the information saved for the FOO on the old device should be available on the new device.



FOO Login Screen

Reconstituting the Device

When reconstituting a FOOs data on a new device, the FOO just needs to login and provision the device like they do as a first time user of a device.

Lesson Summary

In this lesson, you learned to:

- ❑ Understand the procedures available to restore data from a non-functional device to a new device.
- ❑ Understand the procedure for moving a FOO to a new device if the original device is lost or destroyed.

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Lesson 3: Reprovisioning Device Data

Objectives

After completing this lesson, the participant will be able to:

- ❑ Understand the relationship between in Workstation and device in storing purchase requests
- ❑ Control device data reprovisioning

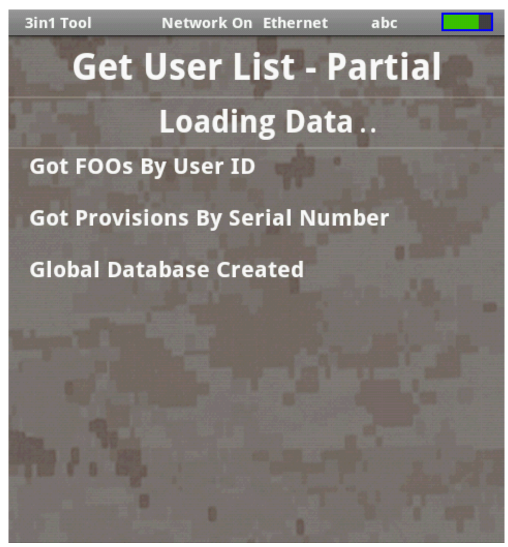
Reprovisioning FOO Data on a Device

The device and Workstation function as a single unit. Data is transmitted frequently from the device to the Workstation and vice-versa. Records of all orders placed on the device are also stored on the Workstation.

If all data is lost on the device, such as when a reset to factory settings occurs, the Workstation can be used to reprovision the device and transmit data to the device. The Contracting Officer has authority to use the Workstation Provision Device feature.

Typically, in field use, there will be a number of orders placed from multiple purchase requests. During reprovisioning, when the Device Approved message is displayed, as shown below, the FOO has a choice of downloading all orders from the Workstation or only recent orders that were placed using active purchase requests.

Choose to download all orders placed by the FOO or only orders placed for active purchase requests



"Partial" indicates only orders placed against active purchase requests are being downloaded to the device

When making this decision, one influencing factor is the type of connectivity and bandwidth available. In cases of poor connectivity or low bandwidth, it may be better to only download recent orders against active purchase requests.

Lesson Summary

In this lesson, you learned how to:

- ❑ Understand the relationship between in Workstation and device in storing purchase requests
- ❑ Control device reprovisioning

Lesson 4: Disabling Devices

Objectives

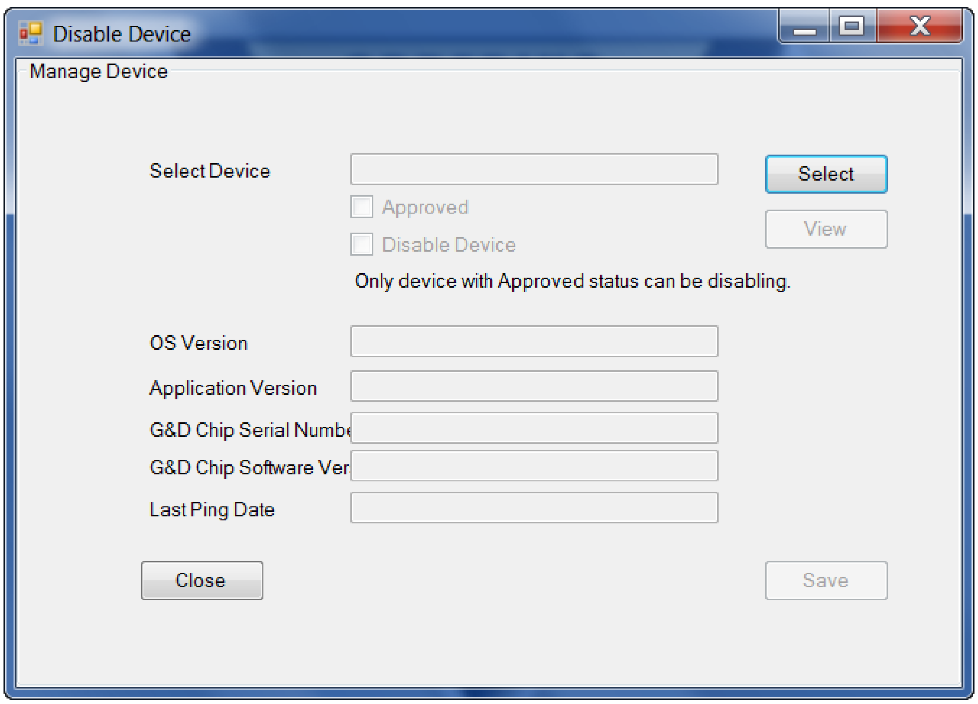
After completing this lesson, the participant will be able to:

- ❑ Select an approved device and disable it
- ❑ Recognize a "bricked" device

Disabling a Device

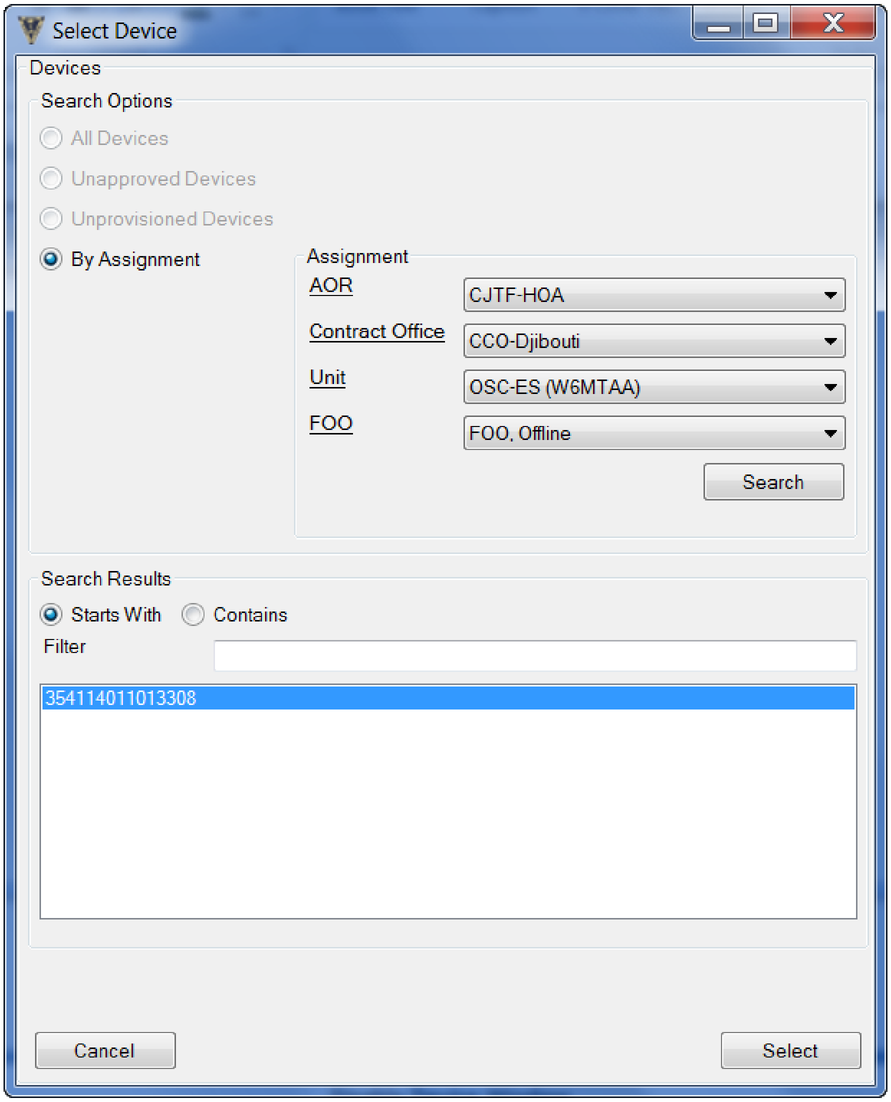
In the event a device needs to be disabled and sent to the 3in1 Program Management Office, use the Disable Device feature.

1. Select **Device Management**, **Disable Device**.
   - On the *Disable Device* window, click the **Select** button to select a device ID. Note that only approved devices may be disabled.



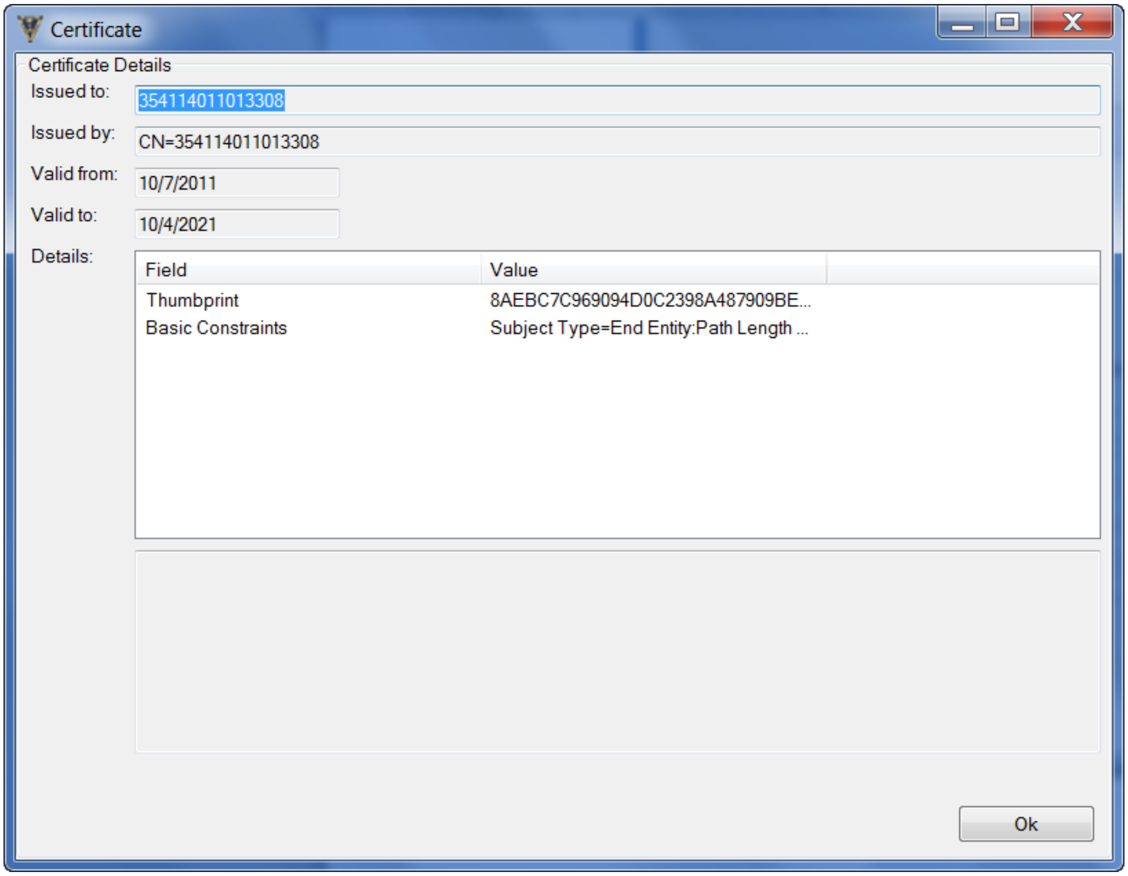
Disable Device Window

2. On the *Select* window, specify the criteria for searching for an assigned device. Select the AOR, Contract Office, Unit and FOO.
3. Click the **Search** button.



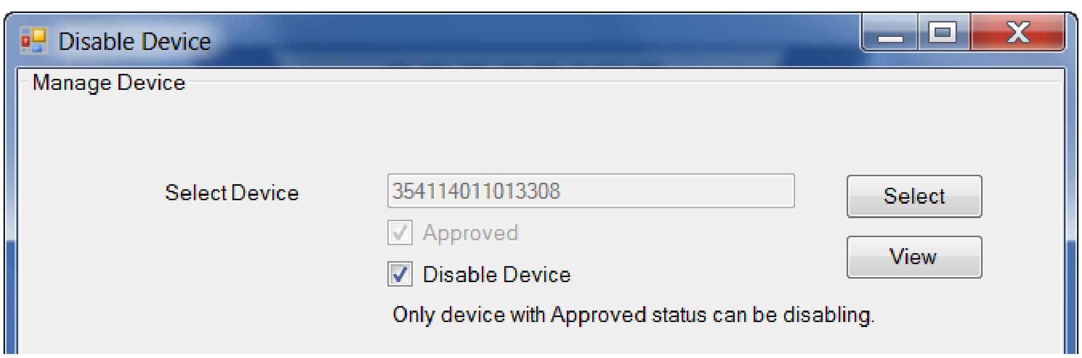
Select Device Window

4. Device IDs that meet the criteria are listed in the selection table. Select a device ID in the table, and then click the **Select** button.
5. On the *Disable Device* window, click the **View** button to view the device certificate, to verify the correct device has been selected.

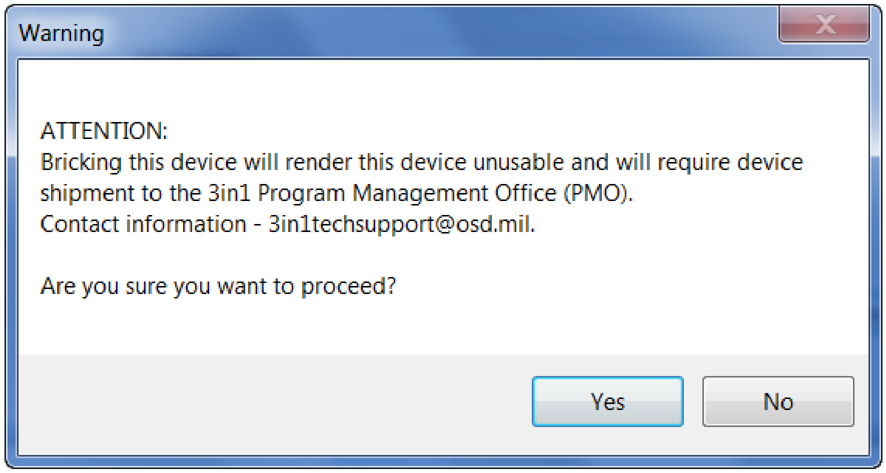


Device Certificate Window

6. After viewing the device certificate information, click OK on the *Certificate* window.
7. Mark the checkbox beside **Disable Device**, then click the **Save** button at the bottom.



8. The following warning message is displayed. ("Bricking" refers to disabling the device.) If you are sure that you want to disable the device and ship it to the 3in1 PMO, click the **Yes** button. To cancel the disable command, click the **No** button.



Once a device has been bricked, the Contracting Office must follow the 3in1 Support Help Desk instructions for sending back the device.

Recognizing a Bricked Device

A device is bricked if the 3in1 logo is displayed on the screen at start up, but the device remains locked. The device has lost all functionally; even pressing the Power button to turn off the device will not work. It is necessary to remove the battery in order to power down the device.

Lesson Summary

In this lesson, you learned to:

- ❑ Select an approved device and disable it
- ❑ Recognize a "bricked" device

Module 14: 3in1 Device Tools & Settings

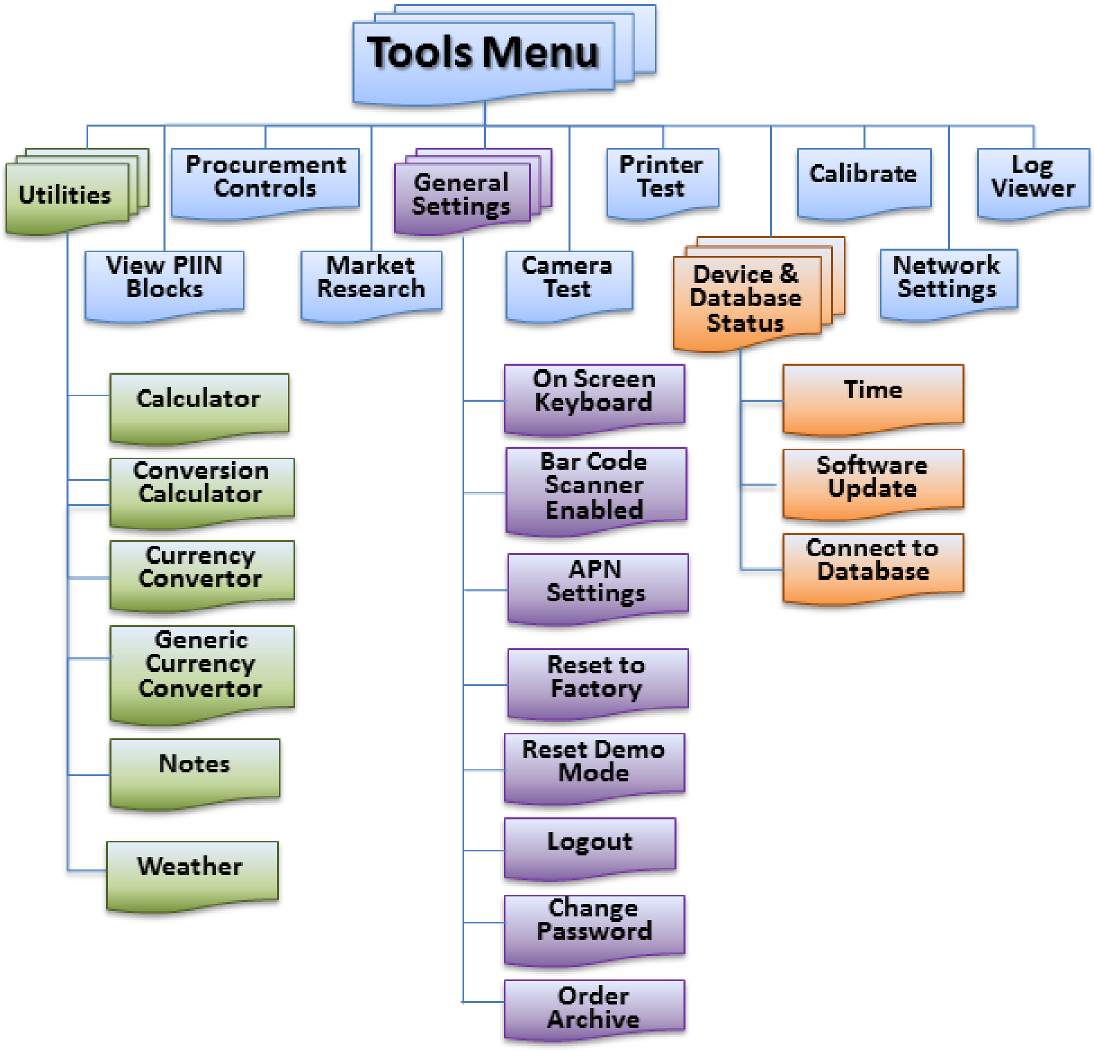
Lesson 1: Device Tools

Objectives

After completing this lesson, the participant will be able to:

- ❑ View entire PIIN Blocks
- ❑ View procurement controls
- ❑ Compare vendor prices
- ❑ Conduct a printer test
- ❑ Conduct a camera test
- ❑ Customize device general settings
- ❑ Calibrate the device screen
- ❑ View device and database status
- ❑ View and change connection and network settings
- ❑ Use the Log Viewer
- ❑ Use device utilities

The 3in1 device provides many helpful tools for the FOO. The following figure shows the menu hierarchy of all device tools.



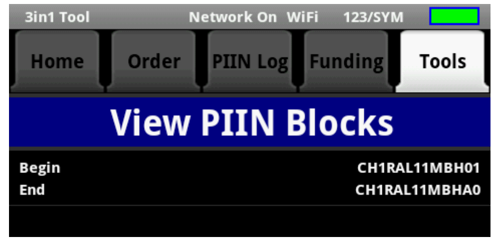
Select the **Tools** tab to view the list of available tools. After using any of the tools, to return to the *Tools* screen tap the **Back** button.

View PIIN Blocks

The *View PIIN Blocks* screen shows all of the PIINs that have been issued to a FOO. Select **View PIIN Blocks** to see the entire 13-character PIIN numbers that mark the beginning and end of the PIIN block.

The PIIN is comprised of the Contracting Office DODAAC, fiscal year, contract type “M” or “W,” a two-character FOO ID, and a two-digit serial for the orders.

Two types of PIINs can be generated. “M” PIINs are generated by default on the device, while “W” PIINs are generated when the check box labeled **For Non-Device**



(Manual) Order Entry is checked. Manual orders are executed as a backup, should the device be inoperable. The manual orders are then entered in the Workstation for electronic processing.

In this example, the user has one PIIN block. These PIINs are from FY 2011, and are in the range from 01 to A0, giving 100 available PIINs.

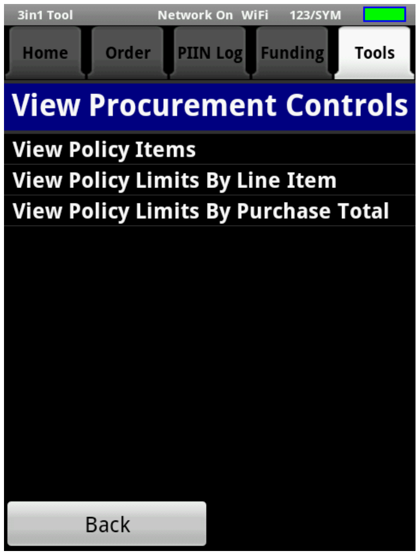
View Procurement Controls

A procurement control to limit the total authorized purchase amount that a FOO can make on a single order can be established so that the device, once provisioned, will restrict purchases by that FOO to remain below that limit. Procurement controls can also be set up to display an alert to the FOO on the device when they try to procure an item that is restricted or requires special approval. A warning can also be applied to a line item total amount, such as requiring a review when purchasing items over a specified limit.

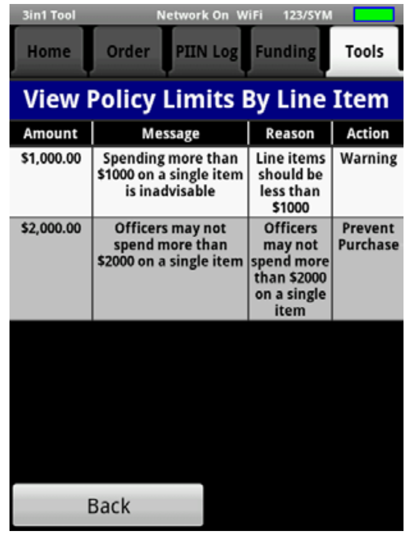
It may be helpful for the FOO to view procurement controls before starting orders. That way, the FOO will know that certain items cannot be purchased, or require special authorization. See *Module 5: The Ordering Process, Lesson 2: Making a Purchase* for information on how the controls are implemented during ordering.

To view procurement controls on the device:

1. Tap the **Procurement Controls** button to open the *Procurement Controls* screen.
2. A menu displays various categories of procurement policies. Select **View Policy Items**, **View Policy Limits by Line Item**, or **View Policy Limits by Purchase Total**.
   - The specific policies display. Note that procurement controls are based on string matching. For example, if a user attempts to purchase a prohibited item that contains the word “wire,” a warning will display. Even though the policy specifies “copper wire,” the warning is triggered if “barbed wire” is entered.
3. When you have finished reviewing, tap the **Back** button.



View Procurement Controls Menu



View Policy Limits by Line Item Screen

Market Research

The Market Research tool is useful for price comparisons among vendors. Perform three types of Market Research:

1. **Device only**. Compare items purchased from multiple vendors on the local device only.
2. **Prime database only**. Search for purchase information within an entire contracting office. The advantage of this search is access to purchases made by other FOOs on other devices or on the Workstation. Save selected merchant information on your local device.
3. **Device and prime database**. A combination of search types 1 and 2.

See *Module 5: The Ordering Process*, *Lesson 2: Making a Purchase* for details on using the Market Research tool.

Printer Test

The Printer Test feature allows printing of a test page, which is an image filled with random numbers, lines and ovals. The **Print** button tests printing the image to a printer. Users can test the printer while on base, before going out to make a purchase, so any malfunctions can be detected and resolved without hindering the purchasing process. If a printer is not connected to the device the **Print** button will be disabled on the ***Printer Test*** screen. See *Appendix G: FieldPro RT43 Printer Information* for information on the printer.

Camera Test

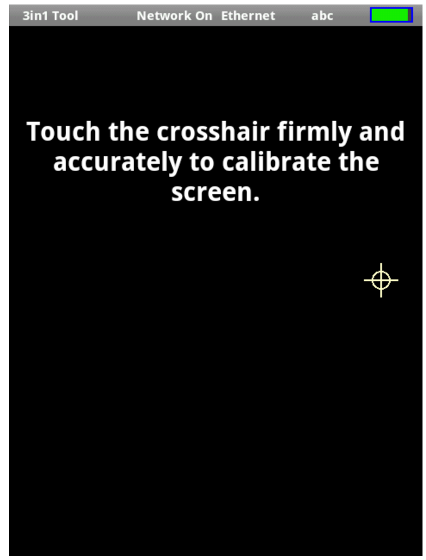
Enables users to detect and resolve camera issues before going to a merchant's location.

General Settings

A number of device settings may be customized. See the next lesson for details.

Calibrate

The BIP-6000 uses a resistive touch screen technology and may require calibration of the touch screen. To do this, the user must touch the cross-hairs that appear on the screen.



Touch screens in general require calibration to ensure the coordinates of the point of contact with the screen are the same coordinates read by the software. When the coordinates read by the software reads are different, the screen needs to be calibrated.

The screen should be calibrated regularly. Use the stylus pen to calibrate the screen. Do not use your finger. Touch the stylus pen at the center of the cross hair. Repeat this each time the cross hair moves to a different location.

When the calibration tool is launched, do not turn off the device without completing the process. If the device is turned off while calibration is in process, the touch screen will not work when the device is turned on.

Device and Database Status

The *Device and Database Status* screen displays key information about the device. Scroll down using the scrollbar on the right to view additional fields.

Device information: The device ID, name, GD Chip ID, Workstation software and device operating system versions, package version, and hardware version.

ADB Enabled: Android Debug Bridge (ADB) should be set to OFF, to prevent the installation of unauthorized apps on the device. If the setting is set to ON, contact the help desk before using the device.

Connection Details: If known, the IP address, endpoint connected to, WiFi Mac address and Cradle Mac address are displayed. If an address is not assigned, "Unknown" is displayed.

Non-market Apps Enabled: The 3in1 program is not available in the Android Marketplace, so the On setting enables 3in1 to run on the device.

Stay Awake Enabled: For security purposes and to conserve battery life, this setting should be OFF. If the setting is ON, return the device or contact the help desk. Do not use the device.

Date: The date that has been set on the device. Orders cannot be started if the date is incorrect. View, and if necessary, reset the device date on the *Device and Database Status* screen.

Printer: The name of the printer currently connected to the device. Displays "NONE" if no printer is connected.

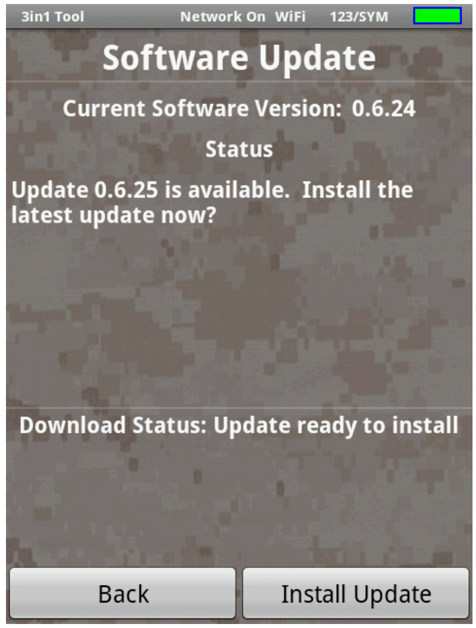
GPS: The Latitude and Longitude of the device. Displays "Unknown" if the device is not visible to GPS satellites.

Upload Status: "Upload Pending" status informs you if any orders recorded on the device have not been uploaded to the prime database.

From the *Device and Database Status* screen, you can set the time zone, date, time and trigger a data upload to the prime database.

Button	Function
Set Time Zone, Date, Time	Resets date, time and/or time zone on the device. Accurate date, time, and time zone settings are essential for proper device operation. Many features, such as correctly identifying the order date, selecting PIINs for the current fiscal year, and accounting in general, require accurate time and date setting. Time zone setting is just as important, because the order data and fiscal year are based on the user's local time.
Print	Prints the Status screen. If a printer is connected to the device, the **Print** button will be enabled; otherwise, it will be disabled.
Back	Returns to previous screen.
Software Update	Checks if an update to the 3in1 application is available. If so, the screen below is displayed and you can install the update. Note that checking for software updates also occurs at scheduled intervals. See *Module 14: 3in1 Device Tools & Settings, Lesson 4: Device Software Updates & Other Information.*

Button	Function
Upload to Prime Database	Activates an upload of data to the prime database. **Note**: This command does not automatically turn on a network. A network connection must be set in order to trigger an upload.



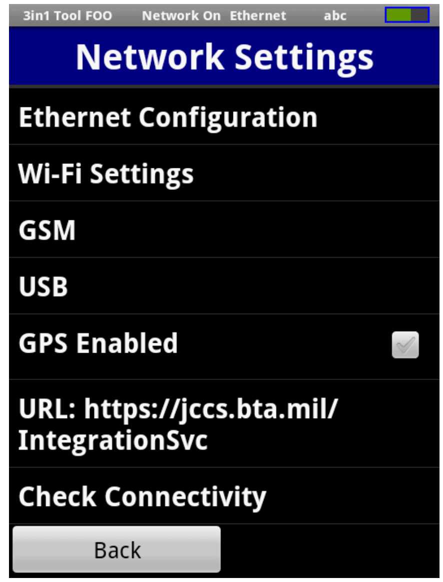
Software Update Screen

Upload Status

The **Upload Status** message, displayed as part of the *Device and Database Status* screen, refers to the status of communication between the device and the prime database. In most cases, the status will be *Idle*. If data is being transferred, the Upload Status changes to *Fetching Data* and an upload bar is displayed as data is transmitted.

When connected via Ethernet, the device will automatically attempt to connect to the prime database every 15 seconds. This does not happen when connected via WI-FI or GSM. The device knows that an Ethernet connection is typically used for uploading and retrieving data from the Workstation; therefore, it automatically connects to the prime database every 15 seconds for this purpose. This activity can be seen on the Device and Database screen, but it is always taking place behind the scene.

Network Settings



There are four methods of transmitting data between the device and workstation/prime database. (Ethernet, Wi-Fi, GSM, USB). Although not a method to transmit data, GPS network is also an available connection. Wi-Fi and GSM must be activated by the Workstation before it can be used by the device. Access network settings from either the *Login* screen or the *General Settings* screen.

To select the device network settings from the *Tools* tab:

1. Tap **Network Settings**.
   - The *Network Settings* screen is displayed.
2. Select one of the following methods to connect to the 3in1 Workstation.
   - Ethernet
   - Wi-Fi
   - GSM
   - USB

Of the four connection types, only those that are currently available will be enabled. For example, if GSM is not available, it will be disabled (grayed out). Also, only one network connection can be active at a time. Enabling one type automatically disables the others.

Ethernet

The most common connection type is expected to be Ethernet.

An Ethernet adapter and USB adapter are required to connect via Ethernet. An SMC 2209USB adapter is supplied in the device kit.

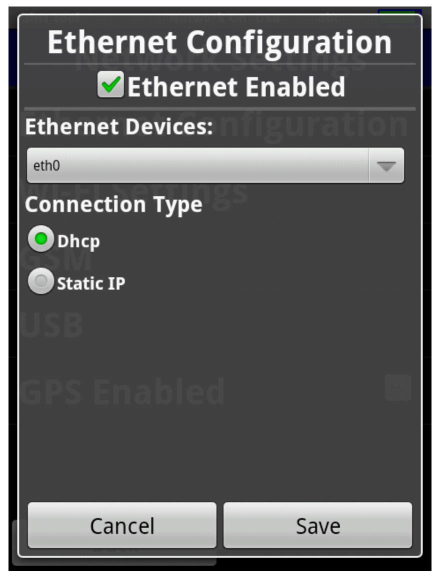
To set up the Ethernet connection:

1. Plug the USB 20 pin adapter (shown below) to the bottom of the device.

2. Plug the Ethernet to the adapter shown to the right. The completed connection is shown below.
   - Note the three indicator lights on the adapter. The light labeled “100” displays if it is connected to a 100MB (“fast”) Ethernet network. The middle light indicates a duplex setting. Almost all networks today are 100MB, full-duplex. If it is connected to an old 10MB network, the 10MB light will display. If no connection is detected, none of the lights display.

Completed connection between device and Ethernet

3. On the device ***Network Settings*** screen, tap **Ethernet Configuration**.
   – The *Ethernet Configuration* screen is displayed.



4. Select the **Ethernet Enabled** checkbox.
5. In the **Ethernet Devices** field, **eth0** should be displayed. Do not change it. If eth0 does not display, the Ethernet adapter is not functioning properly.
   – Users should assume the connection type is **DHCP** unless informed otherwise by a network administrator. If the network administrator indicates that the network is non-DHCP, the necessary configuration information will be provided.
6. Tap the **Save** button.

Connecting to Ethernet via the Cradle

Some cradles have an Ethernet port and some do not. If your cradle has an Ethernet port, you can charge or save the battery while working. To determine if your cradle is Ethernet capable, look at the back of the cradle for the Ethernet port. The Ethernet port is next to the Ethernet symbol. If the port is covered, you cannot connect to a network via Ethernet using the cradle. If it has an RJ45 Ethernet port, you can connect to Ethernet while the device is in the cradle.

To connect to a network via Ethernet using the cradle:

1. Ensure the USB cable is not connected to the cradle. You will not be able to connect to Ethernet via the cradle while the cradle has a USB connection.
2. Place the device in the cradle.
3. Plug the RJ45 cable to the Ethernet port.

The RJ45 cable (looks like a large phone plug) must be inserted directly into the Ethernet port on the cradle. Using the Ethernet and USB adapters to connect to Ethernet will not work with the cradle, even though this connection does work directly with the device.

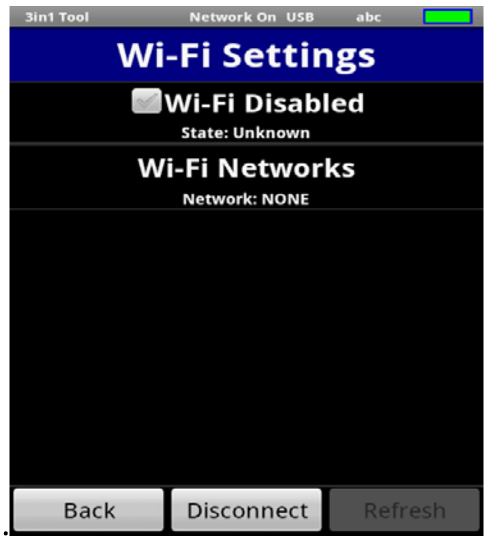
Wi-Fi

If Wi-Fi is available, it can be used as a connection type. This setting toggles On and Off.

Note that Wi-Fi will only function if it is authorized during device provisioning. For security reasons, Wi-Fi is disabled by default.

To connect via Wi-Fi:

1. Tap **Wi-Fi Settings** on the *Network Settings* screen.



Wi-Fi Settings - Disabled

   – ***Tip***: Tapping the **Refresh** button updates the list of available networks.

2. Tap **Wi-Fi Disabled** (assuming it is not enabled).

   – Wi-Fi disabled changes to Wi-Fi enabled, and a list of available Wi-Fi networks is displayed. This may take a few seconds.

3. Select the network to which you want to connect.

4. When prompted, enter the password.

On the Status Bar, the network status should display "On" and the connection type you selected should display.

Warning on Wi-Fi with Access Control Web Pages

Many hotels and cafés now use an *access control web page*. For security reasons, the 3in1 Tool does not have a web browser, and so there is no way for the user to enter passwords in an access control web page.

If the user is authorized to use Wi-Fi connectivity, and attempts to use Wi-Fi in a situation where there is an access control web page, the device will show that Wi-Fi is active, but provisioning and orders will not be transmitted. This could be confusing if the user is not aware of the access control web page.

If you suspect that this is happening, contact the local network administrator to determine if an access control web page is in use.

If an access control web page is in use, it may be possible for the network administrator to grant access to the device through some administrative process.

If that is not possible, then Wi-Fi cannot be used, and the user must use one of the other connectivity options, which are Ethernet, USB, or GSM.

GSM and USB

To select GSM or USB, simply click **GSM** or **USB,** and in the pop-up that is displayed, select the **Enable** check box. GSM is possible only if it has been authorized.

Note: An active GSM SIM chip must be installed in the device for GSM to be activated.

To enable GSM:

1. Tap the **GSM** button.
2. Select the **GSM Enabled** check box and then tap **Save**.

If you do not want to activate GSM, tap **Cancel**.

If you are using GSM and need to configure the device, it is necessary to select or set up the Access Point Name (APN) using technical information from the GSM provider. On the device *General Settings* screen, select **APN Settings**. See *Lesson 2: Device Settings* in this module for details.

Checking Communication Status on the Device

Communication Status Indicator	
	For the terminals which support GSM communication, the lamp indicates the GSM communication status. The wireless LAN status is not indicated with the lamp.

GPS

GPS is not a network connection, but it is included in the *Network Settings* screen because it is based on receiving radio signals. Enabling GPS allows capture of the latitude and longitude coordinates of the device location. The latitude and longitude are displayed on the ***Status*** screen. This information is useful for mapping vendor locations. When placing an order, the FOO may decide to capture the vendor's location, for future reference and to better monitor purchasing activity. See *Module 5: The Ordering Process, Lesson 2: Making a Purchase* for instructions on using GPS during the purchasing process.

GPS is enabled by marking the **GPS Enabled** check box on the *Network Settings* screen, and is disabled by unmarking the check box.

GPS can be enabled only if it has been activated by the FOO manager during provisioning.

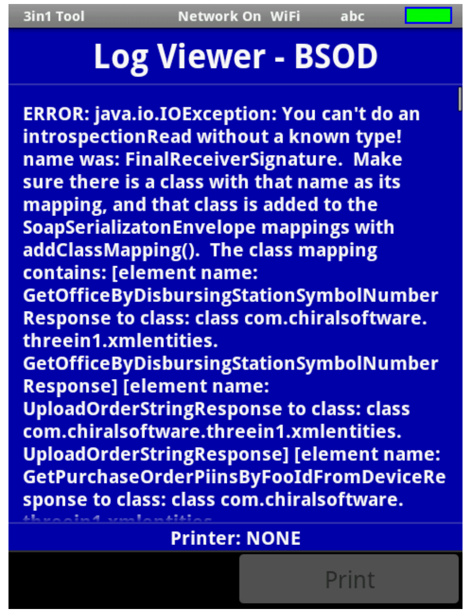
Note: If GPS is enabled, the longitude and latitude will display as "unknown" if the device is blocked from satellites; for example, indoors. GPS requires a clear, wide view of the sky to function properly.

Check Connectivity

In the event that you are unable to connect to a network, call the support center for assistance. The support specialist may ask you to select **Check Connectivity**. One of three possible messages will be returned:

1. Network/Gateway not found
2. Gateway address found but ping failed
3. Network found

Log Viewer



The Log Viewer is a de-bugging tool to be used by technical support. In the unlikely event that the device fails, error messages will display on the screen. If the printer is attached to the device, print the report. Reporting these errors helps improve future releases of the 3in1 Tool.

Utilities

Select **Utilities** on the *Tools* menu to access the features described in this section.

Calculator

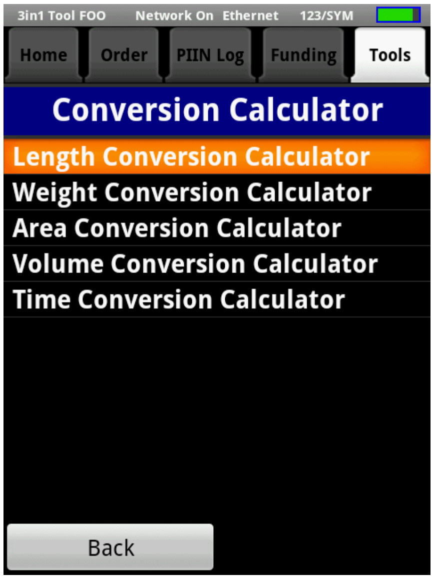
The Calculator tool is suitable for simple arithmetic calculations. Since the 3in1 Tool is primarily an ordering tool, the operations are limited to addition, subtraction, multiplication and division.

To launch the calculator from the *Tools* screen, tap **Utilities**, then tap **Calculator**. To exit the calculator, tap the **Finished** button.

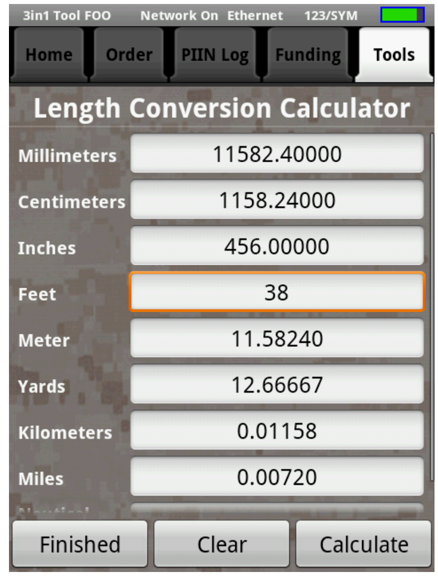
Conversion Calculator

The Conversion Calculator converts units of measurement. Conversions can be performed in the categories of length, weight, area, volume and time. All of the units in these categories will display when the category is selected.

Populating a unit and then tapping **Calculate** will display the equivalent amount in all the other units.



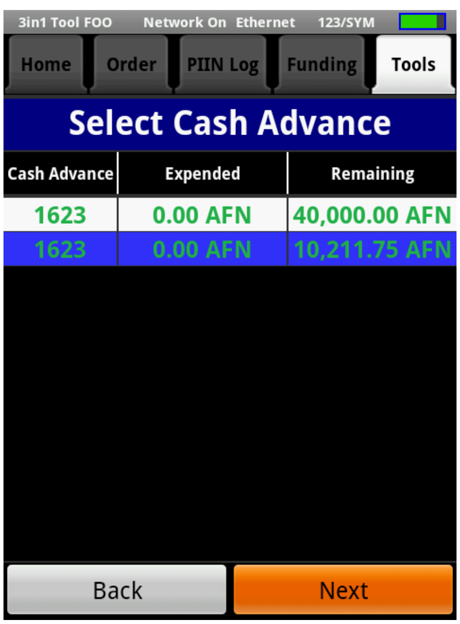
Select the type of calculator



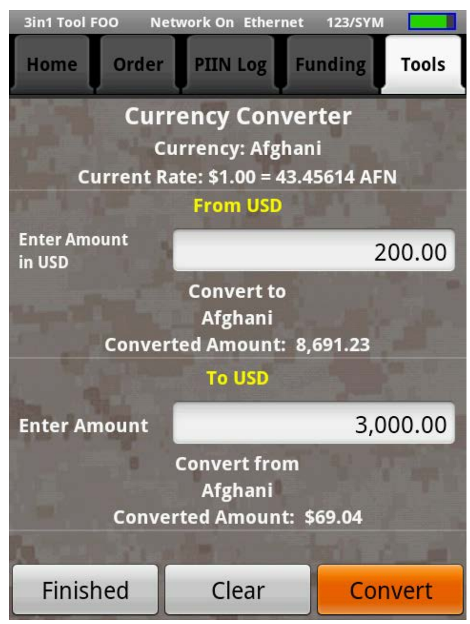
Populate a unit, then tap Calculate to fill in the other units

Currency Converter

The Currency Convertor applies to cash advances in foreign currencies. It is a calculation utility to determine the value of a given amount of USD in the foreign currency and vice-versa. The exchange rate used in the calculation is the same rate used at the time of the cash advance. Conversation to and from USD can be performed simultaneously.

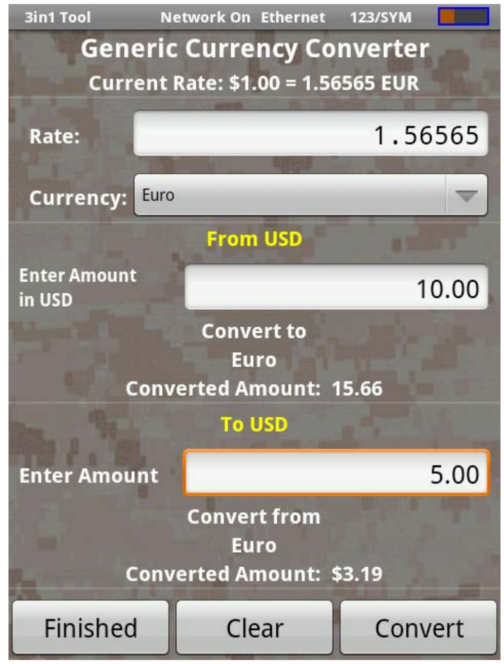


First select a disbursement that uses a foreign currency



Then enter the conversion amount

Generic Currency Converter



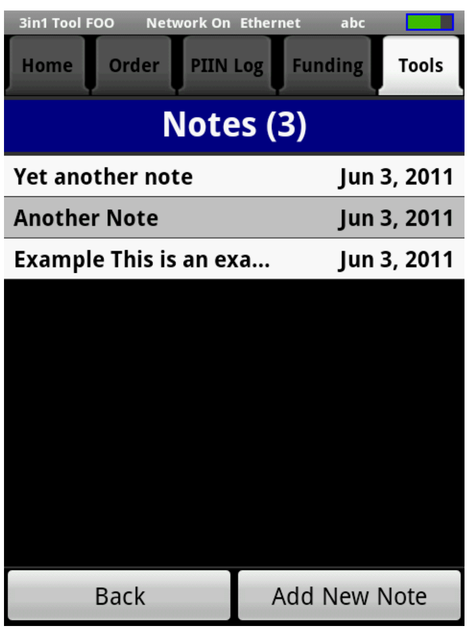
The Generic Currency Converter converts a specified amount from a foreign currency to USD or from USD to a foreign currency. Unlike the Currency Convertor, which is specific to a cash advance, the Generic Currency Convertor allows conversion to and from USD for any currency. The exchange rate must also be specified. The conversion from and to USD can be performed simultaneously.

Notes

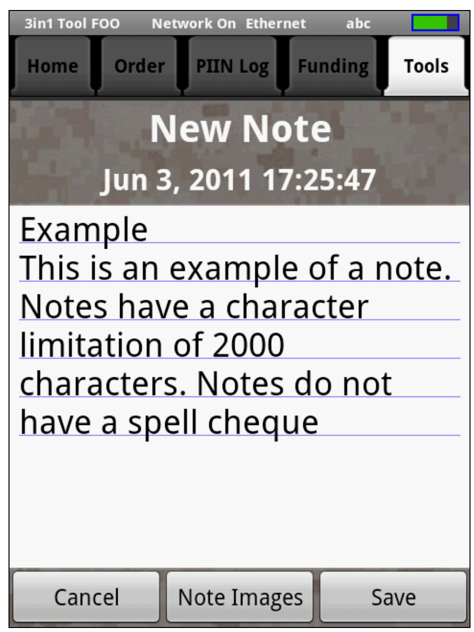
The Notes utility accepts both text and images. A maximum of 2,000 characters may be entered for each note. One or more images can be captured with a note.

To add notes from the *Utilities* screen:

1. Tap **Notes.**
2. Tap **Add New Note** to enter a new note.
3. Enter text.
4. As text is entered, the **Note Image** and **Save** buttons are enabled.
5. Tap **Save** to save the note without adding images or go to step 6.

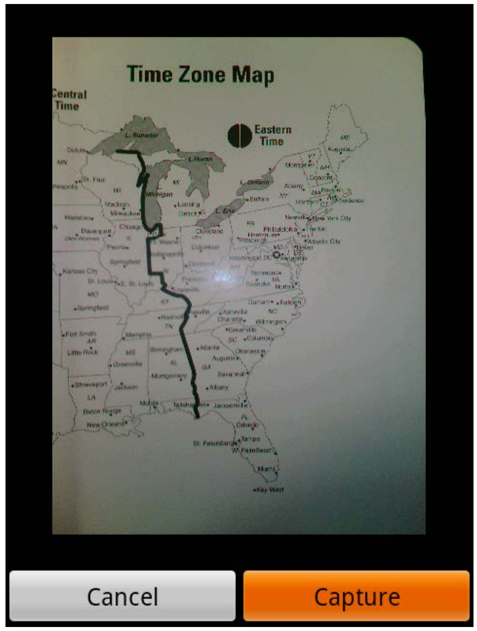


List of notes



Adding a new note

6. Tap **Note Images** to add an image. This activates the camera.
7. Focus on the image and tap **Capture.**



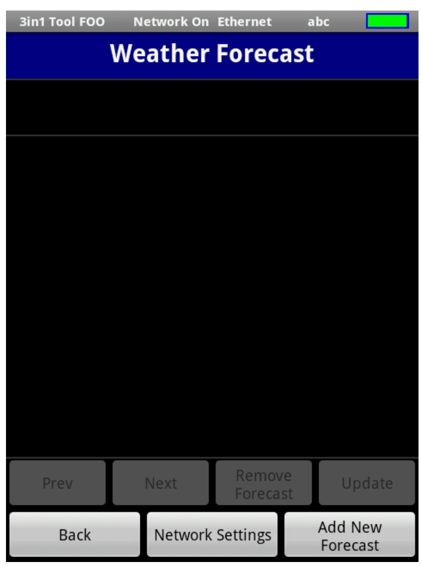
Capture a note image

Weather Forecast

Weather reports can be generated for a specific area and then stored. Use either GPS coordinates or a city name to obtain weather reports. Network connectivity and a GPS-enabled device are required in order to generate a weather report.

To generate a weather forecast:

– Tap **Add New Forecast** on the *Weather Forecast* screen.

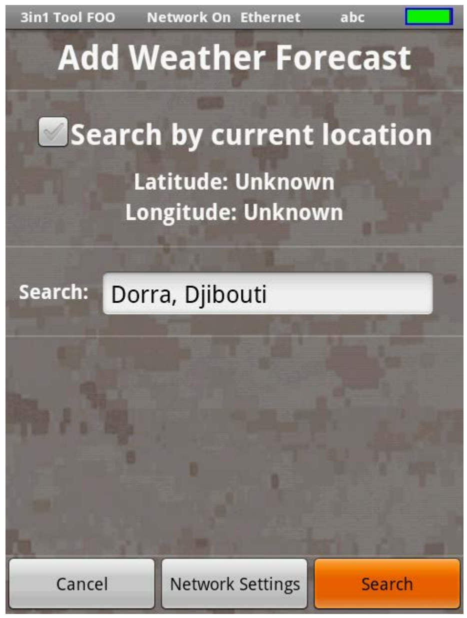


Weather Forecast Screen

The *Add Weather Forecast* screen is displayed. By default, reports are generated using GPS. If GPS is not enabled, tap **Network Settings** and then enable GPS. To use GPS, you must have a clear view of the sky.

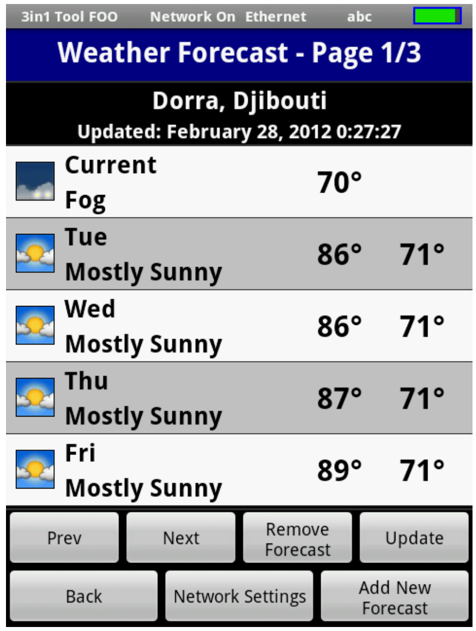
To search by city name:

1. Unmark the **Search by current location** check box.
2. In the Search box, enter the name of the City, State/Province and Country.
3. Tap **Search**.



The forecast is displayed. At the top of the forecast, the location and date and time of the last update are displayed. The title shows the number of forecasts saved.

- The **Remove Forecast** button removes the current forecast from the list.
- The **Update** button updates the forecast with the latest available weather data.
- If more than one forecast is saved, the **Prev** and **Next** button will be enabled to allow scrolling between forecasts.



Weather Forecast

Lesson Summary

In this lesson, you learned to:

- ❑ Use calculator and conversion tools
- ❑ View entire PIIN Blocks
- ❑ View procurement controls
- ❑ Compare vendor prices
- ❑ Conduct a printer test
- ❑ Customize device settings
- ❑ Calibrate the device screen
- ❑ View device status
- ❑ Use the Log Viewer
- ❑ Use Utilities

Lesson 2: Device Settings

Objectives

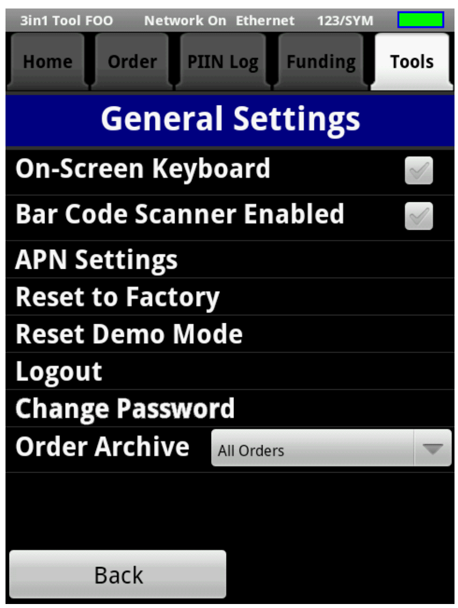
After completing this lesson, the participant will be able to:

- ❑ Enable/disable the on-screen keyboard
- ❑ Enable/disable the bar code scanner
- ❑ Configure APN settings with GSM
- ❑ Reset Demo Mode
- ❑ Log out of the device
- ❑ Change the password used to access the handheld device
- ❑ Control the number of orders displayed on the device based on order date

Access the Settings Screen

To access the *General Settings* screen:

1. On the device, tap the **Tools** tab.
2. On the *Tools* screen, tap **General Settings**.



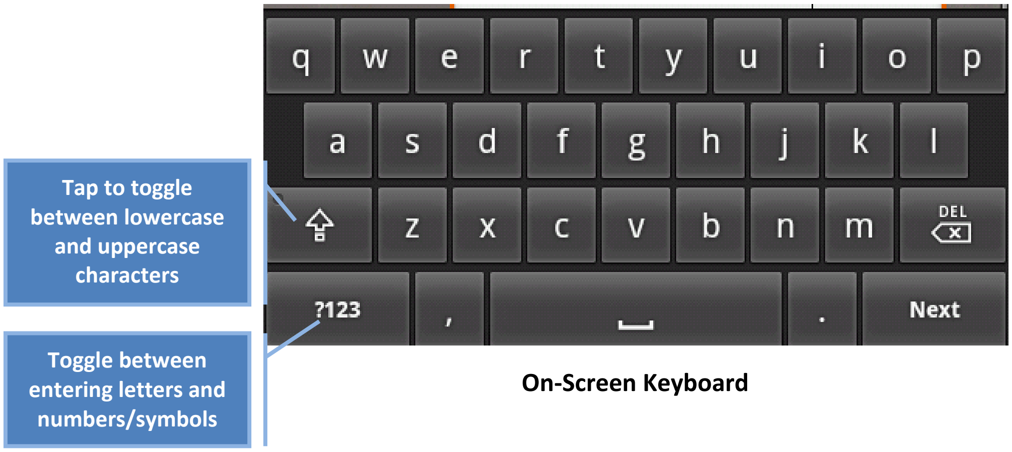
General Settings Screen

On-Screen Keyboard

The on-screen keyboard toggles on and off. A green checkmark indicates it is toggled on.

To switch the on screen keyboard status from On to Off, or vice-versa:

- From the *General Settings* screen, tap **On-Screen Keyboard**.



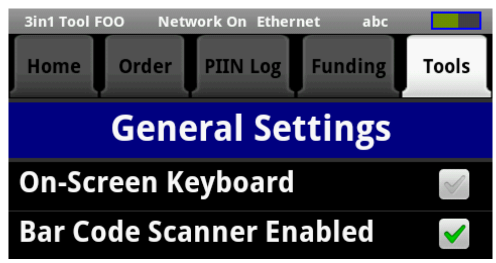
On-Screen Keyboard

When working with the device, the on-screen keyboard pops up when you tap in a data field. Tap the F4 button to hide keyboard if it interferes with viewing the device screen.

Bar Code Scanner Enabled

The Bar Code Scanner can be enabled and disabled. Use this feature to capture UPC numbers during purchasing.

To toggle the scanner on/off, on the **Tools** tab, from the *General Settings* menu, select **Bar Code Scanner Enabled**. The marked checkbox indicates the feature is enabled.

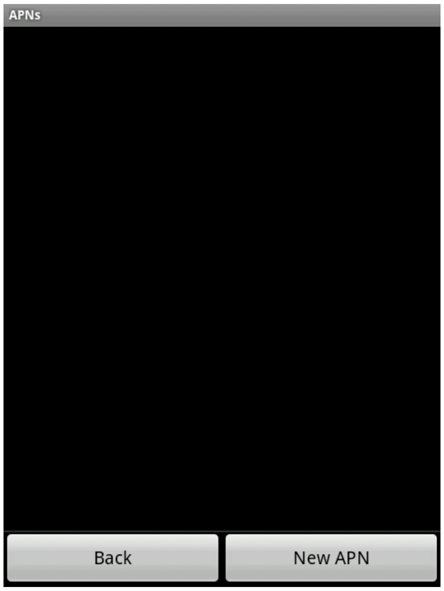


APN Settings with GSM

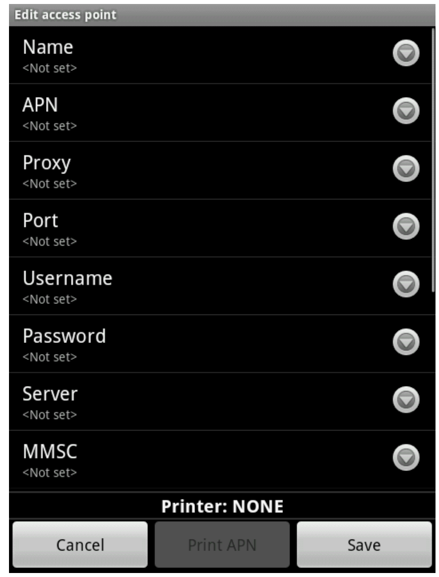
If you are using GSM and need to configure the device, it is necessary to select or set up the Access Point Name (APN) using technical information from the GSM provider. On the device *General Settings* screen, select **APN Settings**. The *APNs* screen is displayed.

To create an APN:

1. Tap the **New APN** button.
2. On the *Edit Access Point* screen, populate each field with data supplied by the GSM provider.
3. If a printer is connected to the device, optionally print the settings for your records.
4. Tap **Save** to create the APN.

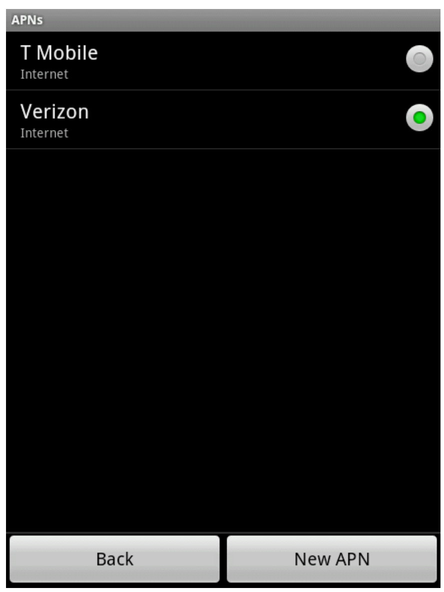


Select the New APN button



Make selections to define the APN and then tap Save

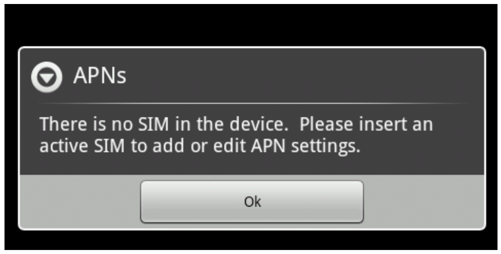
If APNs are already defined, the list is displayed on the *APNs* screen, as shown below. To select an APN, simply tap the button beside it. A green dot identifies the selected APN. Tap the **Back** button to save your selection and exit the *APNs* screen.



Selected APN is identified by green dot

To edit the settings for an APN, select it on the *APNs* screen, then edit the settings on the *Edit Access Point* screen shown above. Tap **Save** when done. The APN can be deleted by tapping the **Delete APN** button, which is displayed after at least one APN has been defined.

Note: If the device does not have a SIM card installed, new APN settings cannot be set. Selecting **New APN** on the *APNs* screen on a device that does not have a SIM results in a message that notifies the user to install a SIM card.



This message notifies the user to install a SIM card in the device

Reset to Factory

This should be used by administrators only, when directed by 3in1 technical support personnel.

Reset Demo Mode

If you have used Demo Mode for a while and want to erase the practice data and start over, select the **Reset Demo Mode** command on the *General Settings* screen. This erases existing demo orders and creates new Demo Mode provisioning. For more on Demo Mode, *see Module 14: 3in1 Device Tools & Settings, Lesson 3: Using the Device Demo Mode.*

Logout

Multiple users can be assigned to one device. Each user logs in to use the device and then logs out when finished. Logging out returns to the *Consent Provision* screen.

Logging out locks the device. The user needs to log back in using a password. Users should log out upon completing their tasks, so that if the device is lost, information on the device will remain secure.

Note that logging out does not power off the device. See *Module 2: Hardware/Application Setup, Lesson 1: Getting Started with the 3in1 Device and Printer* for instructions on powering off the device.

Change Password

To change the password used to log in to the handheld device:

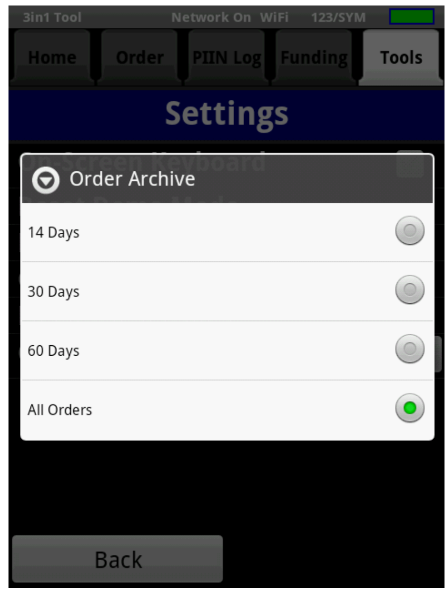
1. On the device, tap the **Tools** tab.
2. Select **General Settings**, then tap **Change Password**. The Change Password pop up is displayed.
3. Enter the current password in the *Current* dialog box.
4. Enter the new password in the *New* dialog box.
5. Re-enter the new password in the *Confirm* dialog box.

See for *Module 13: Device Management Tools, Lesson 1: Resetting a Password on the Device and Workstation* password creation guidelines.

Note: Changing the device password also changes the user password for logging in to the Workstation. Please read about synchronized Workstation and device passwords in *Module 13: Device Management Tools, Lesson 1: Resetting a Password on the Device and Workstation*.

Order Archive

Use the Order Archive feature to filter orders that are displayed on the PIIN Log screen. Orders that are archived will no longer be visible in the PIIN Log. Since screen space is an issue on the handheld device, archiving orders means having fewer orders to scroll through in the PIIN Log.



You can set the archive level to view all orders or only orders placed within the last 14, 30, or 60 days. The calculation is made from the time a PIIN was issued.

To change the archive interval:

1. On the **Tools** tab, select **General Settings**.
2. On the General Settings menu, tap the **Order Archive** drop-down list.
3. Select the number of days from the pop-up.

Lesson Summary

In this lesson, you learned to:

- ❑ Enable/disable the on-screen keyboard
- ❑ Reset Demo Mode
- ❑ Change the password used to access the handheld device
- ❑ View and change connection and network settings
- ❑ Control the number of orders displayed on the device based on order date

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Lesson 3: Using the Device Demo Mode

Objectives

After completing this lesson, the participant will be able to:

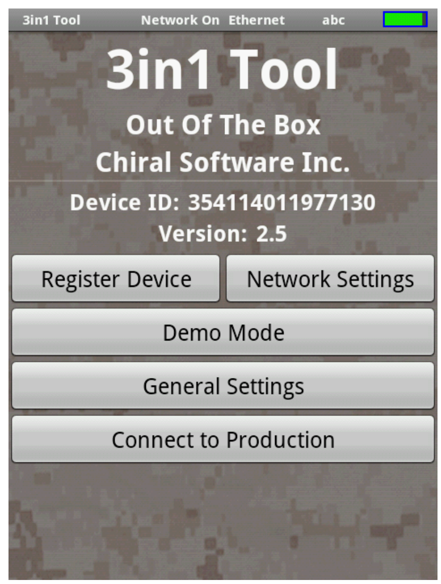
- ❑ Understand the use of Demo Mode
- ❑ Log in as the Demo Mode FOO
- ❑ Place test orders in Demo Mode
- ❑ Exit from Demo Mode
- ❑ Reset Demo Mode

What is Demo Mode?

The device has a mode called Demo Mode, which allows a user to experience placing orders, shopping, and all other aspects of using the software, without needing real provisioning data and without uploading any data to the servers. This mode is helpful for training and demonstrations.

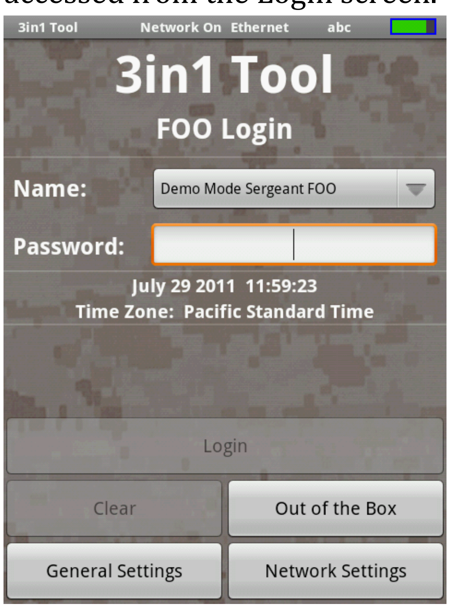
Entering Demo Mode

If you are currently logged in as a FOO on the device and want to use Demo Mode, it is necessary to log off.



If the device is not yet provisioned, and is on the *Out of the Box* screen, Demo Mode can be accessed by tapping the **Demo Mode** button, as shown in the figure to the right.

If the device has been provisioned, Demo Mode is accessed from the Login screen. Log in by selecting the FOO that is labeled **Demo Mode**.



Note that certain details, such as the Demo Mode FOO name, certain pre-created merchants, PRs, and cash advances, are automatically generated when you enter Demo Mode.

The Demo Mode FOO and PA passwords are always "hello", without the quotes. After login, an alert is displayed. Tap OK to continue.

The **Out of the Box** button on the Demo Mode login screen enables the user to quickly go back to the *Out of* *the Box* screen, in the event that the device is not yet registered.

Using Demo Mode

Demo mode works just like regular mode, except the color of the Status Bar is orange, to indicate to the user that this is Demo Mode, and orders will not be uploaded.

When the user logs into demo mode the Dashboard screen will appear and there will be an alert displaying to the user that the device has entered demo mode and it is only for practice purposes.

The Demo Mode *Select Funding* screen is at the right.

Exiting Demo Mode

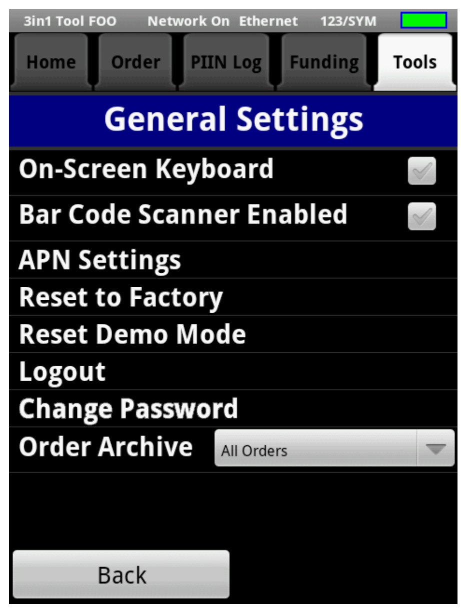
To exit Demo Mode, log out as usual. Then you can log back in as an ordinary user and continue using the system.

Resetting Demo Mode

After entering some orders in Demo Mode, you may want to erase the orders and reset the device. Doing so will erase the orders and create new Demo Mode provisioning. Note that Demo Mode provisioning has some random variation, so it is likely that the Demo Mode user name, PRs, etc., will be different every time.

To reset demo mode, go to the **Tools** tab and select **General Settings**, then tap **Reset Demo Mode**.

Tap OK on the confirmation dialog box. A message is displayed while the resetting occurs.



Lesson Summary

In this lesson, you learned to:

- ❑ Log in as the Demo Mode FOO
- ❑ Place test orders in Demo Mode
- ❑ Exit from Demo Mode
- ❑ Reset Demo Mode

Lesson 4: Device Software Updates & Other Information

Objectives

After completing this lesson, the participant will be able to:

- ❑ Install updated software on the 3in1 device
- ❑ Mount/dismount the device battery
- ❑ Insert/remove the MicroSD card
- ❑ Insert/remove the SIM chip

Software Updates on the Device

The 3in1 Tool device consists of a software application running on the Google Android operating system, on BIP-6000 hardware. From time to time, both 3in1 and operating system software updates are sent out. These updates occur for the following reasons:

- Adding new features
- Adding new capabilities
- Fixing bugs
- Fixing security problems

Software updates are only visible when the device has been registered (using the Register Device button) and is connected to a network. For GSM and Wi-Fi enabled devices, this can be any time that connectivity is available. For Ethernet and USB connected devices, this can be any time the device is plugged in.

The device checks with the 3in1 server to detect when an update is available. Checking for updates takes place behind the scenes and is not triggered by the user. When an update is available, it is downloaded and stored automatically, without any user interaction.

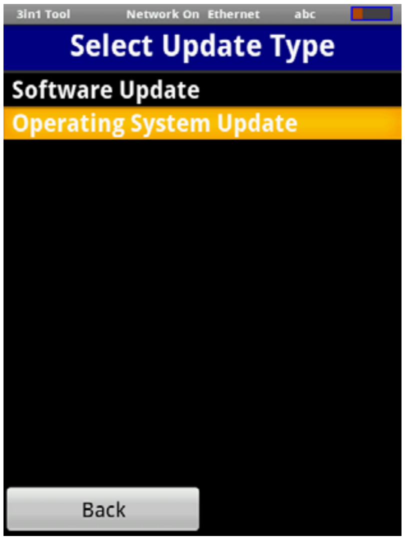
Once the download is stored, the user is prompted regularly to proceed with the update. The prompts are designed to remind the user without interfering with the user's tasks. If the user is in the middle of placing an order, the user should finish the order before continuing with the update. To decline installing the update, tap the **Back** button on the *Software Update* screen, shown below.

When you have completed all other tasks on the device and are ready to install the update without any interruptions:

1. Access the *Device and Database Status* screen by selecting the **Tools** tab on the device.
2. From the *Device and Database Status* screen, tap **Software Update**. (If the device has prompted you to install the update, you should already be on the *Software Update* screen)

Device and Database Status screen displays important device information

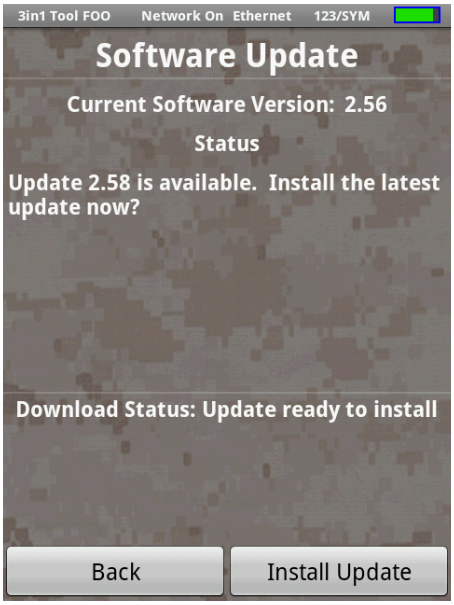
3. If both 3in1 and operating system updates are available, the following screen is displayed. Make a selection.



4. A progress bar indicates when the software download to the device is complete. Tap **Install Update**.
   - The software update is then executed.

Notes on Updating the 3in1 Software

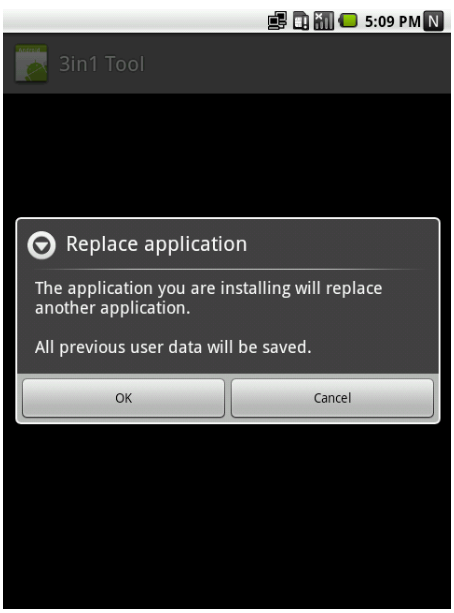
When updating the 3in1 software, the device will save all user data before it updates the 3in1 software.



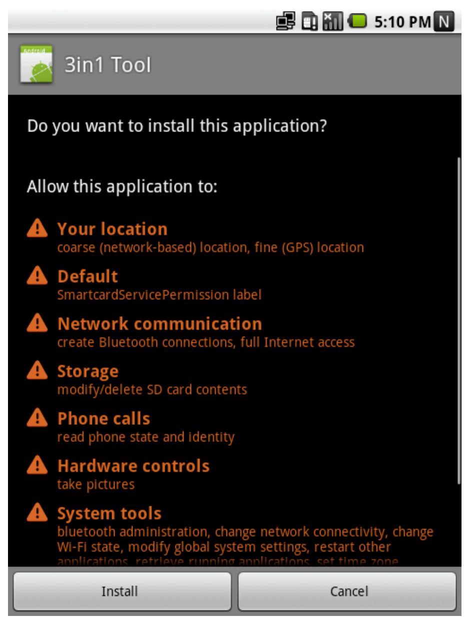
Software Update screen when a new 3in1 version is available

User data is saved prior to the sofware update

Once all user data is saved, the device will prompt you to confirm your intention to proceed with the update. Tap OK to continue. Then tap **Install** on the following screen.



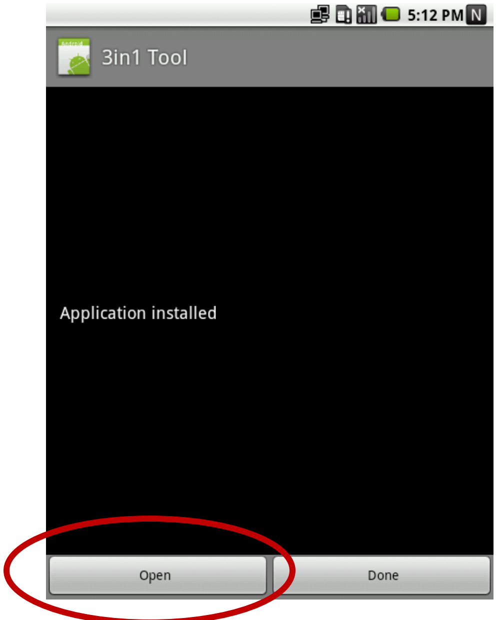
Select the New APN button



Make selections to define the APN and then tap Save

After the update is installed, tap **Open**. The device retrieves the data that was stored prior to the update.

The *Login* screen will confirm the software update is complete.



Confirmation that the 3in1 software update has been installed. Tap Open.

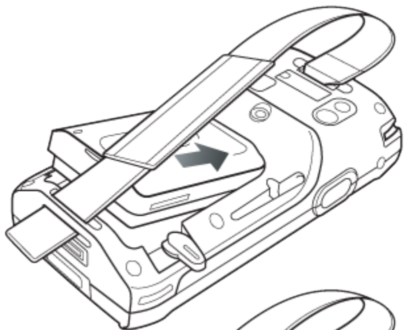
On this screen, tap Get FOO List

Notes:

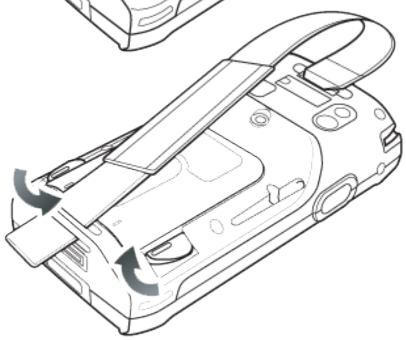
1. It is important to tap the **Open** button circled above, or else the device will become stuck in a loop.
2. Once an update has started, it cannot be cancelled. Some of the screens have a Cancel button; however, tapping Cancel does not cancel the update; it restarts that phase of the update.
3. The duration of the update depends on the amount of data to be stored prior to the update, and retrieved thereafter.
4. Ensure the device has sufficient battery life to complete an update, as interruptions while updating may corrupt the device. Corrupt devices may be fixed by a reset to factory settings.

Mounting/Dismounting the Battery

Mounting The Battery



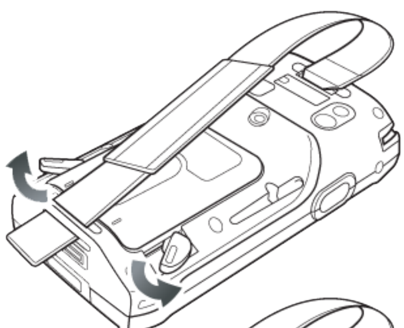
1. Place the battery and push in to the arrow direction.



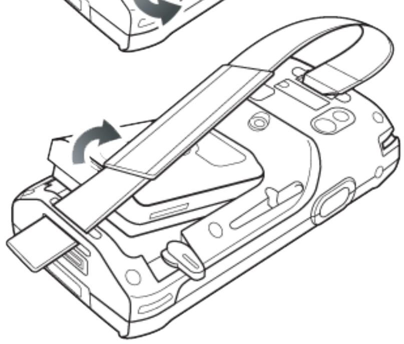
2. Turn the battery butterfly retainers inside to insert the battery. **Caution!** The butterfly retainers should move in easily. Do not apply force. If they do not rotate in with light finger pressure, stop and make sure the battery is fully seated and is flush with the device back. Use of excessive force to rotate the butterflies may damage the battery and/or the device.

Dismounting The Battery

1. Switch off PDA.



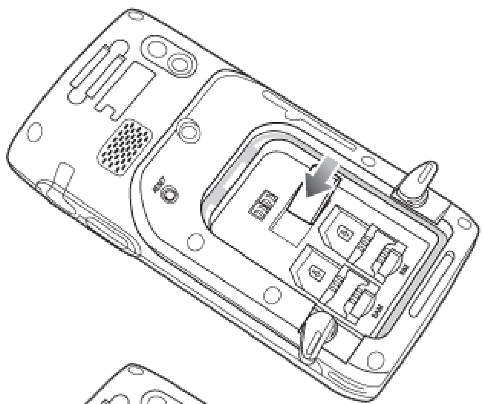
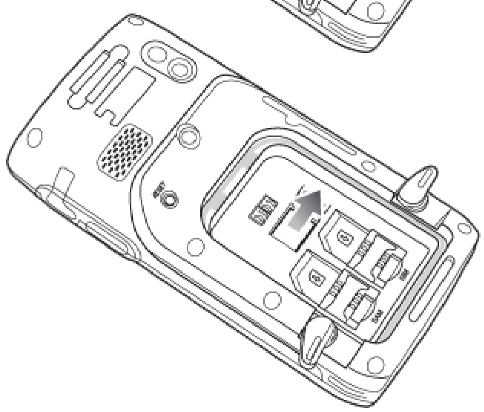
2. Turn the battery pins outside to remove the battery.



3. Lift the battery to follow the arrow direction

Before removing a battery, make sure to switch off the Device. An abrupt power shut off may result in a device failure. Do not remove the battery in environments where water or dust could enter the rear of the device.

Inserting/Removing the MicroSD Card

Inserting/Removing MicroSD Card	
	• Push in a memory card to the arrow direction on the SD card slot until it is completely inserted.
	• If you push the memory card in, it springs out. Then, pull out the card.

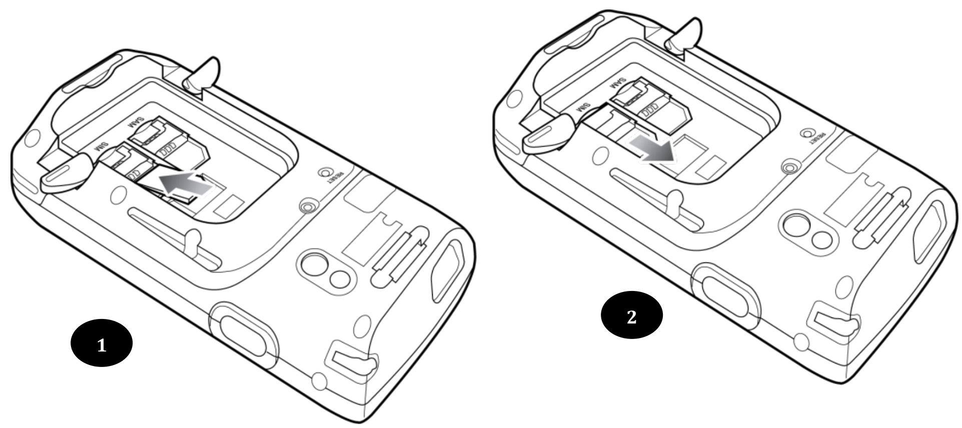
Precautions:

- Make sure to push in the memory card completely. If it is not inserted completely, the device cannot recognize the memory card.
- In order to remove the memory card, push the inserted memory card once, and the card springs out slightly. Then, pull out the memory card. Applying excessive force to remove the memory card will result in a fault of the device.
- Removing the memory card or shutting power off while using a memory card may result in loss of data, or malfunction of the card and the terminal.
- It is not necessary to remove or insert the microSD during normal device operation. The microSD used with the device is not a normal consumer microSD chip and should only be replaced by a technical support person.
- If the memory card is stuck to the device, do not remove the card by force. Contact your supervisor.

Inserting/Removing the SIM Chip

Depending on the requirements and rules of your AOR, the 3in1 Tool may be given network access by GSM. GSM access must be used only when authorized. GSM requires a SIM chip, much like familiar consumer SIM chips.

Inserting & Removing SIM Chips



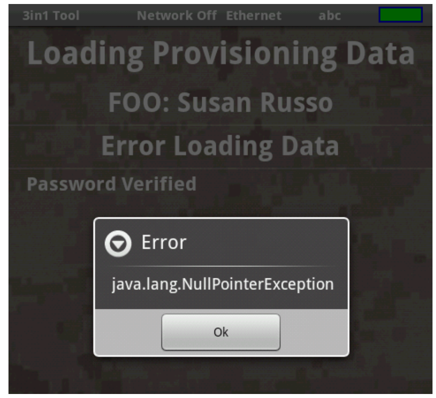
1. *Insert the chip in the slot labeled "SIM". There is also a slot labeled "SAM". The SAM slot is not used.*
2. *Remove a USIM card to the arrow direction. Push carefully to avoid damage to the retaining bar.*

Device and Printer Troubleshooting

All electronic devices occasionally run into unexpected problems. This section describes what to do if the device freezes, displays an error message, or stops working.

The "Blue Screen" lock up screen is displayed (shown at the right).
Rebooting the device usually solves this problem; power down the device and start it again. If the problem persists, contact tech support and answer their questions about the error. If possible provide the information on the screen to the tech support as this helps track down the software problem.

An exception message is displayed (shown at the right).
Shut down and restart the device. Convey the message to tech support so they can notify the developers to solve any software problems.



The device cannot be shut down using the red power button.
Pull out the battery for a moment, as described above.

The device screen displays the Android desktop.
This can be solved by powering the device off and on.

The device powers on, but goes directly to the Android desktop.
Return the device to the person who issued it, as it must be returned to the distributor for the application to be loaded.

The camera light ("flash") stays on after taking a picture.
This may happen occasionally. Power the device off and then back on.

The screen does not display anything after being powered up (is blank).
Place the device on a charger to make sure it has sufficient power. Try turning on the device on while it is on the charger. If that doesn't work, the device needs to be returned for service. If the device turns on while on the charger, but does not work off the charger, the battery may be damaged. Try a replacement battery.

The printer starts beeping and printing garbage.
Press and hold the green power button for a few seconds to power off the printer. If that does not work, then hold the printer so the battery compartment is facing down. Using

your thumbnail, release the battery. It must swing out by almost a full inch to break contact.

The charger does not charge the device.
Check the charging contact on the device, and on the cradle. Dust or sand may damage the contacts. A can-of-air should be used to clean both the cradle and the device charging contact if the device has been exposed to sand. The device should be kept in its carrying case when not in use, to protect it, or placed in the charger. Tape can be placed over the charging contacts on the device, as well. As an alternative, use the charging adapter instead of the cradle.

You have no PIINs, even though you know they have been assigned.
Check the time and date settings on the device. Usually, when the PIINs are not showing up, the device is set on the wrong date, so the PIINs are not active. To re-set the date and/or time, see *Module 14: 3in1 Device Tools & Settings, Lesson 1: Device Tools*.

Orders are not being loaded to the Workstation.
Check the networking status at the top of the screen. If the device is using Ethernet, view the IP address on the *Device and Database Status* screen and confirm that the address is active with your network administrator.

Lesson Summary

In this lesson, you learned to:

- ❑ Recognize when 3in1 application software updates on the device are performed
- ❑ Mount/dismount the device battery
- ❑ Insert/remove the MicroSD card
- ❑ Insert/remove the SIM chip

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Appendix A: FOO/PA Task Checklists

Checklist for Field Ordering Officer Tasks

Field Ordering Officers should use the following checklists to complete tasks. Refer to the referenced page numbers in this training manual for information regarding the 3in1 features used to complete each task.

	FOO Checklist	Page	
1	Register as a new user in the 3in1 Workstation and upload supporting documentation/appointment letter. (*Note: Be sure to use your CAC and select the CAC certificate*)	9	
2	Pick up the 3in1 device with accessories and printer from the KO.	25	
3	Log in to 3in1 device for first time to ensure information is on the device prior to leaving to make a purchase for the first time. Connect the device and sync to obtain latest information.	85	
4	If the PA converts cash to a foreign currency, be sure the PA exchanges that amount on the device also.	199	

	Process a Purchase Order	Page	
1	Create a shopping list and vendor list on the 3in1 device, if known at that time. (*Note: Not required to place an order*) Ensure funds & PIINs are available prior to purchase.	147	
2	Click **Start Order** on *Dashboard.*	95	
3	Select a cash advance on the **Funding** tab.	103	
4	Enter the **Furnish To** unit and address.	104	
5	Select a **Merchant**.	105	
6	Add line items to the order a. Click **Add Line Items** on the Merchants screen. b. On the *Order* screen, click **New Item**.	107	
7	Add taxes, shipping and/or discounts (optional)	117	
8	FOO **Check out/Confirm** the order, PIIN is issued and locked	122	
9	Obtain physical signatures from **Receiver** and **Vendor**	126	
10	PA certifies payment with digital signature	129	
11	**Print** the SF44 as PA payment receipt.	134	

	FOO Post Purchase Actions	Page	
1	Upload orders to the Workstation from the 3in1 device as soon as possible	139	
2	Upload supporting documents as required to each order	139	
3	If required, capture image of receipt with device camera	134	

	Clearing	Page	
1	If you are in the clearance flow, review orders and when ready, begin clearing submitted orders	187	
2	If mission of FOO is complete, return 3in1 device and printer with all accessories to the KO	N/A[1]	

Checklist for Paying Agent Tasks

Paying Agents should use the following checklists to complete tasks. Refer to the referenced page numbers in this training manual for information regarding the 3in1 features used to complete each task.

	PA Checklist	Page	
1	Register as a new user and upload supporting documentation/appointment letter. (*Note: Be sure to use your CAC and select the CAC certificate*)	9	
2	Log in to 3in1 device for first time to ensure your name and information (funding) is on the device.	85	
3	Pick up currency from the Disbursing Agent.	N/A[2]	
4	If you are issued USD by the DA and will exchange it for local currency to make payments, process the exchange on the device before making the purchase, so the device has the correct currency information in it to make the purchase.	199	
5	Determine if you are in the clearance flow. It will depend on the current clearance process put in place by the KO. This is usually done by the FOO.	187	

	PA Post Acquisition	Page	
1	Ensure orders are through the clearance process and respond to all flagged items. {This may be done by the FOO}	187	
2	Download Orders and Vouchers for electronic backup	231	

[1] Performed outside the 3in1 Tool

[2] Performed outside the 3in1 Tool

	PA Post Acquisition	Page	
3	If foreign currency is exchanged back to USD for return to the DA, process the exchange back to USD on the device. Note: a negative number may be displayed on the Workstation since a loss may be incurred when the exchange is made.	199	
4	Return all unused currency to the Disbursing Agent	N/A	

Appendix B: Data Worksheets

Add Purchase Order & Purchase Items Worksheet

The following information is used to manually create a purchase order and record purchase items in the 3in1 Tool Workstation. Complete the worksheet before logging in to the 3in1 Tool Workstation, to ensure you have all the necessary information.

Purchase Order Information

General Information

Unit Name	
FOO Name	
Paying Agent Name	
Device Serial Number	
Purchase Request Number	
PIIN Number	
Order Date	
Contract Office	
Allow Expedient Purchases?	

Received By Information

First & Last Name	
Organization	
Street Address	
City	
State, Zip	
Country	

Payee Seller Information

Name	
Phone Number	
Street Address	
City	
State, Zip	
Country	
Category	

Other Information

Final Receiver Name	
Final Receiver Organization	
GPS Coordinates of Transaction	
Date Invoiced	
Total Cost	
Discount Percent	
Discount Days	
Amount Paid	
Voucher Number	
Paid by	
Time Balance of Fund	
Currency Exchange Rate	
Currency Code	
Comments	

Signature Dates

Ordered by	
Paying Agent	
Payee Seller	
Received by	
Final Receiver	

Purchase Items Information

Item Information

Item Description	
Unit Price	
Quantity	
Unit	
Property Book item?	

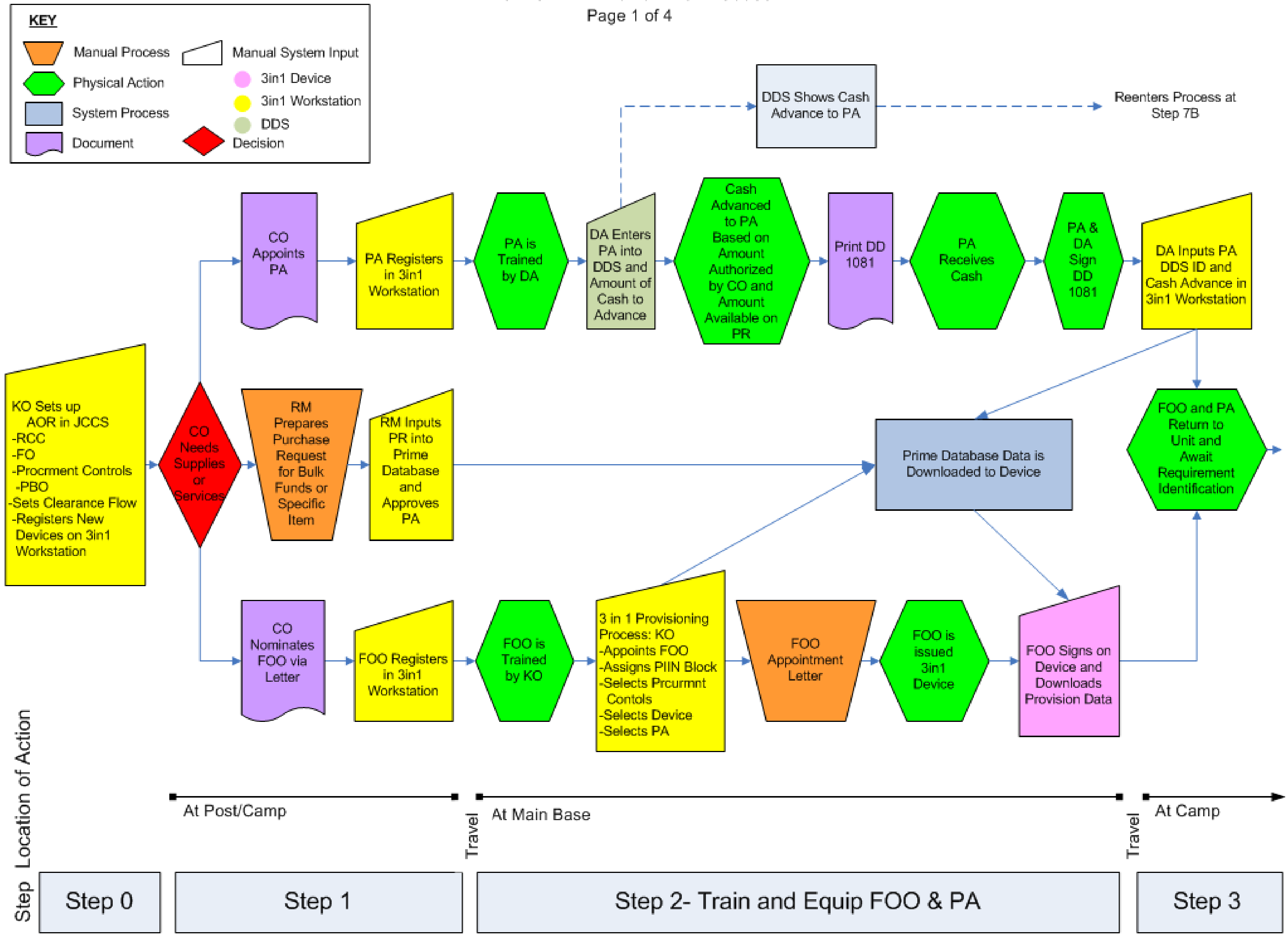
Item Information

Item Description	
Unit Price	
Quantity	
Unit	
Property Book item?	

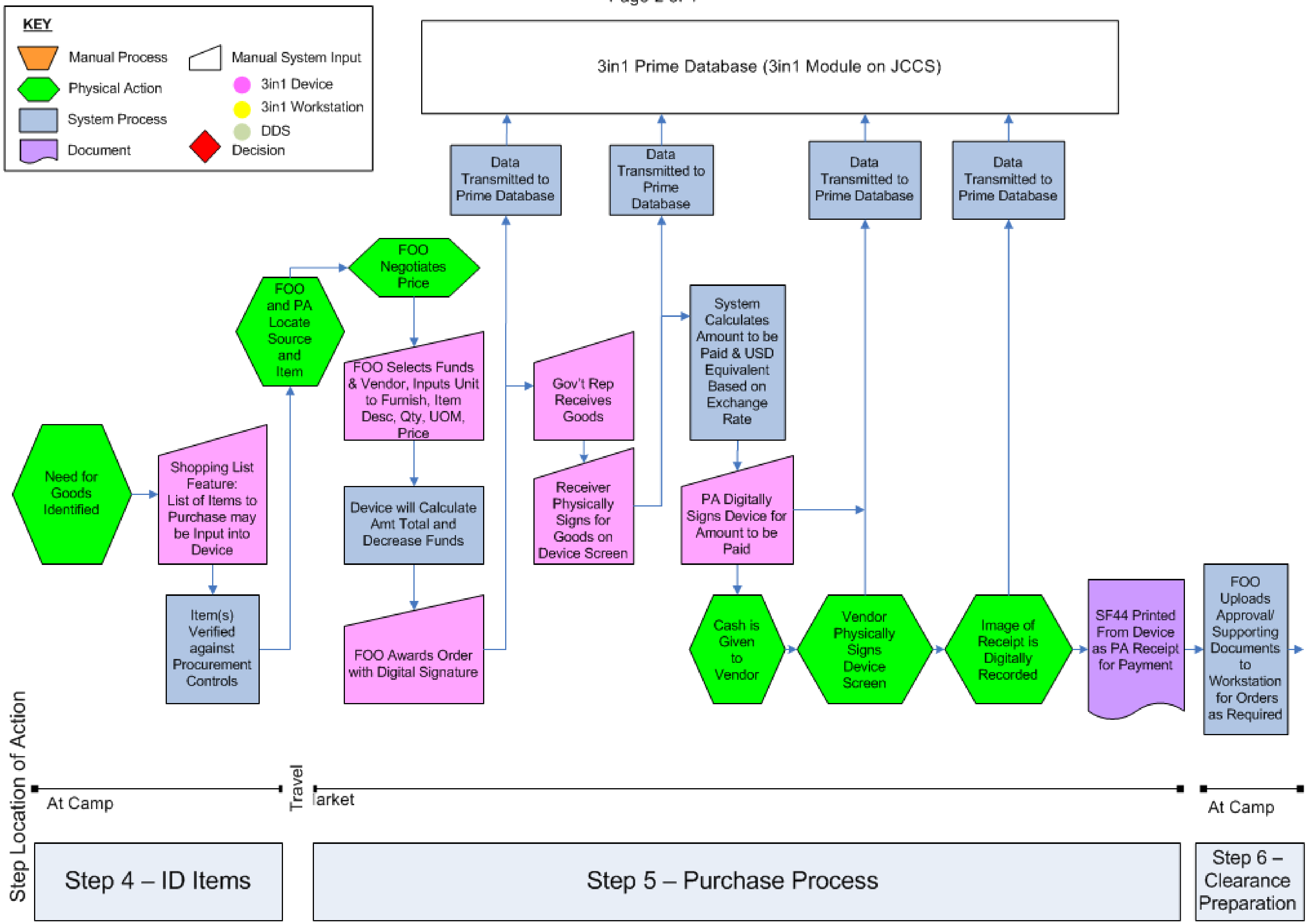
Appendix C: End-to-End Process Diagrams

New SF 44 End-to-End Process

Page 1 of 4

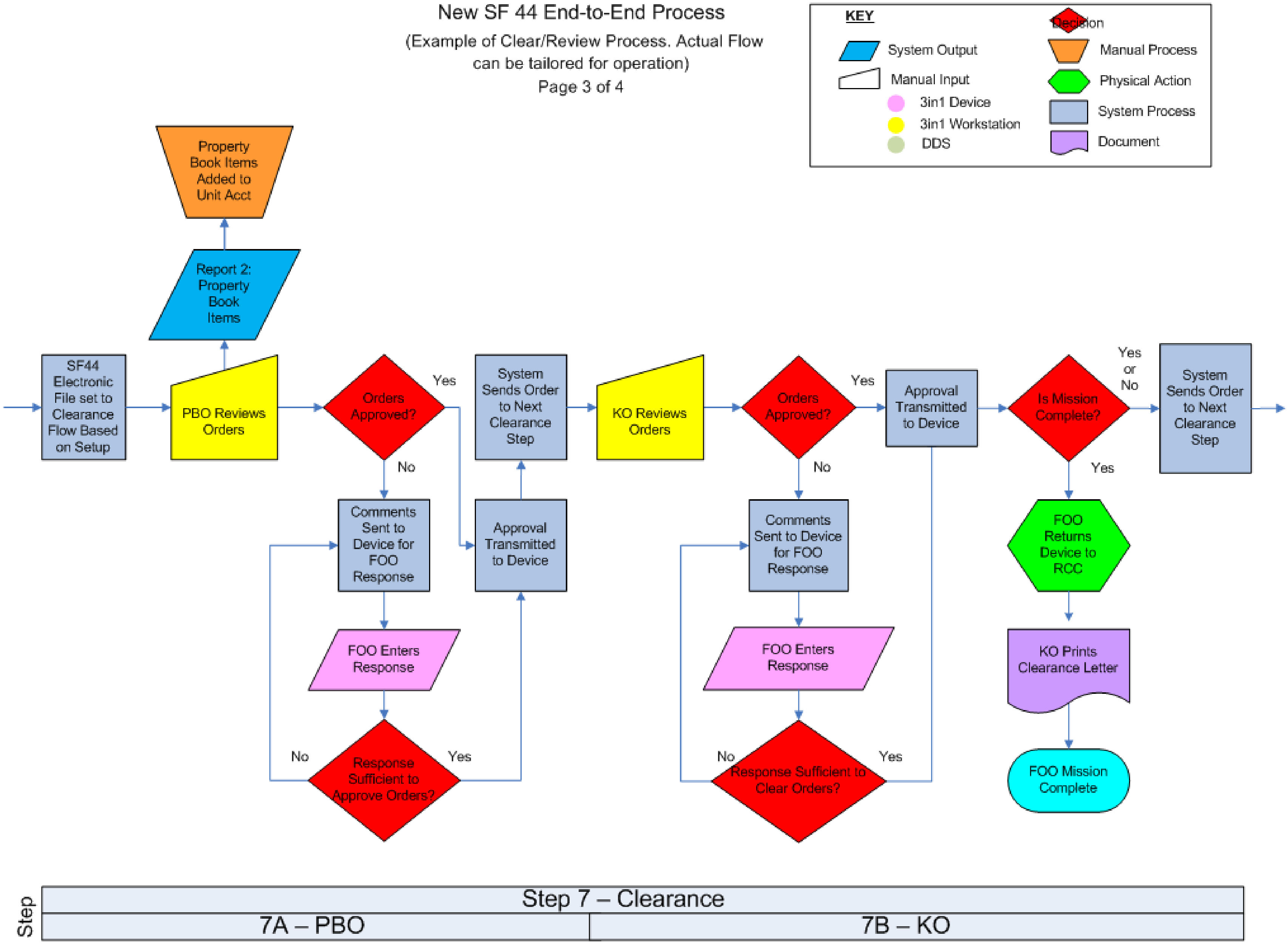


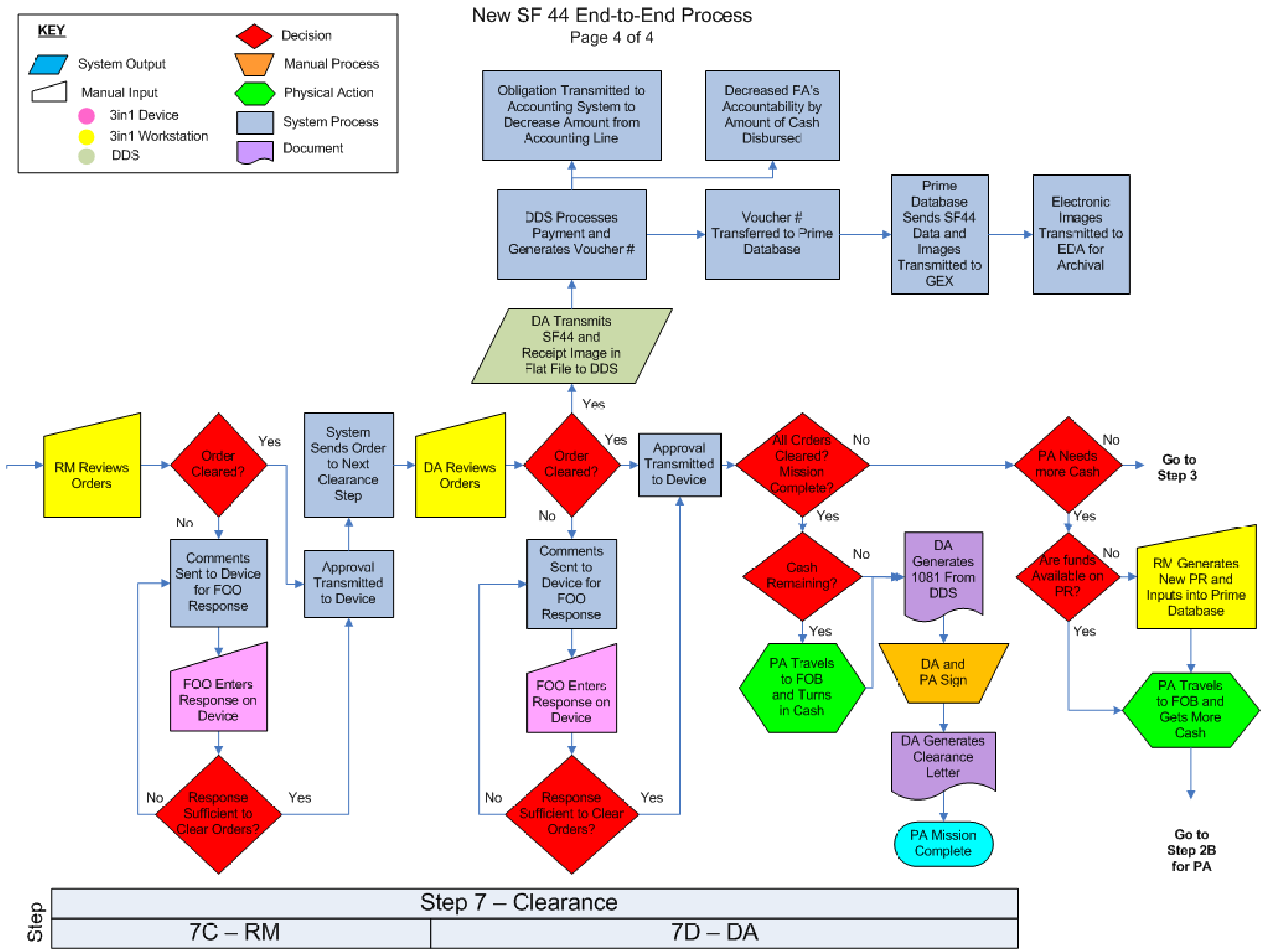
New SF 44 End-to-End Process



New SF 44 End-to-End Process

(Example of Clear/Review Process. Actual Flow can be tailored for operation)
Page 3 of 4





KEY
System Output
Manual Input
3in1 Device
3in1 Workstation
DDS
Decision
Manual Process
Physical Action
System Process
Document
New SF 44 End-to-End Process
Page 4 of 4
Obligation Transmitted to Accounting System to Decrease Amount from Accounting Line
Decreased PA's Accountability by Amount of Cash Disbursed
DDS Processes Payment and Generates Voucher #
Voucher # Transferred to Prime Database
Prime Database Sends SF44 Data and Images Transmitted to GEX
Electronic Images Transmitted to EDA for Archival
DA Transmits SF44 and Receipt Image in Flat File to DDS
RM Reviews Orders
Order Cleared?
Yes
No
System Sends Order to Next Clearance Step
DA Reviews Orders
Order Cleared?
Yes
No
Approval Transmitted to Device
All Orders Cleared? Mission Complete?
No
Yes
PA Needs more Cash
No
Go to Step 3
Yes
Comments Sent to Device for FOO Response
Approval Transmitted to Device
Comments Sent to Device for FOO Response
Cash Remaining?
No
Yes
DA Generates 1081 From DDS
Are funds Available on PR?
No
Yes
RM Generates New PR and Inputs into Prime Database
FOO Enters Response on Device
FOO Enters Response on Device
PA Travels to FOB and Turns in Cash
DA and PA Sign
PA Travels to FOB and Gets More Cash
DA Generates Clearance Letter
Response Sufficient to Clear Orders?
No
Yes
Response Sufficient to Clear Orders?
No
Yes
PA Mission Complete
Go to Step 2B for PA
Step
Step 7 – Clearance
7C – RM
7D – DA

Appendix D: IS User Agreement

STANDARD MANDATORY

DOD NOTICE AND CONSENT BANNER

- You are accessing a U.S. Government (USG) Information System (IS) that is provided for USG authorized use only. By using this IS (which includes any device attached to this IS), you consent to the following conditions:
- The USG routinely intercepts and monitors communications on this IS for purposes including, but not limited to, penetration testing, COMSEC monitoring, network operations and defense, personnel misconduct (PM), law enforcement (LE), and counterintelligence (CI) investigations.
- At any time, the USG may inspect and seize data stored on this IS.
- Communications using, or data stored on, this IS are not private, are subject to routine monitoring, interception, and search, and may be disclosed or used for any USG authorized purpose.
- This IS includes security measures (e.g., authentication and access controls) to protect USG interests--not for your personal benefit or privacy.
- Notwithstanding the above, using this IS does not constitute consent to PM, LE or CI investigative searching or monitoring of the content of privileged communications, or work product, related to personal representation or services by attorneys, psychotherapists, or clergy, and their assistants. Such communications and work product are private and confidential. See *User Agreement* for details.

Appendix E: Acronym List

The following table provides a reference for the acronyms for terms that are used in this guide.

Acronym	Definition
ACSA	Acquisition and Cross-Servicing Agreement
AOR	Area of Responsibility
CAC	Common Access Card
CO (KO)	Contracting Officer
COCOM	Combatant Command
DBSAE	Defense Business Systems Acquisition Executive
DSSN	Disbursing Station Symbol Number
DDS	Deployable Disbursing System
DECC	Defense Enterprise Computing Center
DoD	Department of Defense
DoDAAC	Department of Defense Activity Address Code
EDA	Electronic Data Access
EMMA	Enterprise Monitoring and Management of Accounts
ESN	Electronic Serial Number
FAR	Federal Acquisition Regulation
FOO	Field Ordering Officer
FO	Finance Officer
FOUO	For Official Use Only
GCPC	Government Commercial Purchase Card
GEX	Global Exchange Service
HTTPS	Hypertext Transfer Protocol Secure
JCCI/A	Joint Contracting Command Iraq/Afghanistan
JCCS	Joint Contingency Contacting System
JTF-GNO	Joint Task Force - Global Network Operations
PA	Paying Agent
PIIN	Procurement Instrument Identification Number
PBO	Property Book Officer
PO	Purchase Order
PR	Purchase Request
RCC	Regional Contracting Center
RM	Resource Manager
SDA	Secured Digital Authorization
SF44	Standard Form 44
SMEs	Subject Matter Experts
SOCOM	Special Operations Command
UIC	Unit Identification Code
XML	Extensible Markup Language

Appendix F: Device Safety Instructions & Specifications

Handheld Device Safety Instructions

Read these instructions and warnings to use the Product in a safe manner and to prevent accidents.

Cautions in relation with batteries

- Batteries may explode when damaged, impacted, heated, flooded or taken apart with a gimlet.
- Make sure to keep the batteries out of reach of children or pets.
- If the Product is wet, do not put it in a device that may heat the terminal (heater, microwave oven, etc.). Heating batteries may cause an explosion, deformation or fault. (Water or any other liquid will change the color of the label inside the terminal. In this case, no warranty service will be provided.)
- (3in1 specific) Do not handle the battery except for the purpose replacing, in a safe environment.
- Batteries may become deformed if they are left in a hot and sealed place such as on a dashboard of a car under the direct sun light.
- Make sure that battery terminals (metal part) should not contact with any conductive materials like a necklace or coin.
- Also make sure that batteries should not be damaged by teeth or a nail. Impact may cause an explosion of batteries.
- Use dedicated batteries only and do not use the batteries for any other purpose than operating this Product.
- Using an inauthentic battery may reduce life of the Product, or cause an explosion. (In this case, no warranty service will be provided.)
- Make sure to use the adapter or the standard charger supplied with this Product. Using an inauthentic charger may reduce life of batteries or cause an explosion. (In this case, no warranty service will be provided.)

Safety Guidelines

- Do not use the Product on an airplane or in a hospital. (does not apply to 3in1)
- Do not operate the Product while driving a car.

Caution in relation with Laser Scanner (This feature is disabled in 3in1)

Do not flash scanner light in human and animal's eyes. It could cause damage of the retina and amblyopia.

Safety Instructions

1. This product is EMC-compliant. For safety and health, use the authentic parts supplied by the manufacturer. Any inauthentic part may affect safety.
2. Do not press the power button when the Product is wet. Touching the adapter or power cord with wet hands may cause an electric shock.
3. Do not modify, disassemble or repair the Product at your discretion. Contact the Manufacturer or supplier if there is a problem with the Product. Also, make sure to follow the warnings and Instructions. If you fail to follow any of the above instructions, no warranty service will be provided.
4. Record the data in the Product and keep it in a separate place. Data stored in the Product may be deleted during repairing or upgrading the Product. So, make sure to back up important data. (Bells, text/voice messages and characters are initialized.)
5. Keep this Product away from magnetic products such as credit card, telephone card, etc. The magnetic field of the terminal may affect the data.
6. When not in operation or when you are absent, pull out the power cord, and keep the Product in a safe place.
7. Keep the power cord away from any heating device. When cleaning the Product, pull out the power cord first. Dust off the pins of the power plug.
8. When storing a battery for a long period of time, recharge it and keep it at a room temperature. Even a fully charged battery will suffer reduced life due to the characteristics of the battery.
9. Painting this Product may damage appearance or display, or may cause a fault. Peeled-off paint may cause allergies depending on the physical conditions. In this case, stop using the Product and see a doctor.

Features

Item	Description
CPU:	PXA 320, 806MHZ
OS:	Google Android
RAM:	256MB
ROM:	512MB
DISPLAY:	3.5” QVGA TFT-LCD/3.5” VGA TFT-LCD
INTERFACE:	RS-232, USB 1.1 Host & Client, IRDA
BATTERY:	Rechargeable, 3.7V 4400mAh, Li-ion

SIZE:	80(W) x 160(H) x 35.5(D)mm
WEIGHT:	425g (incl. a hand strap)
ADAPTER:	5V 3A

Communication Specs.

Item	Description
WCDMA:	Frequency : TX (1922.4MHz~1977.6MHz) RX (2112.4MHz~2167.6MHz) Frequency stability : within ±200Hz Antenna power : 250mW Propagation type : G7W, D7W Modulation method : QPSK/BPSK(FDD)
Wireless Lan:	Frequency : 2412MHz~2472MHz No. of channels : 13 Antenna power : 10mW/MHz Propagation type : GID, D2D Modulation method : DSSS/CCK(802.11b), CCK/OFDM(802.11g)
*Bluetooth:	Frequency : 2402MHz~2480MHz No. of channels : 79 Antenna power : 20uW Propagation type : F1D Modulation method: GFSK
*13.56MHZ RFID:	Frequency : 13.56Mhz

* *Disabled for 3in1*

Appendix G: FieldPro RT43 Printer Information

Safety Instructions

Battery Disposal

Only dispose of used batteries according to your local regulations. If you do not know your local regulations, the Rechargeable Battery Recycling Corporation (RBRC) is a non-profit organization created to promote recycling of rechargeable batteries. For more information, visit www. rbrc.org.

- Read all setup and operating instructions before proceeding with operation.
- Do not operate in an enclosure unless properly ventilated. Make sure no ventilation openings are blocked or obstructed, which may result in the printer overheating.
- Do not operate near a heat source.
- No user-serviceable parts inside. Refer service or repairs to a qualified service professional.
- Use of genuine Printek replacement parts is required to warrant proper, safe operation.
- Any alteration or modification of this device voids the user warranty and may make the product unsafe to operate.
- The print head and motors get hot during use. Wait until they cool before touching them.
- Make certain the printer is disconnected from AC power before removing any covers or performing any required cleaning or maintenance.
- Connecting this printer to an ungrounded receptacle can result in electrical shock.
- Never place the printer near inflammable or explosive substances. Do not operate near liquid or spill liquid into the printer at any time.

Getting Started

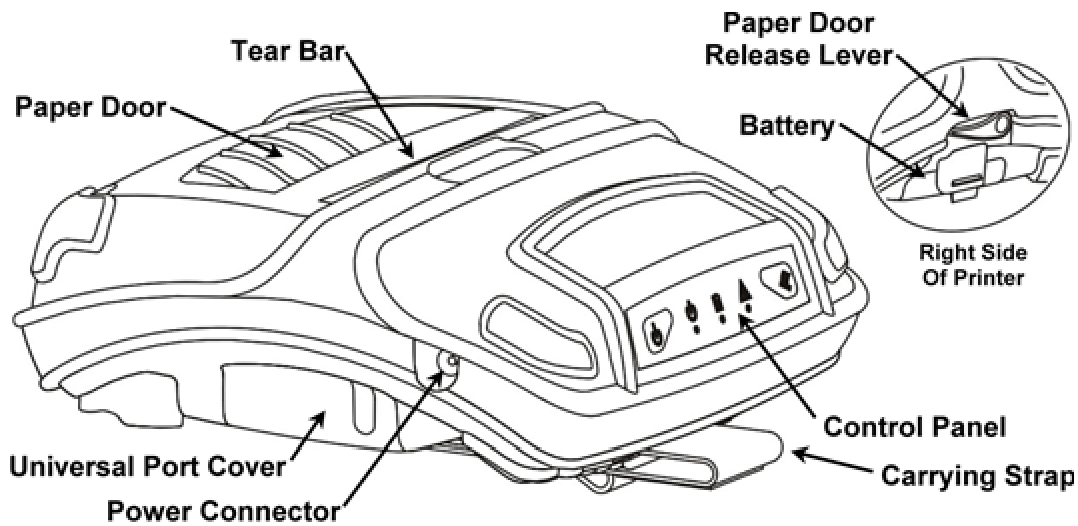
Introduction

For normal daily use, most users will only need to turn the printer on and off, tear off printed output, load paper, and charge the battery as described in the Getting Started section of this manual.

Printer Features

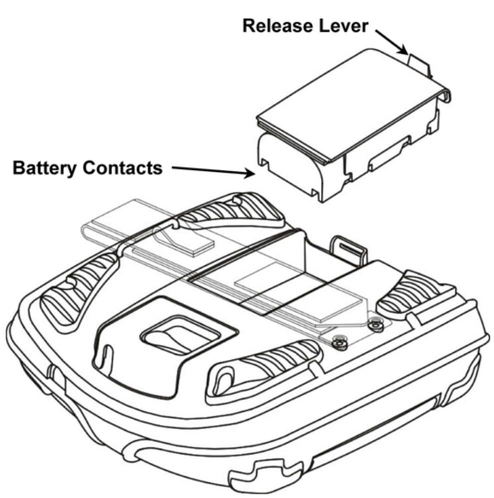
Before preparing your new FieldPro RT43 for use, please refer to the below figure and familiarize yourself with the locations of the various features of the printer.

Printer Features



Battery Installation

The battery for your FieldPro printer is shipped in an "uncharged" state. The battery must be charged using the following instructions prior to using the printer for the first time. Maximum battery capacity is not reached until after completing a minimum of three complete charge and discharge cycles.

Battery Installation	
	• Install the battery by first placing the end of the battery where the battery contacts are located, into the printer. • Then press down on the end where the release lever is located until the lever "snaps" into place.

To charge the battery, connect an optional power supply to the appropriate input source, and then connect the output of the power supply to the printer's Power Connector at the location shown in Figure 3. The Battery Indicator will turn on and remain on until the battery is fully charged. This may take up to 2½ hours.

Note: You must charge the battery for at least 2½ hours prior to the first use.

Caution: Use only Printek power supplies designed specifically for your FieldPro printer. Using a different power supply may cause damage to the printer and will not be covered by the printer's warranty. Printek power supplies are available for use with 100-240VAC/50-60Hz and for12/24VDC vehicle applications.

Battery Charging

The FieldPro RT43 contains battery monitoring and charging circuitry so that the battery may be charged while in the printer. Charging the battery in the printer requires an optional power supply. Printek offers power supplies for use with 100-240VAC/50-60Hz and 12/24VDC for vehicle applications.

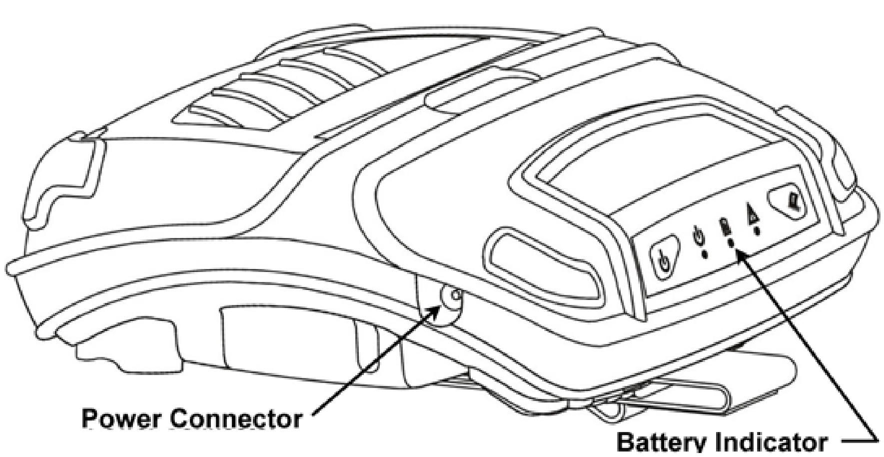
The printer's Battery Indicator flashes whenever the battery needs recharging.

To charge the battery, connect the power supply to the appropriate source, and connect the output of the supply to the printer's power connector.

When the power supply is connected, the printer's charging circuitry will determine if the battery currently requires charging and if so, will turn on the Battery Indicator until the battery has reached sufficient charge. Depending on the condition of the battery, charging may take up to 2½ hours to complete. When fully charged, the Battery Indicator will turn off.

Leaving the power supply connected to the printer will cause the printer to continuously monitor the condition of the battery and keep the battery charged.

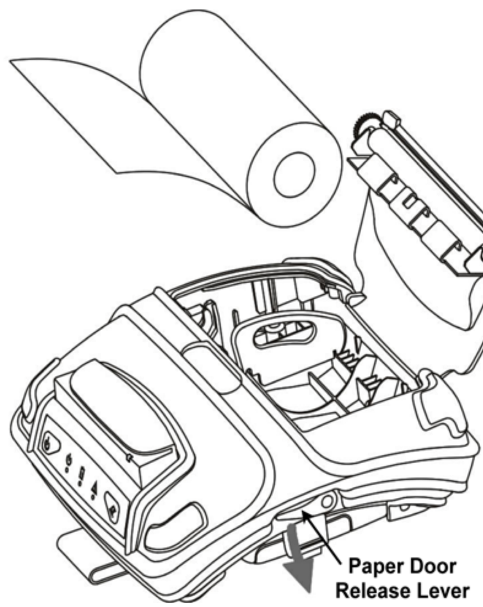
Power Connector & Battery Indicator



Caution: Use only Printek power supplies to power your printer and charge batteries. Other power supplies may damage the electronics and printing mechanism. Damage caused by use of a non-Printek power supply will not be covered by the printer's warranty.

Installing Media

Each printer comes supplied with a roll of receipt paper.

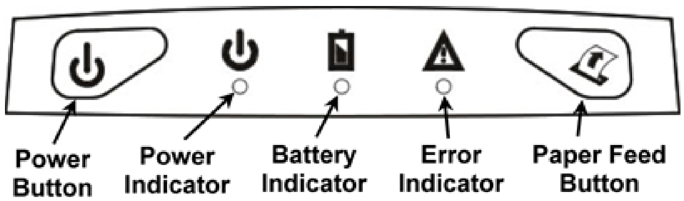
Installing Media	
	• To install media, you must release the paper door by moving the Paper Door Release Lever in the direction shown in and then lift the paper door to expose the paper compartment. • Unroll a small portion of the paper as shown, place the roll into the printer, and close the Paper Door.

If the printer is turned on, you may now press the **Paper Feed** button to advance the paper and then tear it off in preparation for printing.

Note: For maximum performance and optimum print quality, use only genuine Printek media in your FieldPro printer.

Turning the Printer On and Off

Refer to the figure below to locate the printer's Power Button. To turn the printer on, simply press and release the Power Button. To turn the printer off, press and hold the Power Button. The printer will "beep" and then power down after the button is released.

<table>
<tr><th colspan="2">Turning the Printer On and Off</th></tr>
<tr><td>
Printer Control Panel</td><td>To turn the printer on, simply press and release the Power button.
To turn the printer off, press and hold the Power button. The printer will “beep” and then power down after the button is released.</td></tr>
</table>

Control Panel

The FieldPro series printers are designed for simple operation with an easy to use control panel. The control panel consists of three indicators and two pushbuttons. An audible tone is also used to indicate button presses and certain error conditions.

<table>
<tr><th colspan="4">Control Panel Buttons & Indicators</th></tr>
<tr><th>Symbol</th><th>Function</th><th colspan="2">Status</th></tr>
<tr><td></td><td>Power Button</td><td colspan="2">Used to turn the printer on or off.</td></tr>
<tr><td></td><td>Paper Feed Button</td><td colspan="2">Advances paper a preset distance or to the next black mark. Also used to clear paper error conditions.</td></tr>
<tr><td rowspan="4"></td><td rowspan="4">Power Indicator</td><td></td><td>Printer is Off.</td></tr>
<tr><td></td><td>Printer is On.</td></tr>
<tr><td></td><td>Printer is in Standby. (Will wake on receipt of data.)</td></tr>
<tr><td></td><td>Printer is receiving data and/or printing, or is in the Control Panel Setup mode.</td></tr>
</table>

Control Panel Buttons & Indicators			
	Battery Indicator		Battery is fully charged.
		 or 	Battery needs to be charged.
			Battery is being charged.
	Error Indicator		No error.
		 With Alarm	Paper out. (Load paper and press Paper Feed to clear.)
			Paper Door is open.
		 With Alarm	Communications error. (Power off to clear.)

 = On  = Off  = Slow Blink  = Rapid Flash

Performing a Printer Self Test

To perform a self test, press and hold the Paper Feed Button while turning on the printer with the Power Button. The printer will print a test page with the following information:

- The printer's firmware revision level and release date
- Printer serial number
- The current values for items in the Format menu
- The current values for items in the Options menu
- The type of optional interface, if installed, and which interface is currently selected
- The presence of the optional Magnetic Card Reader, if installed
- The current battery voltage
- A list of additional fonts, if installed
- A list of logos, if installed
- A print head test pattern

Note: At the bottom of the test page, the message "Press Feed for Setup Menu" will be printed. Do not press any buttons at this time. After approximately four seconds, "Setup Not Requested" will be printed and the printer is ready for normal use.