3in1 Tool

Contracting Officer

New User Training

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Joint Contingency Contracting System

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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 to automate three key processes: Field Ordering, Receiving, and Payment. This solution automates the Standard Form 44 manual processes used to purchase supplies and services used in contingency environments by a Field Ordering Officer (FOO) and Paying Agent (PA). The 3in1 Tool records cash-and-carry type purchases and payment data when conducting on-the-spot, over-the-counter, field cash purchases, where GPC use is not feasible. The data is 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

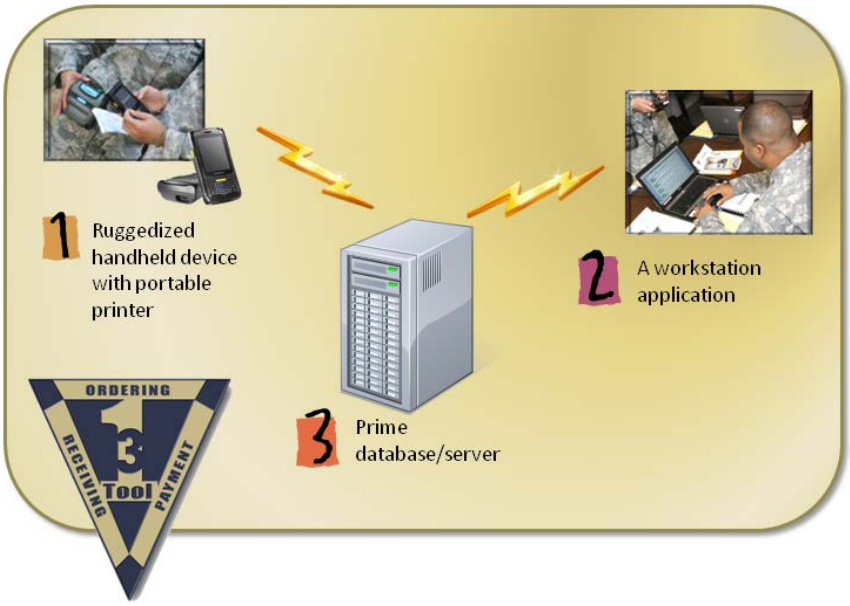
- Eliminates problems associated with paper forms: wasted time duplicating documents, multiple entries into various systems, illegible handwriting, loss or damage to paper, storage/reproduction/shipping
- Reduces FOO/PA exposure to travel in hostile areas by reducing trips to multiple clearance offices 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 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:

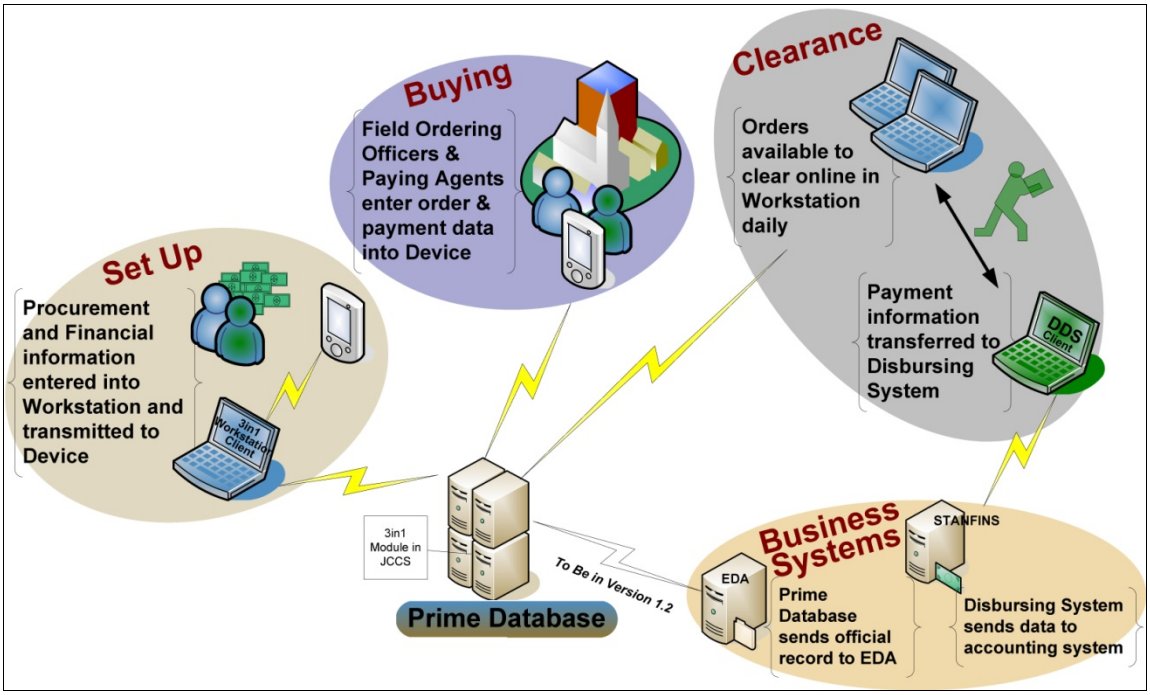
1. The **handheld device** is used in the field to input, temporarily store, and then transmit purchase and payment information. The small, rugged **printer** provides field print capability to document cash payments until data is uploaded.
2. The **Workstation application** is a hard client application 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

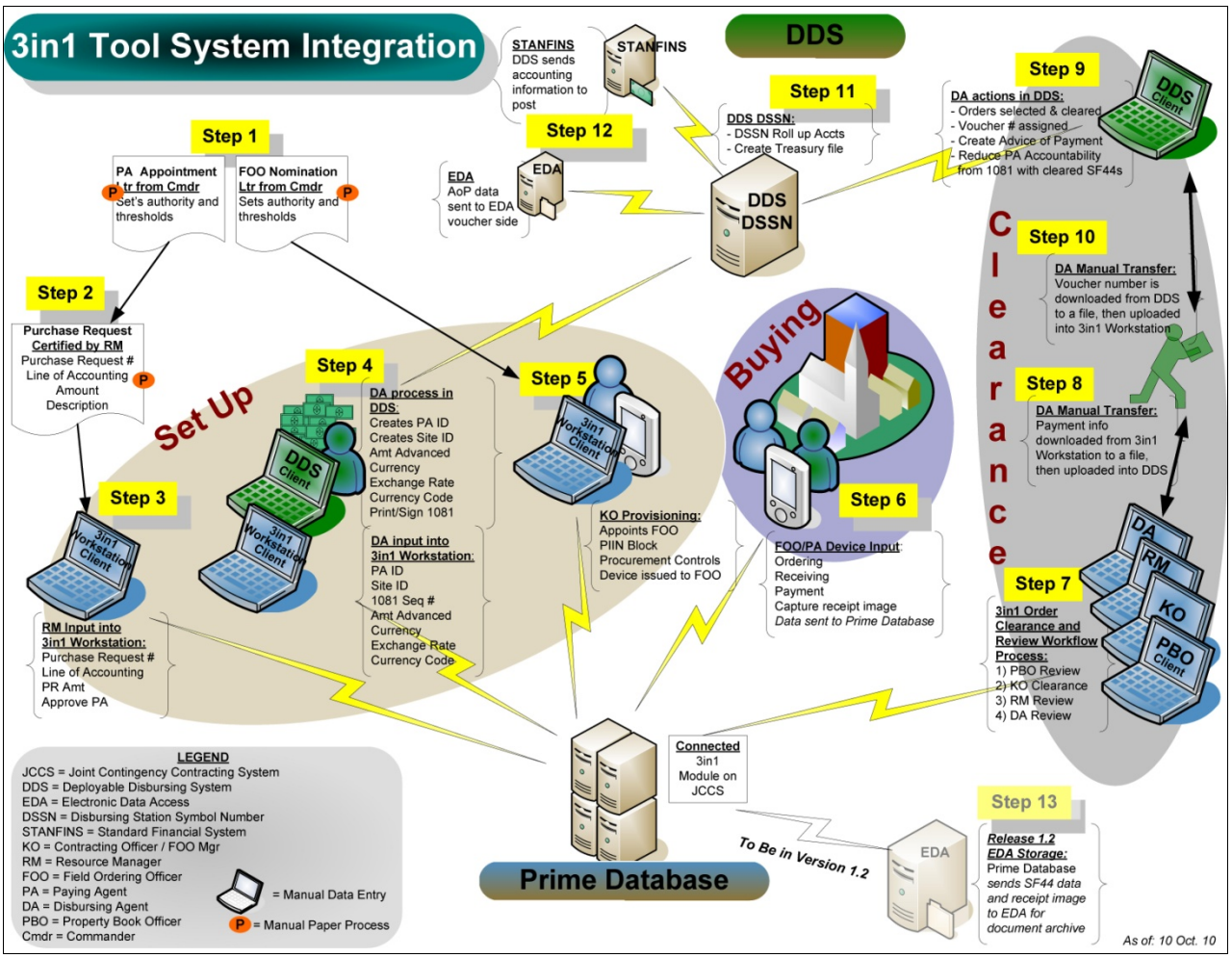
How is the 3in1 Tool used to process device, procurement and financial management information?

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 are 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 3in1 handheld device will automatically calculate 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 downloaded 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

Using This Manual

This training focuses on the features of the 3in1 Tool as it used by Contracting Officers. To use a checklist of required tasks for the Contracting Officer role, see *Appendix A: Contracting Officer 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
- Module 4: Registering New Devices

Part 2: Contingency Operation Setup

- Module 5: Managing 3in1 Workstation Users
- Module 6: Configuring the 3in1 Tool Workstation

Part 3a: Execution: FOO/PA Setup

- Module 7: Activating Devices for FOO/PA Teams

Part 3b: Execution: Purchasing Process

- Module 8: The Ordering Process
- Module 9: Ordering Features on the Device
- Module 10: Managing Purchase Orders on the Workstation
- Module 11: Clearing Purchase Orders

Part 3c: Execution: Post-Purchase Process

- Module 12: Post-Clearance Operations
- Module 13: Updating Financial and Procurement Information
- Module 14: Reporting from the Workstation

Part 4: Reference Information

- Module 15: Device Management Tools
- Module 16: 3in1 Device Tools & Settings

Appendices

- Appendix A: Contracting Officer 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

Note: The order of presented topics does not represent a rigid sequence of actions. There is flexibility in the order in which these actions may be performed: adding purchase requests, issuing cash advances, and provisioning. For example, it is possible for a Field Ordering Officer to receive a handheld device before a Paying Agent is linked to the FOO via provisioning, as long as the device is synchronized before purchases are made.

There are different roles involved in the process of ordering, receiving, and issuing payments for purchases made using the 3in1 Tool. Therefore, access to the Workstation features is role-based. Each user is assigned a role, such as Contracting Officer (CO or KO)

or Field Ordering Officer (FOO). The role assignment determines which features can be accessed.

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: Getting Started with the 3in1 Device and Printer

Objectives

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

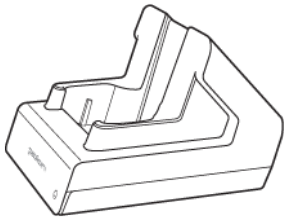
- ❑ Identify the components of the 3in1 handheld device
- ❑ Access the basic functions of the 3in1 handheld device
- ❑ Manage power on the 3in1 handheld device
- ❑ Identify the features of the FieldPro RT43 printer and perform a printer self-test

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*.

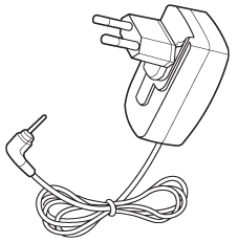
3in1 Tool Components

BIP 6000 Main Body

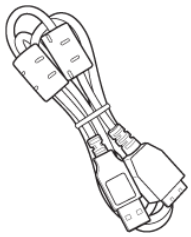


Desktop Cradle

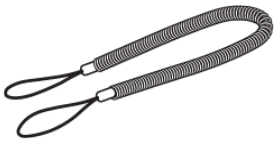
Battery



Power Charger



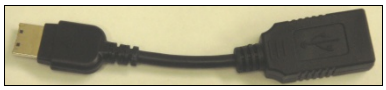
USB Cable



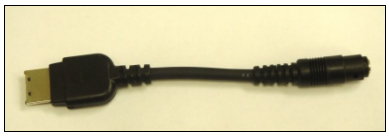
Spring Wire

Stylus Pen

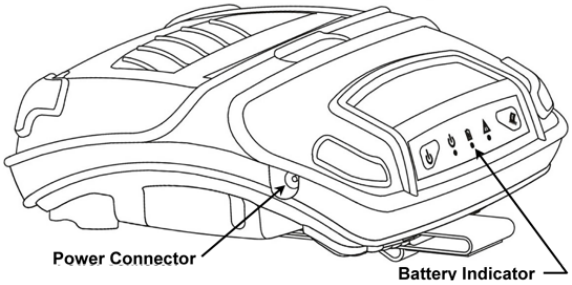
USB-Ethernet adapter



Adapter to connect device to Ethernet adapter



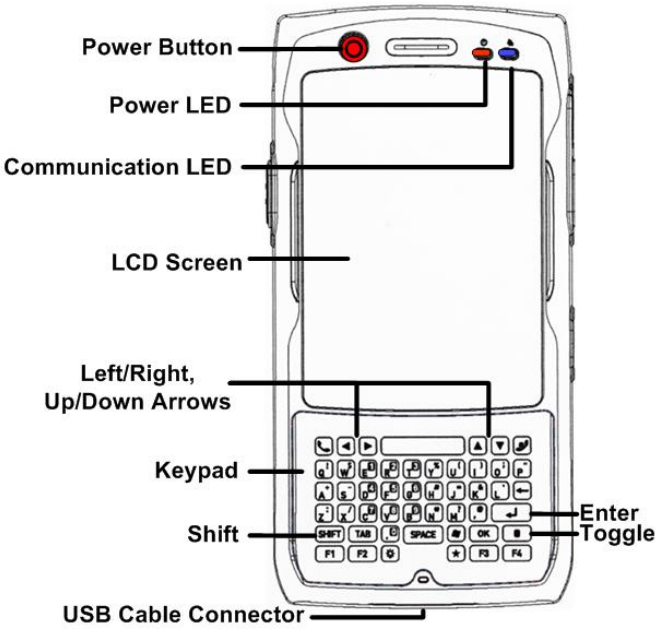
Adapter for non-cradle device charging



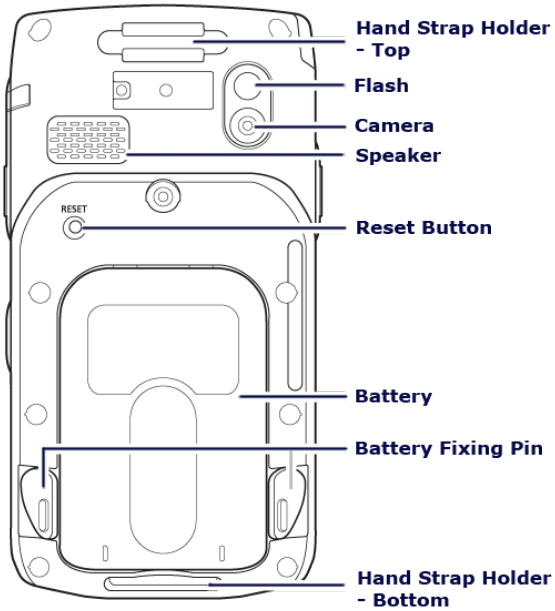
FieldPro RT43 Printer

Handheld Device Features

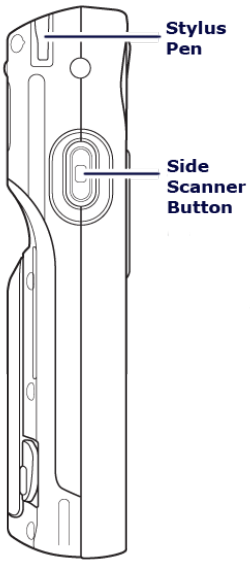
Front View of Handheld Device



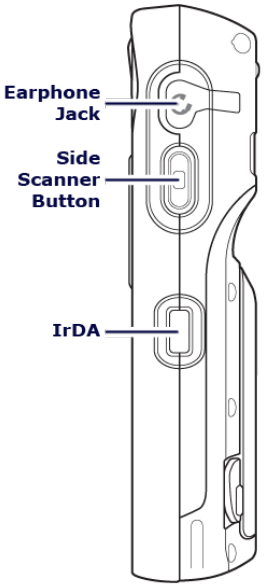
3in1 Device Buttons	Function
	Power Button Switches the device On/Off
	Arrow Buttons Moves the cursor left/right/up/down
	Backspace Button The cursor moves backward, erasing the letters Press and hold this button for at least 3 seconds; the letters are deleted one-by-one, promptly and continuously
	Enter Button Changes lines in the text input mode This button is similar to the Enter key on a computer keyboard
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 press an alphabet key, the uppercase of the key is entered. Then the input mode is switched to 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

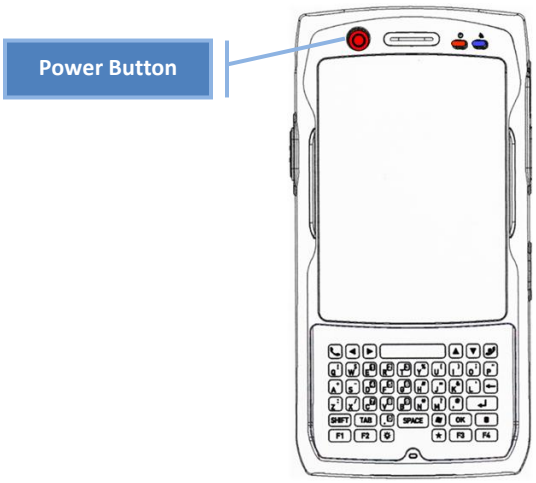
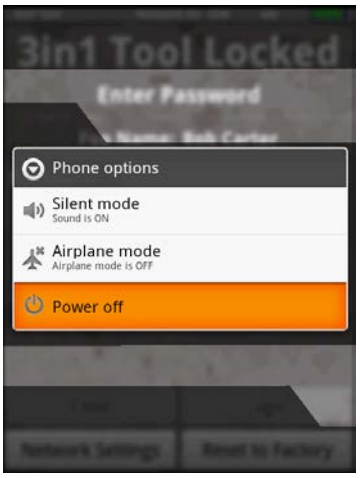


Device Right Side View

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:

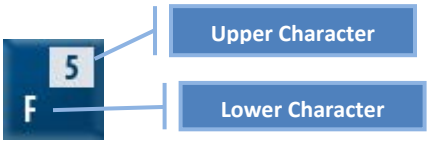
- The Call button
- The Windows button

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:

3in1 Tool Network On Ethernet abc	Input in normal lowercase letter mode, indicated by "abc" on the Status Bar.
3in1 Tool Network On Ethernet ABC	Input in uppercase letter mode, indicated by "ABC" on the Status Bar. This means that the user just pressed the SHIFT key.
3in1 Tool Network On Ethernet 123/SYM	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".

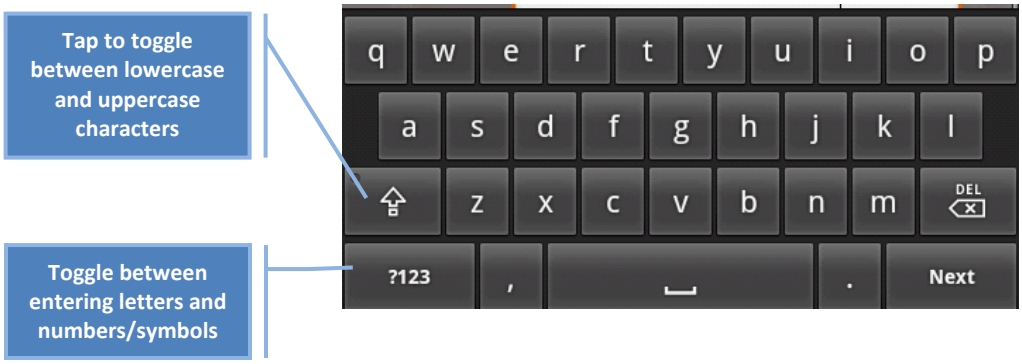
Device Status Bar

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 16: 3in1 Device Tools & Settings, Lesson 1: Device Tools* for details.

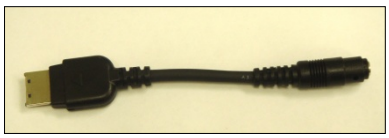


Charging the Device with a Desktop Charger or DC Adapter

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.

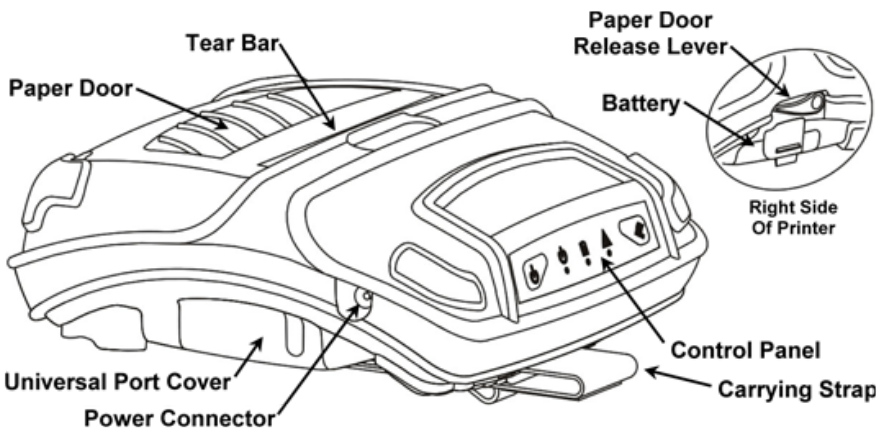
Charge status is indicated in the device Status Bar, which is explained in *Module 3: Application Familiarization, Lesson 1: Navigating the 3in1 Device Application*. When the charge falls to below 20% remaining, the device should be charged before continuing. The device can be used actively for up to 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.

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

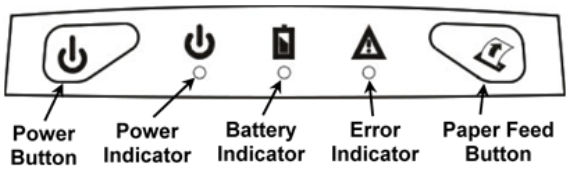
Refer to the figure below to locate the printer's Power button. To turn the printer on, press the Power button, hold down for two seconds, then release.

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

To connect to the device:

1. A USB cable is fixed to the printer. 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, turn 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 and perform a printer self-test

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Module 3: Application Familiarization

Lesson 1: Navigating the 3in1 Workstation Application

Objectives

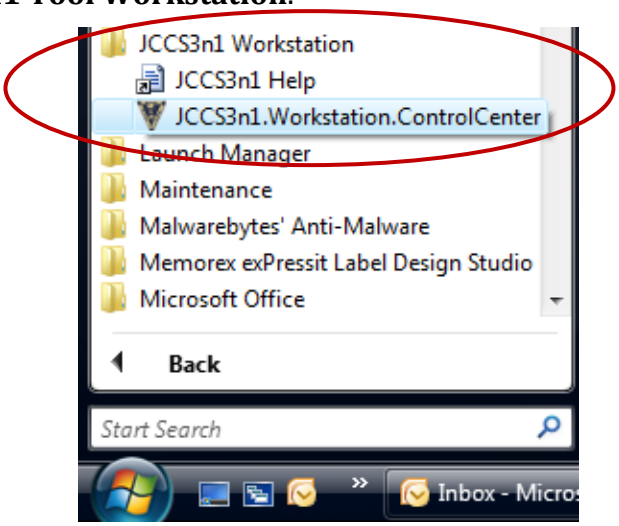
After completing this lesson, the participant will be able to:

- ❑ 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)
- ❑ Navigate the 3in1 Tool Workstation main menu

Log in to the 3in1 Tool Workstation

To log in to the 3in1 Tool Workstation:

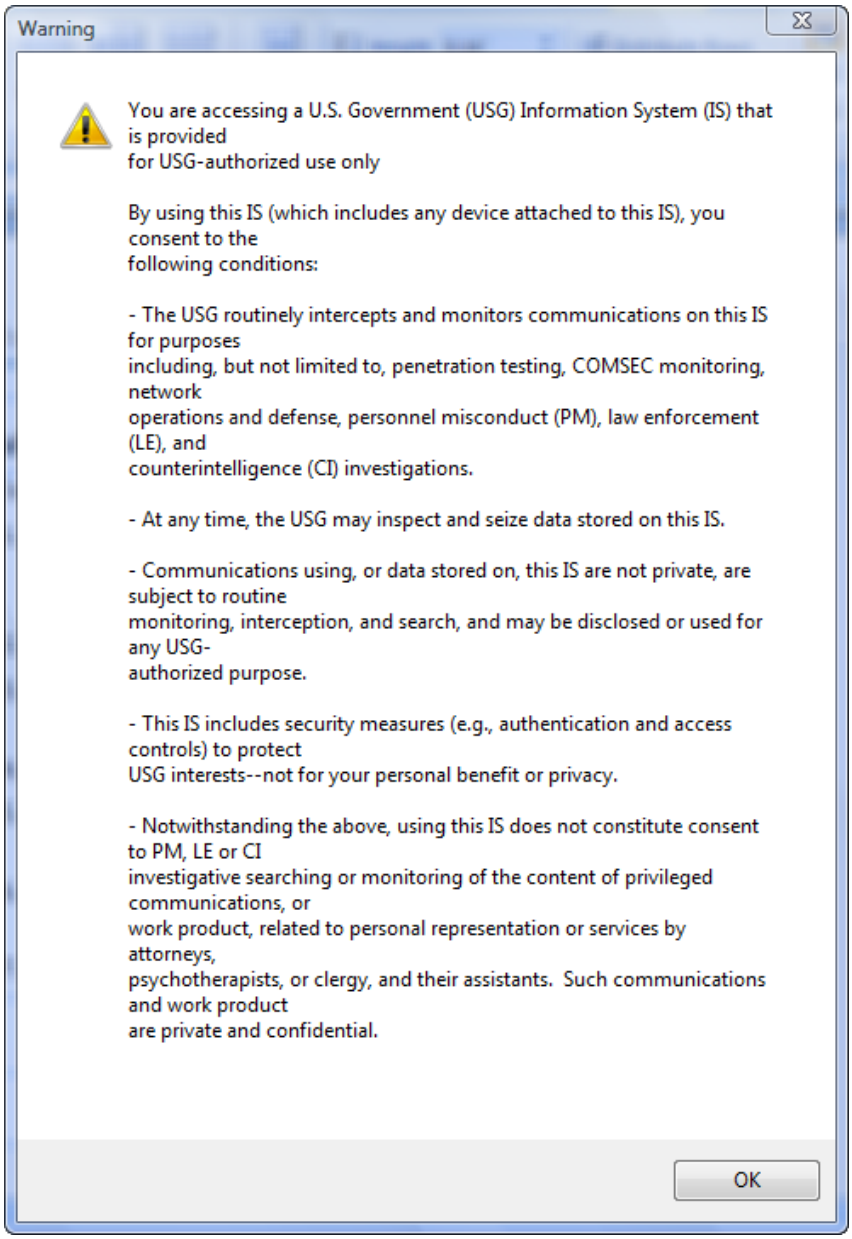
1. In the Windows tool bar, select **Start**, **All Programs**, **3in1 Tool Workstation**. Double-click **3in1 Tool Workstation**.



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.



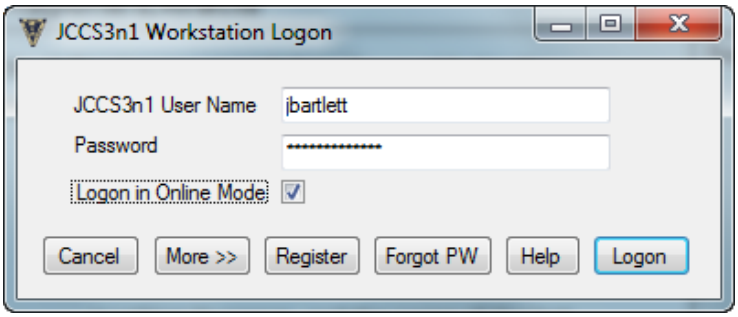
Warning Screen

3. Enter your user name and password on the *Logon* window. (The user name and password are created during registration, which is explained in *Module 5: Managing 3in1 Workstation Users*, *Lesson 1: Registering New Users*.)
4. By default, the Workstation *Logon* dialog box is set for online mode. To log in offline, unmark the **Logon in Online Mode** check box, as shown in the following figure.
   – 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. However, 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.

– Later, you can switch between online and offline mode using the **File**, **Connection Status** command, which is explained in *Module 3: Application Familiarization, Lesson 2: Going Offline with the 3in1 Workstation*.

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



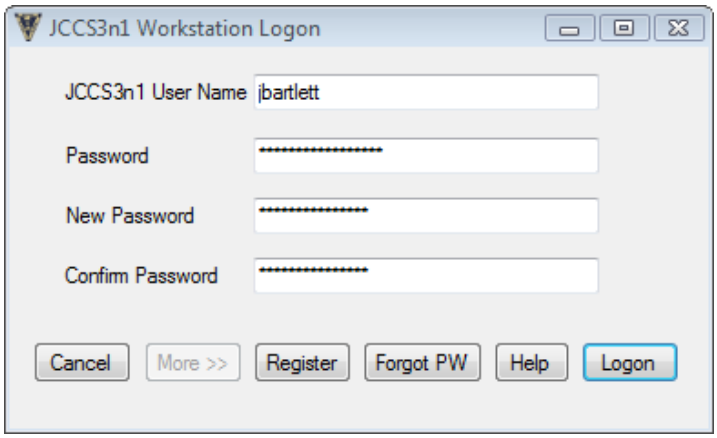
3in1 Tool Workstation Logon Window

To register new users using the **Register** button, see *Module 5: Managing 3in1 Workstation Users, Lesson 1: Registering New Users*. To access online help regarding the options on the Logon window, click the **Help** button.

Change Workstation Passwords

Any Workstation user can change his or her password using the following steps:

1. In the *Logon* window, type your user name and current password.
2. Click the **More** button to display the ***New Password*** fields.
3. Type the new password twice.



3in1 Workstation Logon Screen with New Password Fields

4. Click the **Logon** button. A confirmation dialog indicates the password change was successful.

Password Rules

The following rules apply to creating passwords in the 3in1 Tool Workstation, including the *Personal Information* screen, which is displayed when a new user registers.

- 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
  - An administrator can change passwords at any time

Forgotten Passwords

If a user forgets his or her Workstation login password, the user can click the **Forgot PW** button (on the Workstation Logon window). The user will be asked the three security questions which were answered during the user registration process. If the correct answers are provided to all three questions, the user can retrieve/reset the password. If the user cannot correctly answer the three questions, after three attempts, the system administrator will have to reset the password.

Login Rules

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

- A valid user name and password must be entered
- A user may make 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.
- After the 20 minute denied access period, if the user tries to log in using invalid credentials, three consecutive times, the user will be locked out permanently until the account is unlocked by the system administrator/help desk technician.

Note: The number of invalid attempts resets after the 20-minute period.

Logging in using a CAC

Users 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*.

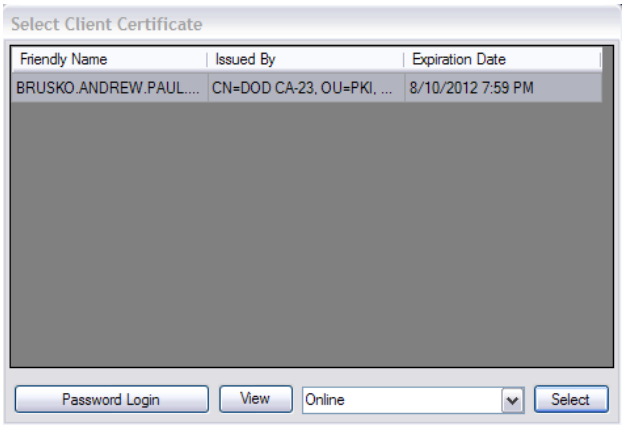
To log in to the 3in1 Workstation using a CAC:

1. Ensure that the CAC is properly inserted into the card reader.

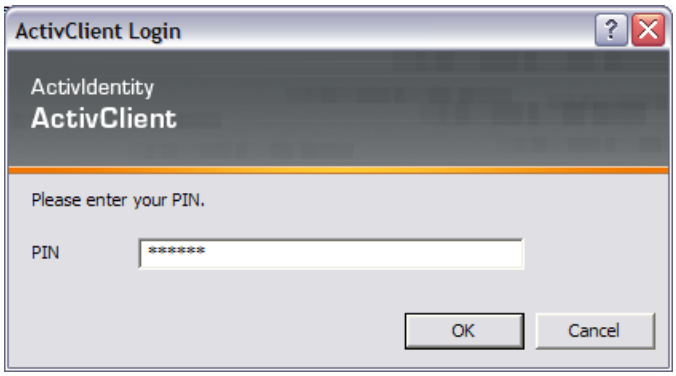
2. Double-click the 3in1 Tool Workstation icon on your desktop.

   After opening the 3in1 Workstation application, and passing the initial warning screen, CAC users will see the *Select Client Certificate* screen.

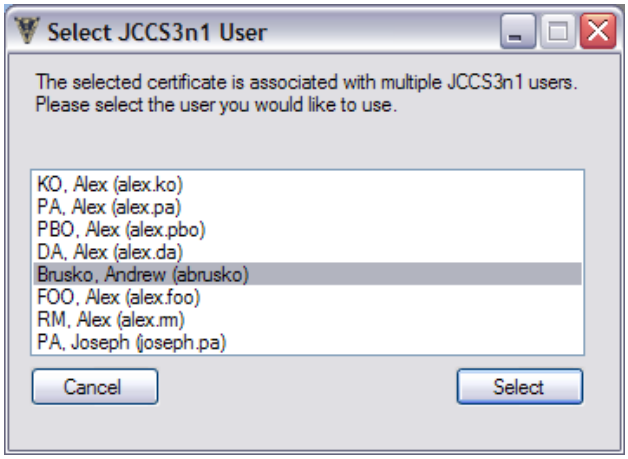
3. Choose a certificate from the *Select Client Certificate* screen. Click the **Select** button.



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.

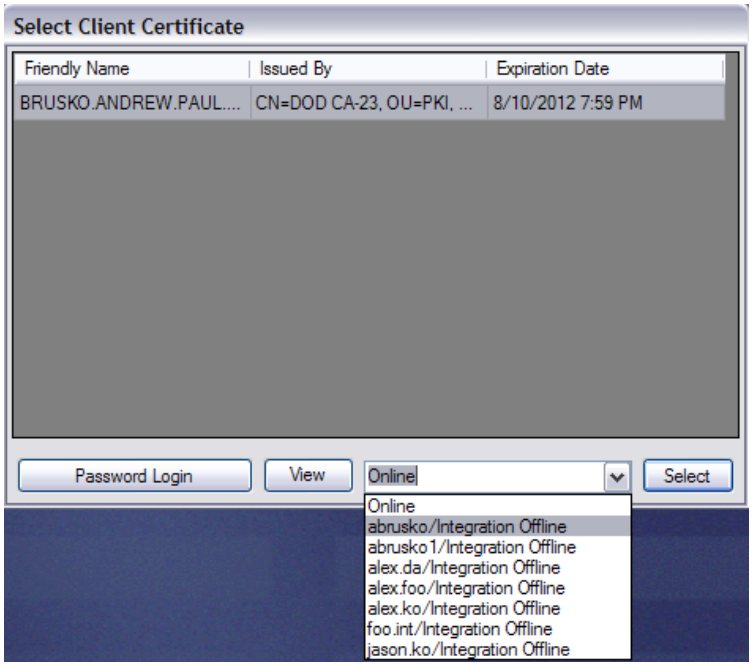


6. You are logged into the 3in1 Workstation under the selected user.

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.

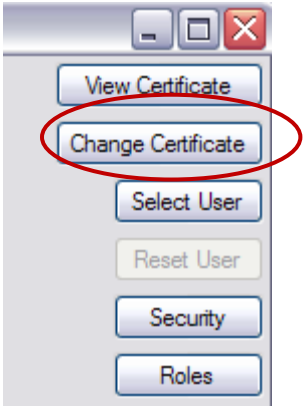
By default, the 3in1 system defaults the login to "Online" on the *Select Client Certificate* screen. To log in to an offline replica with your CAC, select an offline replica from the dropdown menu, as shown below.



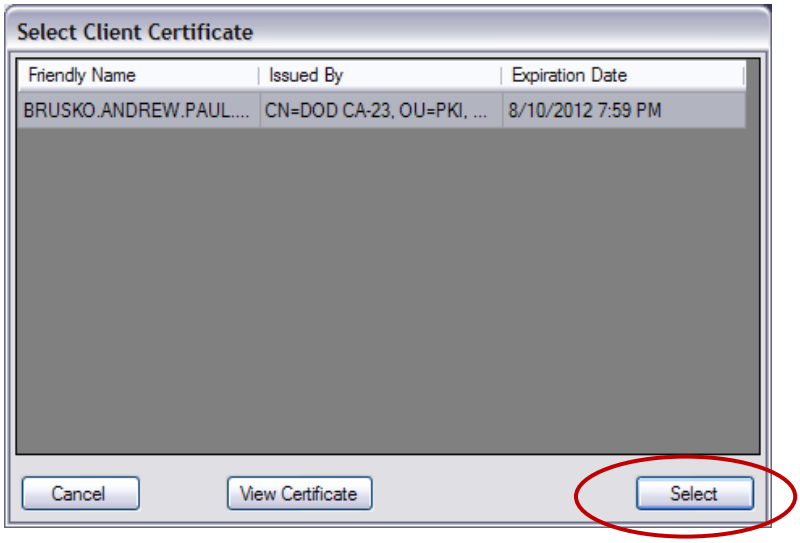
CAC Workstation Registration

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.

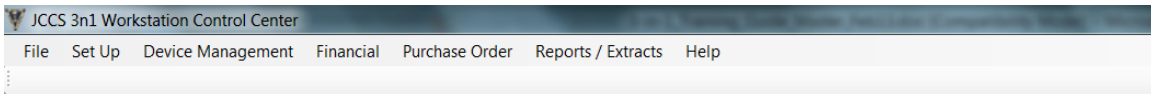


5. Select the client certificate, then click the **Select** button. Enter your CAC PIN if prompted.



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

3in1 Tool Workstation Main Menu



3in1 Tool Workstation Main Window

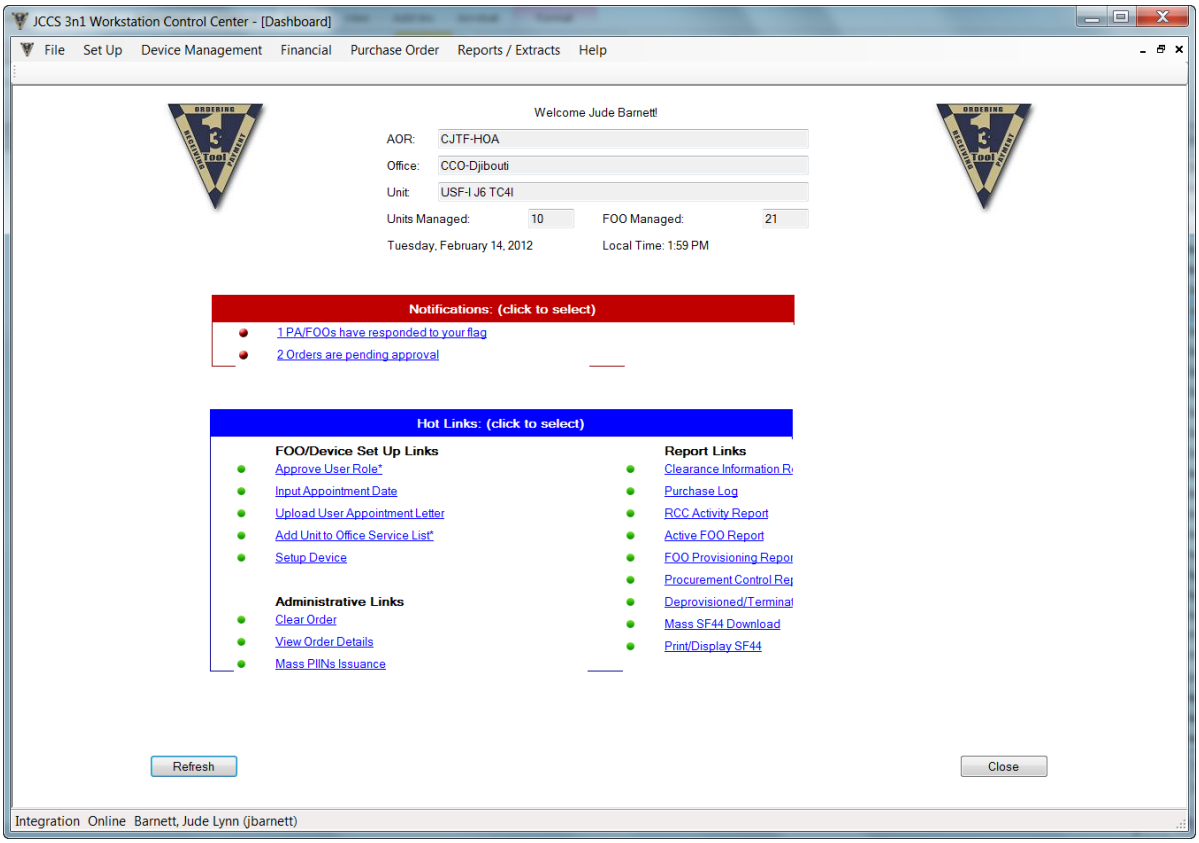
When you log in to the Workstation, the 3in1 main menu options are listed along the top of the screen. Simply click a menu option and then select from the submenu. The feature opens in a new window. It is possible to open multiple windows so you can quickly move between features.

The following is an overview of the key features listed on the main menu. 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, set up RCC default clearance administration; and reserve FOO identifiers
- **Device Management:** Approve and provision 3in1 handheld devices to FOOs, manage PIIN blocks; update procurement information; and rebind the device
- **Financial**: Review or manually add purchase requests; disburse funds; update, close or cancel purchase requests; and exchange data with DDS
- **Purchase Orders**: Look up and clear POs; manually add orders; and view FOO shopping lists
- **Reports:** Select from a list of standard reports and produce them in different formats; download orders/vouchers by FOO/PA for backup
- **Help:** Access online help for Workstation features

Dashboard for Contracting Officers

There is an option to display the *Dashboard* when a Contracting Officer (KO) logs in to the Workstation. The *Dashboard* customized for each user. The top portion displays your assigned AOR, office and unit. In addition, the number of units and FOOs that you manage are displayed.

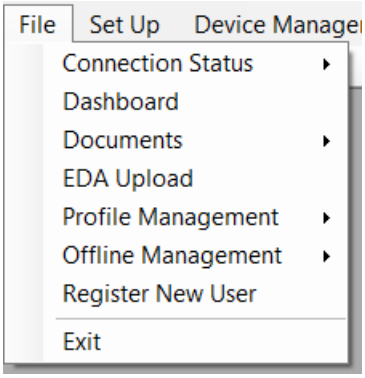


Dashboard for Contracting Officers

The **HOT LINKS** section provides clickable shortcuts to frequently used Workstation features for a KO. For example, click **View Order Lookup** to go directly to the *Purchase Order* window.

Review the **Notifications** section for recent updates, such as the number of FOOs who have responded to clearance flags, FOOs or PAs with less than 10% PIINs available, or the number of orders pending approval. Click a notification to go directly to the relevant area of the program. For example, to clear pending purchase orders, click the "*x* Orders are pending approval" notification. You can then select from a list of FOOs with one or more pending orders and then go to the *Clear Purchase Order* screen.

To update the *Dashboard* at any time, click the **Refresh** button in the bottom left corner. You may leave the *Dashboard* open while accessing other areas of the program using the menu bar. To close the *Dashboard*, click the **Close** button in the bottom right corner. To re-open the *Dashboard*, select **File**, **Dashboard**.



Displaying the *Dashboard* is an option. To change this setting, select **File**, **Profile Management**, **User Profile**. See *Module 5: Managing 3in1 Workstation Users, Lesson 2: Managing User Roles and Accounts*.

Software Updates

Each time that a user logs in to the Workstation, the application automatically checks for software updates; a status box is displayed while the checking occurs. Software updates are performed automatically and do not require any action on the user's part, other than to accept the process.

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)
- ❑ Navigate the 3in1 Tool Workstation main menu

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Lesson 2: Going Offline with the 3in1 Workstation

Objectives

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

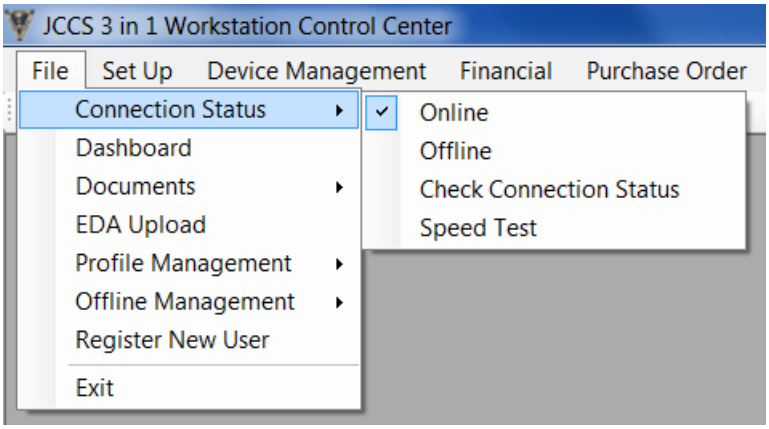
- ❑ Describe the differences between working online and offline using the 3in1 Tool Workstation
- ❑ Change from working online to working offline for the first time
- ❑ Subsequently switch between working in Online and Offline modes

Working Online or Offline

The 3in1 Tool Workstation application can run standalone (Offline) or 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.

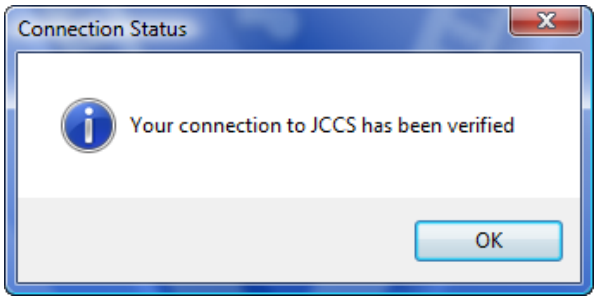
To check your current connection status, select **File**, **Connection Status**. The checkmark indicates whether you are working Online or Offline. The connection status is also displayed in the bottom left corner of the screen.



File, Connection Status Menu

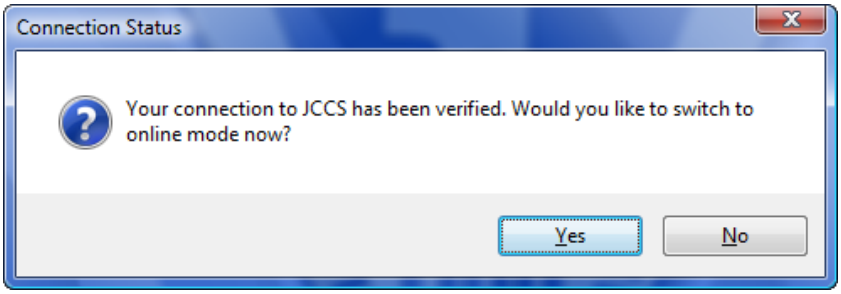
Checking Your Connection to the 3in1 Workstation

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

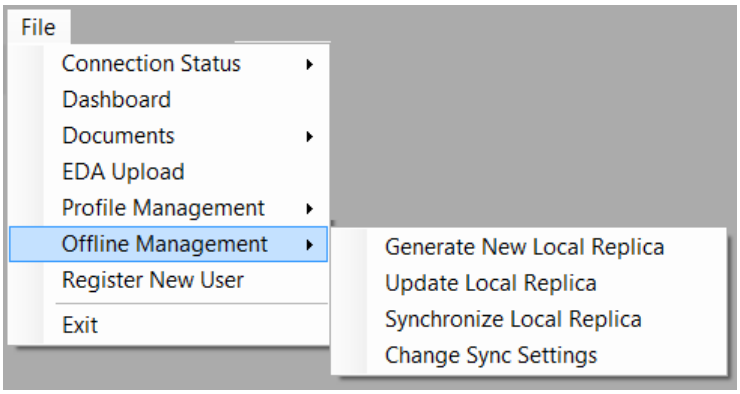
To ensure data is synchronized between your computer and the 3in1 prime database, check your personal data synchronization settings before working offline. Select **File**, **Profile Management**, **User Profile**. See *Module 5: Managing 3in1 Workstation Users, Lesson 2: Managing User Roles and Accounts* for more information.

Working Offline for the First Time

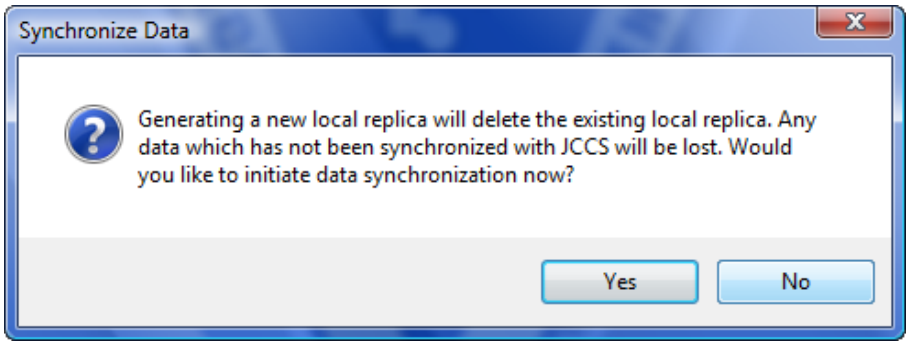
Switching from Online to Offline mode requires creating a copy of relevant data from the 3in1 prime database on your computer, called a ***local replica***. The process is slightly different the first time that you switch from online to offline mode.

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

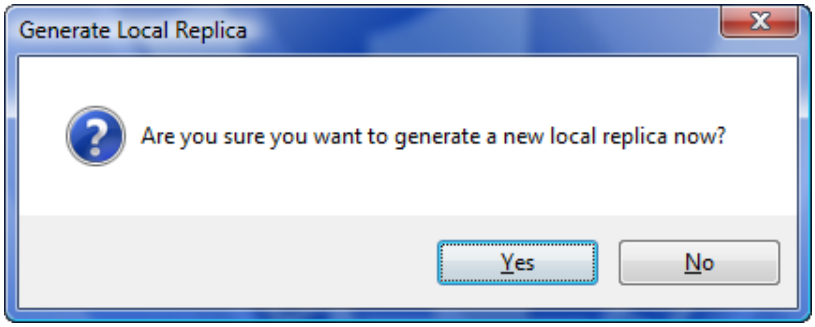
1. While working online, select **File**, **Offline Management**, **Generate New Local Replica**.



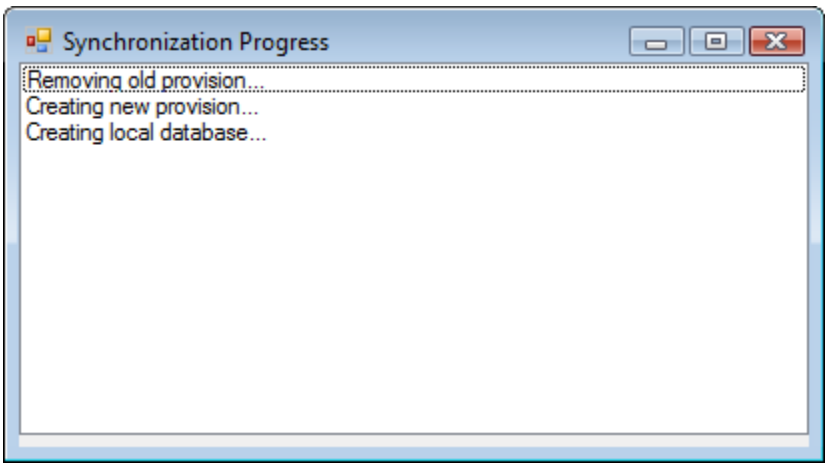
2. In the following dialog box, select **No** because there is no existing replica to synchronize, since this is the first time you are going to work offline.



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



– 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.



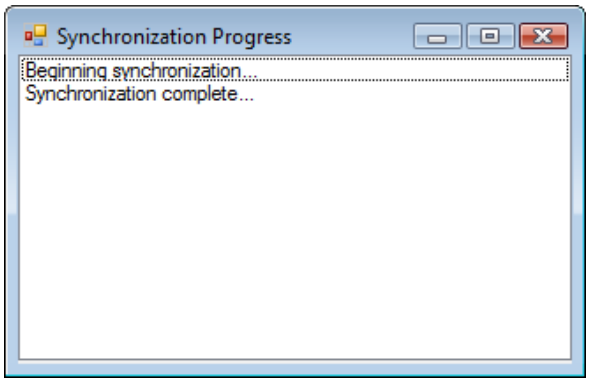
4. Select **File**, **Connection Status**, **Offline**.

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. **To go back online:**

1. Select **File**, **Connection Status**, **Online**.
   - Now you need to upload to the 3in1 prime database all the data that you worked on while in Offline mode.
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

The following role-based limitations apply when working offline:

Reviewers (KO, RM, and DA) can view:

- Information relevant to only their assigned AORs and Offices.
- Financial information for only those users assigned to the reviewer's AOR and Office
- Only the purchase orders in their clearance queues. They cannot look up other purchase orders.

Reports that are run in offline mode include only the information that is in the reviewer's local replica. It will not include information about any POs that were not in the reviewer's clearance queue when he/she went offline.

Users will have to synchronize data every time they make a change. Any changes to provisioning a device, 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 3: 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

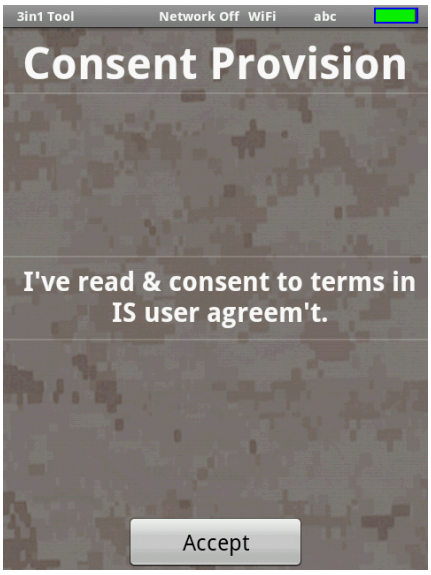
The 3in1 Tool is an application designed to run on the Google Android operating system. While the 3in1 Tool application can run on any Google Android device, most of its features are customized specifically for the Pidion BIP 6000, which is a ruggedized military standard handheld device.

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



A Field Ordering Officer (FOO) or Paying Agent follows the steps below to log in to the device. It is assumed the device has already been registered, approved and provisioned to a FOO/PA team using the 3in1 Workstation, as explained in *Module 2: Hardware/Application Setup, Lesson 1: Registering & Approving New Devices* .

If the device has not been registered and provisioned and you want to see the screens being discussed in this section, you can log on using the Demonstration Mode (see *Module 16: 3in1 Device Tools & Settings, Lesson 3: Using the Device Demo Mode*). Note: the Demo Mode does not communicate with the workstation or prime database and is only for practice

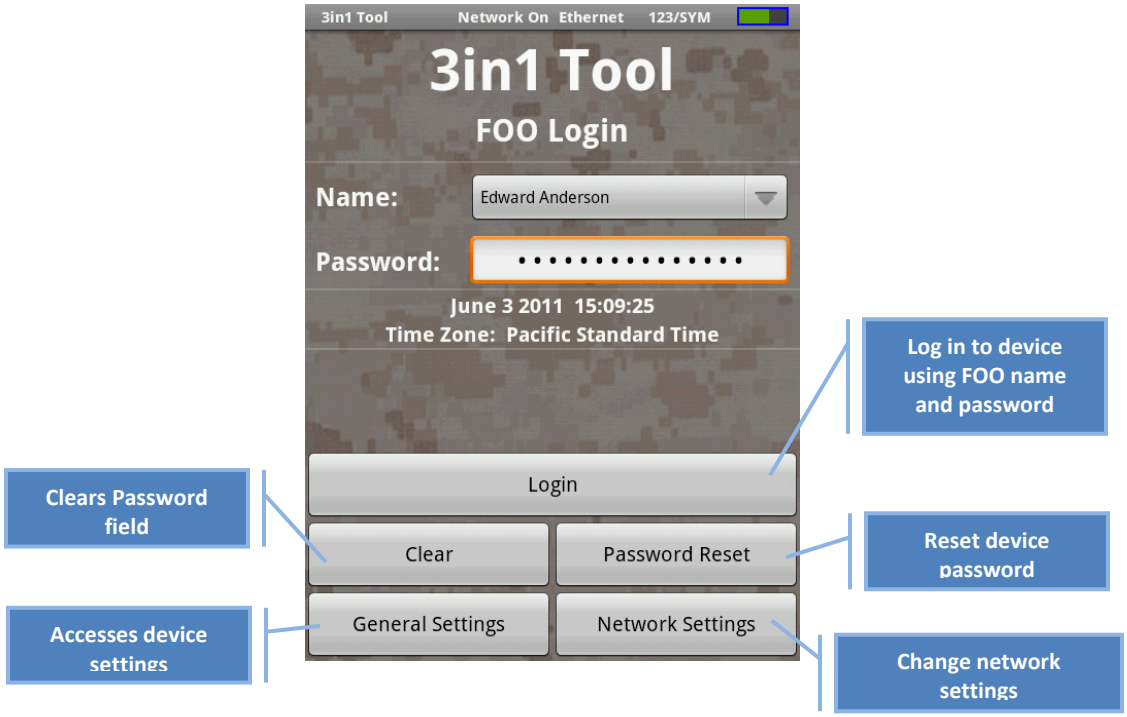
with device functions.

After you unlock the device, the *Consent Provision* screen is displayed. Tap the **Accept** button.

The *Login* screen is displayed. The device detects the role of the user attempting to log in.

Follow these steps to log in:

1. Select your name in the **Name** field. (For Demo Mode, select **Demo Name**)
2. Enter your password in the **Password** field. The device password should be the same as the Workstation login password. (All Demo Mode passwords are: **hello**).
3. Tap **Login** (which is disabled until a password is entered). The *Dashboard* is displayed.



Note: If this is the first time you are using the 3in1 Tool on this device, or after a reset to factory or a software update, you will need to log in and download and install provisioned user data, assigned purchase requests, procurement controls, PIIN blocks, and all other necessary data to the device. See *Module 7: Activating Devices for FOO/PA Teams, Lesson 2: Downloading Data to the 3in1 Device.*

Password Security

Passwords are used in several areas of the device: when a FOO or PA logs in to the device and later, during the order process. In the event that an incorrect password, or there is a need to reset a password, please read *Module 15: Device Management Tools, Lesson 1: Resetting a Password on the Device and Workstation.*

The FOO and PA Device Dashboards

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 are 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, an 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.

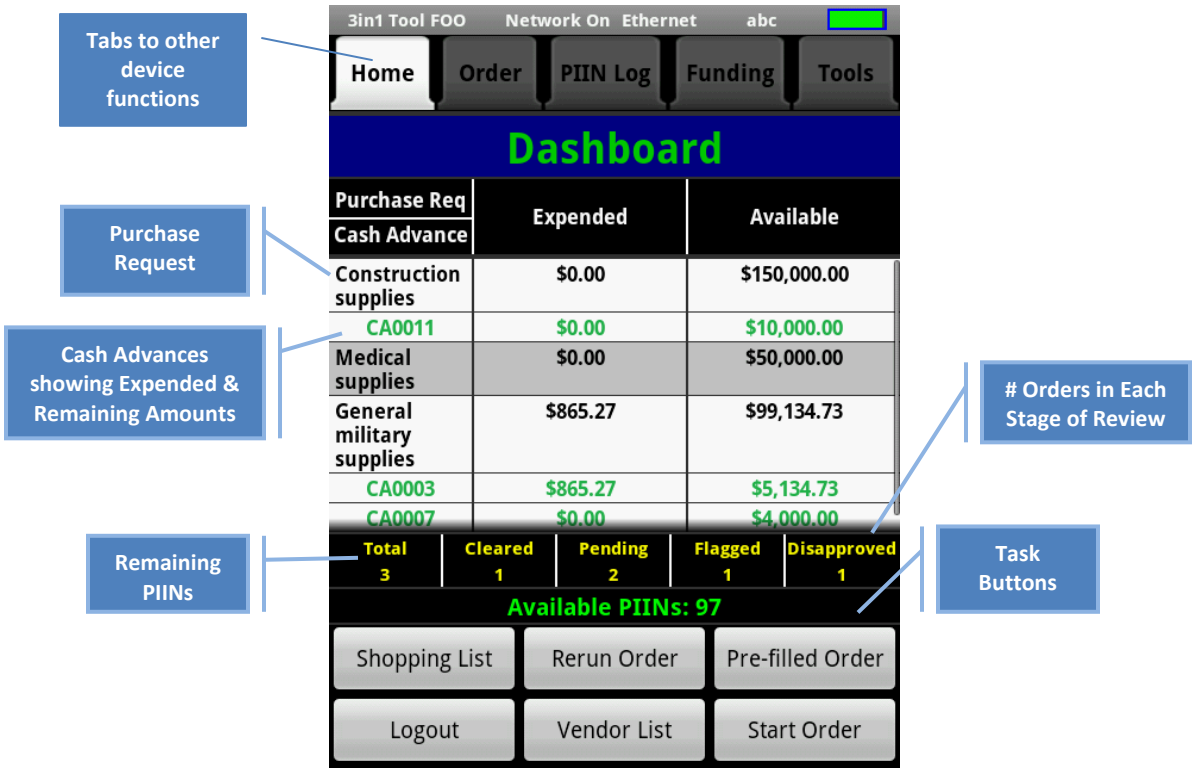
The Dashboard Features

The device ***Dashboard*** is the main screen where you can access the main features of the device application. The FOO and PA roles have different responsibilities and consequently have slightly different *Dashboard* screens, although they share many features. The FOO Dashboard is shown in this section. The Paying Agent *Dashboard* is shown later in this lesson.

The *Dashboard* screen is accessed through the **Home** tab. The *Dashboard* screen displays 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 in 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.

Towards the bottom of the screen, a count of the available PIINs is displayed. In the following figure case, the FOO has 92 PIINs available. If the number is low, the FOO should request additional PIINs from his Contracting Officer. If the number of available PIINs is zero, the FOO cannot place orders.



FOO Dashboard Screen

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 on *the Purchase Request Details* screen. The Funding tab is used by the Paying Agent to return, exchange and add cash advances. The FOO or PA can view and print cash advance details and attach documents. See *Module 9: Ordering Features on the Device*, *Lesson 2: Managing Cash Advances on the Handheld Device*.
Tools	Accesses device tools such as the calculator and currency converter. See *Module 16: 3in1 Device Tools & Settings, Lesson 1: Device Tools.*

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

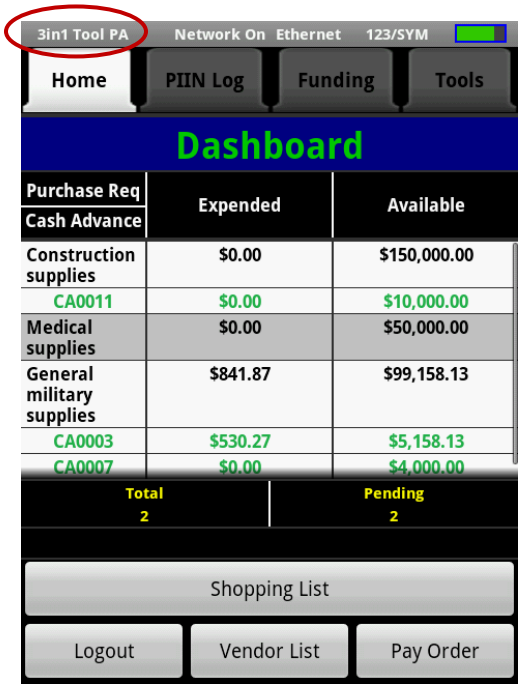
Review Stage	Definition
Cleared	Orders that have been approved, meaning they have been cleared by all reviewers.
Pending	Orders in process or waiting to be reviewed.
Flagged	Orders for which a reviewer has raised an issue or question that needs to be addressed.
Not Sent	Orders that the device has not 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.
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.
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.
Start Order	Creates an order. See *Module 8: The Ordering Process, Lesson 1: Making a Purchase*

FOO vs. 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

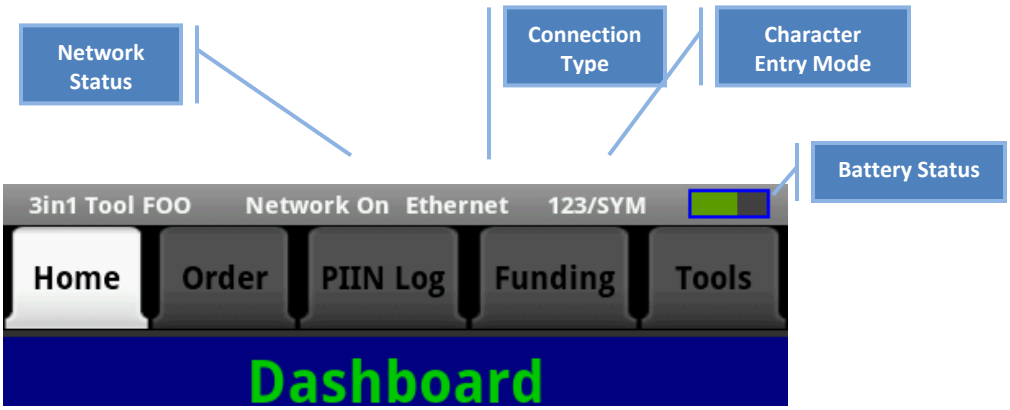
Field Ordering Officer Dashboard

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 PA has additional functions under the Funding tab. See *Module 9: Ordering Features on the Device*, *Lesson 2: Managing Cash Advances on the Handheld Device*.

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:



Device Status Bar

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 authorizing GSM or Wi-Fi use on a device, see *Module 2: Hardware/Application Setup, Lesson 1: Registering & Approving New Devices*. To read about the other types of network settings on the device, see *Module 16: 3in1 Device Tools & Settings, Lesson 2: 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
SHIFT	Use the SHIFT button to switch between lowercase/uppercase English alphabet characters.
	Use the **Toggle (Character)** change button to switch between letters and symbols/numbers.

Features of the Purchase Details Screen

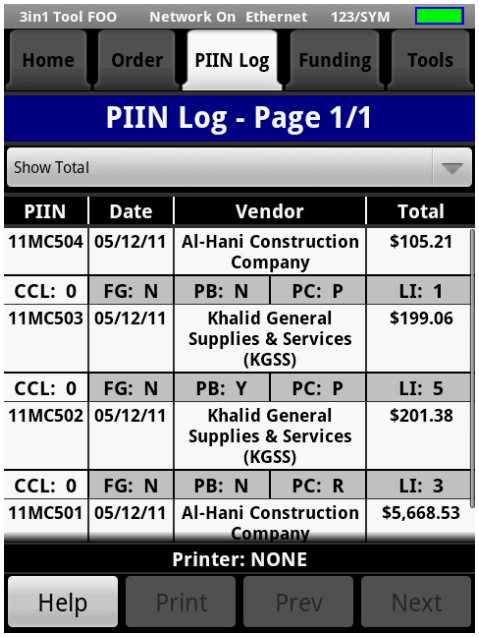
Another key screen that FOOs and PAs will use frequently is the *Purchase Details* screen. The *Purchase Details* screen lists items in a purchase order. Use the buttons on this screen to perform the following actions. See *Module 8: The Ordering Process, Lesson 1: Making a Purchase* for details.

- **Return Order** - Return a purchase order (Available to FOOs only)
- **Print** - View and print an SF44
- **Signatures** - View the signatures and confirmation of all parties who participated in the transaction. None of this information can be edited
- **Location** - Capture the GPS coordinates
- **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

- **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

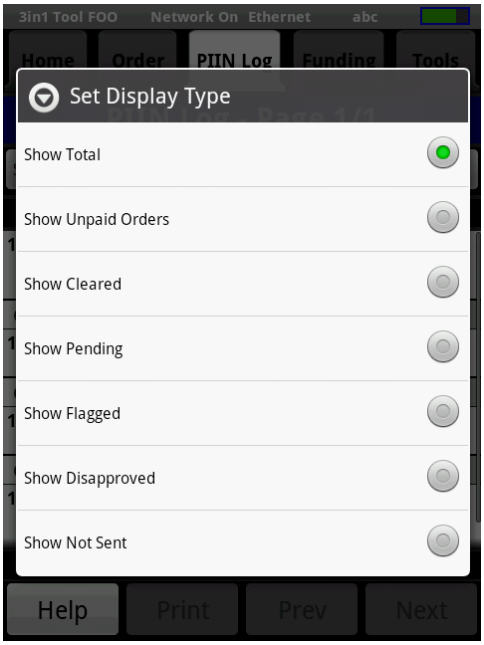


Use the PIIN Log tab to view purchase history and perform the following tasks:

- 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 filter selector at the top of the screen:

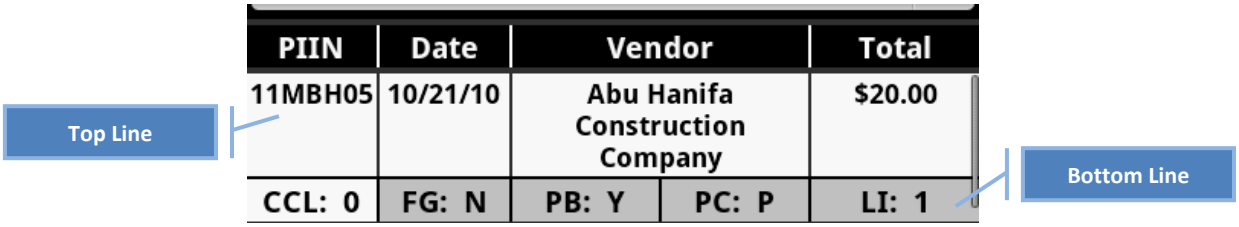


- **Show Total**: Show all the orders in the device.
- **Show Unpaid**: Orders that have not been paid.
- **Show Cleared**: Orders that have passed all the clearance offices.
- **Show Pending**: Orders that have not yet been cleared.
- **Show Flagged**: Orders that have been flagged by a clearance office.
- **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.

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 16: 3in1 Device Tools & Settings, Lesson 2: Device Settings.*

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



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

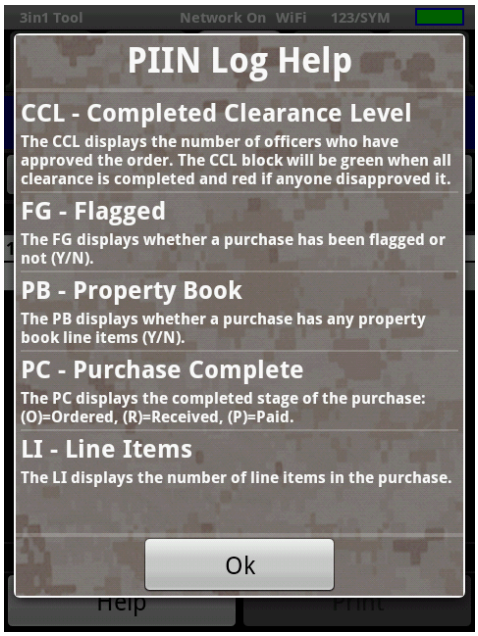
Top Line Information	Description
PIIN	The last seven digits of the PIIN, which begins with the fiscal year and followed by the contract type "M" or "W," a two-character FOO ID, and a two-digit serial for the orders. To view the entire 13-character PIIN, use the View PIIN Blocks setting, explained *in Module 16: 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 handwritten for non-device (manual) orders. 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	Vendor name
Total	Order total amount paid for that 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

Bottom Line Information	Description
	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.



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 16: 3in1 Device Tools & Settings, Lesson 2: 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 the user 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 tap **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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Module 4: Registering New Devices

Lesson 1: Registering & Approving New Devices

Objectives

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

- ❑ Launch the 3in1 Tool on the handheld device
- ❑ Set the date and time on the device
- ❑ Select network settings to connect the device to the Workstation
- ❑ Describe the terms of the IS User Agreement
- ❑ Describe the device ID and its importance
- ❑ Register new devices in the Workstation
- ❑ Approve devices in the Workstation
- ❑ Enable GSM or Wi-Fi Radio settings for a device

First Time Use of the 3in1 Device

Note: *Registration and approval is required only when 3in1 is launched on the device for the first time. A new launch of 3in1 also takes place after the "Reset to Factory Settings" command is used, and when changing between training and live environments.*

It is assumed that Contracting Officers will follow the process of registering, approving, and assigning new 3in1 devices to FOOs. The Contracting Officer is expected to sit at the Workstation with each new device and go through the process of:

1. Selecting the network connection (typically Ethernet)
2. Registering the device with the Workstation
3. Approving the device in the Workstation
4. Assigning a FOO/PA team to the device

After that, the FOO can log into the device and download order data.

New and unregistered devices have GSM and Wi-Fi disabled by default. Select either a USB or Ethernet network connection to the Workstation. You can later authorize GSM or Wi-Fi use, and then change the network connection type on the device.

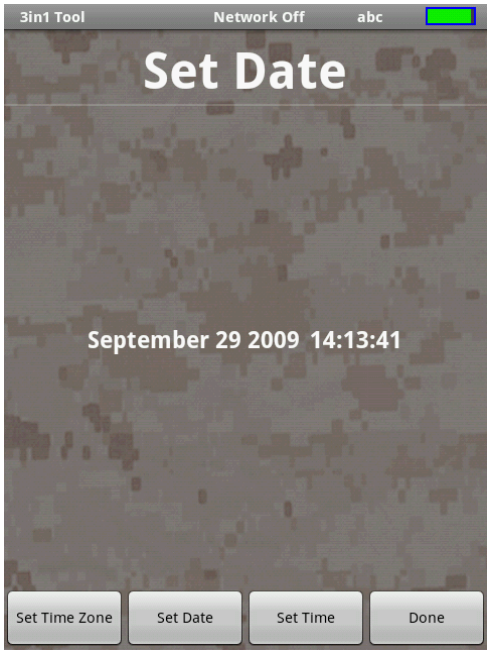
In a situation where a device has a GSM chip installed, and GSM service has been authorized, is active and a signal is found, the device will set its time and time zone automatically from the GSM signal; the ***Set Date*** screen as described below, would not display.

Set Date and Time on the Device

After you power up the device for the first time, it will prompt you to set the date and time. Accurate date, time, and time zone settings are absolutely 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. Although the date and time is factory set on the device, they need to be reset for the specific time zone in which the device will be used.

Follow these steps to set the date and time:

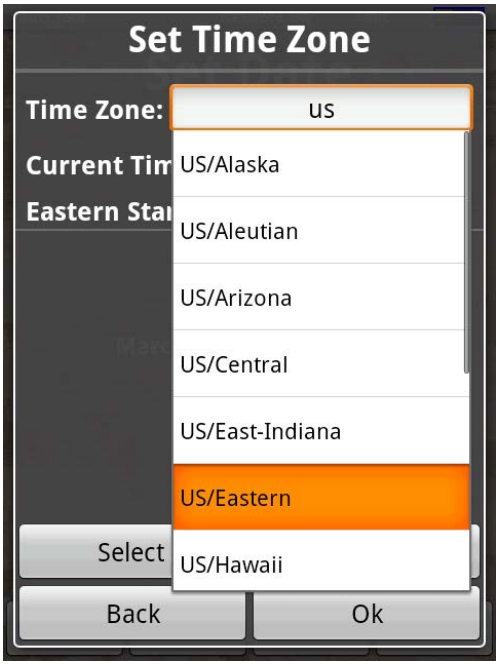
1. Power on the 3in1 handheld device.
   - The device *Unlock* screen is displayed when the **Power** button is pressed.
2. Using the stylus pen or your finger, slide the padlock icon to the right. This will unlock the device.
   - The initial time and date screen is displayed, as shown below.
3. Set the time zone to your local time zone by tapping the **Set Time Zone** button with your finger or the stylus.



Set Date Screen

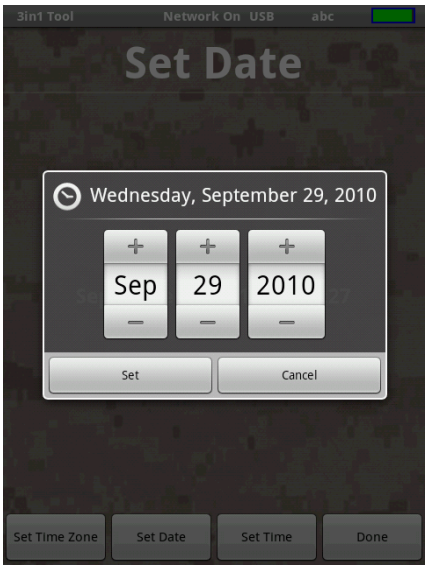
4. In the *Set Time Zone* dialog box, start to enter the correct time zone. The auto-complete list will appear when enough characters have been entered. Select OK after the time zone has been entered.
   - If the time zone name is not known, select **Select Time Zone From List**. Tap the selector arrow and select the correct time zone. There are over two hundred

time zones supported by the device, so it may be necessary to scroll up and down by dragging your finger up and down in the selector area.

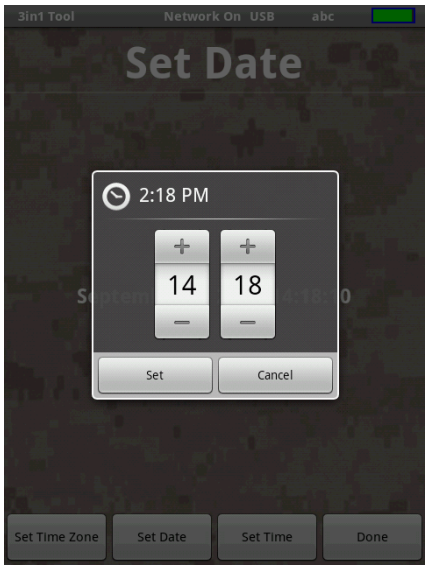


Selecting a Time Zone

5. Tap the radio button beside the appropriate time zone.
6. Tap the **Ok** button on the *Set Time Zone* screen.
7. Tap the **Set Date** button at the bottom of the *Set Date* screen.
8. Set the date by pressing buttons with your finger or the stylus. Use the plus and minus buttons to change the month, day of month, and year. Tap **Set** to save the date currently displayed.
9. Set the time by tapping the **Set Time** button at the bottom of the screen.
10. Set the time by pressing buttons with your finger or the stylus. Use the plus and minus buttons to change the month, day of month, and year. Tap **Set** to save the time currently displayed.
11. When the time zone, date, and time are all set correctly, tap the **Done** button at the bottom of the screen. These values can also be changed later if necessary.



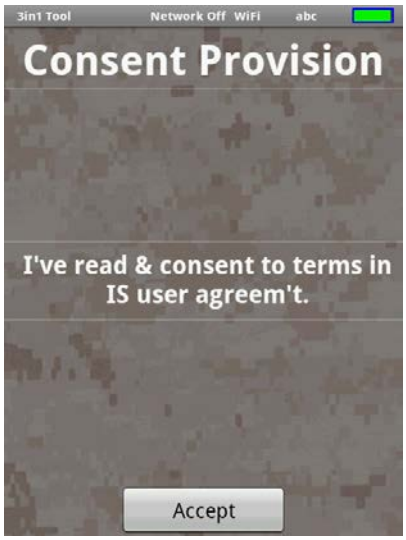
Setting the Date



Setting the Time

Review the Consent Provision Screen

After the initial time and date setting process, the device displays the *Consent Provision* screen. Every time the device is started, the *Consent Provision* screen is displayed first.



Consent Provision Screen

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. Read the IS user agreement text provided in *Appendix D: IS User Agreement* before tapping the **Accept** button on the *Consent Provision* screen.

The Out of the Box Screen

The *Out of the Box* screen is displayed after the Consent Provision screen when the device is used for the first time or after a reset to factory. Use the **Network Settings** button to establish a connection to the 3in1 Tool Workstation and register the device.

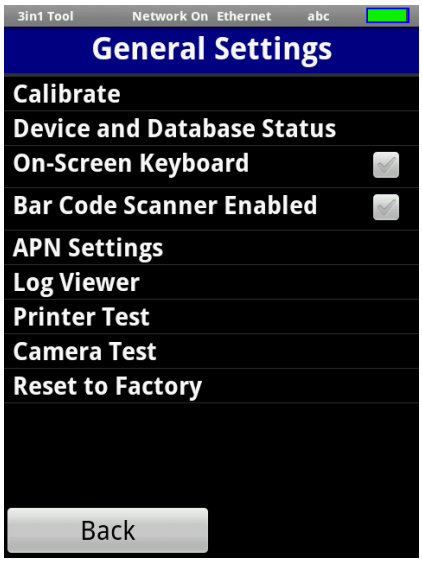
The other buttons on the *Out of the Box* screen are:

Register Device – Select this after establishing network connection, to register the new device ID in the 3in1 Workstation so it can be approved and assigned to a FOO/PA team. Note that the device must be registered in order to download the most recent 3in1 software updates.

Demo Mode – Enables users to practice using device features with sample data. Actions performed in Demo Mode are unconnected to the Workstation or any database. See *Module 16: 3in1 Device Tools & Settings, Lesson 3: Using the Device Demo Mode* for details.

Connect to – Identifies the database with which the device will communicate. It can be changed to point to other databases that serve specific functions.

General Settings – Provides access to the following device settings that can be set upon initial use of the device:



Calibrate: Ensures the coordinates of the point of contact with the screen are the same coordinates read by the software. Touch the cross-hairs that appear on the screen. When the calibration tool is launched, do not turn off the device without completing the process.

Device and Database Status: Displays key information about the device.

Note: If the device has not been fully registered and approved, selecting the **Device and Database Status** option will display a message prompting the user to complete the registration process.

On-Screen Keyboard: Toggle the on-screen keyboard on/off by marking/unmarking the checkbox.

Bar Code Scanner Enabled: Enables/Disables the device bar code scanner feature, which is used to capture UPC numbers of items purchased.

APN Settings: If GSM is enabled on the Workstation and device, it is necessary to configure the Access Point Name (APN) using technical information from the GSM provider. On the

device *General Settings* screen shown earlier, select **APN Settings**. See *Module 16: 3in1 Device Tools & Settings, Lesson 2: Device Settings* for details.

Log Viewer: A de-bugging tool to be used by technical support.

Printer Test: Prints a test page if the small printer is connected to the device.

Camera Test: Enables users to detect and resolve camera issues before going to a merchant's location.

Reset to Factory: Reserved for use by system administrators only.

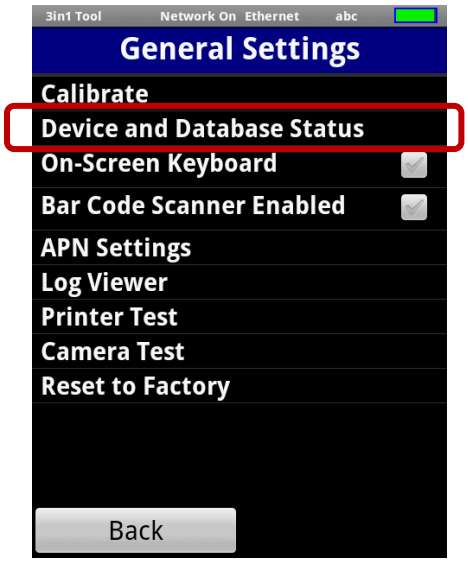
Note the options on this menu differ from the one available when you select *General Settings* on the **Tools** tab. See *Module 16: 3in1 Device Tools & Settings, Lesson 2: Device Settings*.

Important Security Check during First-Time Device Use

A security check MUST be performed when the device is used for the first time.

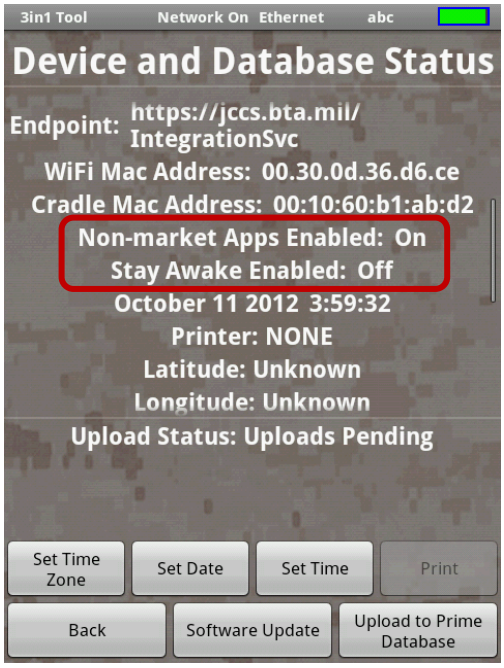
Verify the following settings:

1. On the *Out of the Box* screen, tap the **General Settings** button.
2. On the *General Settings* screen, tap **Device and Database Status**.



3. On the *Device and Database Status* screen, verify the **ADB Enabled** setting is **OFF**. This prevents the installation of unauthorized apps on the device.
   - If the setting is set to ON, contact the help desk before using the device.

4. 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.
5. 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. **<u>Do not use the device</u>**.
   - Setting **Stay Awake Enabled** to **Off** also conserves the device battery life.

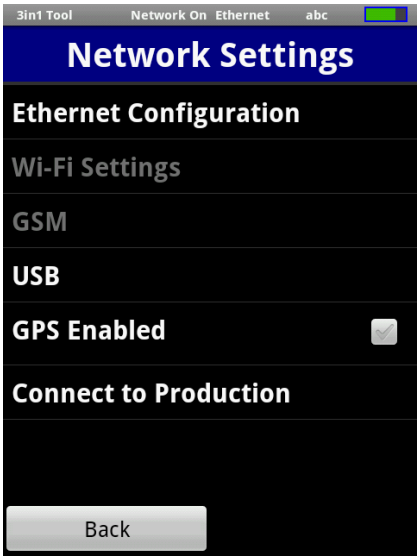


Select Network Settings

Now you are ready to connect the device to the 3in1 Tool prime database so that the device ID can be registered and the device can be approved for use and provisioned to a FOO.

To access the device network settings:

1. From the *Out of the Box* screen, tap **Network Settings**.
2. On the *Network Settings* screen (shown on the right), select a connection type.



***Note*:** The only network settings that can be selected at this point are Ethernet and USB. For security reasons, wireless communication is disabled on new devices, by default. When each individual device is provisioned on the Workstation, wireless communication can be enabled. After provisioning data is received, and if Wi-Fi and/or GSM is enabled, these connection methods can also be used. Also, **GPS Enabled** is not a network setting. It allows capture of the current latitude and longitude of the device. See *Module 16: 3in1 Device Tools & Settings, Lesson 1: Device Tools*.

USB Setting

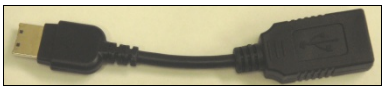
The USB setting does not require configuration. Simply tap **USB** on the screen shown on the right. In the subsequent pop-up that is displayed, select the **Enable** check box.

Ethernet Setting

The most common connection type is 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.

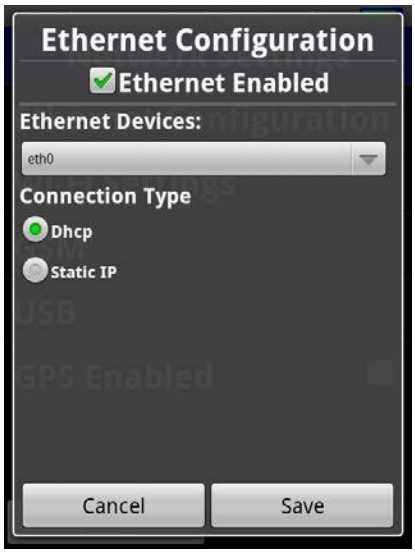


2. Plug the Ethernet to the adapter shown to the right. The completed connection is shown below.

   – Note the three indicator lights on the adapter. From left to right, the lights are: **Full/Half, 10/100** and **Link/ACT**.
   – The light labeled “10/100” is displayed if it is connected to a 100MB (“fast”) Ethernet network. Almost all networks today are 100MB, full-duplex. However, 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. Tap 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 at the bottom of the screen.



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 <u>not</u> 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.

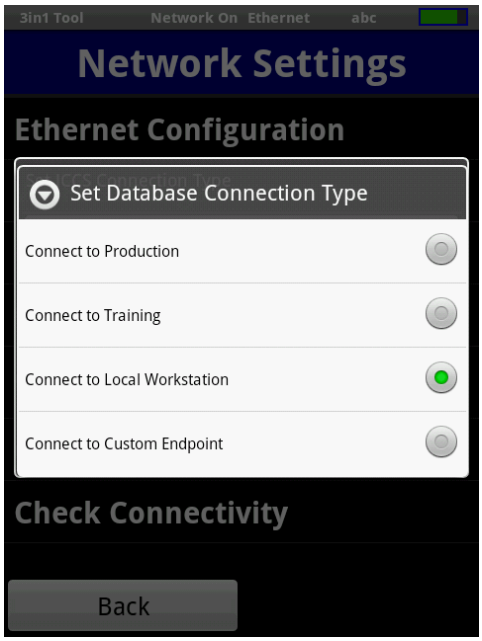
Database Environments

The 3in1 tool is used to capture and record field purchase data. However, it is also used for training and testing purposes. During training and development of the 3in1 system, a different but similar database is used. By default, the database environment is set to **Connect to Production**. Database environment options include:

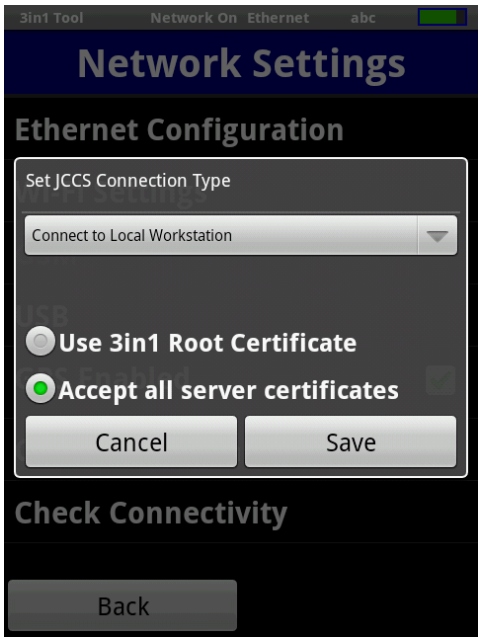
- **Connect to Production** – This environment records actual transactions made by Field Ordering Officers during use of the device in theater. The device will default to the Production (live) database.
- **Connect to Training** – This environment can be used by Field Ordering Officers, Paying Agents and any other user roles while they learn to use the 3in1 system. The 3in1 Workstation must also be changed to use the Training database.
- **Connect to Local Workstation** –This option is used to transfer orders and clearance information directly from a device that is physically connected to a Workstation computer, when the user intends to work offline for a period of time.
- **Connect to Custom Endpoint** – This environment is used only by the developers of the 3in1 system or when directed by a 3in1 system administrator.

To select the environment you wish to connect to:

1. Tap **Connect to Production** on the *Network Settings* screen (or whatever is the current setting; for example, **Connect to Local Workstation**).
2. From the **Set Database Connection Type** drop-down list, select the database you want to connect.
3. Accept the default setting of **Accept all server certificates** (unless otherwise instructed by an administrator).
4. Tap **Save**.

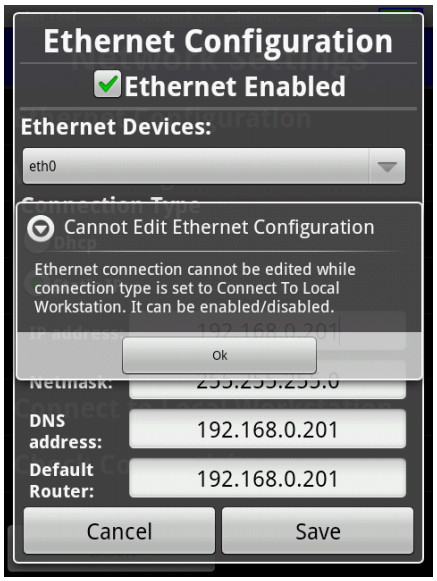


First select the database for connecting the device



Then select *Accept all server certificates* and tap Save

When the device is connected to the local Workstation via Ethernet, the following warning message will be displayed if an attempt is made to edit the Ethernet connection.



Warning displayed when attempting to edit Ethernet configuration

About Device IDs

The handheld device ID is set at the factory and cannot be changed for the entire lifetime of the device. Each device has a unique ID. The device ID is displayed on specific screens, and is printed on the exterior of the 3in1 handheld device. This number is used to identify the device in the 3in1 Workstation.

If a device is retired, its ID can be deleted in the Workstation. In the event a device is misplaced, its ID can be deleted in Workstation. This will prevent the device from communicating with the 3in1 prime database. If the device is recovered later, it will have to be registered again.

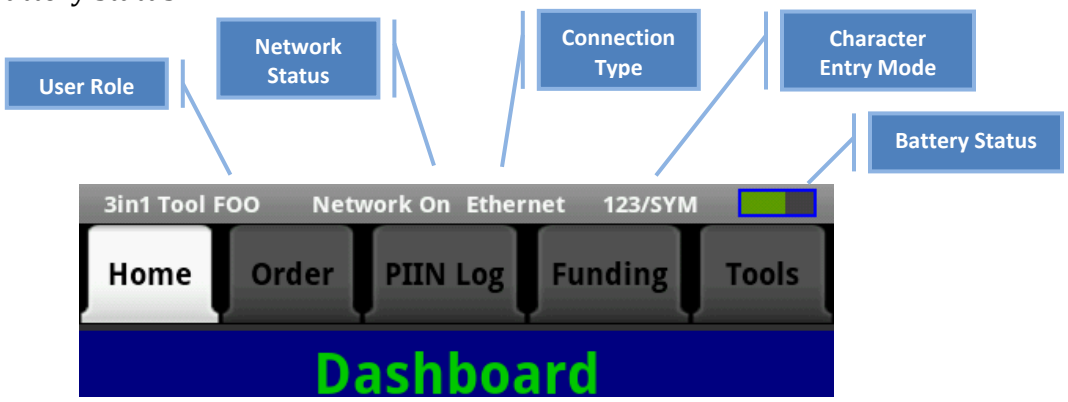
Verify Network Connection on the Status Bar

To verify a network connection has been established, check the Status Bar at the top of the device screen. 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 authorizing GSM or Wi-Fi use on a device, read the next section. To read about the other types of network settings on the device, see *Module 16: 3in1 Device Tools & Settings, Lesson 2: Device Settings*.

From the Status Bar you can determine:

- The network status
- The connection type
- The character entry mode
- The battery status



Status Bar on the 3in1 Handheld Device

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.

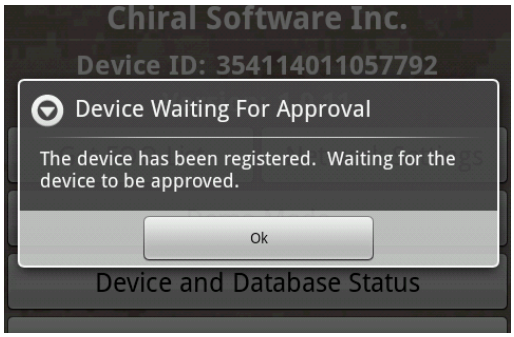
Character Entry Mode refers to the current keyboard setting. Four types of characters can be entered.

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

3in1 Device Buttons	Function
SHIFT	Use the SHIFT button to switch between lowercase/uppercase English alphabet characters.
	Use the Toggle (Character) change button to switch between letters and symbols/numbers.

Register the Device

After establishing a network connection, tap the Register Device button on the *Out of the Box* screen. At this point, the device attempts to communicate with the 3in1 Tool Workstation and send its device ID. Once the device has been registered, a message is displayed, indicating the device is awaiting approval.



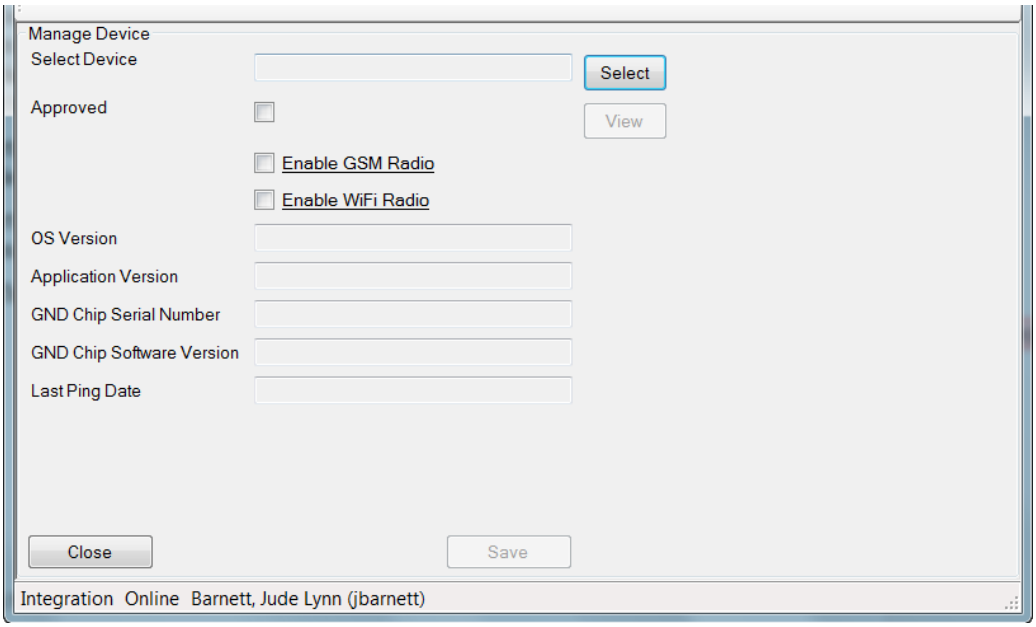
In the 3in1 Tool Workstation, the device ID will appear in the list of Unapproved devices. See the next section for steps to approve a device for use.

Approving Devices in the 3in1 Tool Workstation

Each new handheld device must be registered in the 3in1 Workstation prior to being assigned to a FOO and PA team. As described earlier, as soon as a network connection is established between a new device and the 3in1 Tool Workstation, the device transmits its device ID number. The new ID number is added to the list of unapproved devices (under **Device Management** in the 3in1 Tool Workstation main menu). The Contracting Officer can then select and approve the device for provisioning to a FOO.

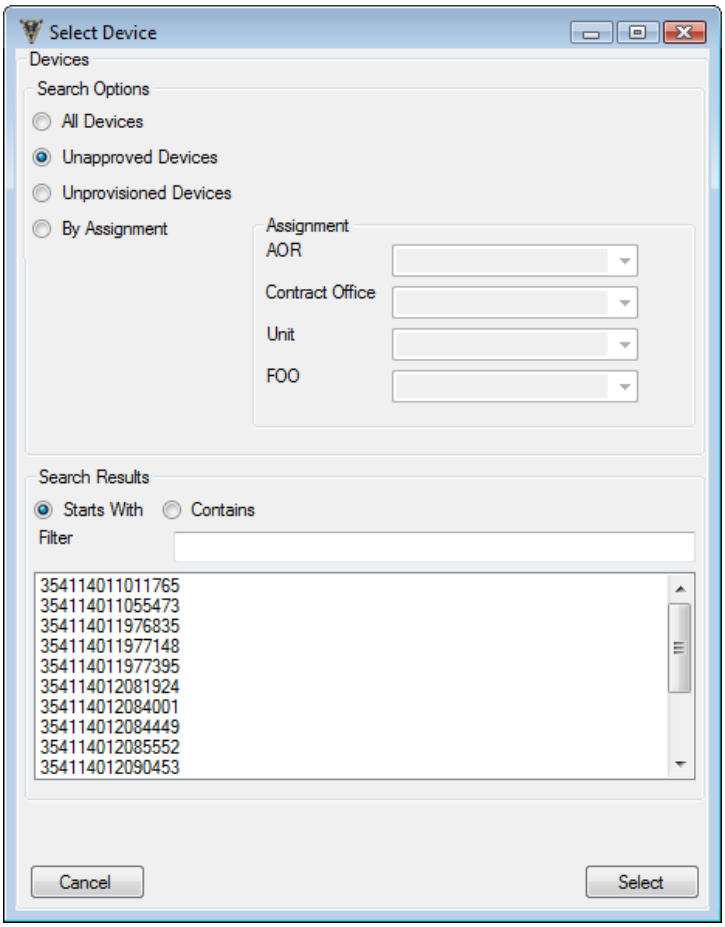
The Contracting Officer can review and approve newly-registered devices by following these steps:

1. Select **Device Management**, **Approve Devices** from the main menu.
   - The *Device Management* window opens.



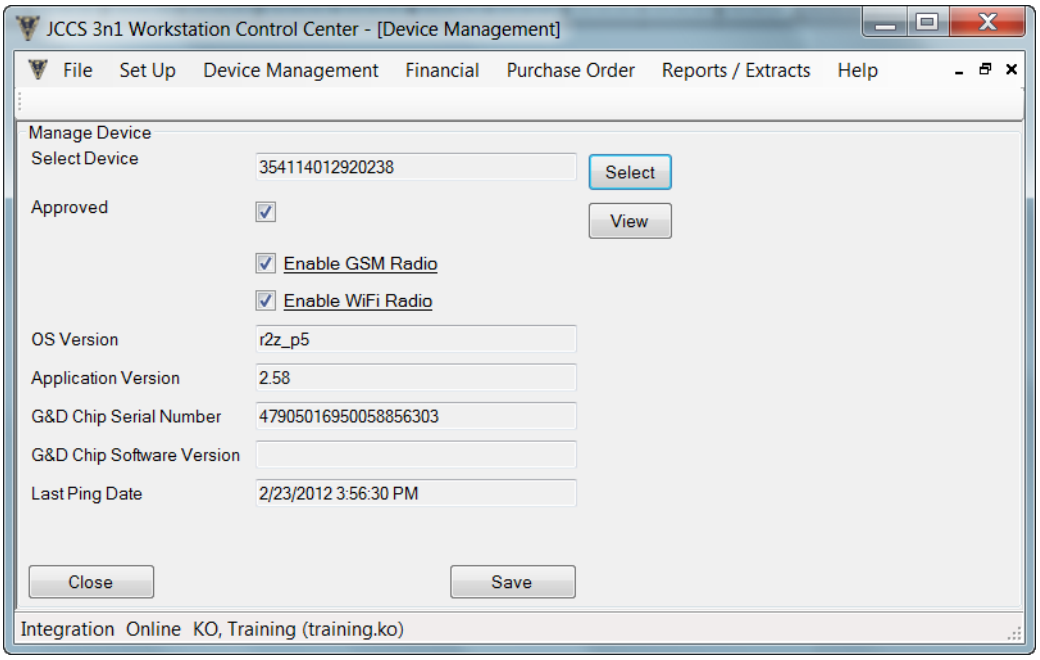
Select a device to approve using this screen

2. Click the **Select** button.
   – The *Select Device* window opens.
3. In the *Select Device* window, click the **Unapproved Devices** radio button.
   – The list of devices at the bottom of the window updates.



Select from the list of unapproved devices

4. Select a device from the list.
5. Click the **Select** button.
   - The window closes and the selected device is displayed in the *Device Management* window.
6. Select the **Approved** check box.
   - If applicable, enable **GSM** or **Wi-Fi** radio for the device by clicking the appropriate check box. This setting can be changed during provisioning, but note that the radio setting applies to all FOOs who are loaded on the same device.
   - You will also need to change the network settings on the device to GSM or Wi-Fi. See *Module 16: 3in1 Device Tools & Settings*, *Lesson 2: Device Settings* for details.



Approved 3in1 Handheld Device

- Optionally view the device validation certificate by clicking the **View** button.
- Other fields are filled in using information downloaded from the device: **Device Operating System**, **Application Version**, **GND Chip Serial Number** and **Software Version**, and **Last Ping Date**. Last Ping Date refers to the most recent date when data was transferred between the device and Workstation.

7. Click the **Save** button.

Next Steps

After the device has been successfully registered and approved on the Workstation, the next step is provisioning the device to a FOO/PA team, and downloading user data to the device. See *Module 7: Activating Devices for FOO/PA Teams, Lesson 1: Provisioning Devices from the Workstation* and *Lesson 2: Downloading Data to the 3in1 Device for the First Time.*

Lesson Summary

In this lesson, you learned to:

- ❑ Launch the 3in1 Tool on the handheld device
- ❑ Set the date and time on the device
- ❑ Select network settings to connect the device to the Workstation
- ❑ Describe the terms of the IS User Agreement
- ❑ Describe the device ID and its importance
- ❑ Register new devices in the Workstation
- ❑ Approve devices in the Workstation
- ❑ Enable GSM or Wi-Fi Radio settings for a device

Part 2: Contingency Operation Setup

Module 5: Managing 3in1 Workstation Users

Lesson 1: Registering New Users

Objectives

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

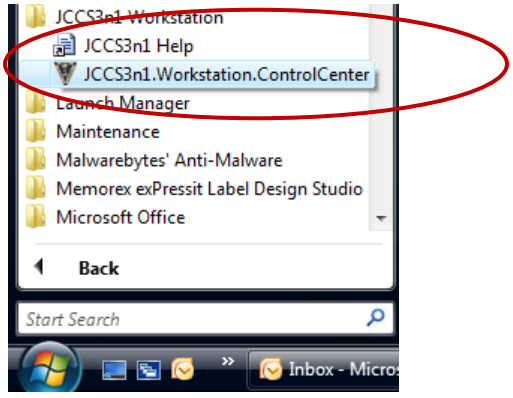
- ❑ Register new users in the 3in1 Tool Workstation
- ❑ Identify various roles used in the Workstation
- ❑ Identify the features that can be accessed by each role
- ❑ Request a role assignment for a new user
- ❑ Upload supporting documents for a new user

Registering a New User

Each 3in1 user must be registered with a user ID and password. The feature for registering a new user may be accessed from the 3in1 Workstation Logon window or from the JCCS web site.

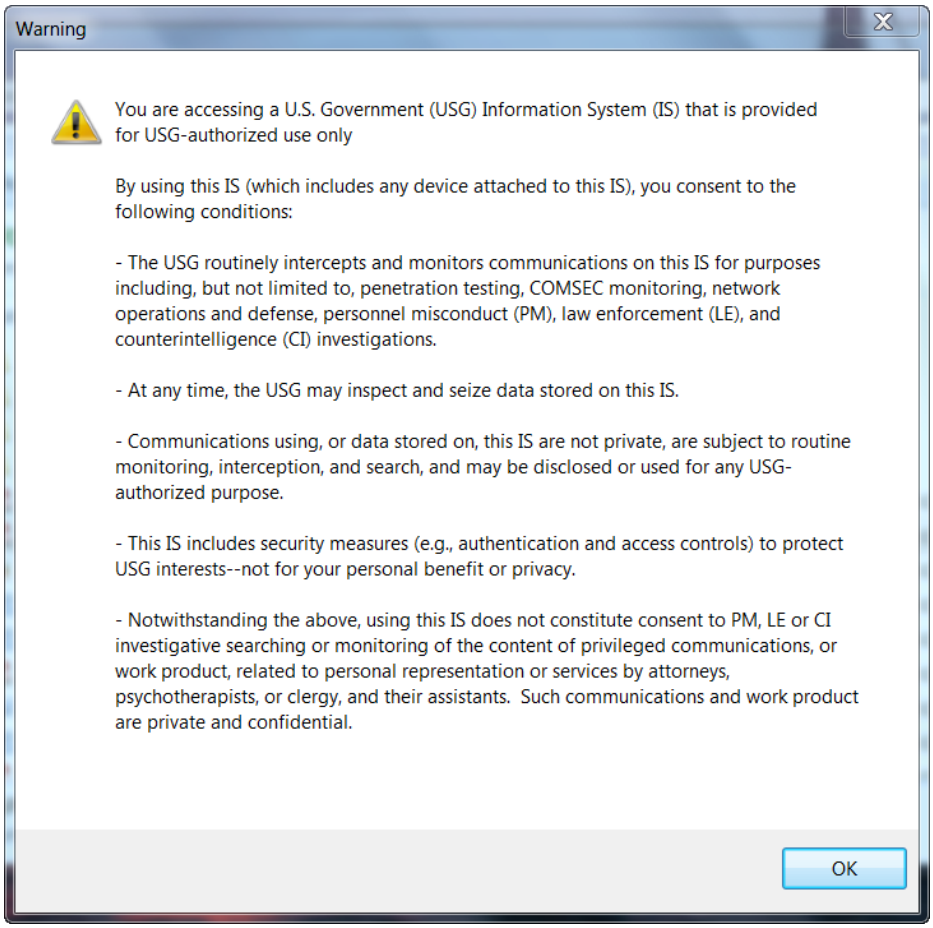
To register a new user from the 3in1 Workstation Logon window:

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



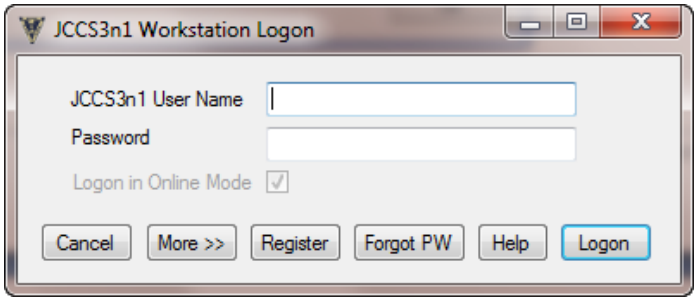
Start, All Programs, 3in1 Tool Workstation

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.

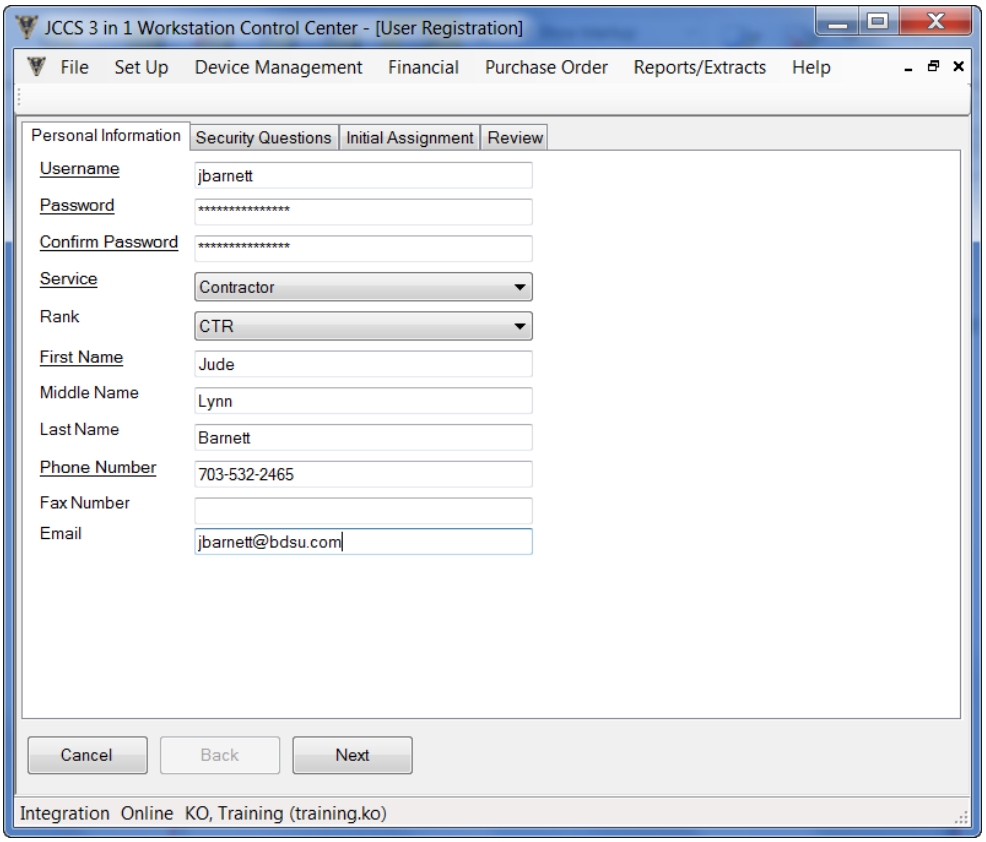
4. Provide information on the **Personal Information**, **Security Questions** and **Initial Assignments** tabs, then verify your information on the **Review** tab.

System Administrators and Contracting Officers can register new users by selecting **File**, **Register New User** from the main menu.

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.
   - The email address will be used for all system notifications, such as orders sent to your queue for clearing.
2. Click the **Next** button to display the **Security Questions** tab.



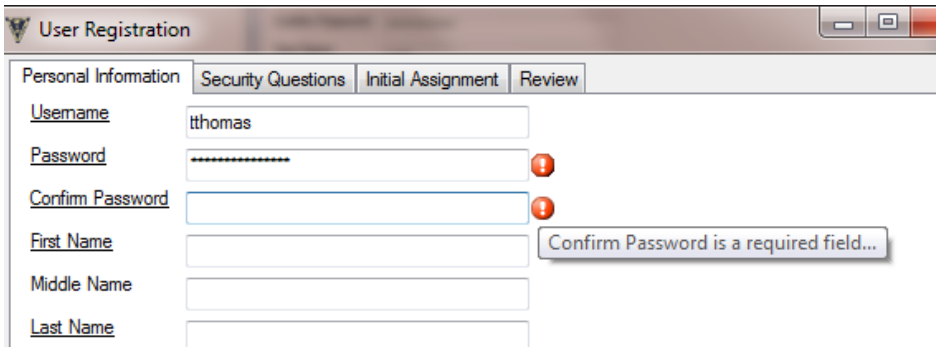
User Registration Personal Information Tab

The following rules apply to creating passwords in the 3in1 Tool Workstation, including the Personal Information screen, which is displayed when a new user registers.

- 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

– An administrator can change passwords at any time

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



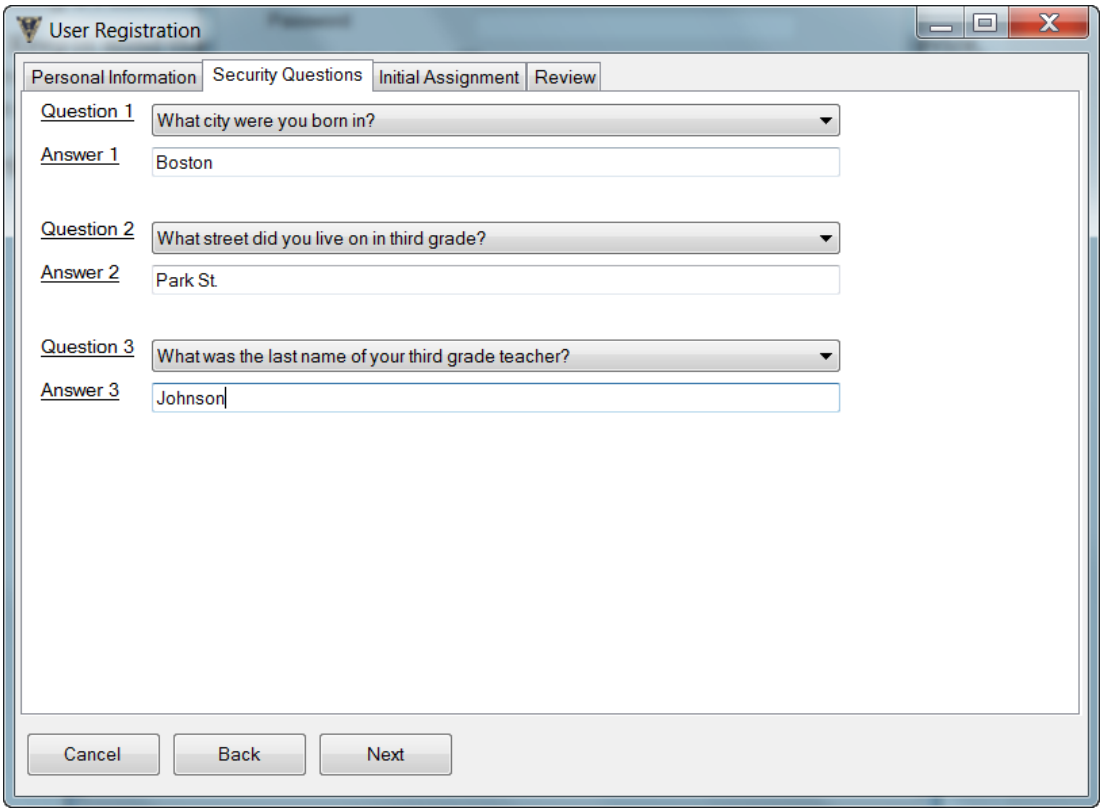
Complete required fields in order to advance to the next screen

Workstation Password Also Used on 3in1 Device

When FOO/PA users register on the Workstation and create a password, this password will be sent to the device for the initial log in by the FOO and PA. After initial provisioning, passwords are maintained separately by the Workstation and the device. FOOs and PAs will have to update each application as required. Later, if there is a need to reset the password on the device or Workstation, please refer to *Module 15: Device Management Tools, Lesson 1: Resetting a Password on the Device and Workstation*.

Note: Only the following special characters can be entered on the device. Include only these special characters in new passwords that will be used on both the device and Workstation: ! $ + - : / % ( ) ; “ # = & ‘ * ? @ ,

Security Questions

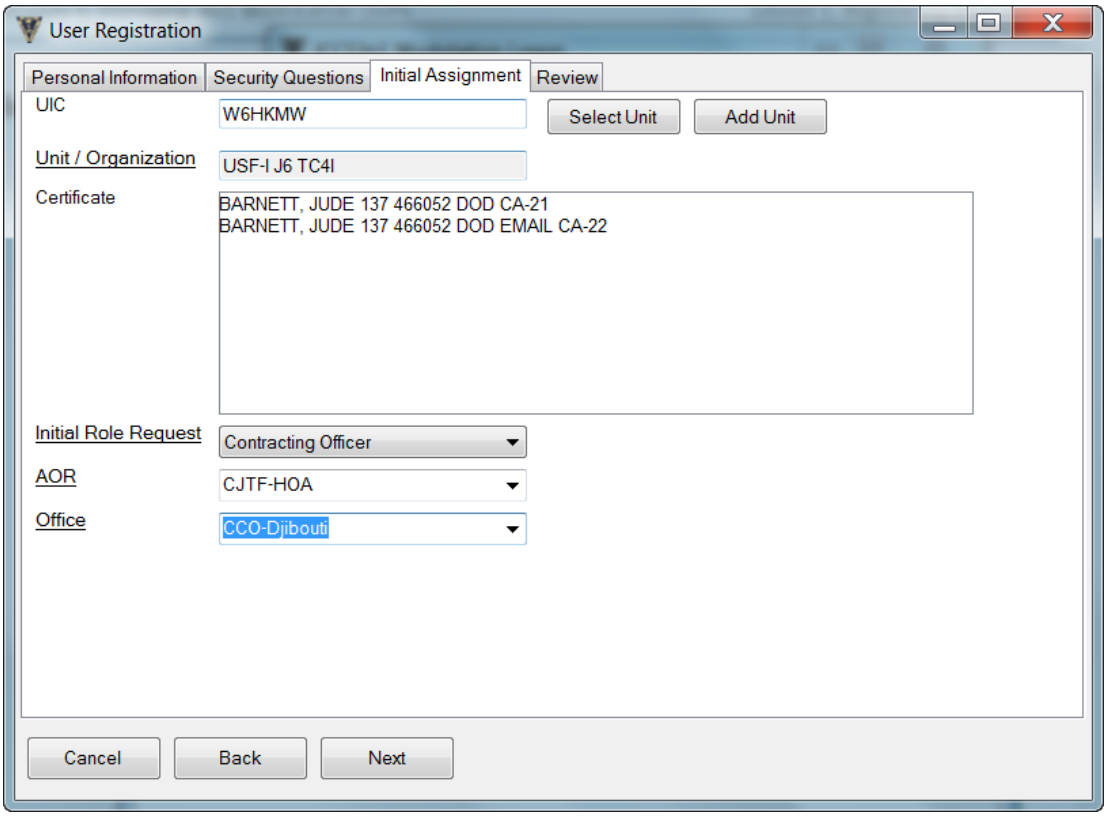


User Registration – Security Questions Tab

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

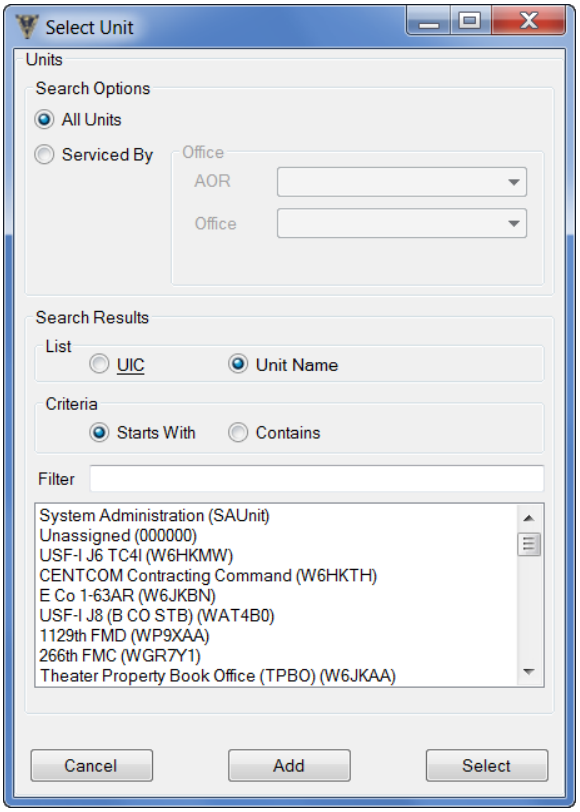
In the **Initial Assignment** tab, specify your Unit Identification Code (UIC), which is a six-character, alphanumeric code that uniquely identifies each Active, Reserve, and National Guard unit of the Armed Forces for the contingency operation.



User Registration – Initial Assignment Tab

To select an existing UIC:

1. Click the **Select Unit** button.
   - The *Select Unit* window is displayed.
2. 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.
3. Under **Search Results**, choose to display the search results by UIC or unit name.
   - The list of units updates to match the specified criteria.
4. Select a unit from the list, then click the **Select** button.
   - The UIC and corresponding unit/organization display.

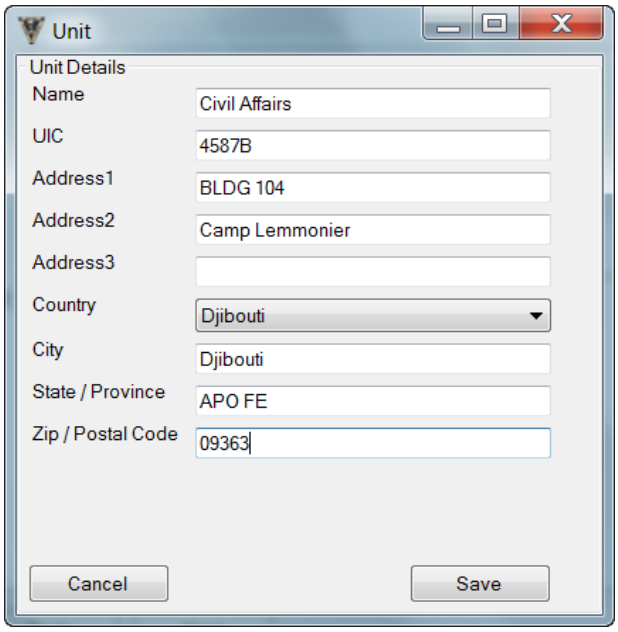


Alternatively, you may need to enter a new unit into the system, or you may be assigned to a

non-DoD specified unit without an assigned UIC.

To 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 Unit Window

Initial Role Request

Each 3in1 Workstation user must have an assigned role. 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, FOO, 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 and appointed by a Contracting Officer, has been trained, is qualified and appointed in writing to

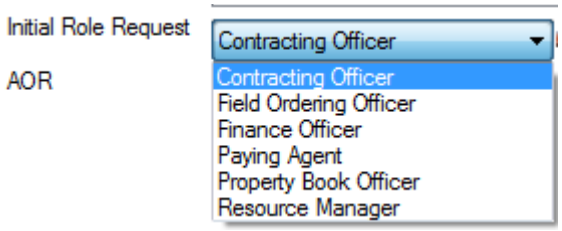
make purchases using the 3in1 Tool, using data provisioned to the 3in1 device by the KO.

- **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

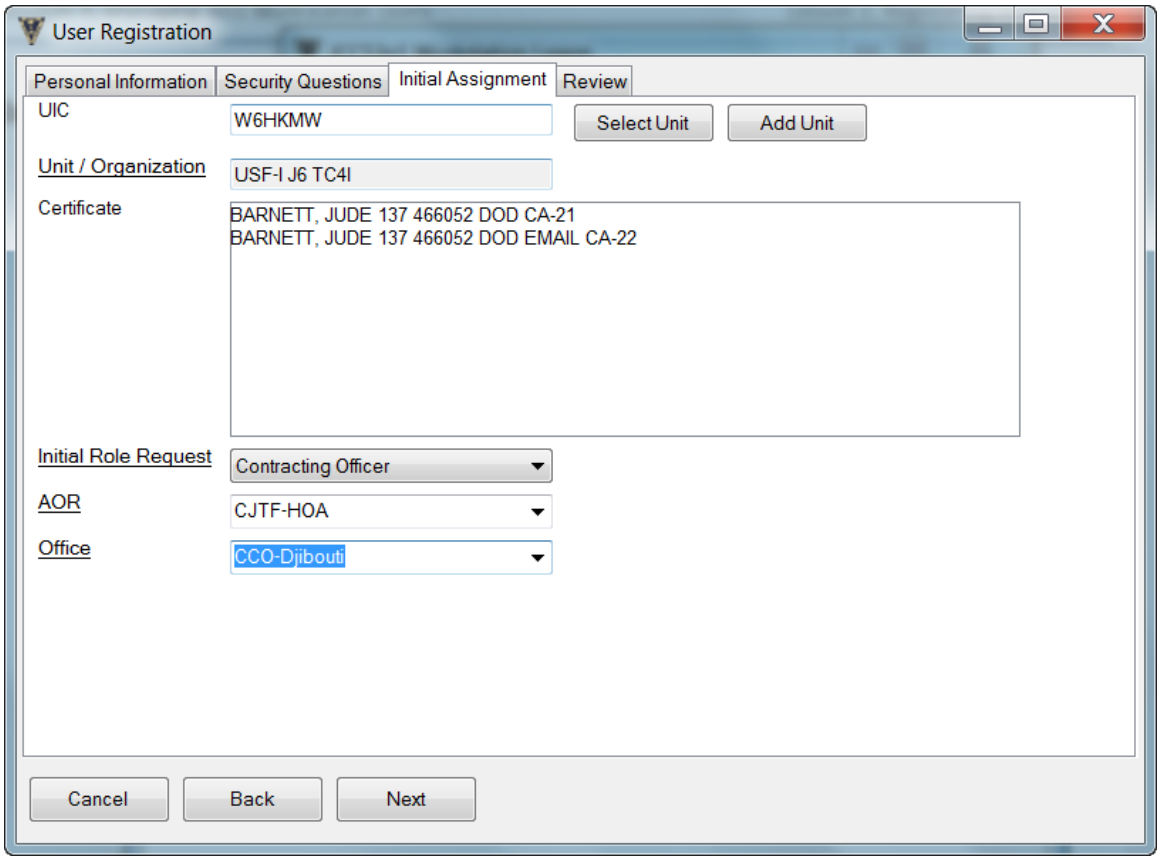
assigned to the order by DDS and enters the voucher number on the order in the 3in1 prime database.
Note: If DDS is not used, accounting reports can be generated and downloaded to Excel for manual accounting by the finance office, and the voucher numbers can be manually added on the 3in1 Workstation.

- **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.
- **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.
- **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:



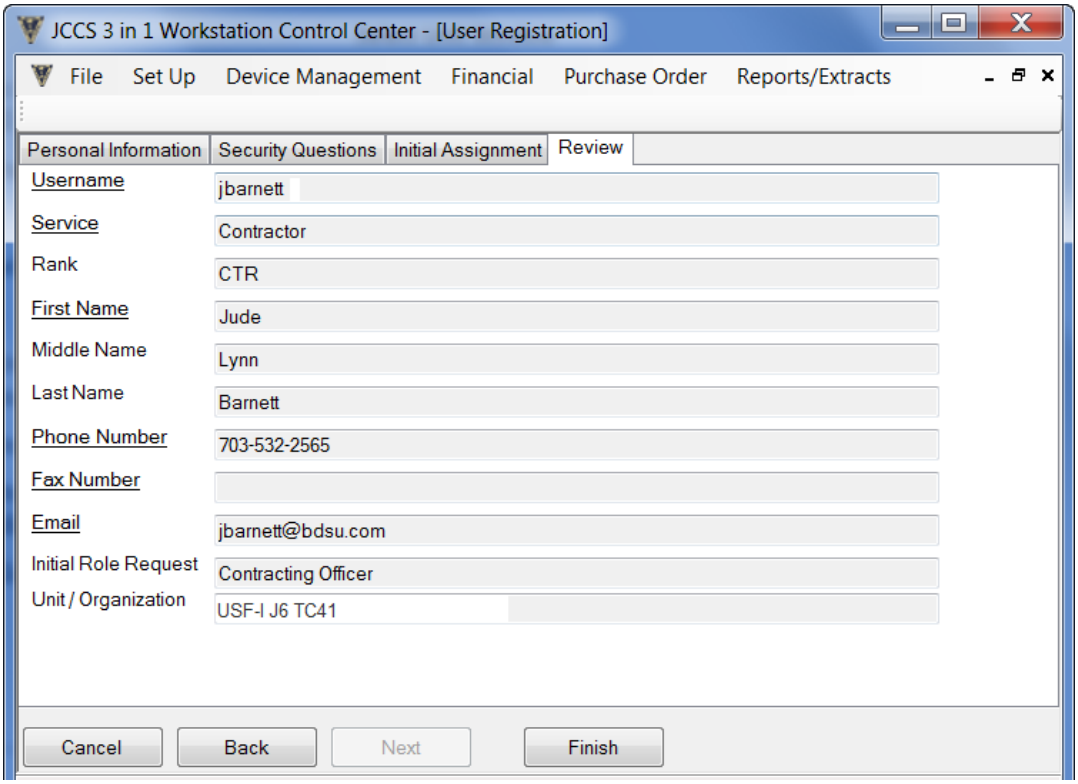
1. In the **Initial Assignment** tab, in the select a role from the **Initial Role Request** drop-down list.
2. For all roles except the FOO, specify the associated AOR and office. For example, if you select Contracting Officer, you need to specify your Area of Responsibility and assigned Contracting Office.
3. 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.



On CAC-enabled systems, select a digital signing certificate for the user. Also select a role for the user in the Initial Role Request field.

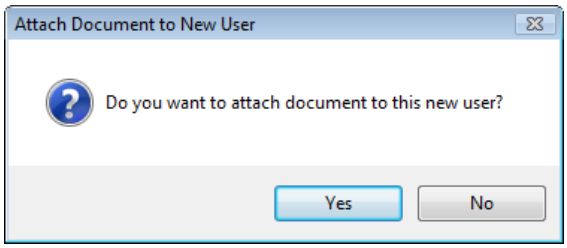
4. Click **Next**.
   – The *Registration Review* window is displayed.

Finishing the Registration Process and Uploading Supporting Documents



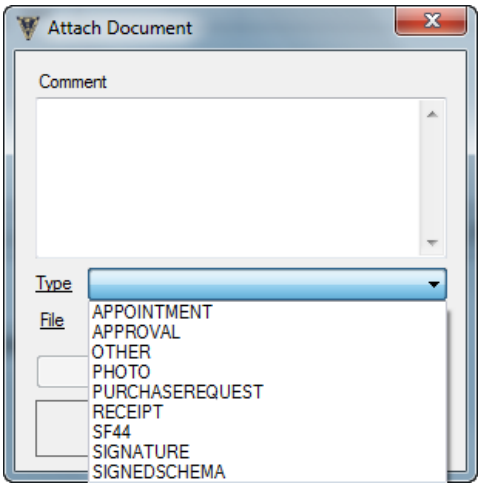
User Registration Review Tab

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**.

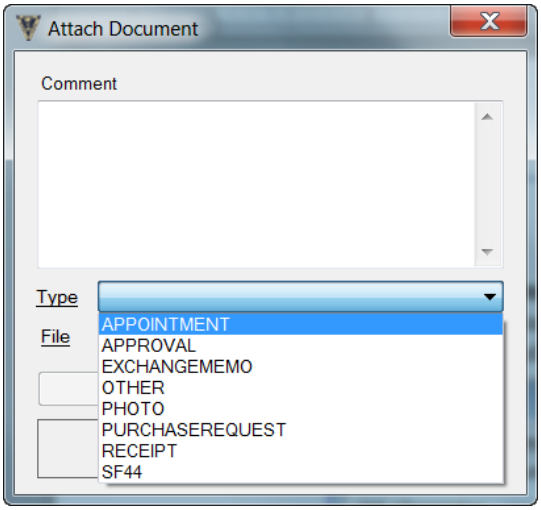


Attach Document to New User Dialog Box

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



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



It is possible to access the attached document later and upload other documents using the Document Handling feature which is explained in *Module 5: Managing 3in1 Workstation Users, Lesson 2: Managing User Roles and Accounts.*

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.

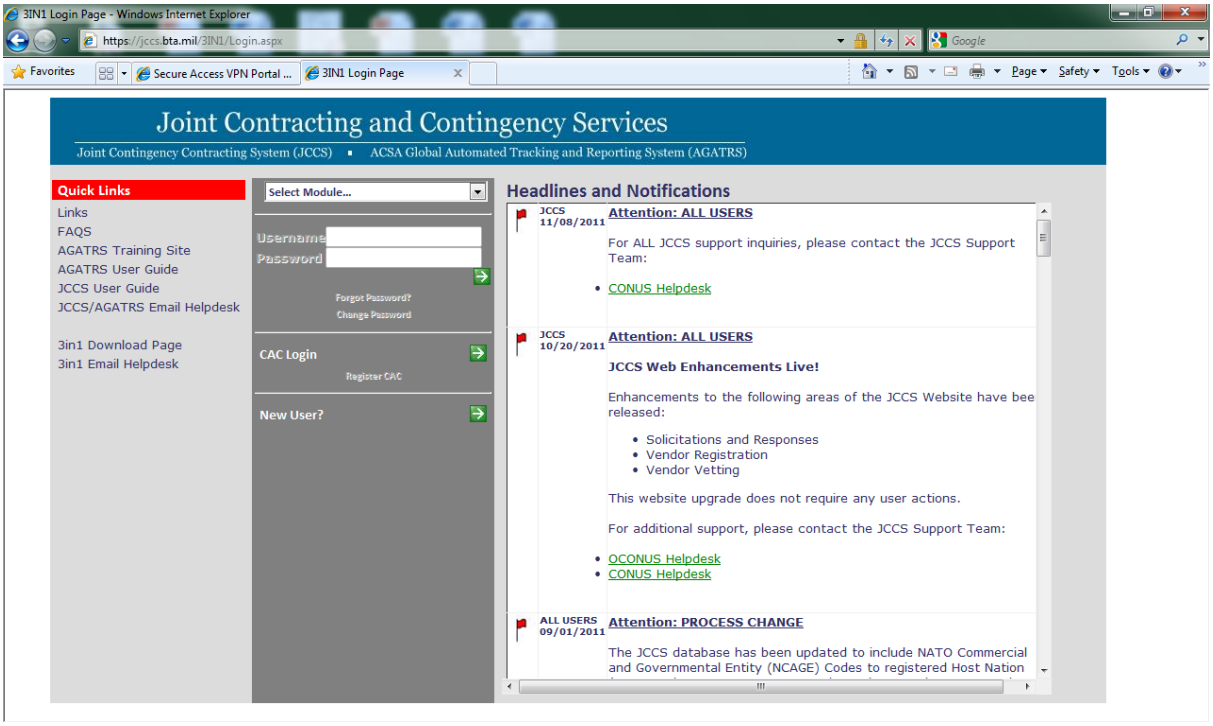
Web-Based User Registration

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:

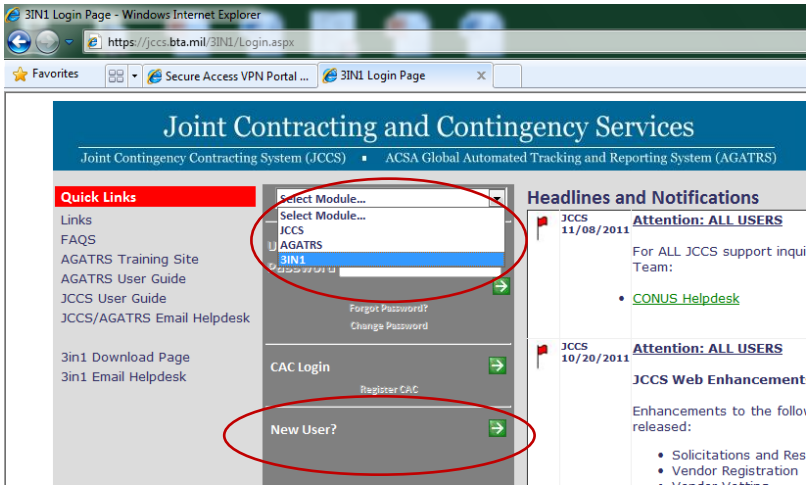
1. Navigate to the following link from your Internet browser: **https://www.jccs.gov/3IN1/Login.aspx**

2. Select **CAC/Digital Certificate Users**.
3. Select your DOD certificate.
   – The JCCS web page is displayed.



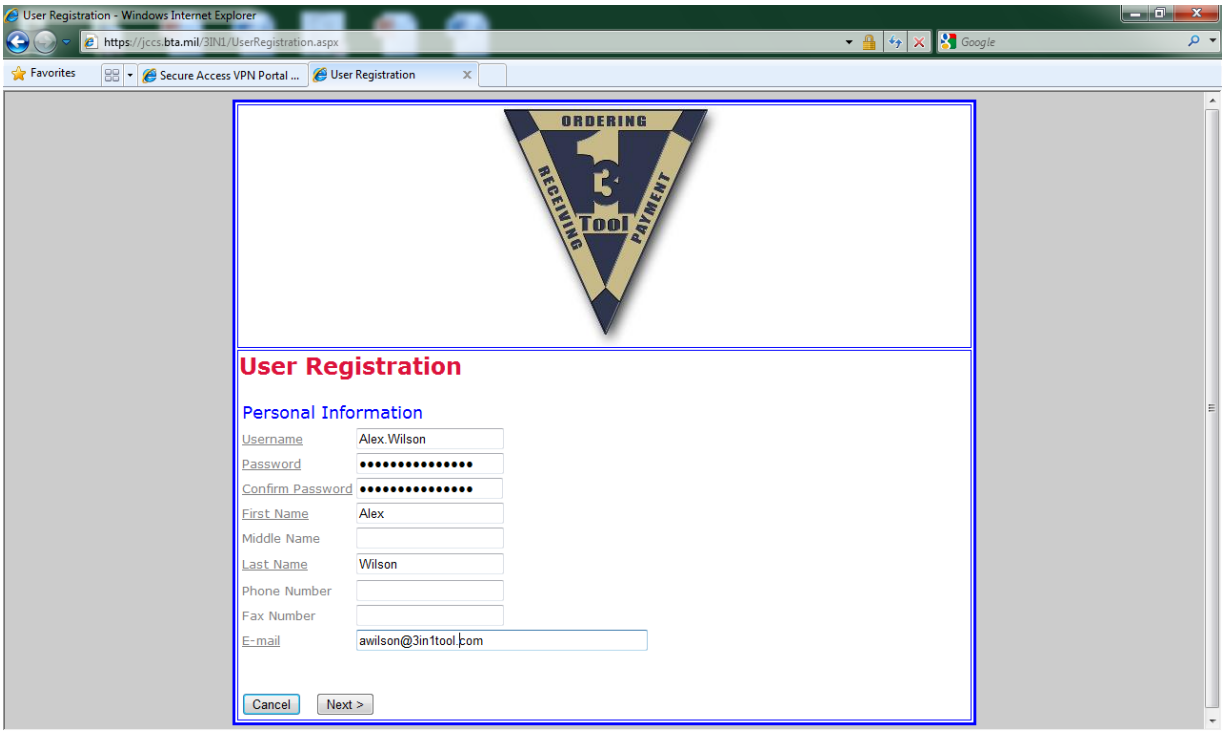
JCCS Login Screen

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.

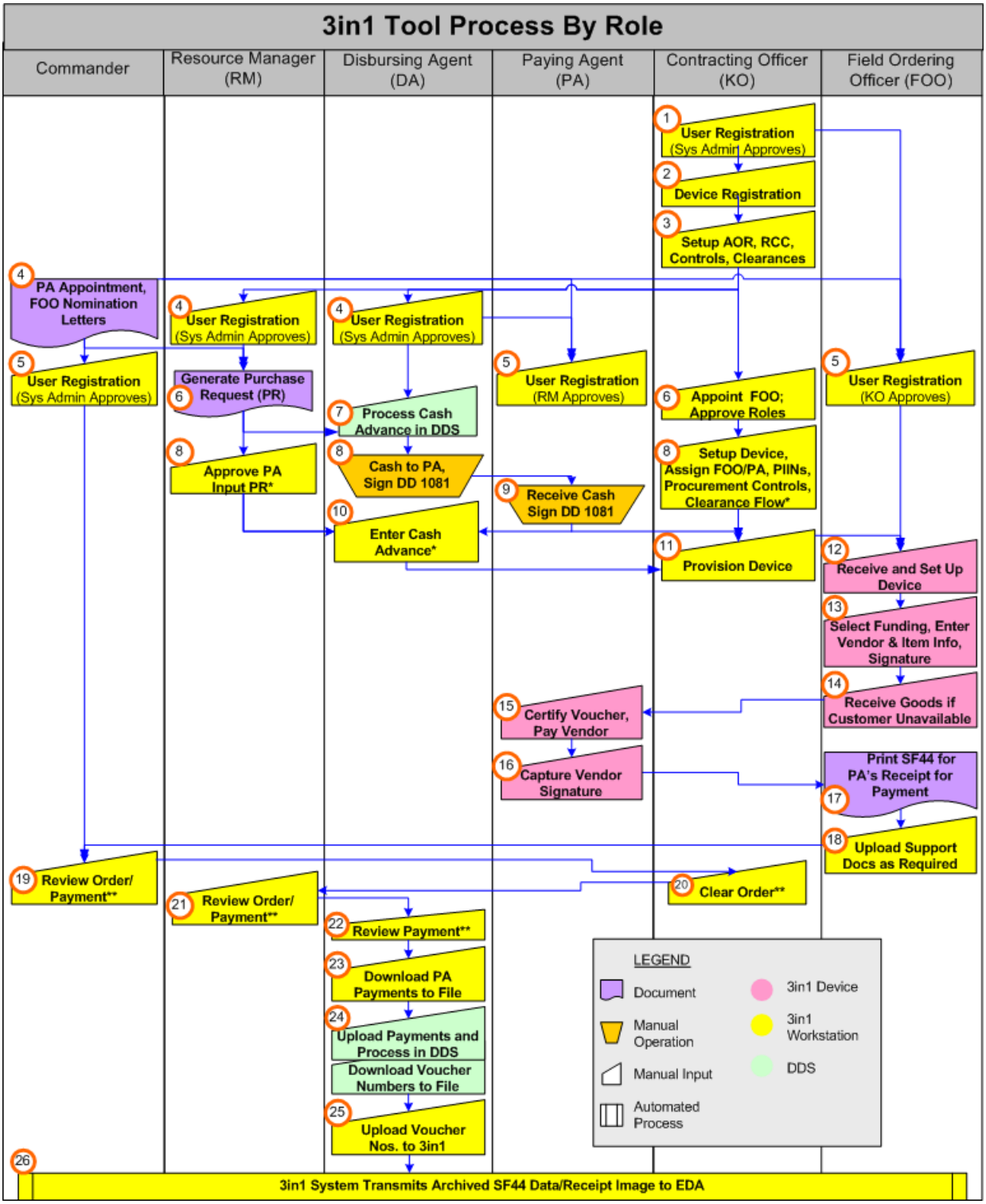


Web-based User Registration – Personal Information Screen

A message confirms a successful registration after you have completed the Personal Information, Security Questions, and Initial Assignment Request screens. After an authority approves your role, you may start using the 3in1 Workstation.

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

Lesson 2: Managing User Roles and Accounts

Objectives

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

- ❑ Assign and approve user roles
- ❑ Add and edit Unit Identification Codes
- ❑ Attach documents to users
- ❑ Manage user accounts through the Profile Management feature

Approving User Roles

When users register themselves in the 3in1 Tool Workstation, they request a role, such as FOO or paying agent. Authorized personnel review and approve these requests using the Manage User Roles feature. They can also change user role assignments.

The typical role approval system is as follows:

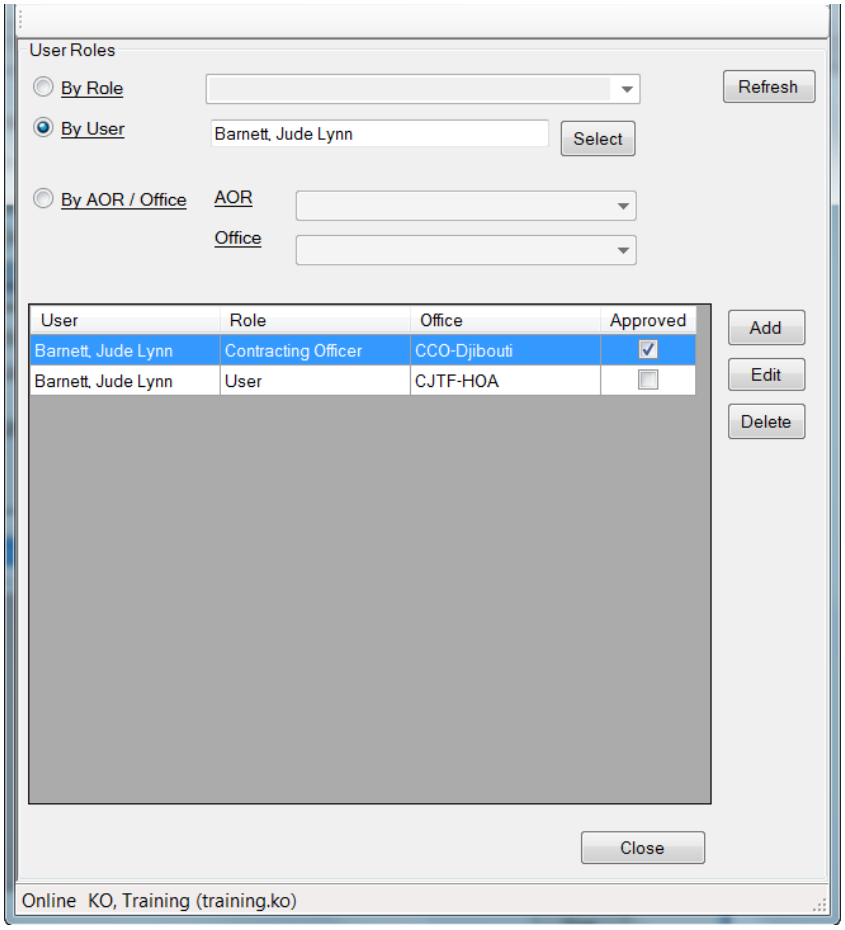
Role Requested	Approved By:
Paying Agent	Resource Manager, Finance Officer, or Contracting Officer
Reviewer	Contracting Officer or System/AOR Administrator
Field Ordering Officer	Contracting Officer
Contracting Officer Finance Officer (Disbursing Agent) Resource Manager Property Book Officer	System Administrator or AOR Administrator

To approve a user for an assigned role:

1. Select **Set Up**, **Manage User Roles** from the main menu.
   - The *Manage User Roles* window opens.

2. Select a user by role, user name or office (these filters are explained below).
3. Mark the **Approved** checkbox beside the user name in the table. Note, you do not need to mark the role of user as the system will activate it when a role is assigned.

– The Workstation automatically begins processing the approval of the requested role(s) for the selected user(s).



Manage User Roles Window

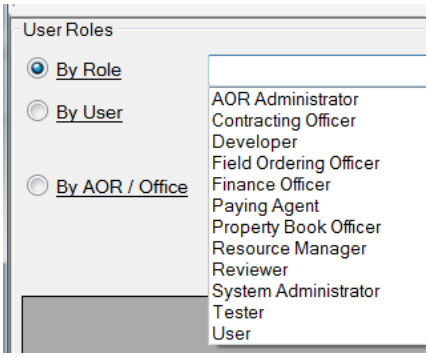
Filtering Users

Users can be viewed using different filters:

- By role name
- By user name
- By AOR office assignment

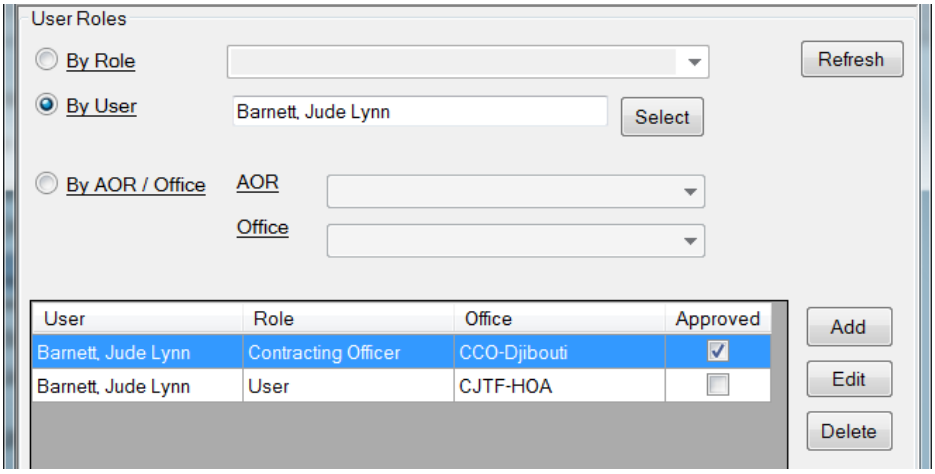
Filtering by Role

To view users who requested a specific role, select the **By Role** radio button on the *Manage User Roles* window, then select a role name. The user table updates to display only those users with the selected role. Both approved and unapproved users are displayed.



Filtering by User Name

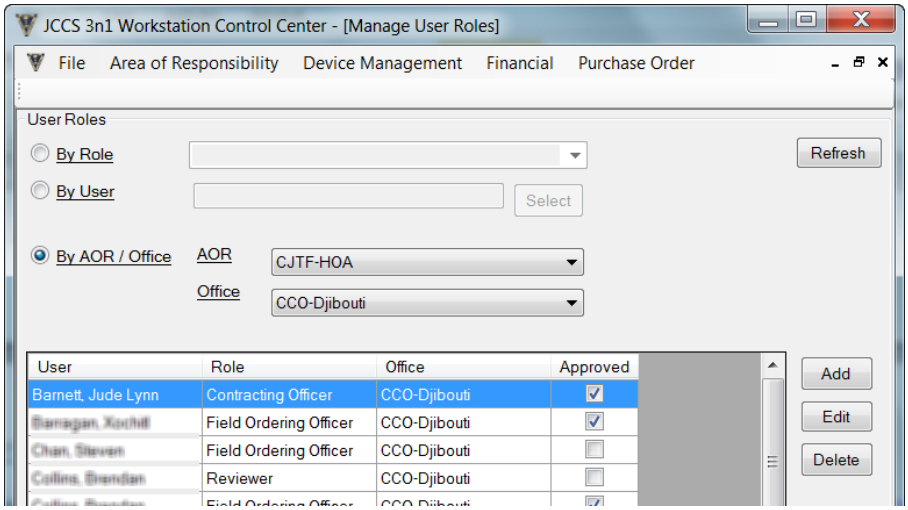
To view the roles requested for a specific user, click the **By User** radio button, then click the **Select** button and select a user name; see the *Username Search Filters* section later in this lesson for more information on selecting users. The user table in the *Manage User Roles* window updates to show only the selected user and their roles.



Users Filtered by User Name

Filtering by AOR Office Assignment

Another way to filter users is by AOR office assignment. For example, to identify missing role assignments in an AOR office, select the **By Office** radio button, then specify the AOR and office. The table updates to display users (and their roles) assigned to the office.



Users Filtered by Office

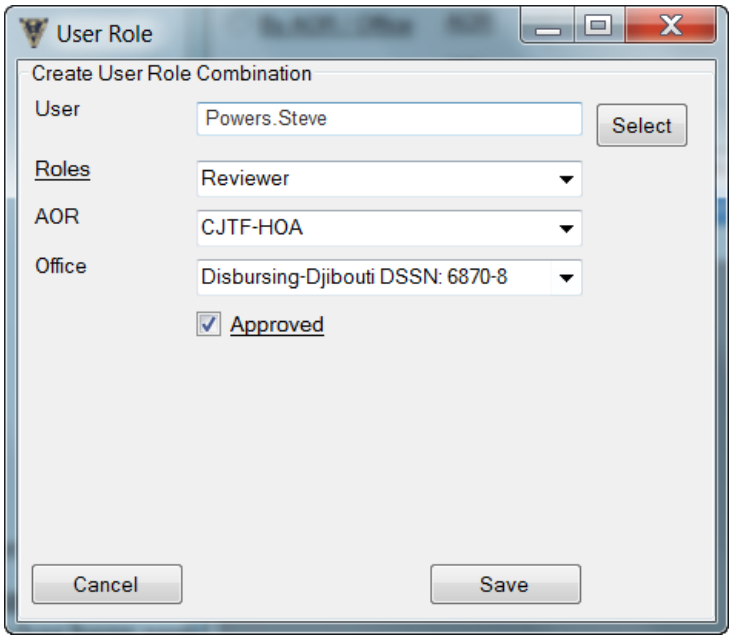
Adding a User/Role Combination

If you discover a person is missing from an office, follow these steps to assign a user to a role and AOR office:

1. Click the **Add** button.

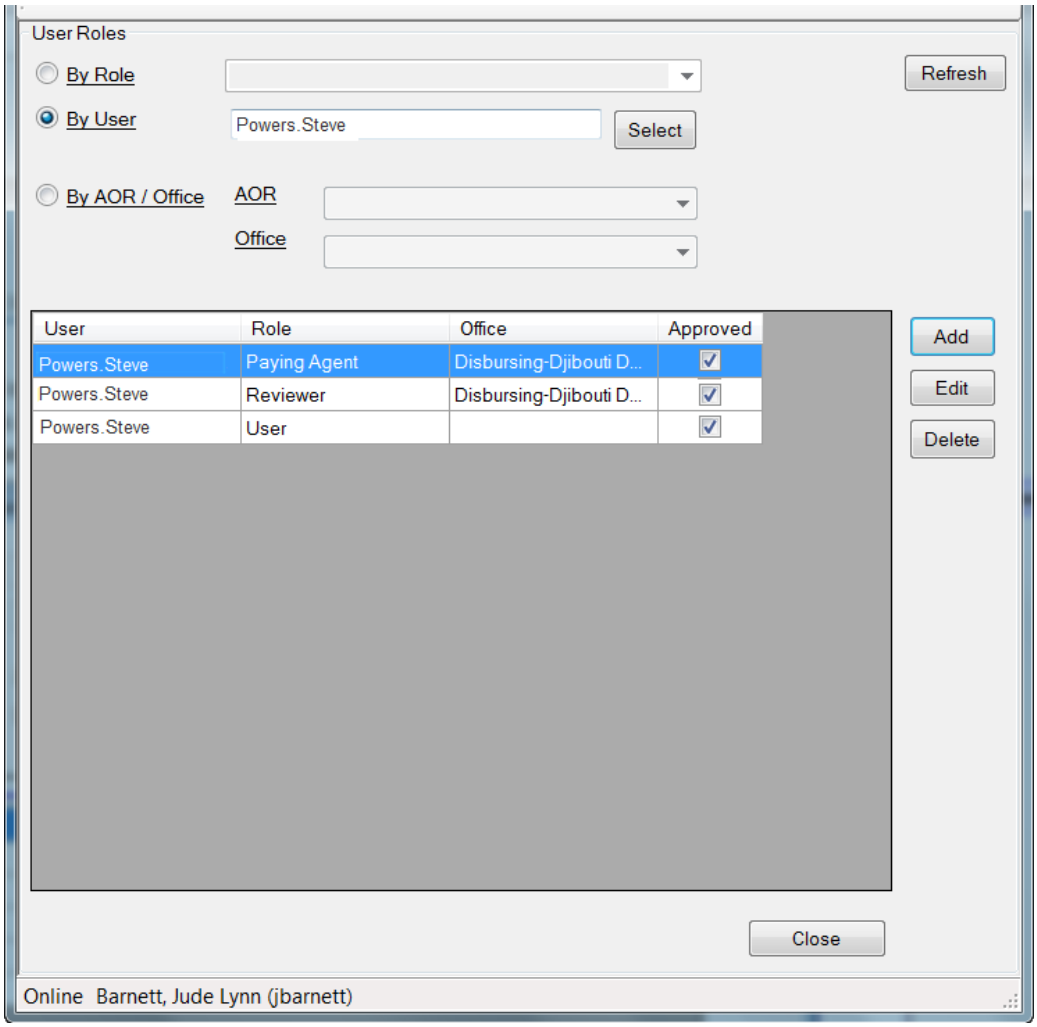
- The *User Role* window opens.

2. Click the **Select** button to select a user name from the list of registered users.
   - The *Select User* window opens.
3. In the *Select User* window, click a user name and then click the **Select** button.
   - For details on using the various username filters, see the *Username Search Filters* section below.
4. In the *User Role* window, select the appropriate role for the user. The AOR and Office fields are then displayed.
5. Assign the user to an **AOR** and **Office** by selecting from the drop-down lists.
6. Mark the **Approved** check box so the user can log in to the 3in1 Tool Workstation and use features applicable to the assigned role.
   - Note that the term "approved" refers to an action within the 3in1 Tool Workstation only.
7. Click the **Save** button.
   - The user is added to the table in the *Manage User Roles* window.



User assigned Reviewer role in specified AOR/office

In the **Approved** column of the *Manage User Roles* window, a marked check box indicates the user has been approved for the listed role. If you see some users are not approved who should be approved, mark the check box to assign them to the role and AOR office listed beside their name.

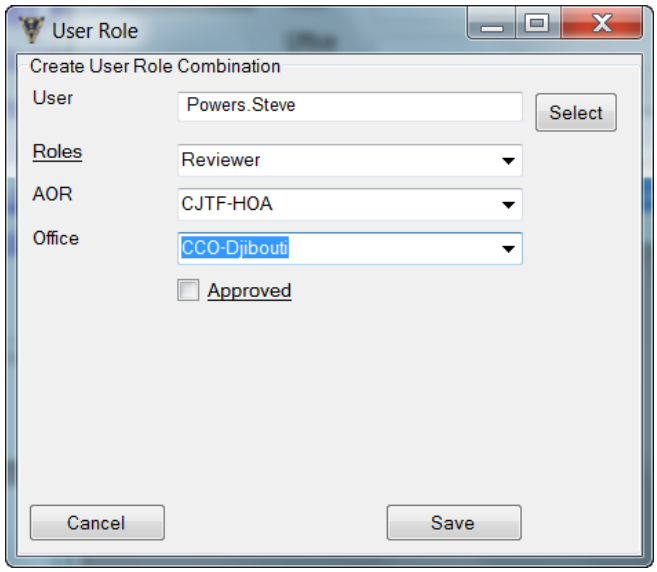


Manage User Roles Window

Editing User Roles

Use the **Edit** button to change a current user's role and/or office.

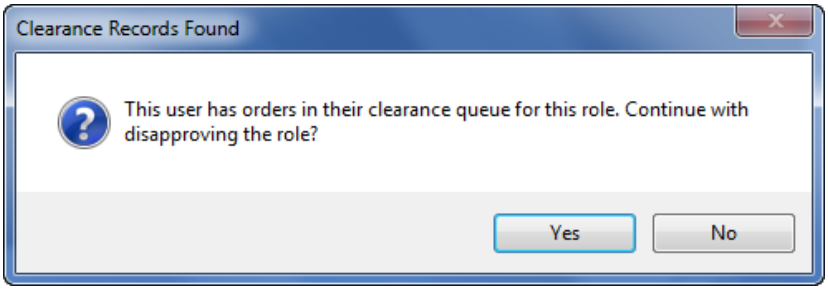
1. Ensure the appropriate user's name is displayed on the *Manage Users* window.
2. Select the user's name in the table and then click the **Edit** button**.**
3. In the *User Role* window, change the user's role and/or associated office.
4. Click the **Save** button.



Use the Edit feature to change a user's role and/or AOR office

Unapproving Users

To disapprove a role, unmark the **Approved** checkbox. If an individual has been assigned to a clearance configuration and has pending orders, a warning message is displayed. The administrator can proceed with the disapproval by clicking the **Yes** button.

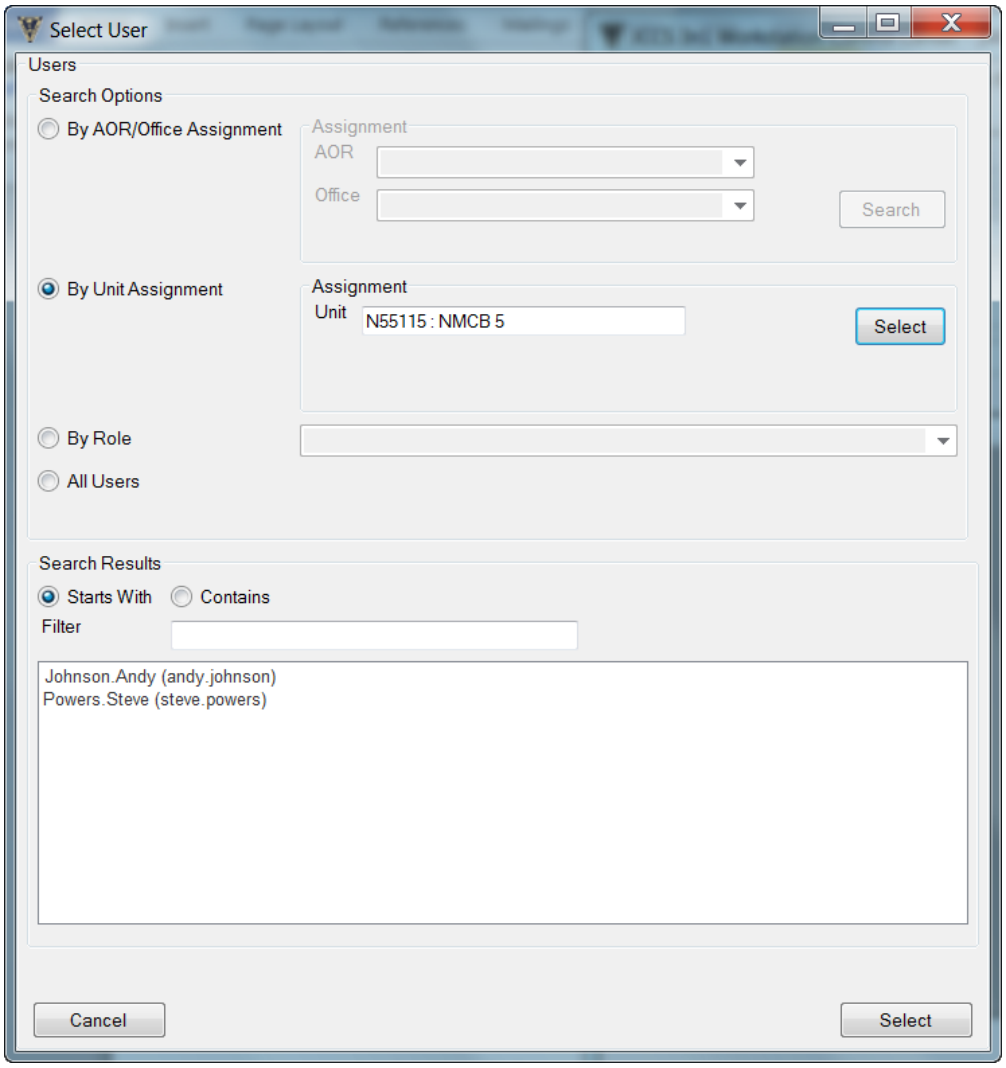


Note: As a general rule, do not disapprove users who have orders in their clearance queues.

Username Search Filters

The *Select User* window has multiple search options which are explained in this section. The list of 3in1 Tool Workstation registered users can be filtered by clicking a radio button: **All Users**, **by** AOR/Office or Unit **Assignment**, or **by Role**.

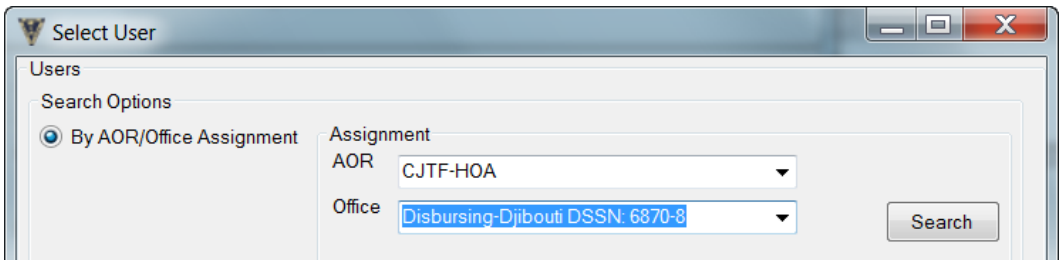
As the name implies, **All Users** is not really a filter; it displays all registered 3in1 Tool Workstation users.



Select User Window – Users filtered by Unit Assignment

To select a user based on AOR/Office assignment:

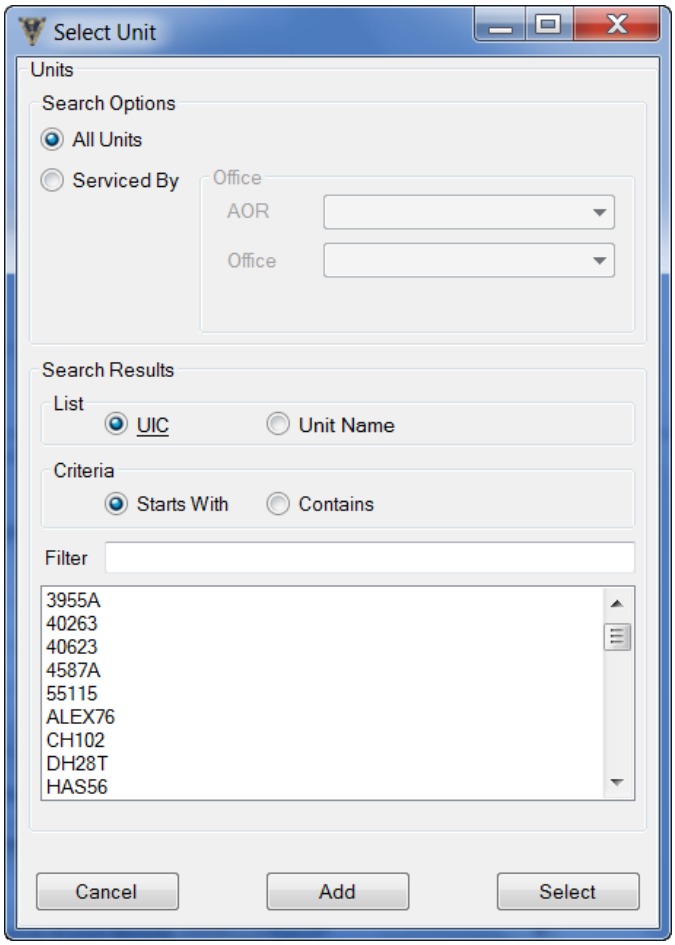
1. Select the **By AOR/Office Assignment** radio button (shown in the figure above).
2. Select an **AOR** from the drop-down list.
   - Selecting the **Office** is optional. To search for a user in all offices, leave the Office field blank. (If an office is there from a previous search, simply put the cursor in the Office field and press the Backspace key to delete it.)
   - The list of users updates to match the specified criteria.



3. Select a user from the Search Results list, then click the **Select** button.

To select a user based on unit assignment:

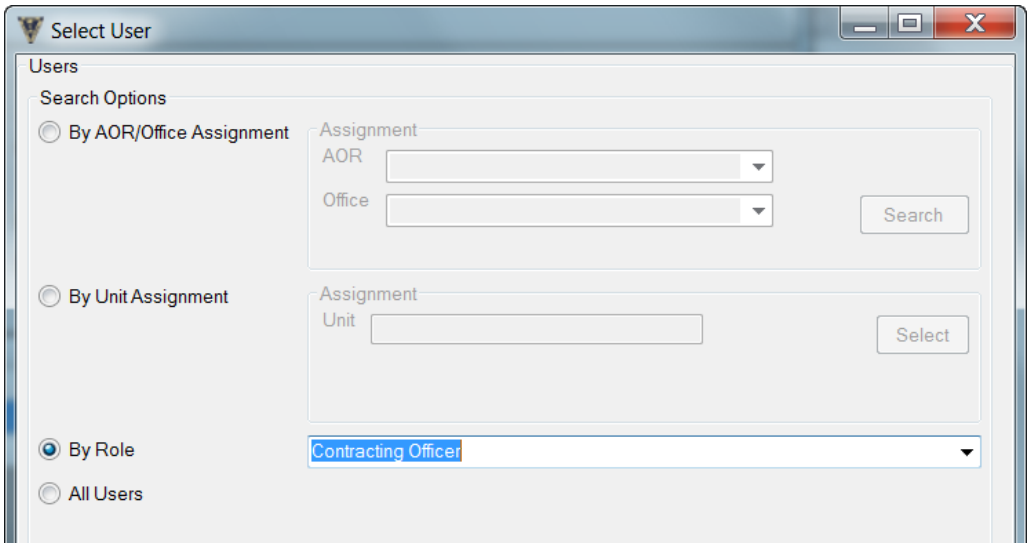
1. Select the **By Unit Assignment** radio button
2. Type the unit ID directly in the **Unit** field, or click the **Select** button to look up a unit ID.
   – The *Select Units* dialog box opens.
3. In the *Select Units* dialog box, under **Search Options**, search for all units or those serviced by a specific AOR and office.
4. Under **Search Results**, select a radio button 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 *Select User* window is populated with the selected Unit ID; the list of users updates to display users assigned to the specified unit.
6. Select a user from the list, then click the **Select** button.

To select users By Role:

1. Select a role name from the drop-down list.
   – The list of users updates to match the specified criteria.
2. Select a username from the list, then click the **Select** button.



Select User by Role

Optionally specify an additional filter, for user names that start with or contain specific characters that you type in the field provided. The list of users updates to match the specified criteria.

Removing Role Assignments

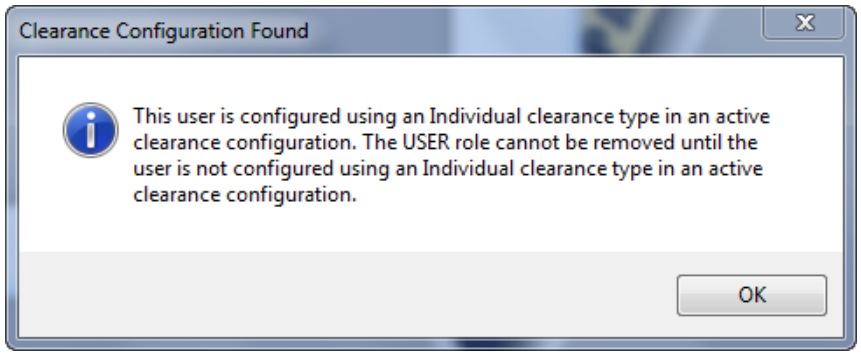
If it becomes necessary to remove a role assignment from a user, follow the steps below. Note the user is not deleted from the 3in1 system and can be re-assigned to a different role and AOR office.

1. Select **Set Up**, **Manage User Roles** and select a user.
2. Unmark the **Approved** checkbox, if it is marked, or select the user and role then click the **Delete** button.

The role assignment is removed, and the row is removed from the table.

There are two scenarios where deleting a user role is not allowed.

1. If an individual has been assigned to a clearance configuration, a warning message (shown below) states the individual cannot be removed from the role and the deletion does not occur. The administrator must first go the *Provision Device* window, **Clearance Configuration** tab and remove the individual from all clearance configurations. Then the administrator returns to the *Manage User Roles* window and uses the **Delete** button to remove the user from the role.



If an individual has been assigned to a clearance configuration, this warning message states the individual cannot be removed from the role. Select Device Management, Provision and the Clearance Configuration tab, then remove the individual from all clearance configurations.

2. If a user is the only one assigned to a role that is assigned as an Office/Role clearance type in a clearance configuration, a message is displayed indicating the user cannot be deleted. However, if more than one person is assigned the role in the same office, the deletion is allowed.

It is possible to re-select the user and assign the same or a different role, using the **Add** button.

Click the **Close** button when you have finished editing the *Manage User Roles* window.

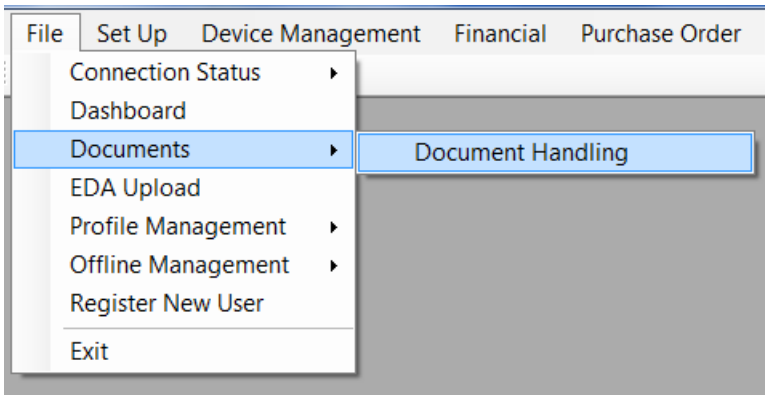
Only users who are assigned a System Administrator role can delete a user from the system. This is performed using the Delete button on the **File**, **Profile Management**, **User Profile**, *User Profile* window.

Attaching Documents to User Profiles

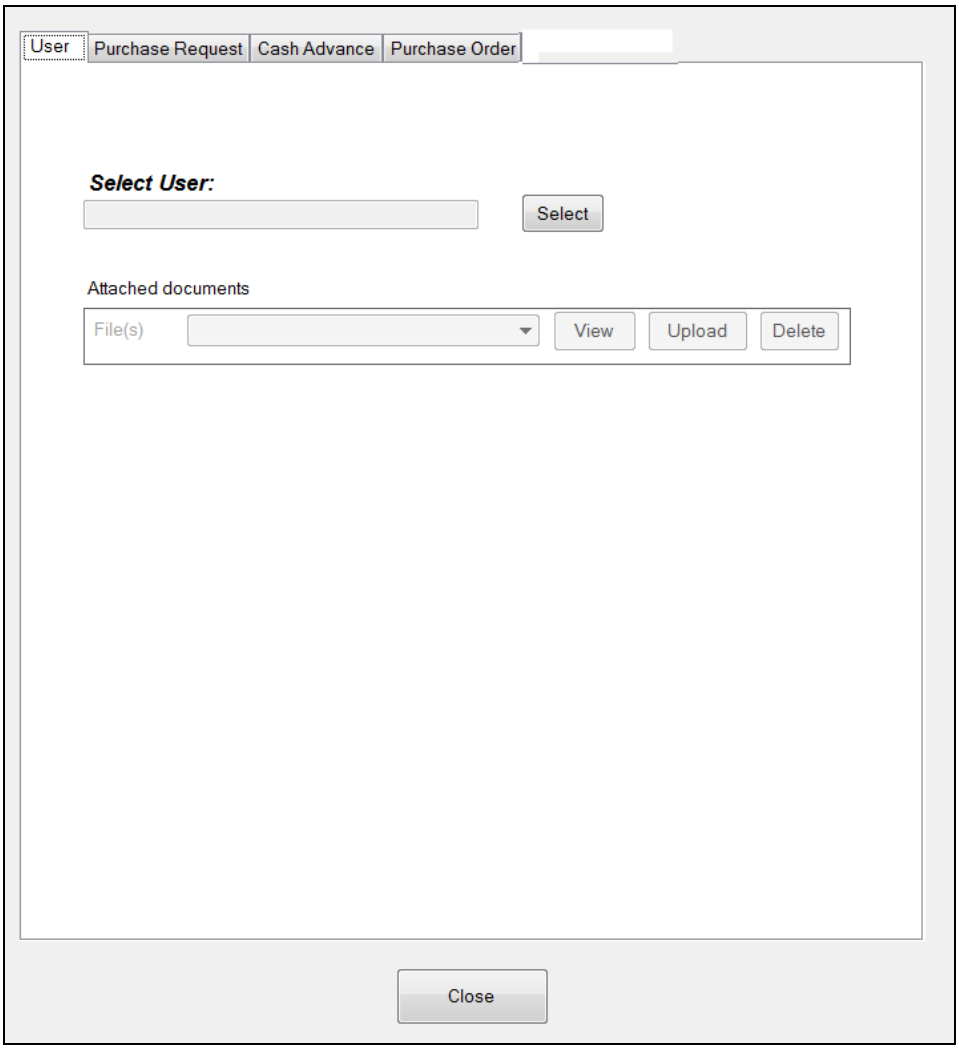
Documents such as appointment letters can be attached to a user profile through the Document Handling feature.

To attach documents to user profiles:

1. From the main menu, select **File**, **Documents, Document Handling**.

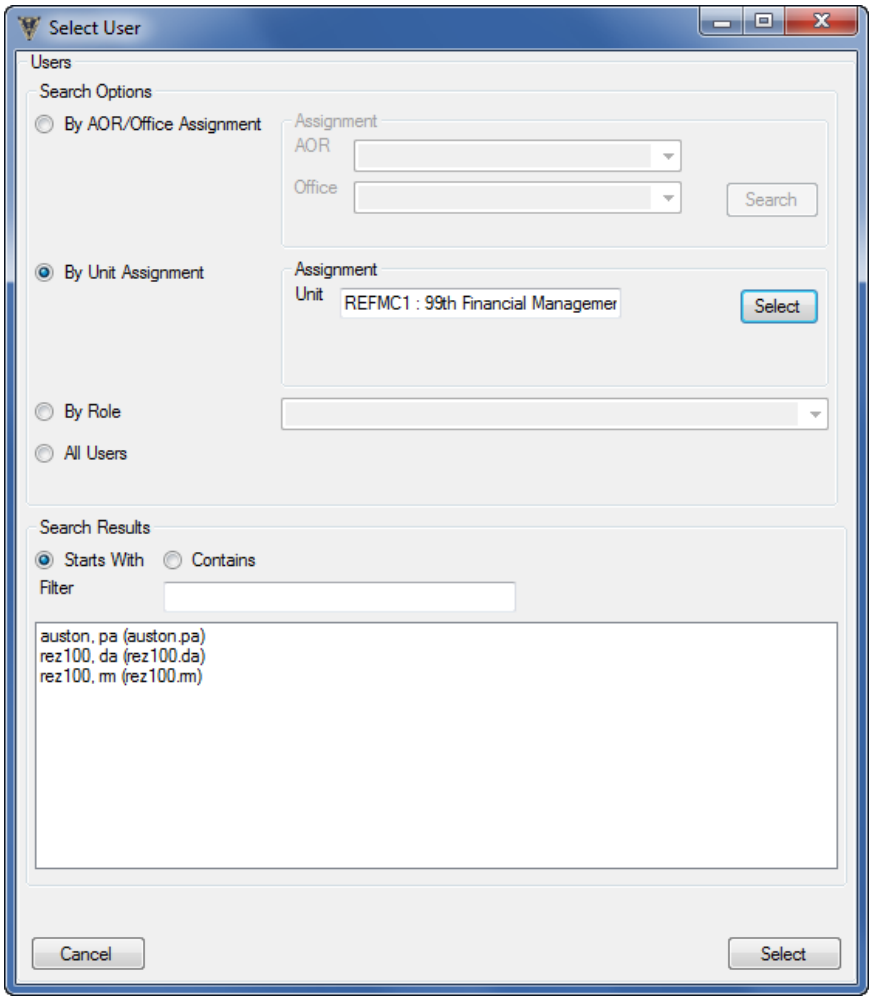


2. In the *Document Handling Form* window, click the **User** tab.



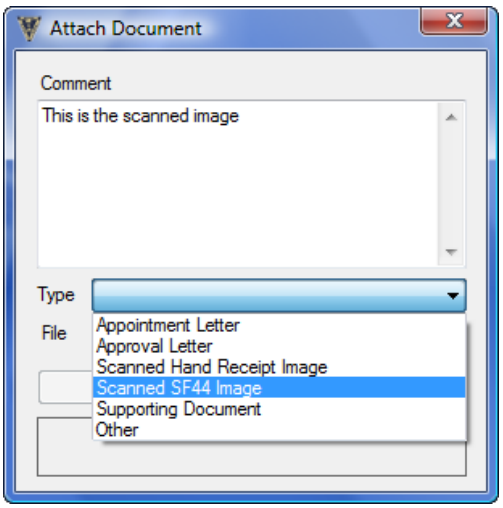
The Document Handling User tab is used to attach documents to Workstation users

3. Click inside the **Select User** field, and then click the **Select** button.
   – The *Select User* window opens.
4. Using filters in the *Select User* window was explained earlier in this lesson. For example, search by role to locate FOOs, to upload scanned PRs.
5. Select a user, then click the **Select** button.



Select User Window

6. In the *Document Handling Form* window, click the **Upload** button. The *Attach Document* dialog box opens.
7. Use the **Browse** button to locate and select the file.
8. Provide a comment about the attachment.
9. Select the file **Type** (i.e., Appointment Letter)
10. Click the **Upload File** button.
11. Close the *Attach Document* dialog box.
    - The file is now attached to the user.
12. Click the **Close** button to close the *Document Handling Form* window.



Note: Try to minimize the size of scanned documents, as downloading files in a limited bandwidth environment will be a slow process.

To view documents that are attached to a user:

1. In the *Document Handling Form* window, select the file attachment from the drop-down list, as shown in the previous figure.
2. Click the **View** button.

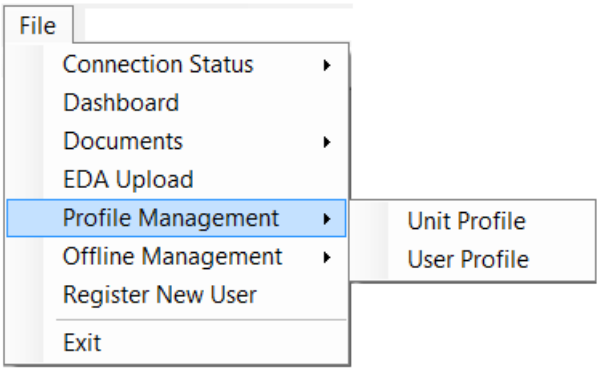
The selected document opens in the application that is associated with the document type. A system setting on your computer associates file types with applications. For example, .XLS (spreadsheet files) are usually associated with Microsoft Excel.

To remove a file attachment:

1. In the *Document Handling Form* window, select the file attachment, if there is more than one, from the drop-down list.
2. Click the **Delete** button.

Managing Unit Profiles

Use the **File**, **Profile Management, Unit Profile** feature to edit, delete or add Units.

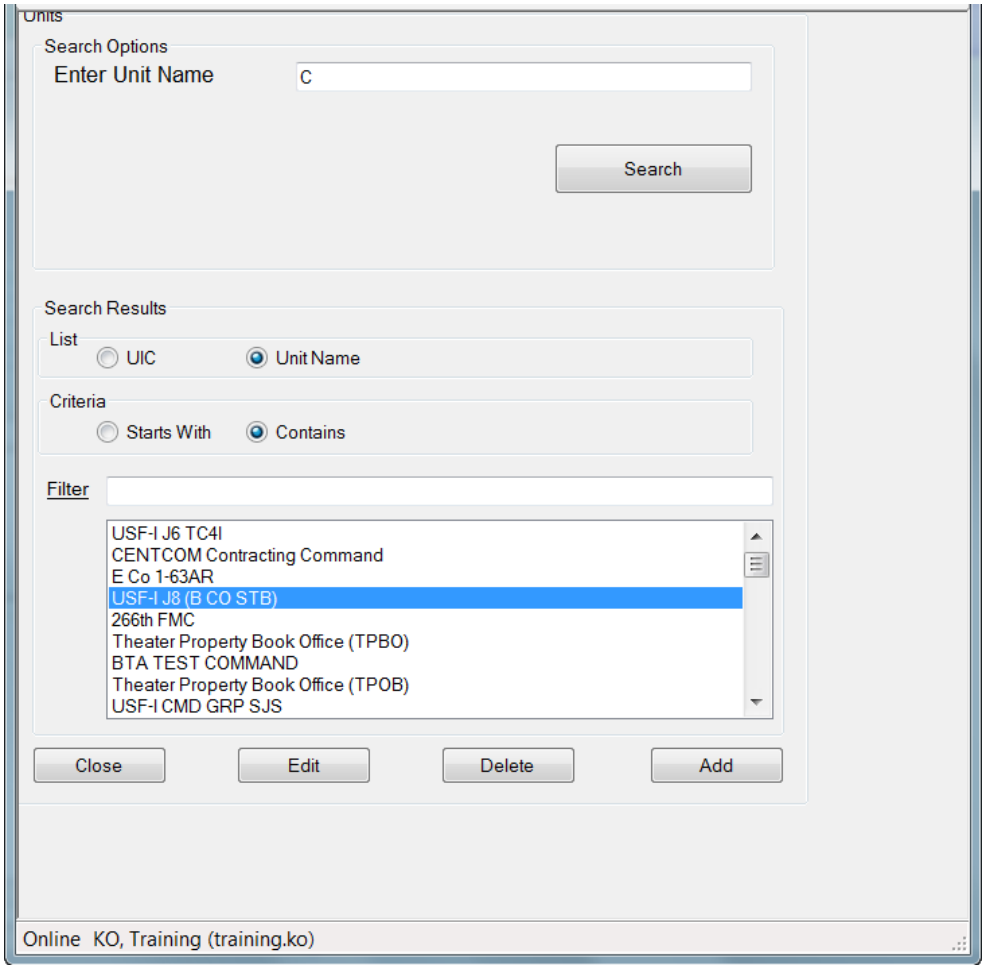


File, Profile Management Menu

Editing or Deleting Units

To edit or delete units, first locate the UIC profile:

1. On the *Unit Profile* window, type the unit name (partial or whole) in the **Enter Unit Name** field.
2. Under ***Search Results***, click a radio button to specify how to list the results, by **UIC** or **Unit Name**.
3. Under ***Criteria***, click a radio button to specify whether the text you typed is contained in or starts the unit name.
4. Click the **Search** button. A list of matching Units is displayed.



Use the search options to locate the unit to edit or delete

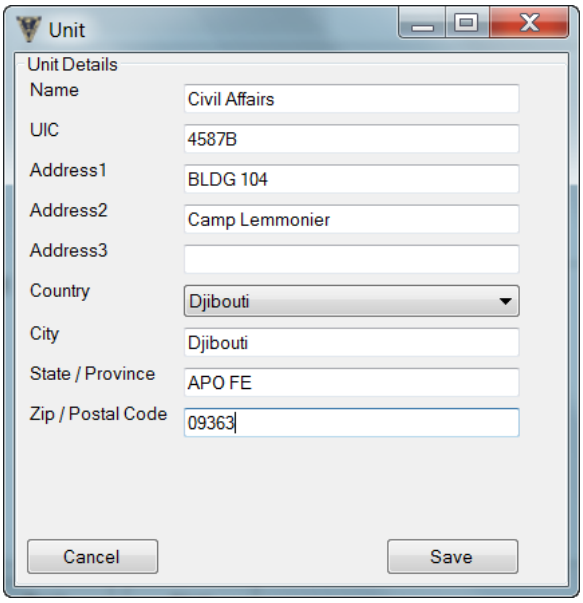
5. Select a unit name from the list, then click the **Edit** button.
6. Modify the fields as necessary, then click the **Save** button in the *Unit* window.

To delete a Unit, select a name from the list, then click the **Delete** button.

Adding Units

To create a unit:

1. Click the **Add** button *Unit Profile* window.
2. The *Unit* window opens. Complete the fields and then click the **Save** button.

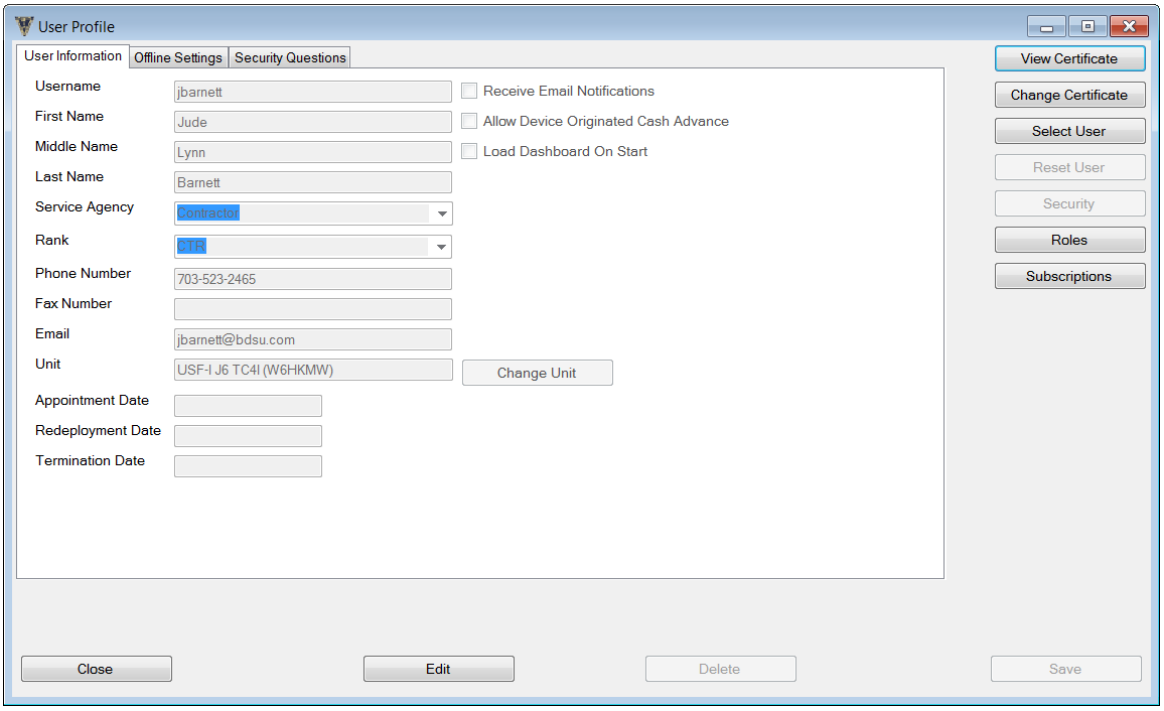


Unit Window – Define a new Unit

Managing User Profiles

Edit user information by selecting **File**, **Profile Management, User Profile**. Contracting Officers can edit the information for any user. Other roles can edit only their own information. However, they can look up and view other users' information.

Carefully review all the settings on this window, as access to some features is determined by the selections made on this screen. Click the **Edit** button to make changes. Be sure to click the **Save** button after making any changes.



User Profile Window

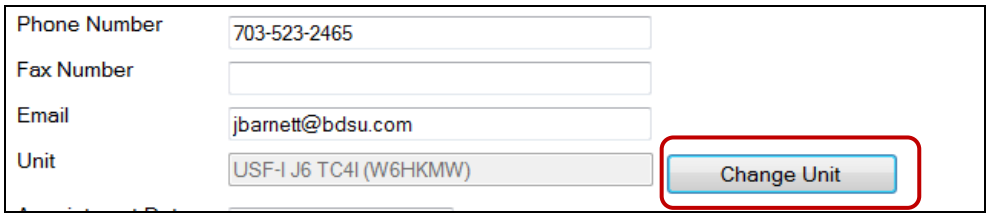
By default, your user information is displayed. To edit the screen, click the **Edit** button.

To view the information for a different user:

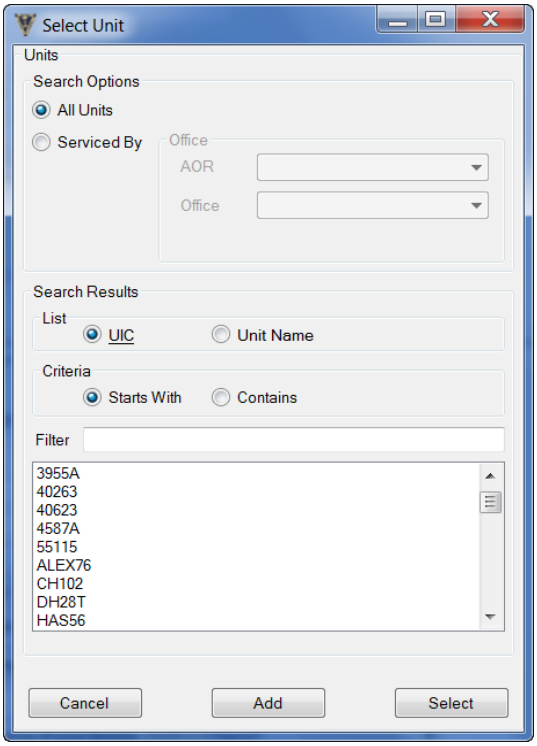
1. Click the **Select User** button. The *Select User* window opens.
2. Use the **Search Options** to locate the appropriate user, then click the **Select** button.
3. Returning to the *User Profile* window, click the **Edit** button to edit the user information.
   - Edit user contact information as well as the security questions.
   - Add **Appointment**, **Deployment** and **Termination** dates in the fields provided.
4. Click the **Save** button.

Changing the Unit Assignment

If you need to change a unit assignment, click the **Edit** button at the bottom of the *User Profile* window, then 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 on the *User Profile, User Information* tab 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.
- **Reset User** – Restores previously saved settings
- **Security** – See the section below, *Managing User Account Security*.
- **Roles** – Opens the *Manage User Roles* window so you can view and/or edit roles assigned to a user.

On the *Security Questions* tab, you may change the three security questions that are used to confirm your identity in the event you forget your Workstation logon password.

Enable E-Mail Notifications

The 3in1 system generates email notifications 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.

To enable e-mail notifications to the user, mark the check box. If it is unmarked, the user will not receive 3in1 system-generated emails.

Authorizing Paying Agents to Initiate Cash Advances from the Device

Paying Agents (PAs) may initiate cash advances from the handheld device if they have permission. The KO authorizes this ability on the *User Profile* window.

To authorize paying agents to initiate cash advances from the device:

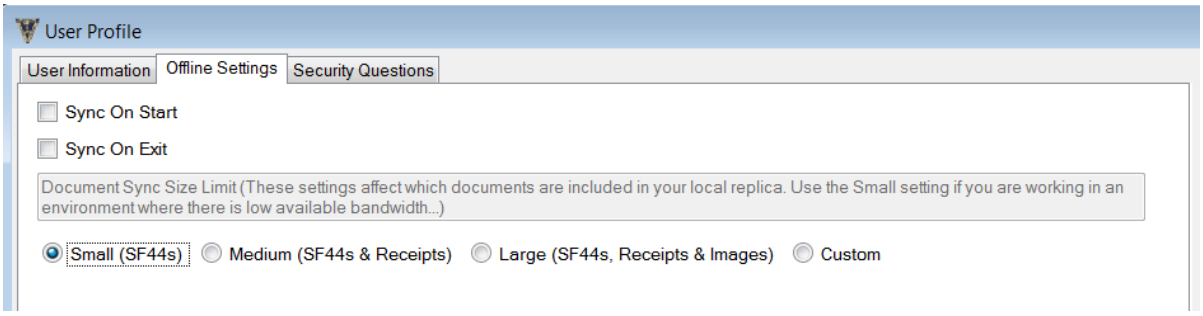
1. Select a Paying Agent using the **Select User** button.
2. Click the **Edit** button.
3. Mark the **Allow Device Originated Cash Advance** check box.
   - If it is unmarked, the PA cannot initiate a cash advance from the device.
4. Click the **Save** button.

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 when a user logs in. Dashboards display status messages and clickable shortcut links for Contracting Officers. 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 2: 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.

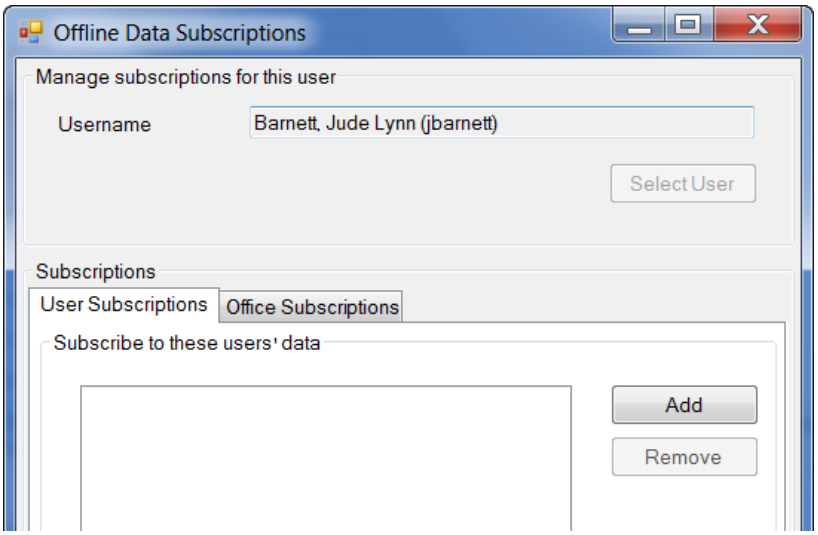
- **Small** - Includes only SF44s in local replica
- **Medium** - Includes SF44s and receipts in local replica
- **Large** - Includes SF44s, receipts, and images in local replica
- **Custom -** Includes documents equal to or smaller than the entered document size limit (in kilobytes) in local replica

Subscriptions

Use the Subscriptions feature 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.

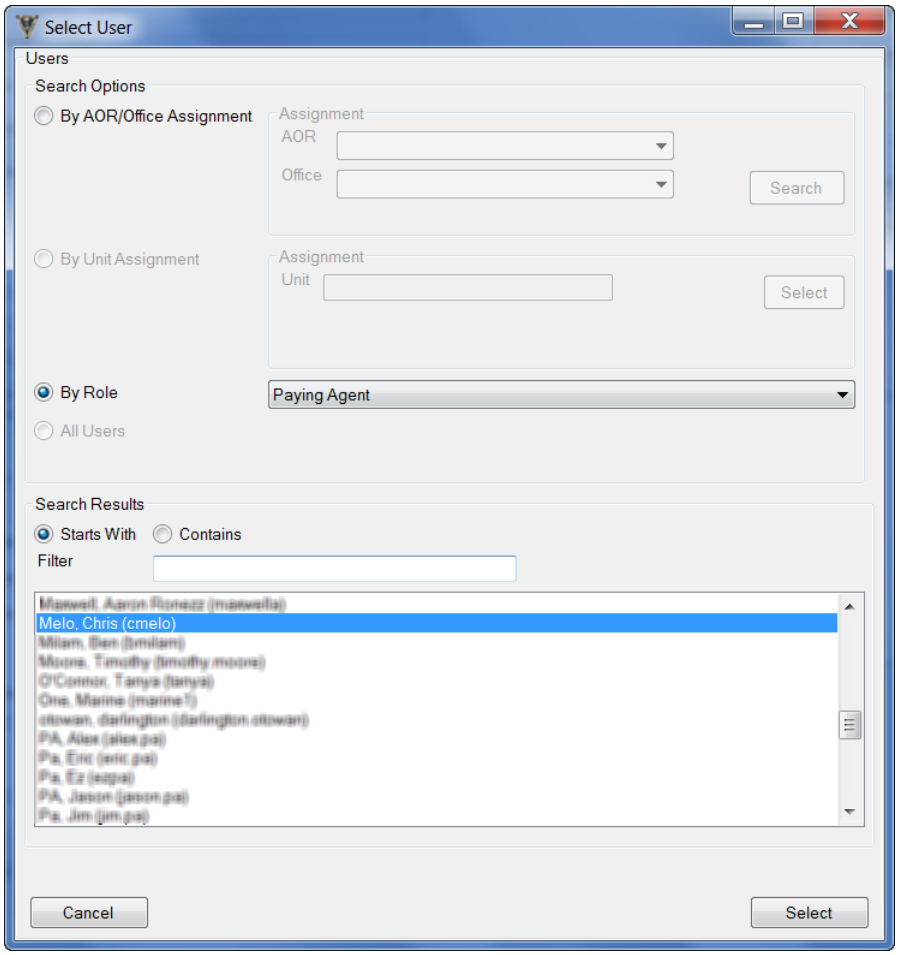
To add user and/or office subscriptions:

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



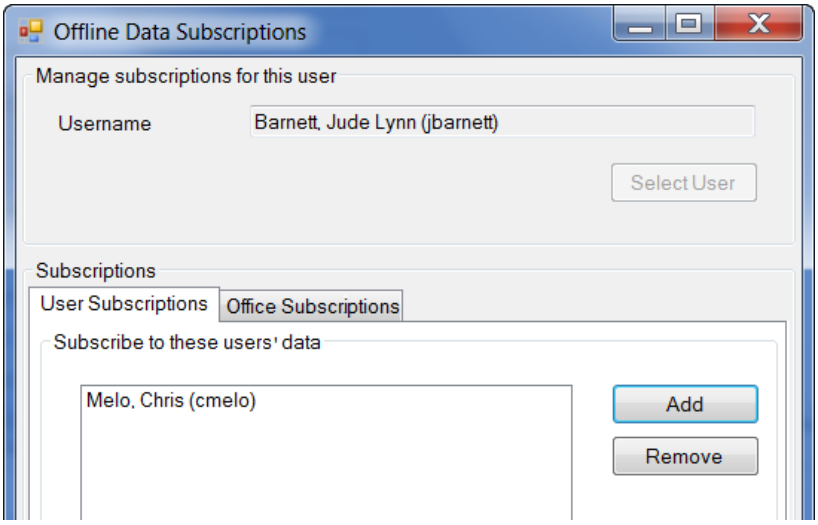
Offline Data Subscriptions Window

2. On the **User Subscriptions** tab, click the **Add** button.
3. On the *Select User* window, select a user.



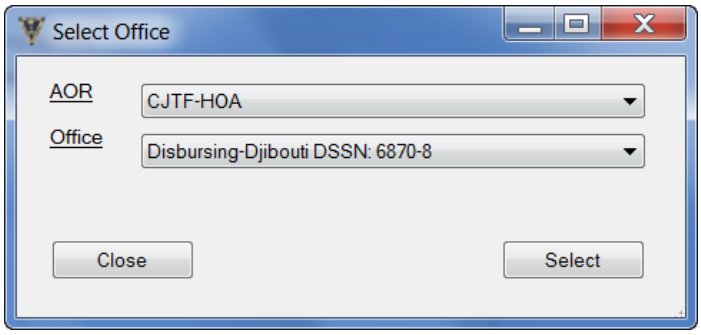
Select a user and click the Select button

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



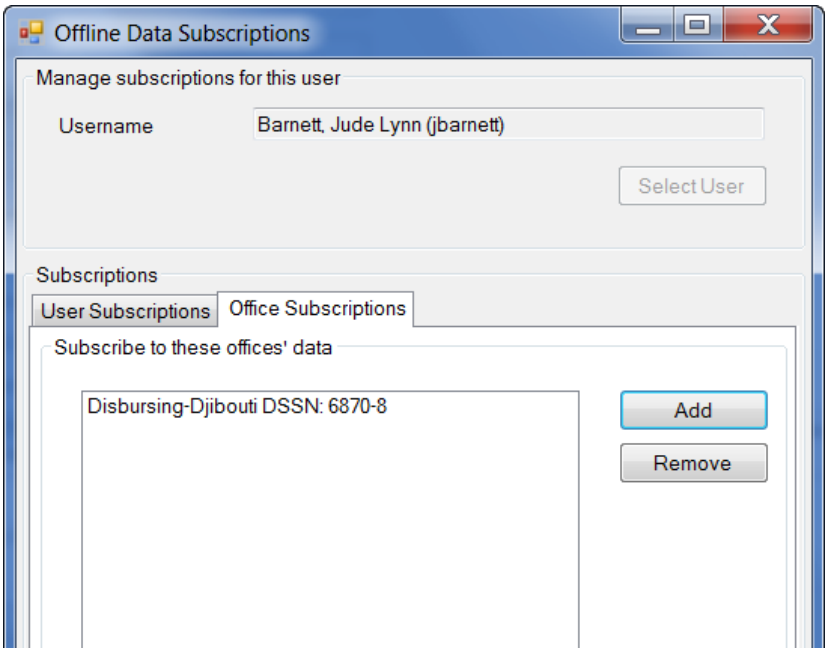
Selected users' data will be downloaded when you go offline to work

4. On the **Office Subscriptions** tab, click the **Add** button to select an office.
5. 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 Subscriptions Tab

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

Managing User Account Security

Only users with the System Administrator role have access to the **Security** button on the *User Profile* window. Selecting this button opens the *Account Security* window, which is used by system administrators/help desk technicians to reset user passwords on the device or Workstation.

In addition, only System Administrators can use the **Delete** button at the bottom of the *User Profile* window to remove the user from the Workstation.

Lesson Summary

In this lesson, you learned to:

- ❑ Assign and approve user roles
- ❑ Add and edit Unit Identification Codes
- ❑ Attach documents to users
- ❑ Manage user accounts through the Profile Management feature

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Module 6: Configuring the 3in1 Tool Workstation

Lesson 1: AOR Setup

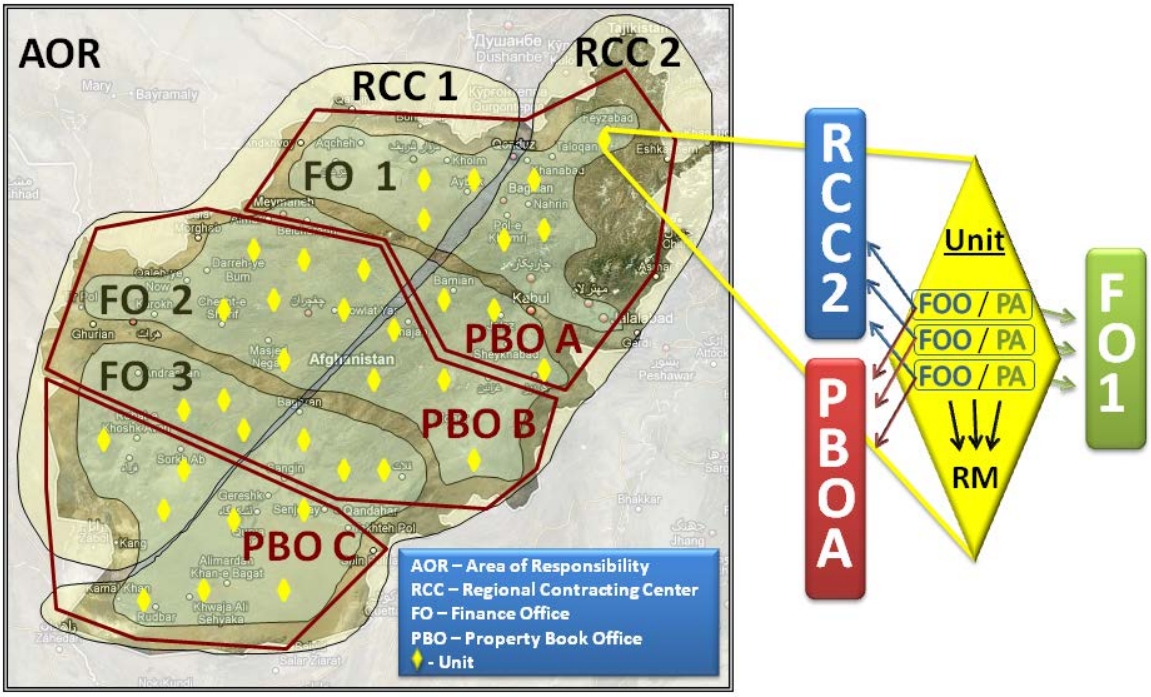
Objectives

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

- ❑ Add, edit and delete an Area of Responsibility
- ❑ Add contracting, finance and property book offices to AORs
- ❑ Assign units serviced to an office
- ❑ Edit or delete offices

Area of Responsibility

An Area of Responsibility (AOR) is created at the outset of an operation, as a way to identify and organize the units, roles, and responsibilities within the AOR. Users who are assigned the role of AOR Administrator in the 3in1 Workstation will define areas of responsibility and their associated offices using the **AOR Administration** feature.



AOR Organization

The 3in1 Tool system supports contingency operations around the world for all Services. Contingency operations are 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 FO. Resource Managers (RM) do not have a regional level relationship and only identify the units they are assigned to support.

The size of the operation will determine the number and types of offices 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 FO must also be established. If the operation is bulk funded and the RM is not deployed, the Contracting Officer or Finance Officer can enter the purchase request information into the system during provisioning.

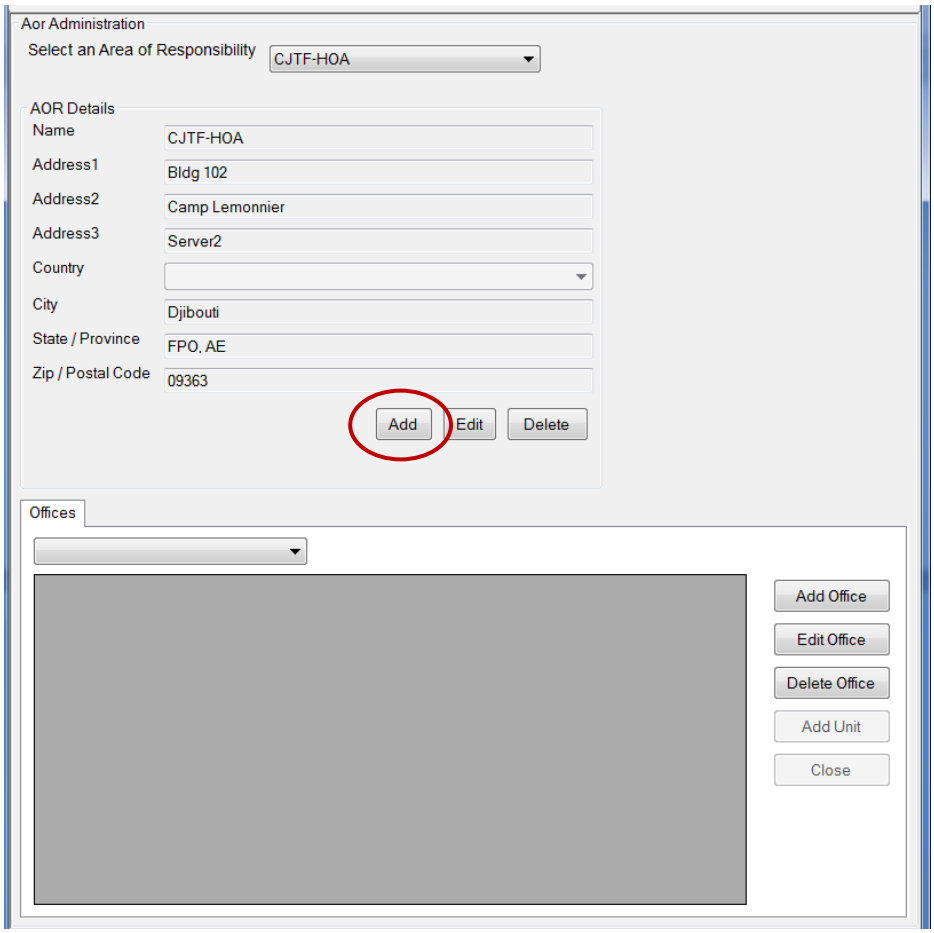
Adding an AOR

Tip: Fill out the *Add AOR and Offices Worksheet* in *Appendix B* to ensure you have all the required information for entering data in the 3in1 Tool Workstation.

To add an AOR:

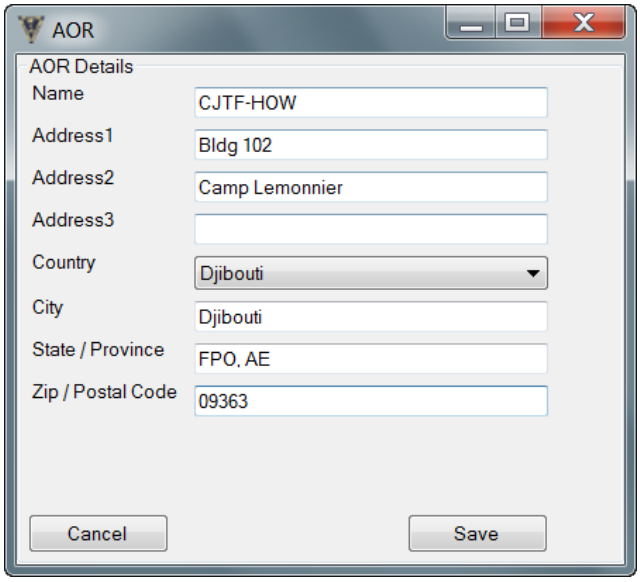
1. Select **Set Up**, **AOR Administration** from the 3in1 Workstation main menu.

   – The *AOR Administration* window opens.



Use the AOR Administration window to manage AOR details and their associated offices

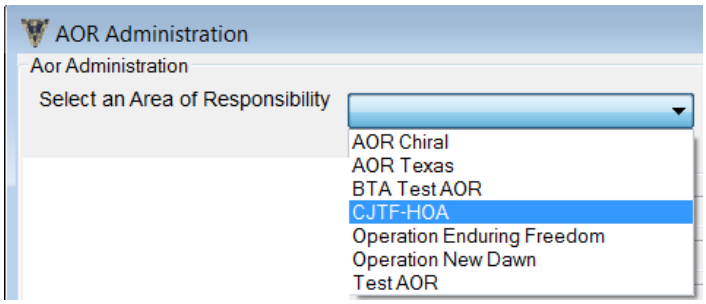
2. Click the **Add** button.
   – The *AOR* window opens.
3. Enter a name for the new AOR, then specify the address, city and country. (Name is the only required field.)
4. Click the **Save** button to add the new AOR.



Editing or Deleting an AOR

To edit information for an existing AOR:

1. In the *AOR Administration* window, select an AOR from the top drop-down list.



Select AOR

- Information associated with the selected AOR is displayed.

2. Click the **Edit** button.
3. Make edits to the information, then click the **Save** button.

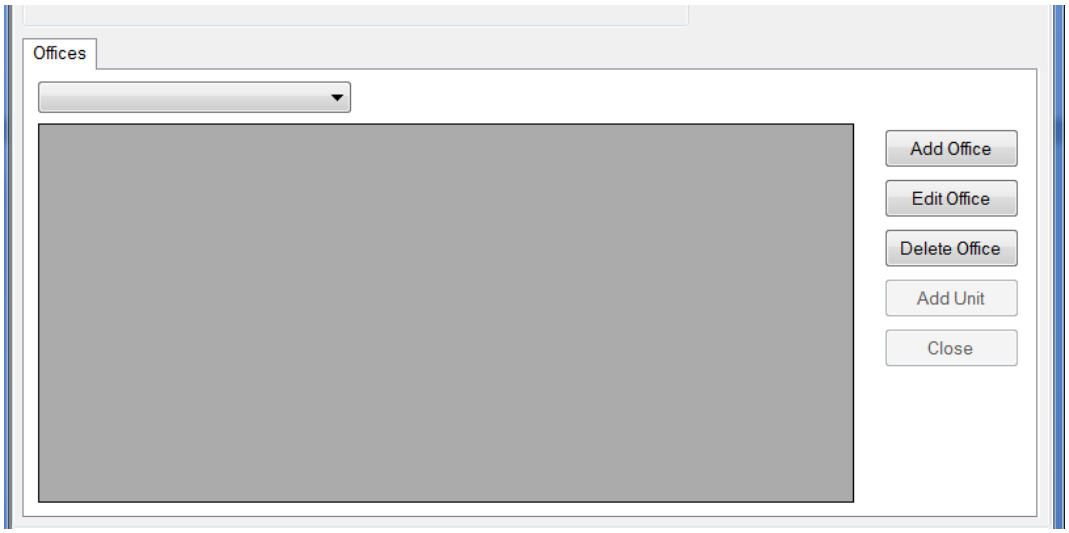
To delete an AOR, click the **Delete** button. The AOR is removed from the system.

Adding AOR Offices

An AOR can have associated contracting, finance, property book offices, or a custom office can be created for the purposes of review and clearing. Contracting and finance roles and offices, along with the role of Resource Manager, have additional procurement and financial capabilities in the 3in1 system. Property Book and generic offices only have review/clearing functions in the 3in1 system. A user's access to the system is based on his/her role and visibility of FOO/PA teams and data is based on the office to which he/she is assigned. Offices must have the units they are to support identified for visibility of the data. When setting up an AOR, consider the necessary contracting and financial office functions along with the necessary offices needed to conduct the clearance or review process. See *Module 6: Configuring the 3in1 Tool Workstation, Lesson 3: Defining Clearance Flow* for more information on setting up the clearance workflow process.

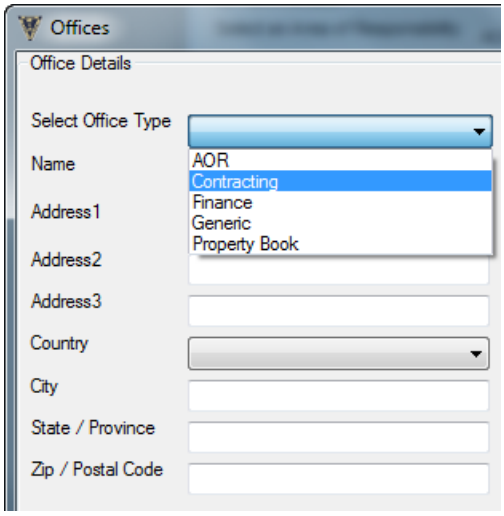
To add an AOR office:

1. In the *AOR Administration* window, select an AOR from the drop-down list.
2. In the bottom half of the screen, locate the **Offices** tab. Click the **Add Office** button.



3. Select an office type from the list: **Contracting, Finance, Property Book,** or **Generic**.

Generic and AOR office types can be selected, if for some reason, the office type should remain unspecified.

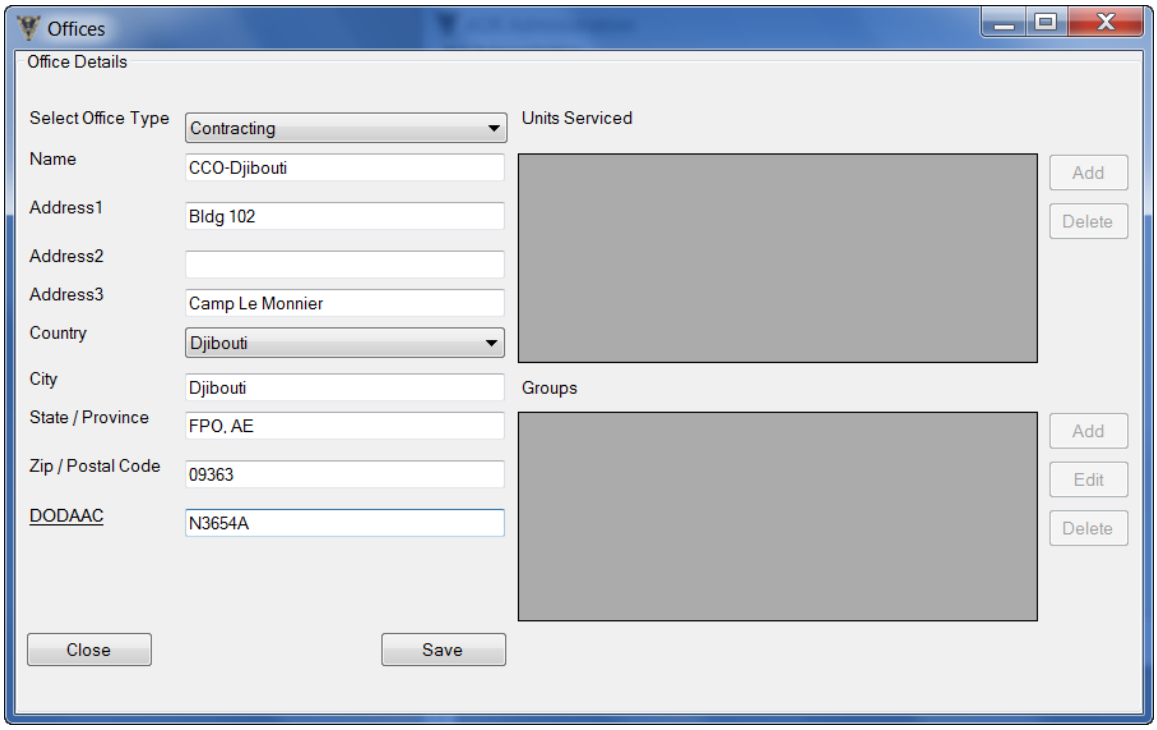


AOR New Office Type

Add a Contracting Office

To add a Contracting office:

1. Select **Contracting** as the Office Type in the *Offices* window.
2. Complete the required fields: **Office Type**, **Name** and **DODACC**; the other fields are optional.
3. Click the **Save** button to save the edits.



Add New Contracting Office

Note: The DODAAC is a six-character Department of Defense Activity Address Code that uniquely identifies a unit, activity, or organization that has the authority to requisition and/or receive materiel.

When you click the **Save** button, the headings UIC and Name display in the Units Serviced panel.

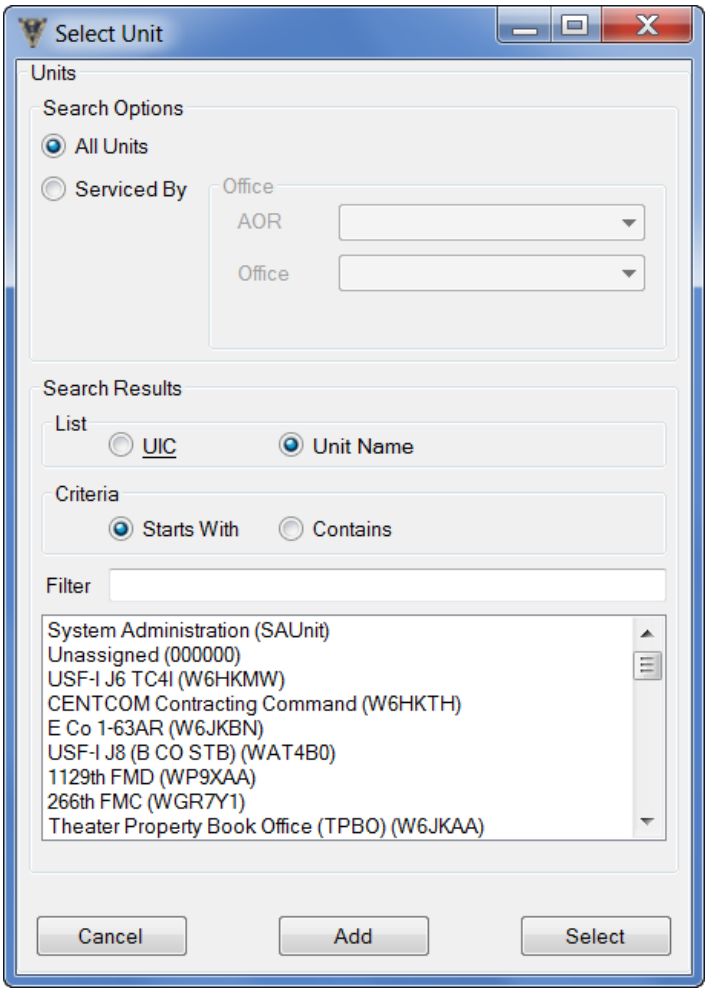
To cancel the operation and not add a new office, click the **Cancel** button.

Adding Units Serviced

After adding and saving an office, it is necessary to add the units that are serviced by the office. This is important because this will link these units to the office within the system so they will be available for selection when managing the devices and orders/vouchers, and generating reports. Every 3in1 user has an assigned to a unit identified by its UIC, which determines the offices with which the user is associated. The Unit Identification Code (UIC) is a six-character, alphanumeric code that uniquely identifies each Active, Reserve, and National Guard unit of the Armed Forces for the contingency operation. The UIC is used for data aggregation by unit and by region and are important in assigning orders for clearance purposes.

To add a unit to the office currently displayed:

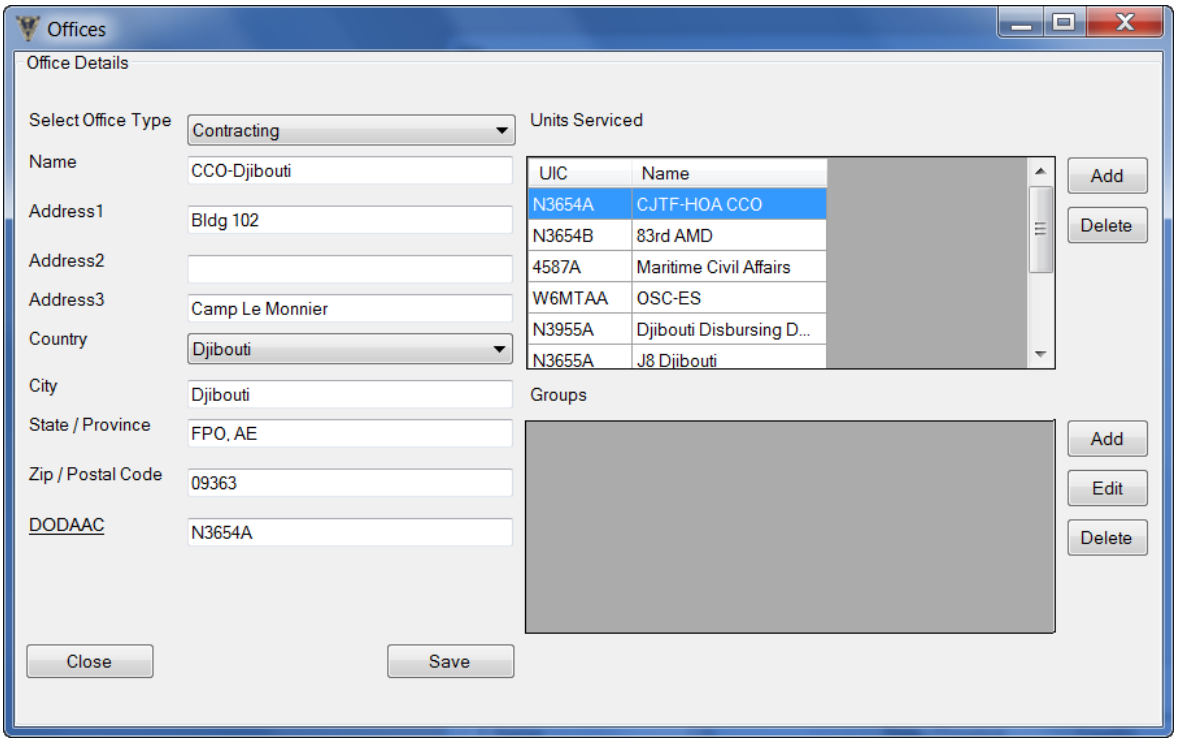
1. Click the **Add** button on the right side of the *Offices* window.
   - The *Select Unit* window opens.



Select Unit Window

2. Under **Search Options**, click a radio button to either search for all units or those serviced by a specific AOR and office.
3. Under **Search Results**, choose to display the search results by UIC or unit name.
   - Optionally type characters to search for using the *Starts With* or *Contains* filter.
   - The list of units updates to match the specified criteria.
4. Select one or more units from the list, then click the **Select** button.
   - To select multiple units, press the Ctrl key and then click the units.
   - The selected unit is added to the **Units Serviced** table.

If you later need to remove a unit from an office, select the unit in the Units Serviced table, then click the **Delete** button.



Unit Assigned to an Office

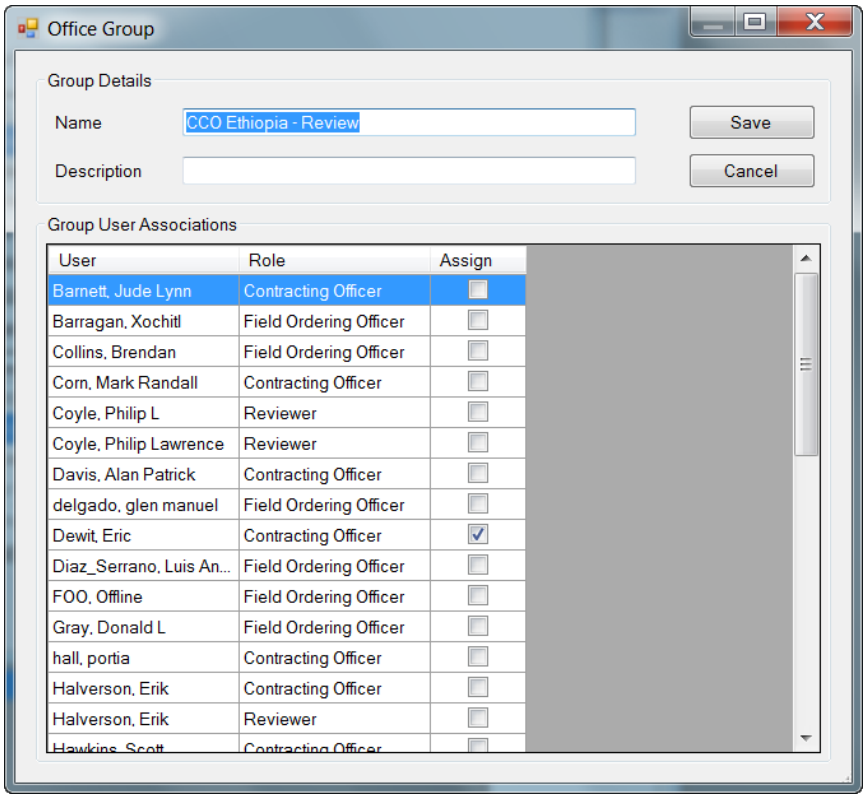
Adding Groups

The optional grouping capability enables configuring an office with multiple groups for the purposes of accomplishing multiple reviews within one office. For instance, if a Finance office requires that specific people review the orders before the Disbursing Agent approves the clearance of those orders with 3in1, this can be accomplished by setting up a group of reviewers and a group of approvers.

These groups can be selected when defining the clearance workflow for purchase orders, as explained in *Module 6: Configuring the 3in1 Tool Workstation, Lesson 3: Defining Clearance Flow*.

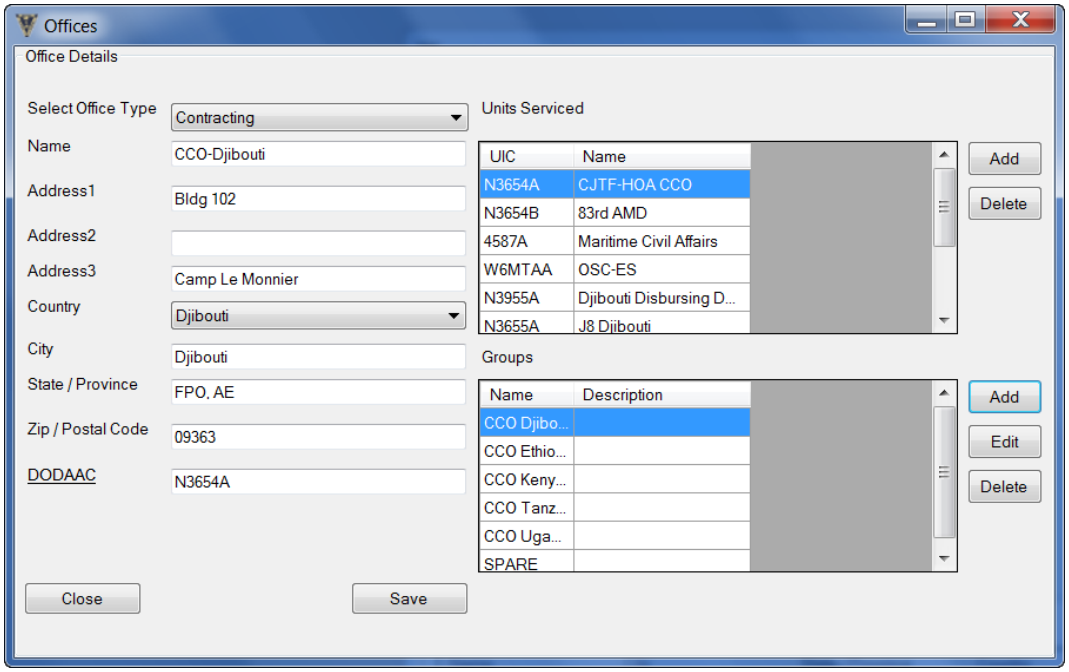
To add a group to the office currently displayed:

1. Under **Groups**, click the **Add** button on the right side of the *Offices* window.
   - The *Office Group* window is displayed.
2. Enter a name and description for the group.
3. Under **Group User Associations**, select the check boxes beside users who should be assigned to the group. Only users who are assigned a role that corresponds to the currently selected office (Contracting, Finance, etc.) are displayed.
4. Click the **Save** button.



Mark the Assign checkbox to assign users to the newly defined office group

The new group is displayed in the Groups table. It is possible to edit the group (add or remove users) by clicking the **Edit** button in the Groups section.



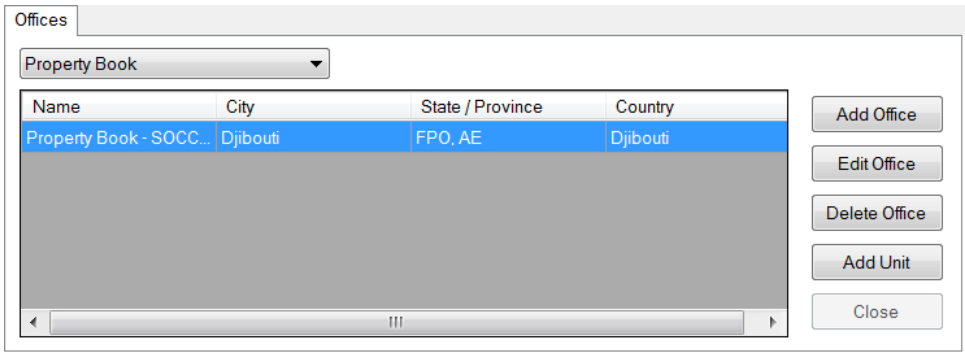
Units and groups are assigned to the contracting office

If you later need to remove a group from an office, select the group in the Groups table, then click the **Delete** button.

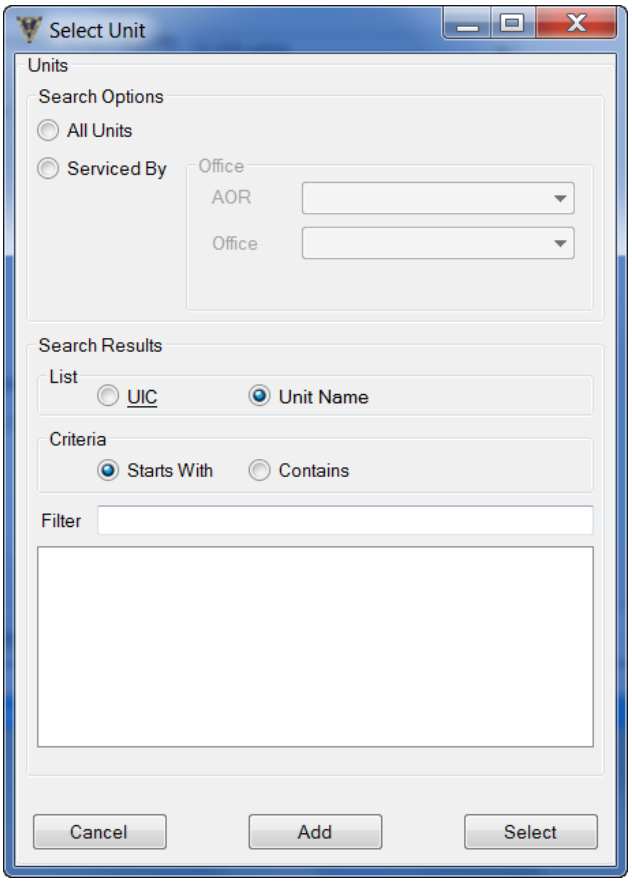
Creating Units

If the unit you are looking for does not exist, you can create it.

On the *AOR Administration* window, in the **Offices** tab, click the **Add Unit** button.

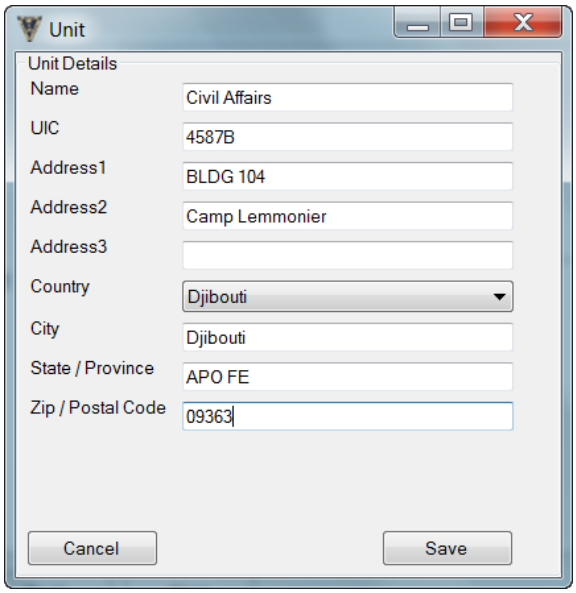


The *Select Unit* window is displayed. Click the **Add** button.



Select the Add button to define a new unit

The *Unit* window is displayed. In the **Name** field, enter the Unit name. In the **UIC** field, enter the Unit Identification Code. Fill in the remaining fields and click the **Save** button.

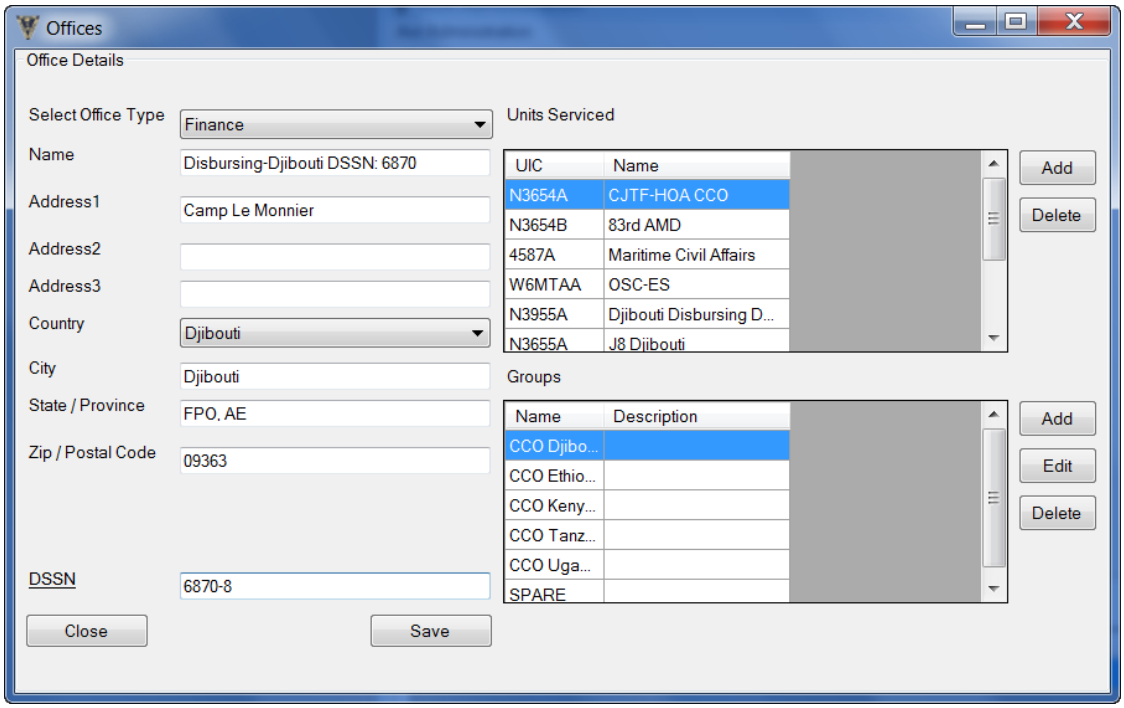


Provide details about the new unit

Adding a Finance Office

To add a Finance office to an AOR:

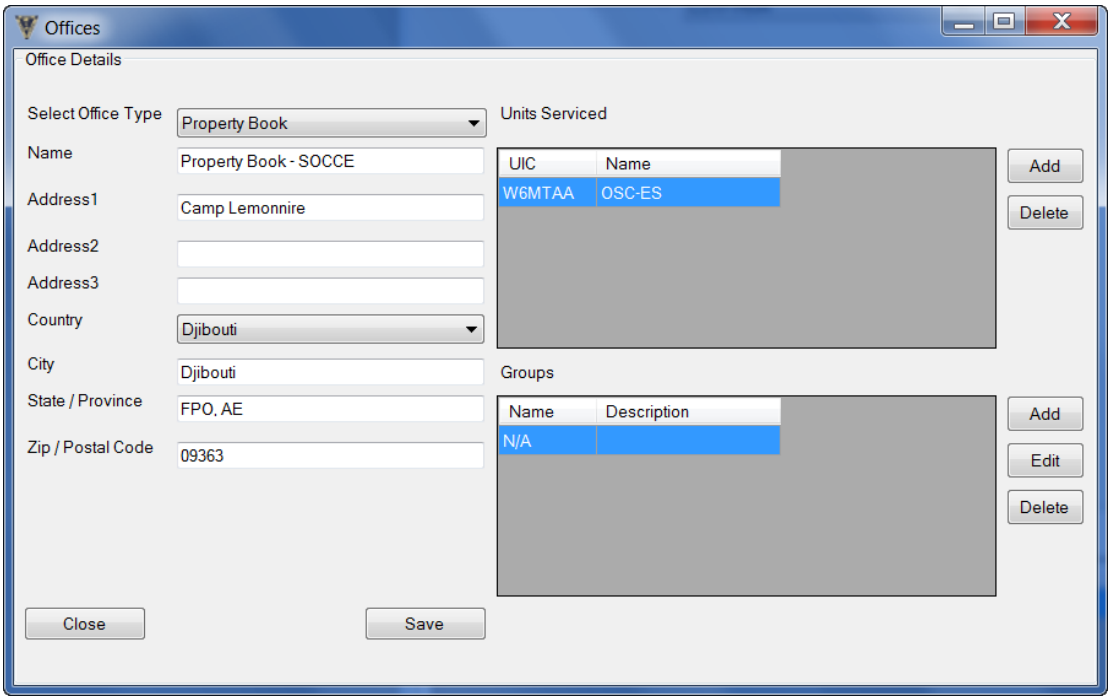
1. Select **Finance** as the office type.
2. Complete the office details fields. Only the Name and DSSN are required.
   - The Disbursing Station Symbol Number (DSSN) identifies each disbursing/Finance Office.
3. Click the **Save** button to save the edits.



Adding a Property Book Office

To add a Property Book office to an AOR:

1. Select **Property Book** as the office type.
2. Complete the fields in the *Offices* window.
3. Click the **Save** button to save the edits.

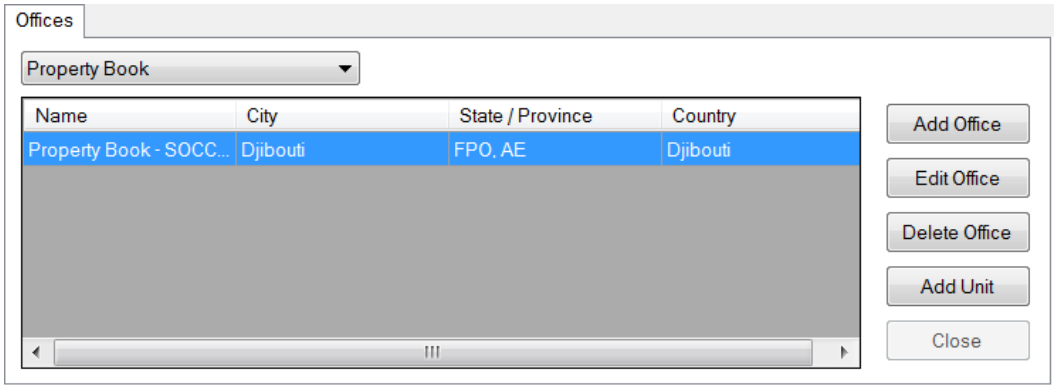


Property Book Office Details

Editing and Deleting AOR Offices

To edit or delete the details of a specific office:

1. In the *AOR Administration* window, select an AOR from the drop-down list.
2. At the top of the **Offices** tab, select the office that you want to edit or delete.



AOR Administration Window – Offices Tab

3. To modify the field values, click the **Edit Office** button.
4. After making changes, click the **Save** button.

To delete the office, click the **Delete Office** button.

Lesson Summary

In this lesson, you learned to:

- ❑ Add, edit and delete an Area of Responsibility
- ❑ Add contracting, finance and property book offices to AORs
- ❑ Assign units serviced to an office
- ❑ Edit or delete offices

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Lesson 2: Defining Procurement Control Policies

Objectives

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

- ❑ Add/Edit/Delete procurement control policies at the AOR or Office level
- ❑ Configure item or limit procurement policies for AOR Contracting Offices

Adding AOR/RCC Procurement Control Policies

Controls can be established on the Workstation 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.

Tip: Fill out the *Default Procurement Policy Worksheet* in *Appendix B* to ensure you have all the required information for entering data in the 3in1 Tool Workstation.

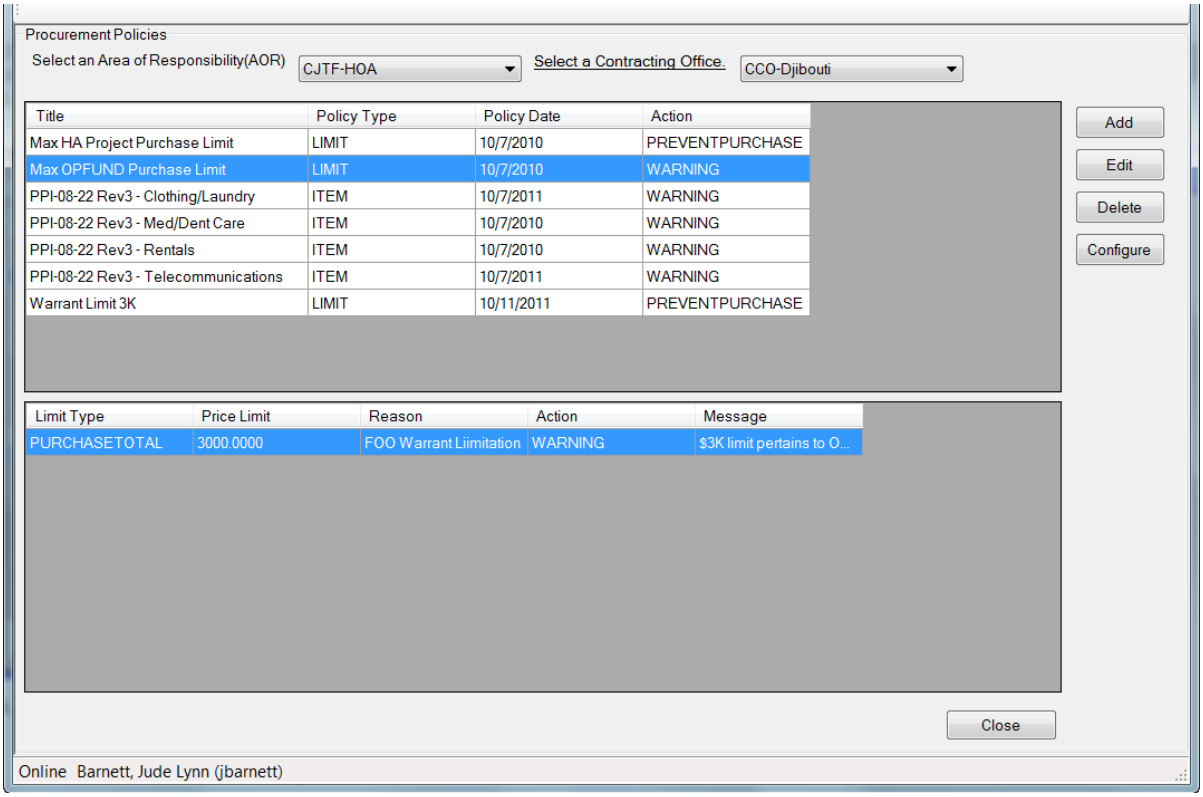
Step 1: Establish the Policy

Creating procurement controls is a two-step process. First, establish the policy, then configure the specific warnings or limits.

To add a new procurement policy to an AOR/RCC:

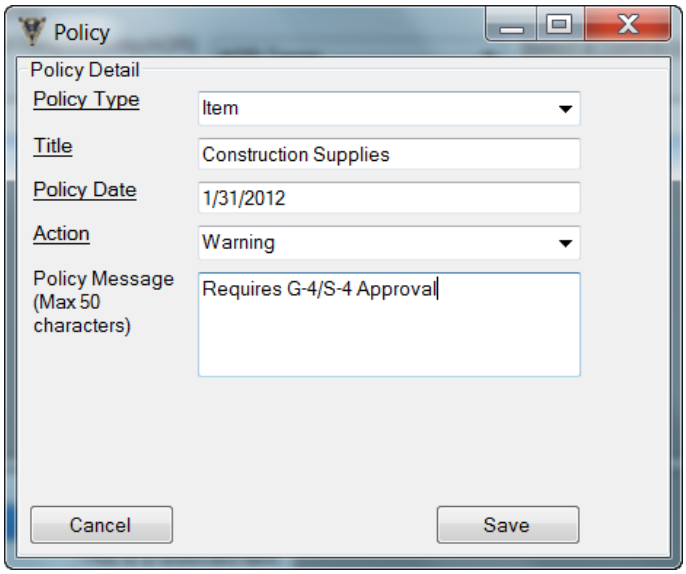
1. Select **Set Up**, **AOR/RCC Procurement Control Policies** from the main menu.
   - The *Procurement Control Policy Administration* window opens.
   - Procurement controls can be established at two levels: when the AOR is set up and when the Contracting Office is set up.
2. To set up procurement controls at the AOR level, select an **AOR** from the drop-down list. Proceed to Step 4.
3. To set up 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.



Existing procurement policies are displayed for the selected office

4. Click the **Add** button.
5. In the *Policy* window, select a policy type, and specify a policy title, date, action associated with the policy and a short message that will be displayed on the device.
   – 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.
   – 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.



An Item limit policy applies to specific products; in this example, construction supplies will be defined during policy configuration

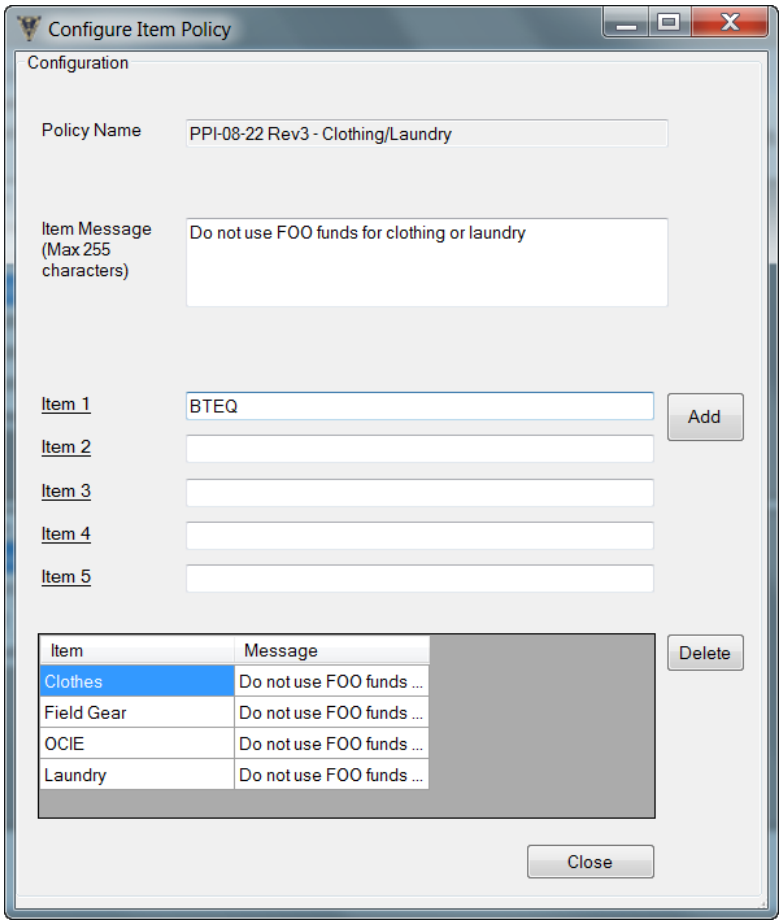
6. Click the **Save** button to save the new policy.

Step 2: Configure the Policy

Item procurement control policies can be configured to issue warnings to FOOs before specific items are purchased.

To configure an item policy:

1. Select an Item type policy in the table, then click the **Configure** button.
   - The *Configure Item Policy* window opens.
2. In the *Configure Item Policy* window, define new items to which the policy applies.
   - For example, if the policy requires approval by a specific person prior to the purchase of some items, define those items and who needs to approve the purchase on the *Configure Item Policy* window.



Define the items controlled by this policy

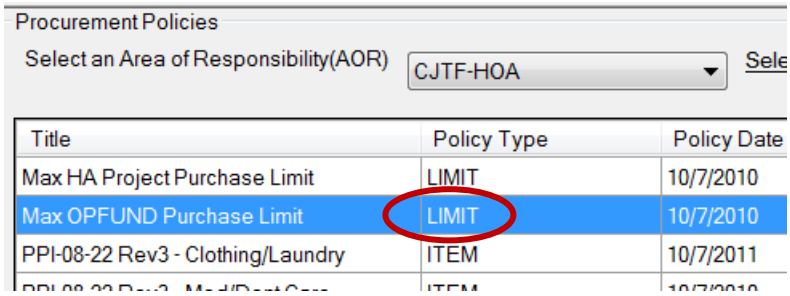
3. Click the **Add** button to add the new items to the policy. The items are displayed in the table at the bottom of the *Configure Item Policy* window.
4. To delete an item from the table, select the item, then click the **Delete** button.
5. Click the **Close** button when you have finished.

Configuring Limit Policy

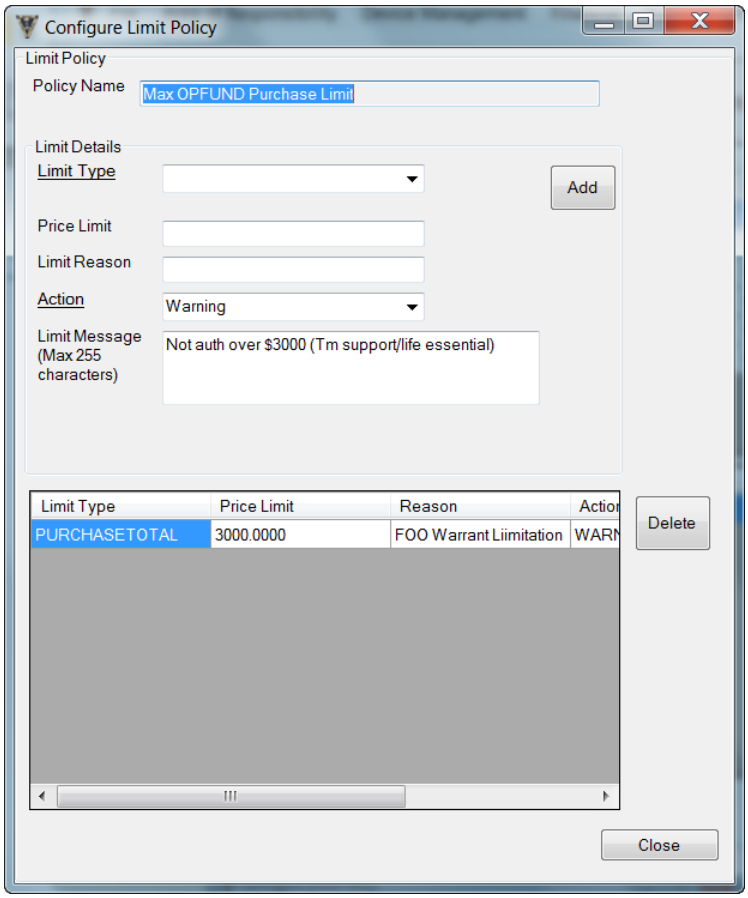
Procurement control policies can be configured to set price limits on items purchased or purchase totals. When a purchase is going to exceed the limit, a warning can be issued or a prevention action can occur.

To configure a limit policy:

1. Select a **Limit** policy type in the table, then click the **Configure** button.



2. In the *Configure Limit Policy* window, select the Limit Type: **Line Item** or **Purchase Total**.
   – Line Item sets a purchase limit on individual line items to issue a warning message if exceeded. Purchase Total sets a limit on the total purchase price authorized.
3. Specify the **Price Limit** and **Reason**.
4. Select an action to trigger when the limit is exceeded: issue a warning message or prevent purchase.
5. Define a message to display to users regarding the limit policy.
6. Click the **Add** button. The limit is displayed in the table.



Configure Policy Limit Window

Viewing Procurement Policies

Existing policies display in the top table of the *Procurement Control Policy Administration* window.

From this screen, you can edit a policy by first selecting the policy in the table, then clicking the **Edit** button.

To delete a policy, first select it in the table, then click the **Delete** button.

Other Features

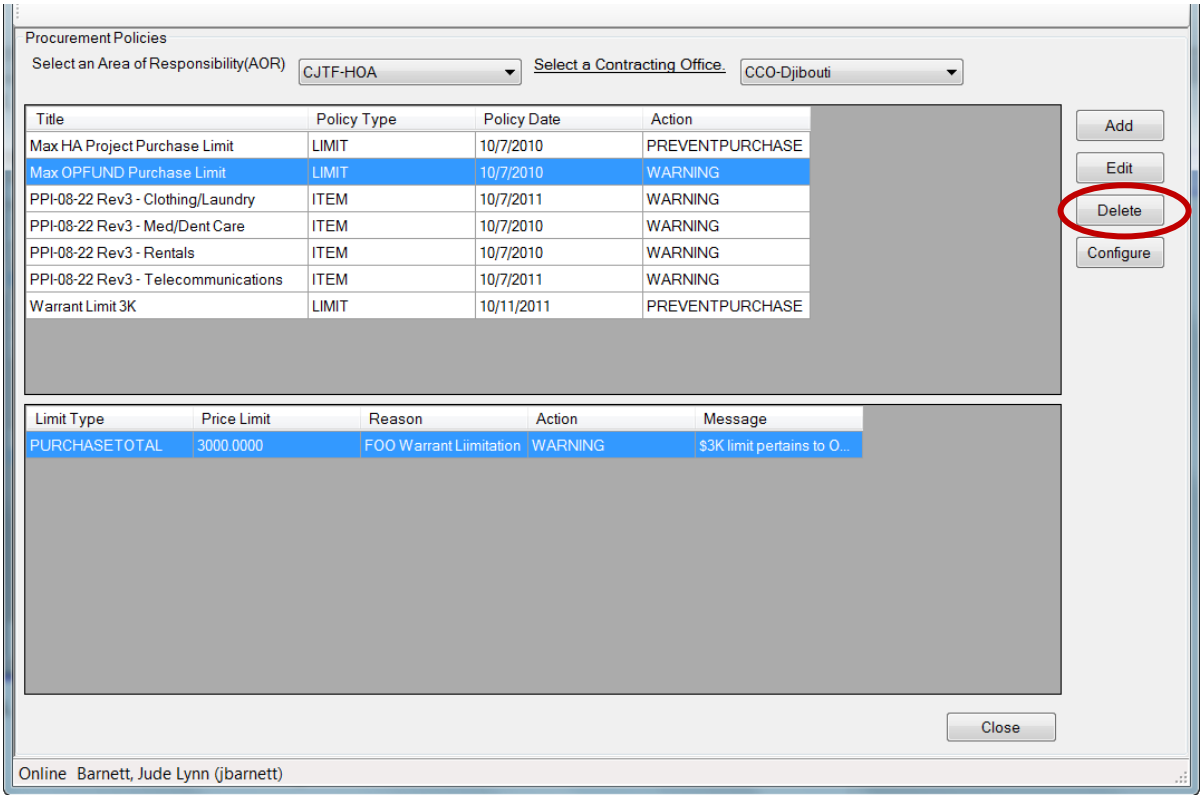
To delete an item from the table, select the item, then click the **Delete** button.

Click the **Close** button when you have finished. The limits display in the table beneath the selected policy.

The defined procurement policies can be selected when provisioning devices to FOOs. *Module 7: Activating Devices for FOO/PA Teams, Lesson 1: Provisioning Devices from the Workstation* explains this procedure.

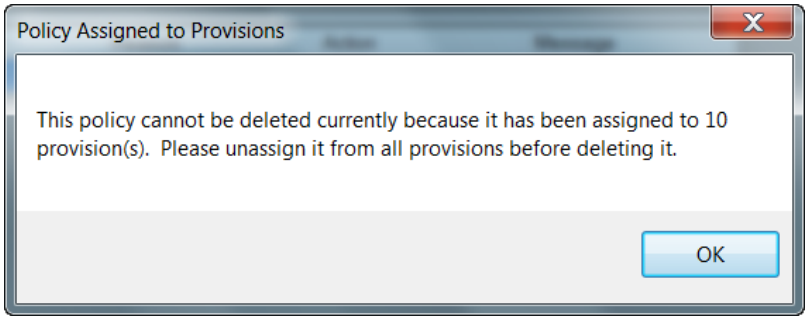
Deleting Procurement Policies

The **Delete** button on the *Procurement Control Policy Administration* window is used to delete the policy selected in the top table.



Procurement Control Policy Administration Window

However, if a KO attempts delete a procurement policy that has been assigned to provisions, a warning message is displayed and the deletion does not occur. The KO must unassign the policy from all provisions, then return to the *Procurement Control Policy Administration* window and delete the policy.



This message is displayed when a KO attempts to delete a procurement policy that is assigned to one or more provisions

Lesson Summary

In this lesson, you learned to:

- ❑ Add/Edit/Delete procurement policies to an AOR/Contracting Office
- ❑ Configure item and limit types of procurement policies

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Lesson 3: Defining Clearance Flow

Objectives

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

- ❑ Define the default purchase order clearance sequence for a Contracting Office
- ❑ Understand how the default clearance is applied to purchase order review and clearance procedures

Clearance Workflow Administration

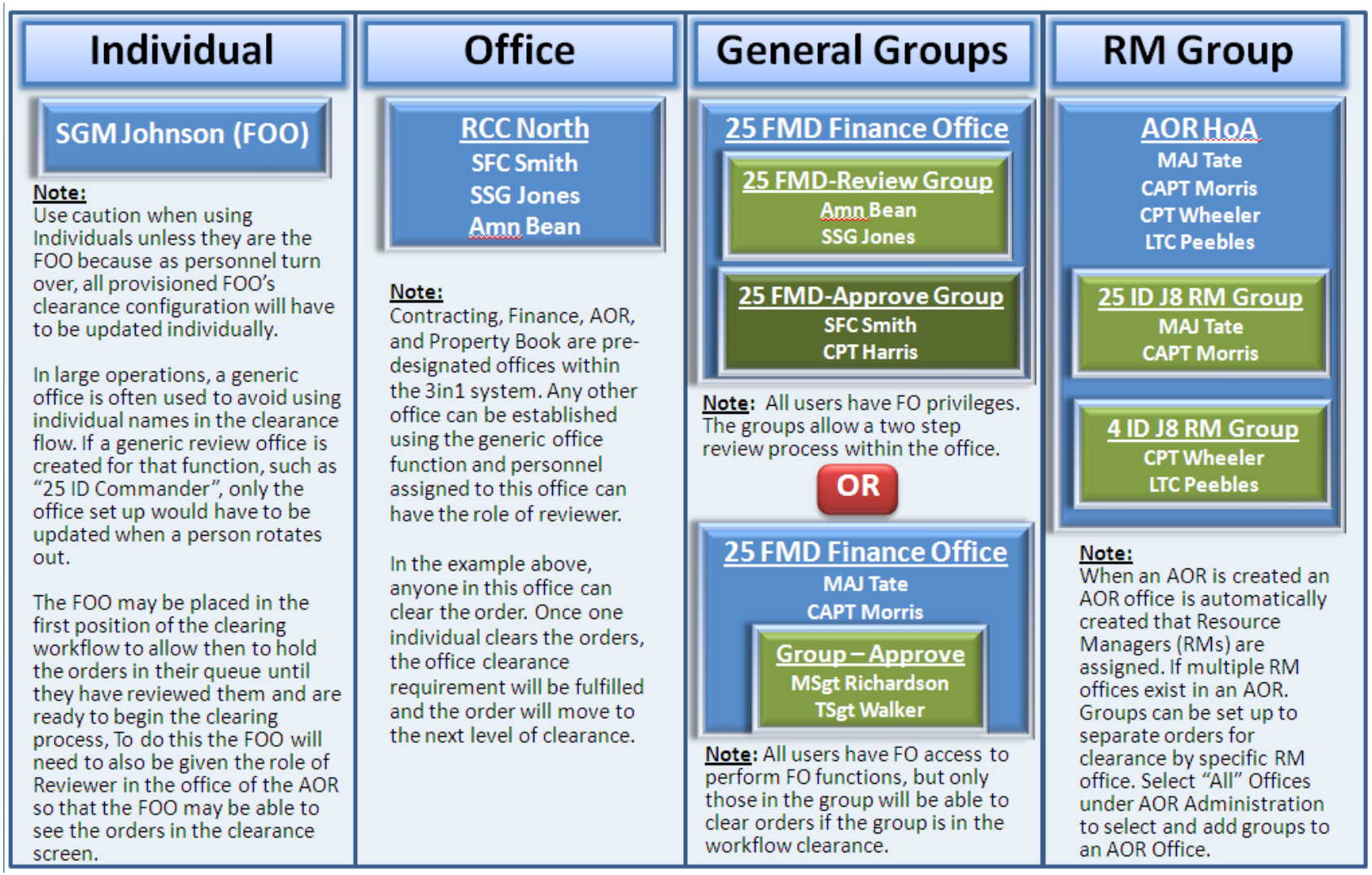
The 3in1 system has the ability to establish a review/clearance workflow sequence of approval for orders to be processed. The workflow can be established by office, groups within an office, or by individual. As orders proceed through each level of the workflow that has been established, an email is automatically sent to the next person in the workflow, notifying her/him of orders in the queue that are awaiting review.

There is no pre-established review/default clearance workflow. It is recommended that a review/clearance workflow is set up for the FOOs assigned to a Contracting office, based on the common workflow to expedite the provisioning process. Use the Default Clearance Administration feature to establish the sequence of approval required for each Contracting Office. The default review/clearance configuration will be applied to purchase orders associated with a specific Contracting Office. Clearance is performed by the sequence of personnel listed in the default clearance workflow configuration.

To expedite the device setup, a default clearance order can be created in advance and automatically assigned to each provisioned device. This can be tailored for each FOO during provisioning. The default clearance configuration applied to each FOO, based on the assigned Contracting Office, can be modified using the Provision Device feature, which is described in *Module 7: Activating Devices for FOO/PA Teams, Lesson 1: Provisioning Devices from the Workstation*.

Determining 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. As previously stated, the clearance flow can be created with individuals, offices, or groups within an office. The graphic below shows examples of each.



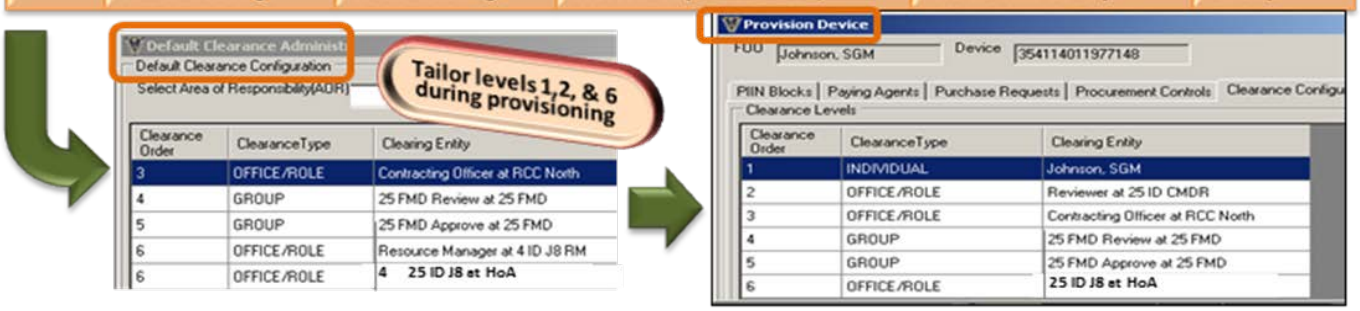
After determining how to structure the review/clearance workflow for your operation, identify the stages of the workflow that are common among several FOOs and set them up as the default clearance workflow.

Scenario

1. The FOO should hold orders in queue until ready to begin the formal clearing process
2. Each Unit Commander must review their FOOs orders first before contracting will clear them
3. Contracting Officer must clear orders prior to the Finance Office Clearance
4. Finance office has a 2 step review process. First the specialists would review the clearance package, then the DA would clear the FOO/PAs package of orders
5. Resource Manager (RM) reviews purchases and closes out the PR. However there are 2 RM offices in the AOR with several RMs in each office. *Note: RMs must be assigned to the AOR Office*

Recommended Office and Clearance Structure

Level	Person	Role	Office	Group	Clearance Type
1	SGM Jones (FOO)	FOO	HoA (AOR Office)		Individual
2	Maj Sams (Cmdr)	Reviewer	25ID Cmdr (Generic Office)		Office
3	All required KOs	Contracting Ofr	RCC North (Contracting Off)		Office
4	Finance Specialist	Finance Ofr	25 FMD (Finance Off)	25 FMD-Review Grp	Group
5	Disbursing Agent	Finance Ofr	25 FMD (Finance Off)	25FMD-Approve Grp	Group
6	Resource Mgr	Resource Mgr	HoA AOR (AOR Office)	25ID J8 RM Group	Group
6	Resource Mgr	Resource Mgr	HoA AOR (AOR Office)	4ID J8 RM Group	Group



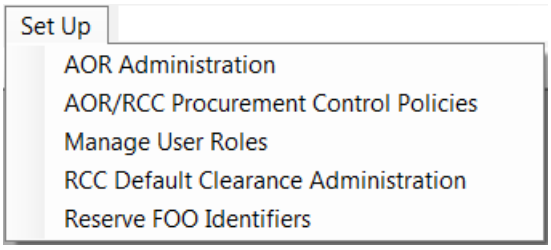
Set the Default Clearance with the common workflow positions starting with the contracting office in the 3rd review level and put both RM offices in the appropriate review level. The respective FOO and commander can be added and the incorrect RM office can be deleted when the FOO is provisioned. Personnel should be assigned to their respective offices during the setup.
Be sure the FOOs unit is assigned to the appropriate offices.

Setting Up a Default Clearance Configuration

Tip: Fill out the *Default Clearance Configuration Worksheet* in *Appendix B* to ensure you have all the required information for entering data in the 3in1 Tool Workstation.

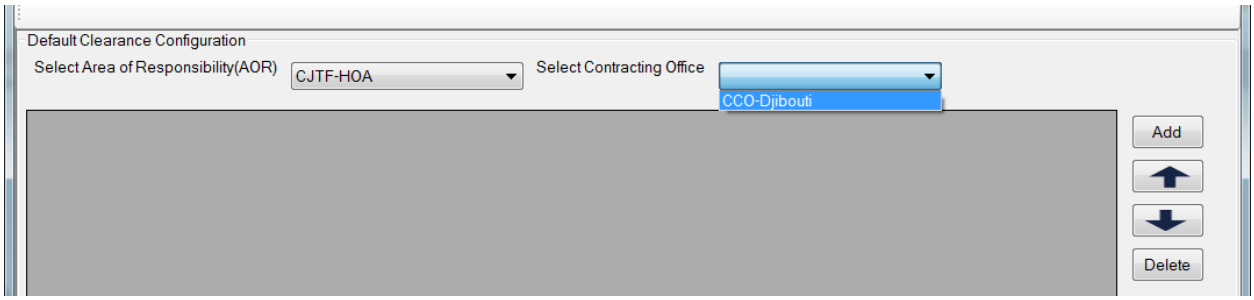
To set up a default clearance sequence for a Contracting Office:

1. From the 3in1 Tool Workstation main menu, select **Set Up**, **RCC Default Clearance Administration**.



   – The *Default Clearance Administration* window opens.

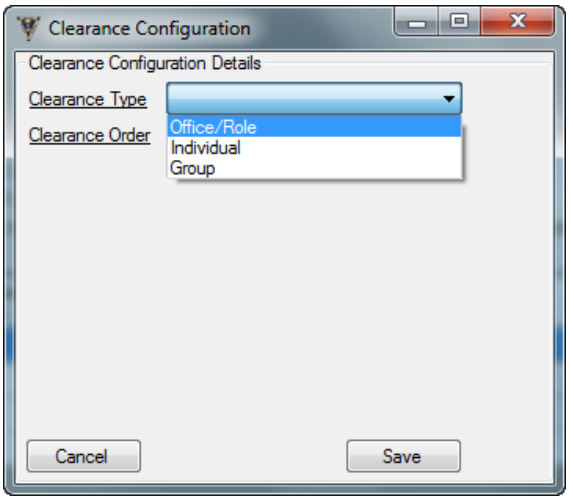
2. Select an **AOR** and **Contracting Office** from the drop-down list.



Default Clearance Administration window

3. Click the **Add** button.
   – The *Clearance Configuration* window opens.
   – You must be authorized to modify default clearances for the selected Contracting Office, or you will receive a message that prevents you from adding or editing a default clearance. (Contracting offices are assigned to users in the Manage User Roles feature.)

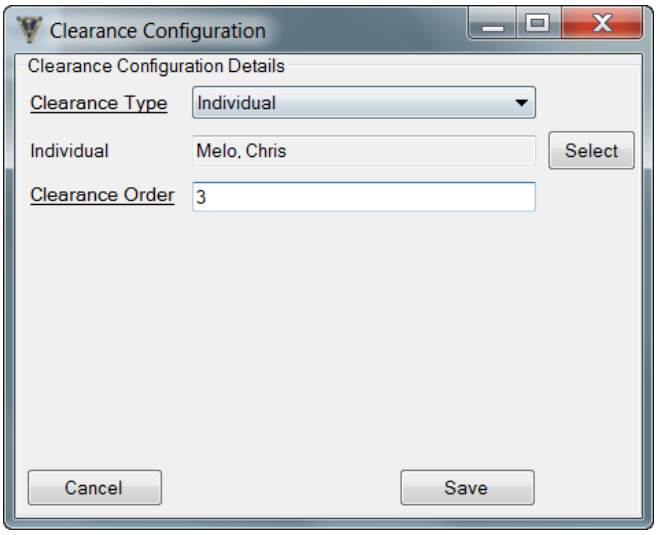
4. In the **Clearance Type** field, specify whether the person who clears the purchase order must be a named individual (**Individual**), can be anyone in a specific role who is assigned to the Office (**Office/Role**), or a named **Group** of users who share the same role at an office.



Clearance Configuration window

Specifying Individual or Office/Role Clearance Authorization

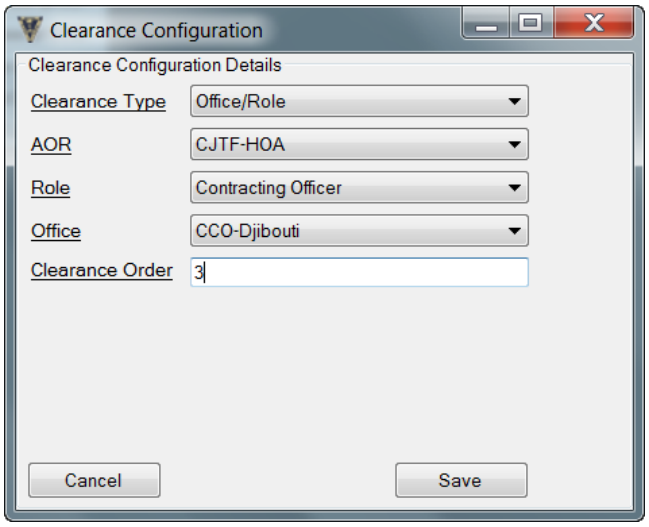
If you selected Individual clearance, follow these steps:



1. Select the user name by clicking the **Select** button.
2. In the **Clearance Order** field, type the number that corresponds to the individual's place in the clearance sequence. For example, if this person is first to review purchase orders, type 1.
3. Click the **Save** button.

If you selected Office/Role as the Clearance Type:

1. Select the AOR and Office, the role the approver must have, and the number that corresponds to the approver's place in the clearance sequence.
   - The program enters some default values, but you can change them before saving.
   - If you need to create an office, such as a unique office for reviewing purposes, use the AOR setup feature, as explained in *Module 6: Configuring the 3in1 Tool Workstation, Lesson 1: AOR Setup*.
2. Click the **Save** button.

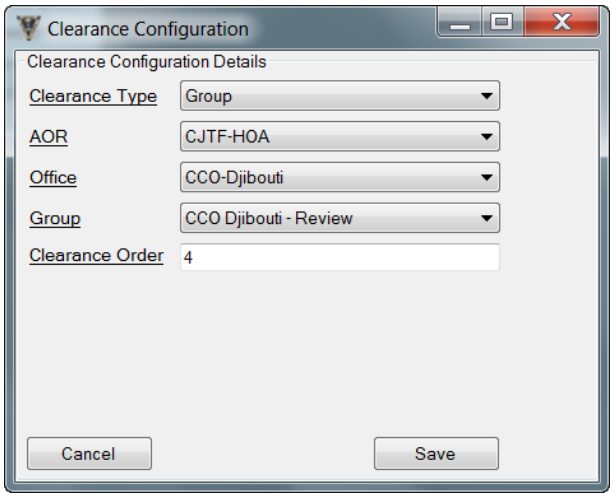


Adding an Office/Role Clearance

The approver is added to the table in the *Default Clearance Administration* window.

Specifying Group Clearance Authorization

When defining AOR offices, as explained in *Module 6: Configuring the 3in1 Tool Workstation, Lesson 1: AOR Setup*, it is possible to create groups of users who share the same role. For example, when adding or editing a Contracting Office, create a group named "Approvers" and assign Contracting Officers to this group.

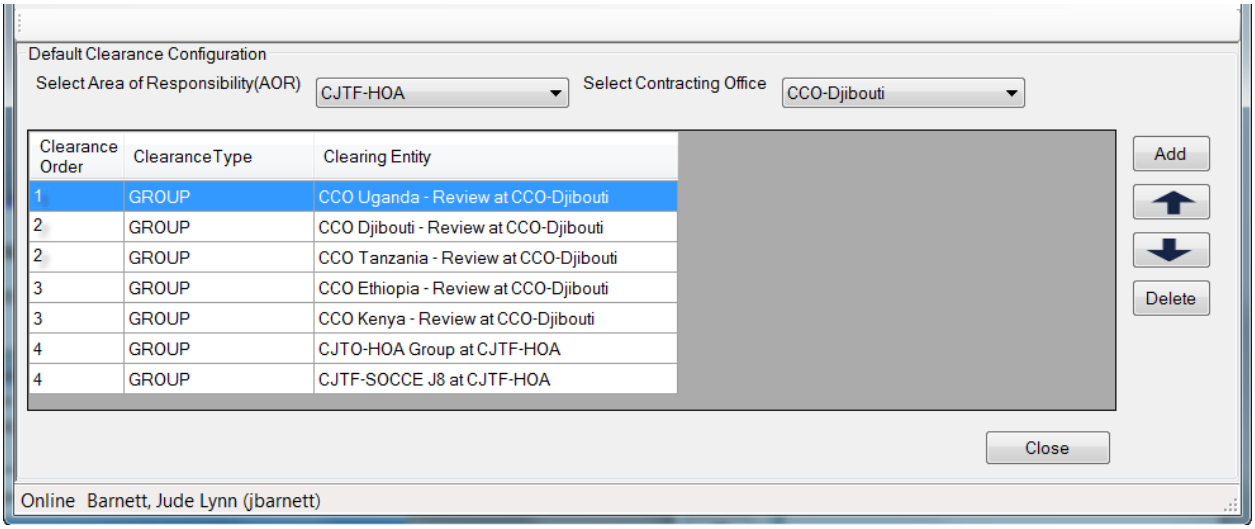


To add a group as a clearance authority:

1. Select **Group** as the Clearance Type.
2. Select the **AOR** and **Office**.
3. Select the group name, as shown in the following figure.
4. Click the **Save** button.

Completing the Clearance Workflow

Continue adding clearance personnel. A completed clearance configuration is shown in the following figure.



Default Clearance Administration 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.

Editing a Default Clearance Configuration

The sequence of approvers can be reordered using the Up and Down arrow buttons. First select a row in the clearance order table, then click the **Up** arrow button to move the approver up in the list, or click the **Down** arrow button to move the approver down in the list.

It is not possible to edit a clearing entity. Click the **Delete** button to remove the selected row, then re-add it. Be careful, as there is no confirmation of a deletion; the clearing entity is removed immediately after you click the **Delete** button.

Lesson Summary

In this lesson, you learned to:

- ❑ Define the default purchase order clearance sequence for a Contracting Office
- ❑ Understand how the default clearance is applied to purchase order review and clearance procedures

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Part 3a: Execution: FOO/PA Team Setup

Module 7: Activating Devices for FOO/PA Teams

Lesson 1: Provisioning Devices from the Workstation

Objectives

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

- ❑ Reserve FOO Identifiers
- ❑ Identify unprovisioned devices from the 3in1 Tool Workstation
- ❑ Provision devices to FOOs
- ❑ Customize provisioning settings
- ❑ Provisioning virtual devices

Reserve FOO Identifiers

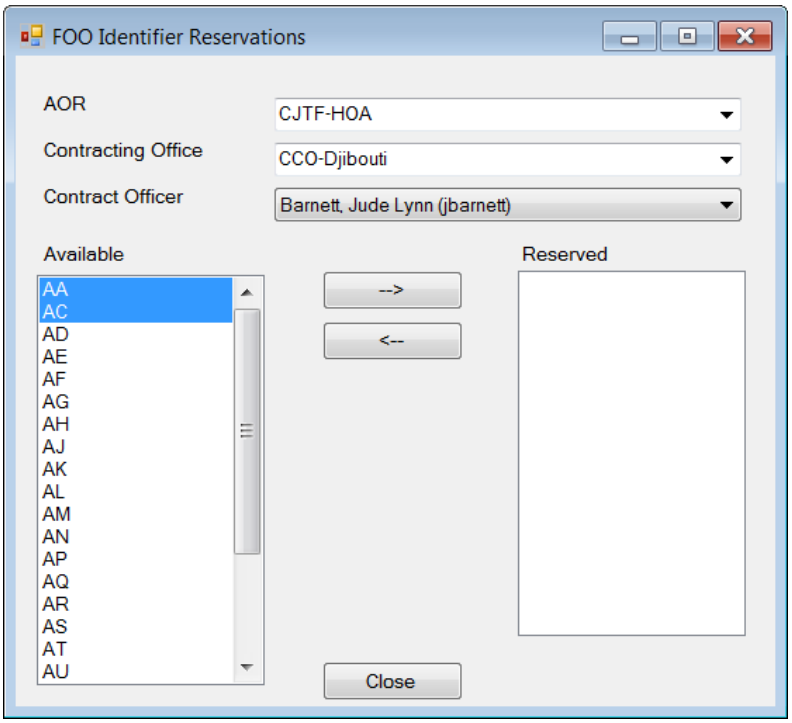
The Reserve FOO Identifiers feature enables a KO to reserve a set of FOO IDs. FOO IDs are assigned when each provision is created; FOO IDs are also part of the PIIN. KOs use the Reserve FOO Identifiers feature to avoid duplication of PIINs among multiple contracting offices that share the same DODAAC. The other purpose of this feature is to avoid creating duplicate FOO IDs when KOs work offline.

When a KO reserves a set of FOO IDs, no other KO from the same contracting office can use these IDs. For example, assume KO1 at Contracting Office A reserves FOO IDs from AA to BA. KO2 at Contracting Office A cannot use the FOO IDs that were reserved by KO1; the system will allow KO2 to use the next available sequential FOO ID, which in this case, would be BB.

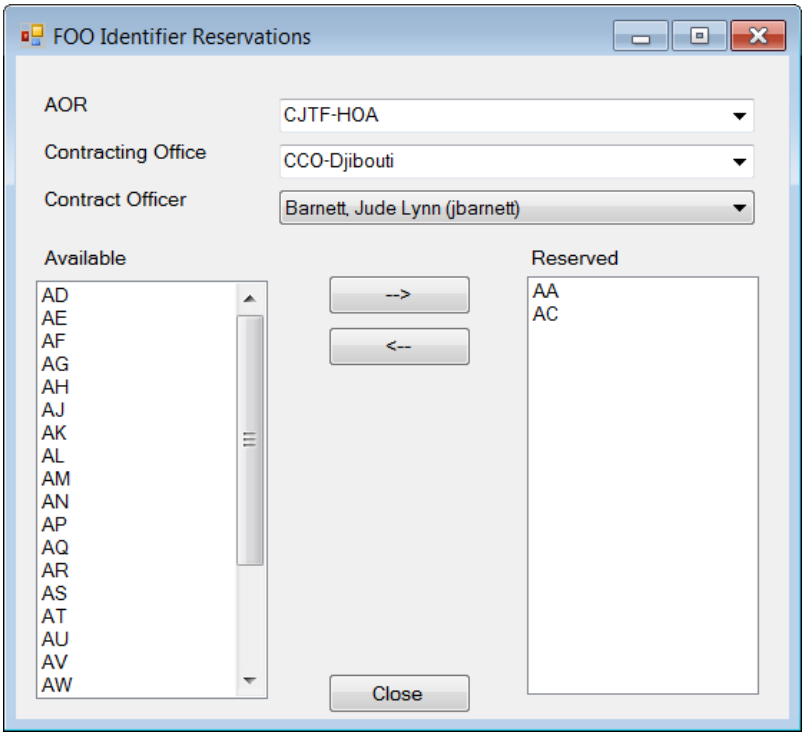
This feature is also useful when working offline. Without reserving FOO IDs, two KOs at the same contracting office who both create provisions while working offline, will create duplicate FOO IDs. This means the PIINs also will be duplicated and there will be an unresolvable conflict when the replicas are synchronized. For example, assume KO1 and KO2 at Contracting Office A each create an offline replica. Then they each create a provision; the system will automatically assign the FOO ID "AA" to both KOs, which will lead to duplicate PIINs (the FOO ID is part of the PIIN). To avoid this conflict, the KOs should each reserve a set of different FOO IDs before going offline. When the KOs create offline replicas and create provisions in offline mode, the system assigns two different sets of FOO IDs, using the reservation list saved by each KO.

To reserve FOO IDs:

1. Select **Set Up**, **Reserve FOO Identifiers** from the main menu.
2. On the *FOO Identifier Reservations* window, use the drop-down lists to select the correct AOR, Contracting Office and Contract Officer.



3. Select one or more FOO IDs in the left column. (To select multiple IDs, press Shift or Ctrl and then click the IDs).
4. Click the right arrow --> to reserve the selected IDs. The reserved IDs move to the right column.



FOO Identifier Reservations Window – Reserve FOO IDs to prevent duplication of FOO IDs and PIINs

If for some reason you need to unreserved the IDs, select them in the right column, then click the left arrow <-- button. The IDs return to the unreserved list in the left column.

Provisioning a Devices to a FOO/PA Team

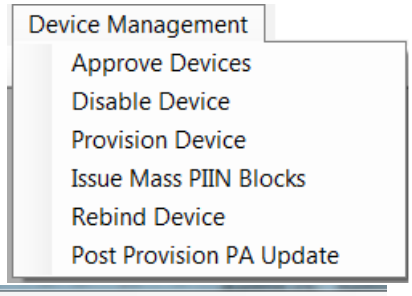
The process of provisioning devices sets up devices for use by teams of FOOs and PAs. Many variables are assigned during device provisioning, including a block of order numbers called a Procurement Instrument Identification Number (PIIN), FOOs and PAs, purchase requests (PRs), procurement control policies, and clearance configuration. The 3in1 Tool Workstation enables a KO to configure all these items on a single screen, using multiple tabs. If an RM is also deployed, they will manage the PR data instead of the KO.

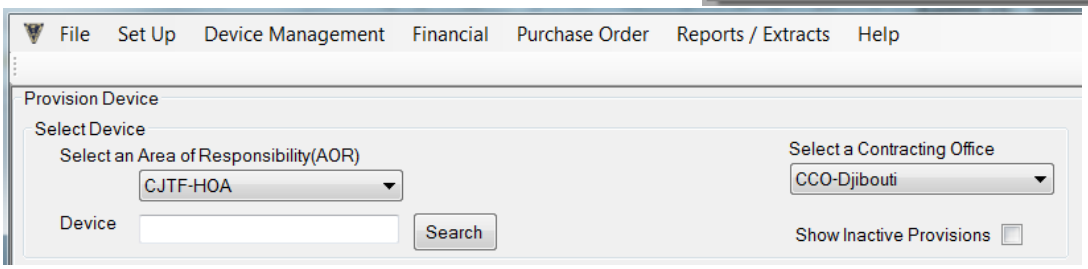
Devices can be provisioned to FOOs after they have been registered and approved in the Workstation. Both the FOOs and PAs must be approved in their respective roles in order to be provisioned to a device. The handheld device may be used by teams consisting of multiple users. For example, a device may be shared by one FOO and multiple PAs. Up to 28 users may be assigned to a single device.

Tip: Fill out the *Provision Device Worksheet* in *Appendix B* to ensure you have all the required information for entering data in the 3in1 Tool Workstation.

Accessing the Provision Device Window

1. Select **Device Management** from the main menu, then select **Provision Device**.
   - The *Provision Device* window opens.
2. Select the **AOR** and **Contracting Office** associated with the FOO.





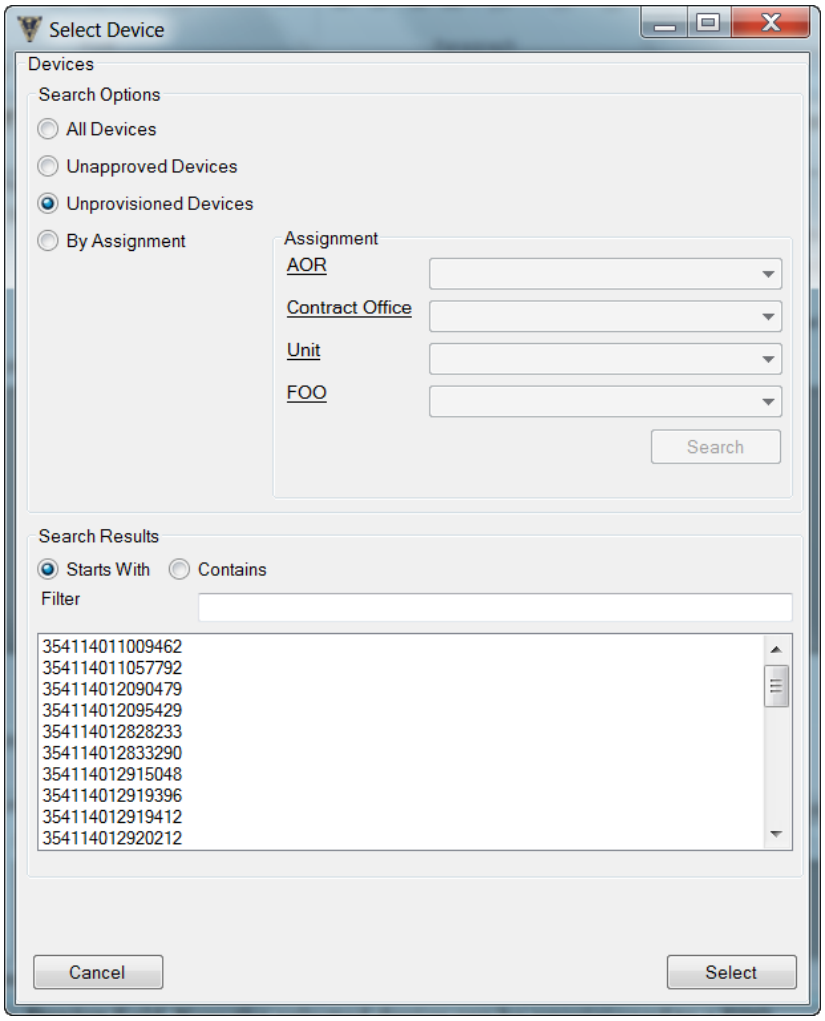
Provision Device window

Selecting Unprovisioned Devices

The next task is to locate and select an unprovisioned device:

1. Click the **Search** button.
   - The *Select Device* window opens.
   - By default, the devices assigned to the specified AOR Contract Office are displayed.

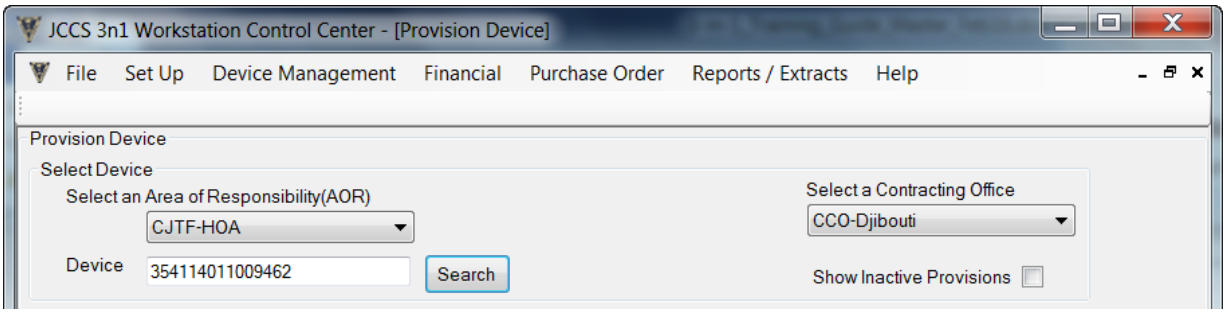
2. In the *Select Device* window, click the **Unprovisioned Devices** radio button.



3. Scroll through the list of unprovisioned device ID numbers, select one, then click the **Select** button.

Optionally refine the search by specifying characters that the device either starts with or contains. The list updates to display only the devices that match the filter.

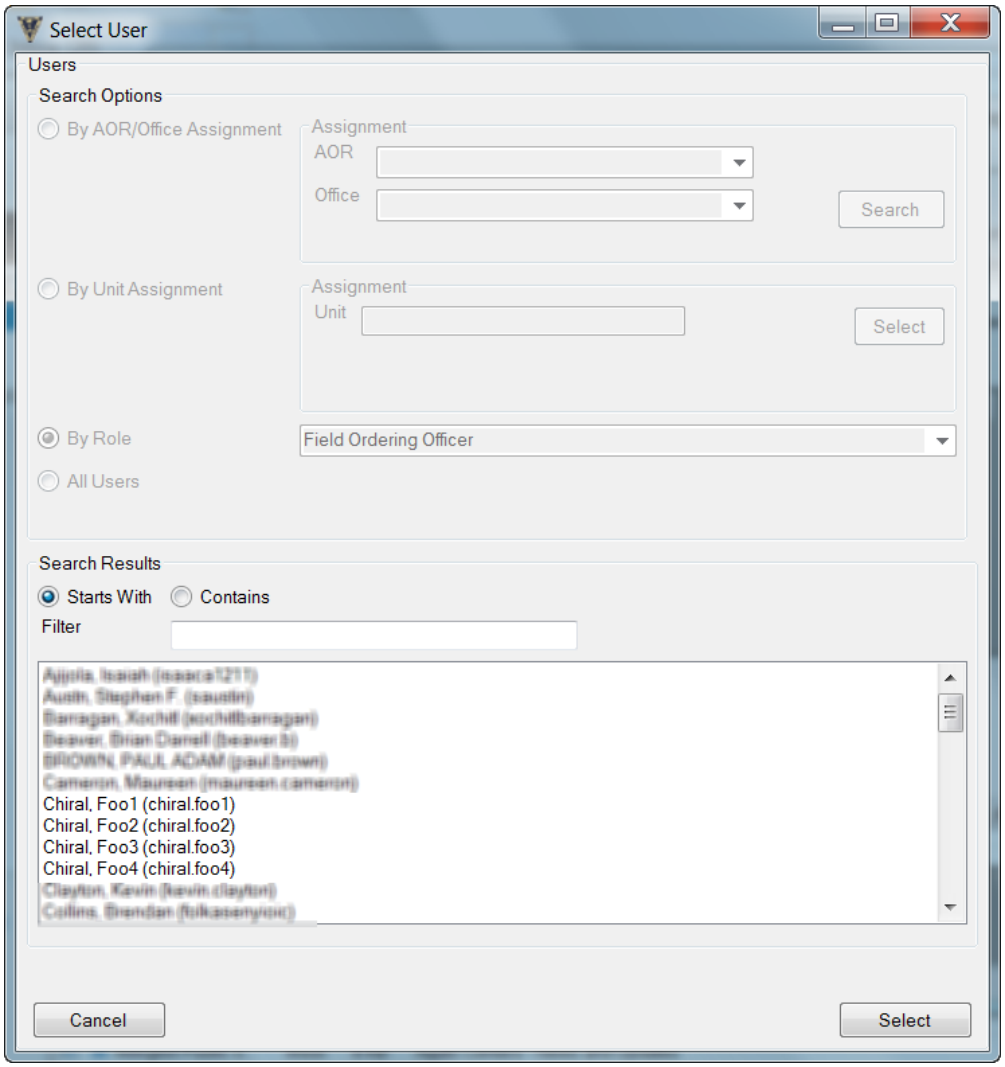
Clicking the **Select** button returns you to the *Provision Device* window. Notice the selected device is displayed in the **Device** field. Now the selected device can be provisioned to a FOO.



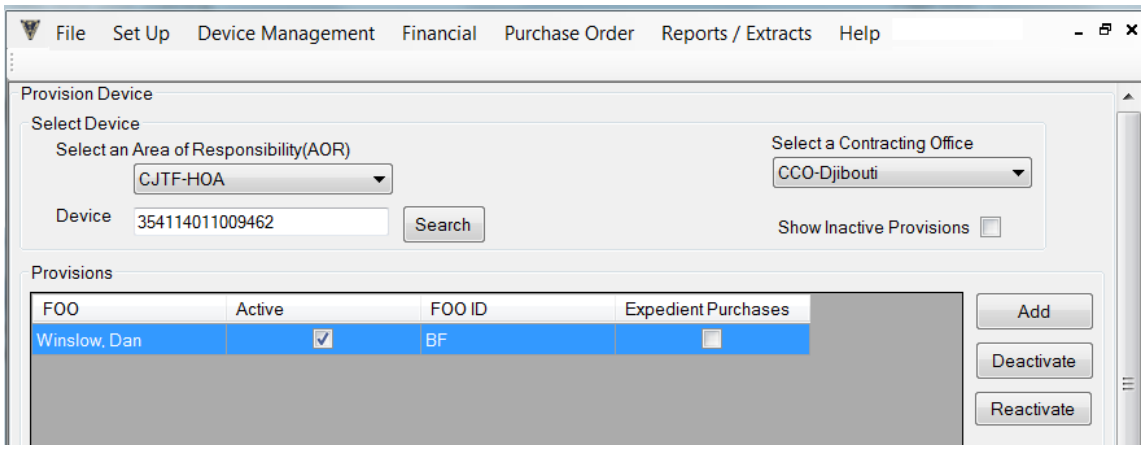
Provision Device Window

Selecting a FOO

1. In the **Provisions** section of the window, click the **Add** button.
   - The *Select User* window opens. Only users who are assigned the FOO role in the selected AOR office are selected.
   - If you do not see the FOO you are looking for, verify that the FOO's unit has been assigned as a supported unit to your Contracting office. Also, ensure the FOO has been approved in the role of FOO. See *Module 5: Managing 3in1 Workstation Users, Lesson 1: Registering New Users*.
2. Select a FOO from the list, then click the **Select** button.



After selecting a FOO, decide whether to allow expedient field purchases; these enable FOOs to create orders on the handheld device without following the standard order process. This allows the FOO/PA team to quickly obtain the vendor signature in the field and permits them to fill out the rest of the order information once they are in a safe location. This feature should only be enabled in extreme situations. This is desirable when FOOs are in high risk/dangerous locations.



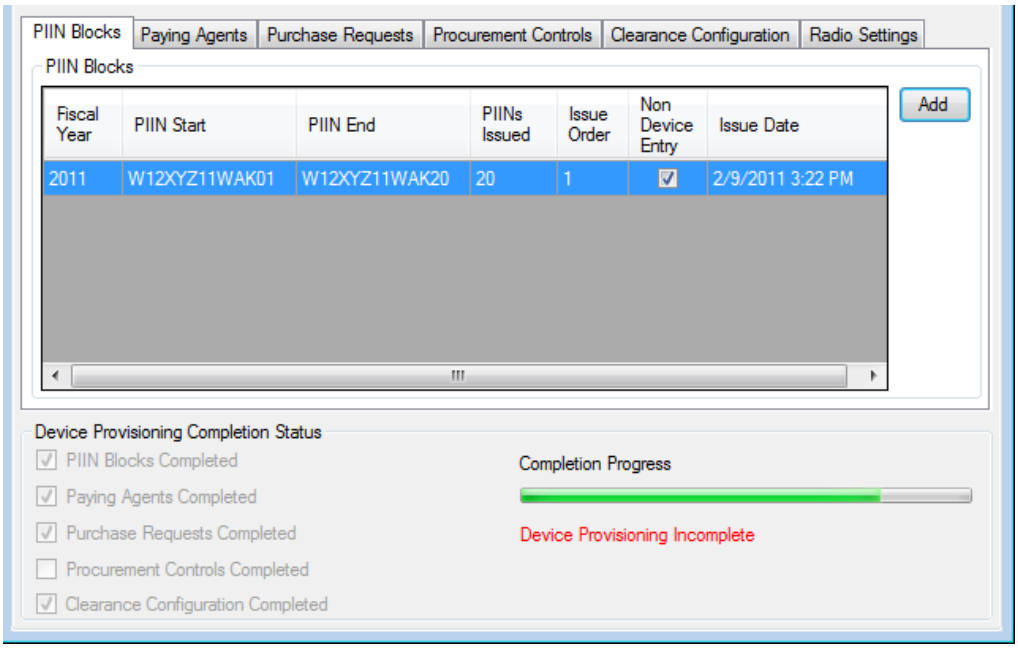
Provision Device Window – Selected Device and FOO

Note the FOO ID is assigned to a FOO when he/she is provisioned to a device and stays with him/her as long as the FOO is associated with the device. The FOO ID is also incorporated in the PIIN naming structure, as explained in the following section.

The Workstation will assign same FOO ID such as "AA" to different FOOs in different contracting offices with different DODAACs. The generation of FOO ID is sequential: AA, AB, AC…..AZ; BA, BB…..BZ….ZA, ZB….ZZ; A0, A1, A2…A9; Z0….Z9; then 2A….2Z; 3A….3Z; ending with 9Z. After 9Z has been assigned, the Workstation recycles FOO IDs from people who may have been terminated.

Note: Zero (0) and 1 in the first position are reserved for purchase orders accomplished by the Contracting office.

Use the tabs along the lower window to customize device provisioning to a FOO. To monitor your progress in completing the provisioning, check the Completion Progress bar at the bottom of the *Provision Device* window.



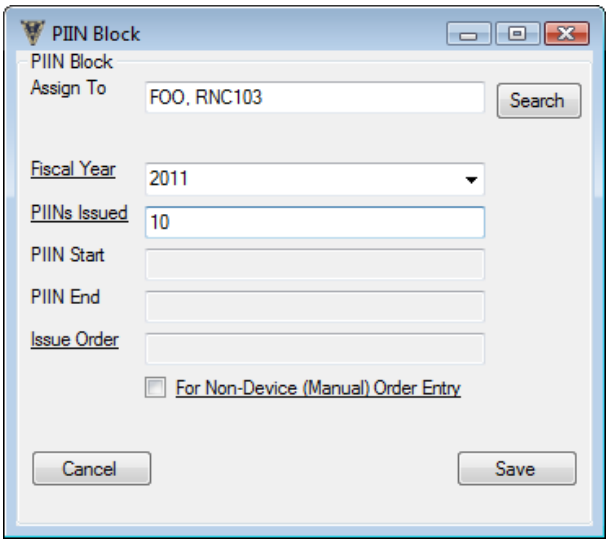
Provision Device Window – Completion Progress Bar

When a provisioning tab is completed, the associated check box is marked and the progress bar is filled with more green, to indicate the degree of completion. When all tabs are filled in, the progress bar shows 100% completion (the entire bar is filled with green).

Note this feature is informational; it will not prevent you from exiting the *Provision Device* window if some of the tabs have not been completed. If you assign a PA who already has a PR assigned, select the PA and assigned PR on the **Purchase Request** tab to acknowledge the PR assignment and complete the progress bar.

Assigning PIIN Blocks

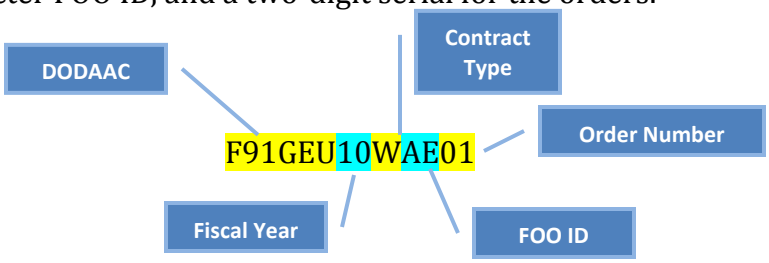
The first tab is **PIIN Blocks**, which assigns a block of PIINs to a FOO.



To assign a Block of PIINs:

1. In the **PIIN Blocks** tab, click the **Add** button.
   - The *PIIN Block* dialog box opens.
2. Select the fiscal year.
3. Enter the number of PIINs to be issued. The system will automatically generate a block of PIINs for that FOO.
   - Optionally specify a PIIN start or end or an issue order. Click the **Save** button.
   - To add PIINs that will be used for manual entry of orders, rather than for orders added using the handheld device, mark the **For Non-Device (Manual) Order Entry** check box.

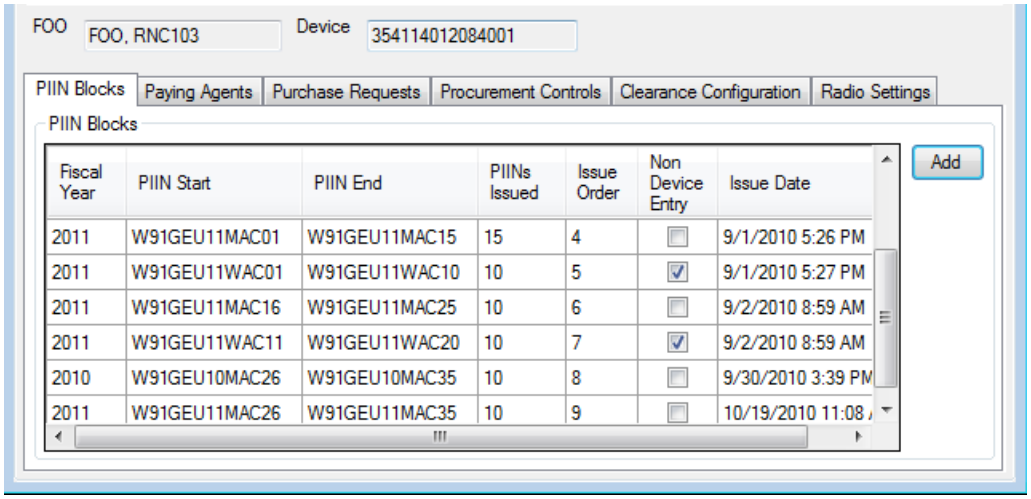
The Workstation generates the order numbers (PIINs) to be assigned to a FOO. The PIIN is comprised of 13 characters: The Contracting Office DODAAC, fiscal year, contract type "M" or "W," a two-character FOO ID, and a two-digit serial for the orders.



Two types of PIINs can be generated. "M" PIINs are generated 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 by hand as a backup, should the device be inoperable. The manual orders are then entered in the Workstation for electronic processing.

When issuing the device to FOOs, be sure to tell them the manual order numbers they have been assigned for backup paper orders.

Note: There is no Save button for the tabs in the *Provision Device* window. Changes are saved automatically. When you finish editing, just close the window.

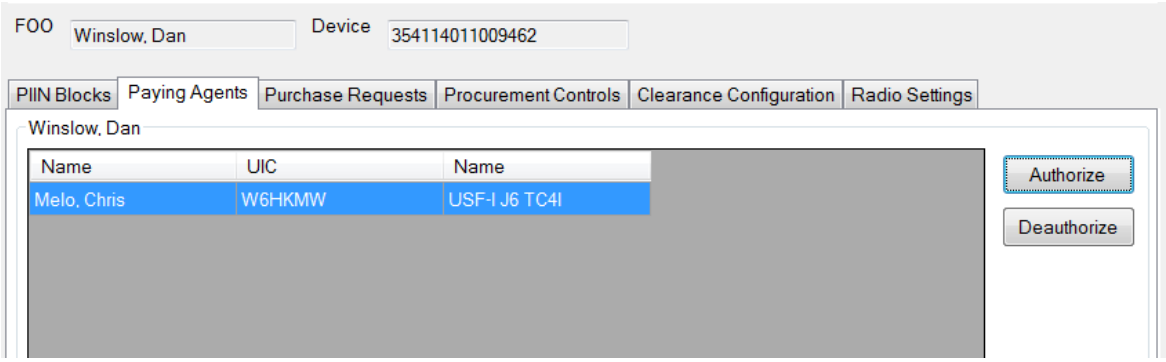


PIIN Blocks Tab Displaying Added PIIN Block

Assigning Paying Agents

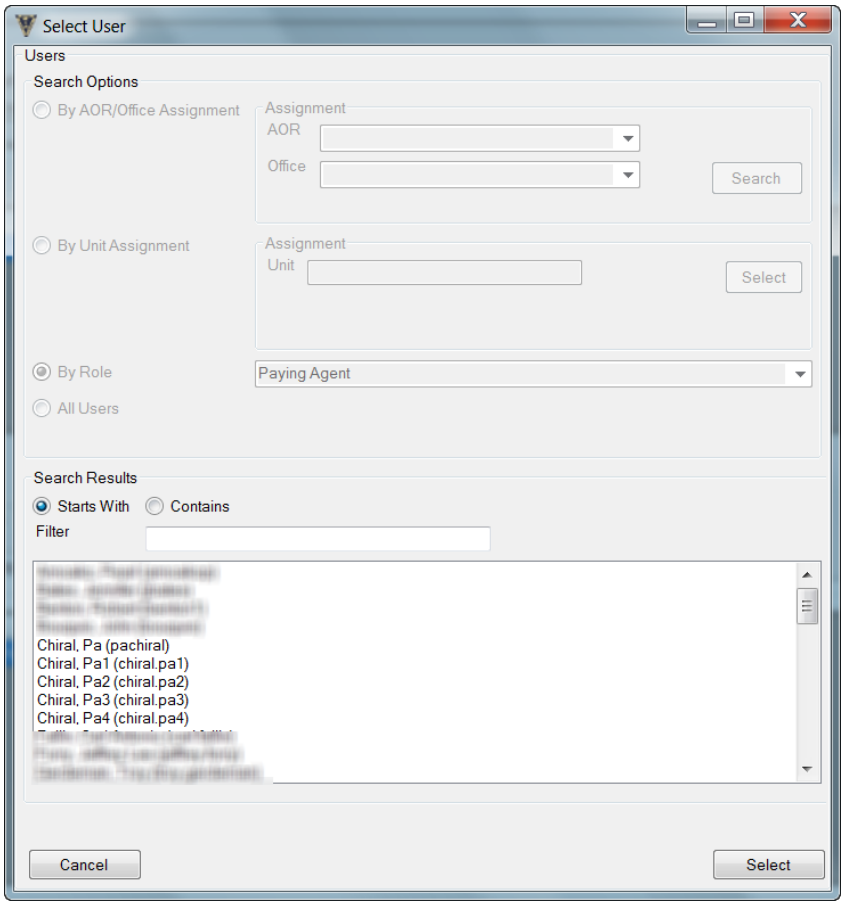
Use the **Paying Agents** tab to associate a paying agent to work with a FOO. PRs assigned to a PA to have cash disbursed will then be linked to the FOO to place orders against.

1. Select the **Paying Agents** tab.

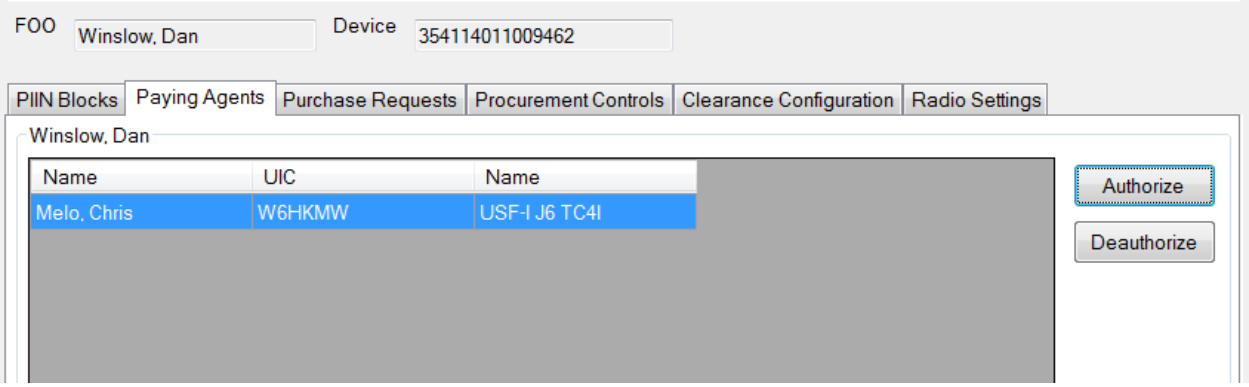


2. Click the **Authorize** button.
   – The *Select User* window opens.
3. Users who are assigned the Paying Agent role are displayed. Select a user.
4. Click the **Select** button.

   Note: The PA must be approved in the role of PA in order to be listed in the following window.



The selected user is added to the **Paying Agents** tab.



Paying Agents Tab

To remove a paying agent, select the name in the table, then click the **Deauthorize** button.

Note: Multiple FOOs and PAs can be assigned to a device. However, each FOO and PA can be assigned to only one device at a time.

Assigning Purchase Requests

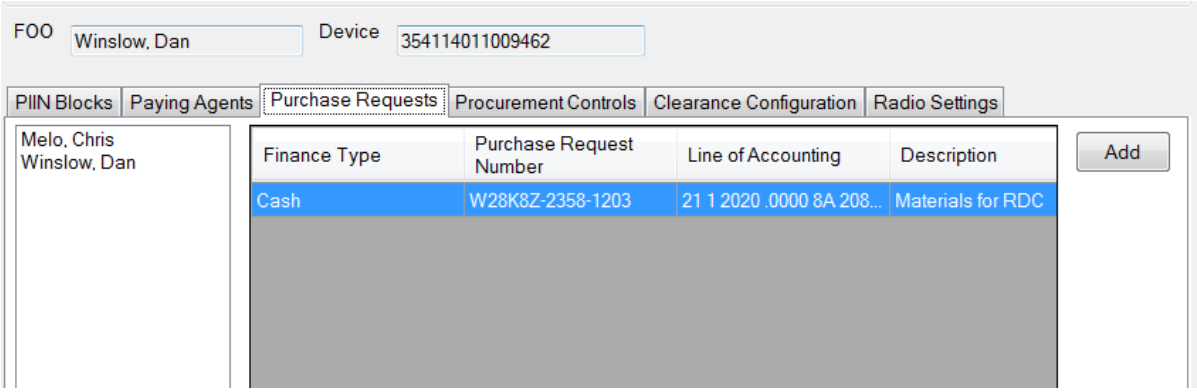
The Contracting Officer can use the **Purchase Requests** tab to update purchase request information associated with a FOO or paying agent. The two types of PRs are cash and

cashless. Cash PRs are associated to the PA who will be advanced the cash. Cashless PRs can be assigned to a FOO and is used when the order will be paid either directly by the Finance Office on base or via another method such as EFT.

Note: If the Finance Office created and assigned purchase requests to the selected FOO/PA team, these purchase requests will be displayed when you open the **Purchase Requests** tab.

Tip: Fill out the *Add Purchase Request Worksheet* in *Appendix B* to ensure you have all the required information for entering data in the 3in1 Tool Workstation.

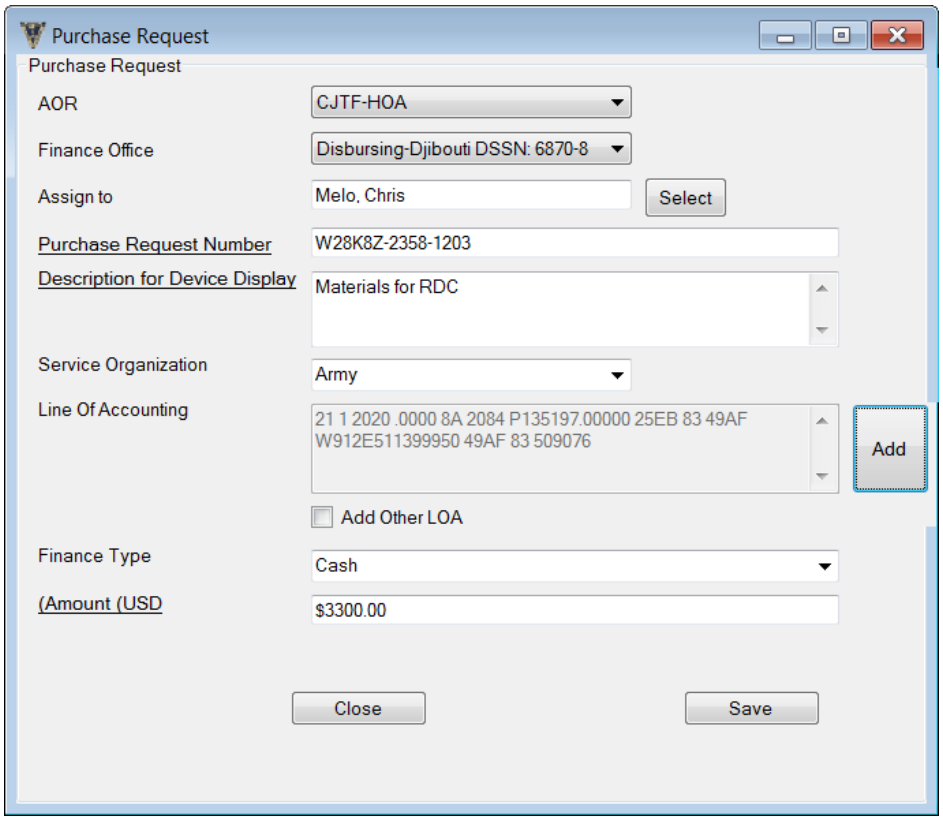
1. In the left column of the **Purchase Requests** tab, select the name of the person associated with the PR.
2. Click the **Add** button.



Provision Device – Purchase Requests Tab

   – The *Purchase Request* window opens.

3. Complete the purchase request fields.
   – The description should be concise and provide a way to distinguish this PR from others. The description is displayed on the smaller device screen, so try to minimize the amount of characters used. An example description: “FY10 CES Supplies.”



Purchase Request Window

4. Click the **Save** button on the *Purchase Request* window.
5. New fields display at the bottom of the *Purchase Request* window, to enable attaching documents, such as a scanned original PR. Use the **Upload** button to locate and upload files.
   - The scanned PR can also be uploaded using the Document Handling feature, after provisioning is complete. This functionality is described in *Module 13: Updating Financial and Procurement Information, Lesson 1: Updating Purchase Requests*.

Purchase Request Window – File Attachment Area

   - The added purchase request is then added to the Purchase Requests table.

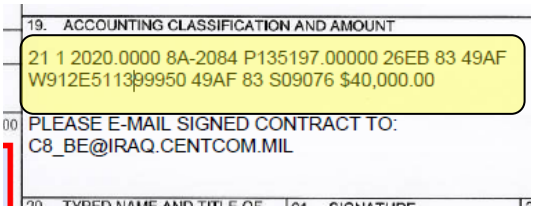
Entering the Line of Accounting

Non-DDS users can type directly in the **Line of Accounting** field on the *Purchase Request* window by first marking the **Add Other LOA** check box.

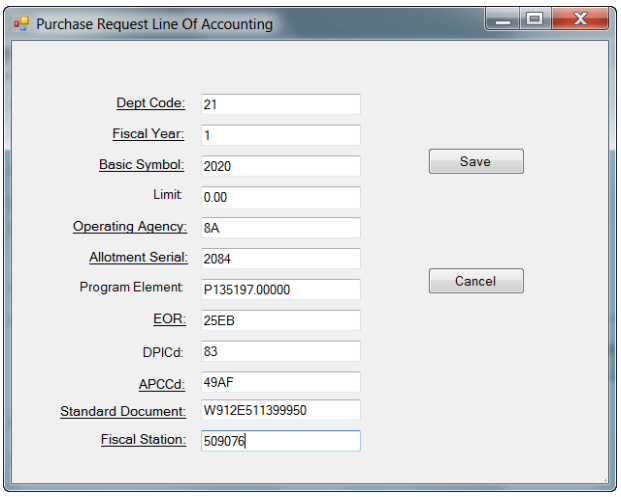
DDS users can add the Line of Accounting details using these steps:

1. Select the appropriate **Service Organization** (Army, Navy, or Marine).

2. Click the **Add** button to open the *Line of Accounting* dialog box.
3. Fill in the fields and click the **Save** button.
   - The fields in the *Line of Accounting* window meet the requirements for the selected Service Organization.
   - Also note that the content of purchase requests cannot be edited later, so be sure to enter all information, including the Line of Accounting, during the add purchase request process.



Line of Accounting source (Army)



Army Line of Accounting entered in 3in1 Workstation

Note: Although DPICd and APCCd are repeated in the printed LOA, it only needs to be entered once in the system.

Army LOA Field	Definition
Dept Code	A two-digit numeric code that identifies the military department or government entity receiving the appropriation
Fiscal Year	A one-digit numeric code that designates the year funds are available for obligation
Basic Symbol	A four-digit number that identifies the type of funds used
Operating Agency	A two-digit numeric code that identifies the organization receiving or issuing funds
Allotment Serial	A three-to-five position numeric code that identifies a particular distribution of funds
EOR	The Element of Resource four-digit alphanumeric code that identifies the type of resource being employed or consumed
APCCd	The account processing code
Standard Document	The standard document number
Fiscal Station	The six-digit number that identifies the activity which is responsible for performing the official accounting and reporting for the funds

Marine/Navy LOA Field	Definition
ACRN	A two-digit Accounting Classification Reference Number
Department	A two-digit numeric code that identifies the military department or government entity receiving the appropriation
Fiscal Year	A one-digit numeric code that designates the year funds are available for obligation
Basic Appropriation Symbol	A four-digit number that identifies the type of funds used
Subhead	A four-digit number that identifies the subdivision of funds that restricts the amount or use of funds for a certain purpose, or identifies sub-elements within the account for management purposes
Object Class	A three-digit number that classifies transactions according to the nature of the goods procured or services performed rather than their purpose
Bureau Control Number/Operating Budget	A five-digit number that identifies the operating budget holder, allotment, or organization having responsibility for managing a program
Sub-Allotment	A one-digit number that denotes a further breakdown of the Operating Budget /Bureau Control Number at the Funds Administering Activity level
Authorization Accounting Activity	A six-position alphanumeric code that identifies the activity which is responsible for performing the official accounting and reporting for the funds
Transaction Type	A two-digit number that classifies transactions by type (i.e., travel advances, progress payments)
Property Account Activity	The six-digit number that identifies the budget program activity (N for Navy) and the Customer Indicator (Activity UIC)
Cost Code	Up to 12 digit cost code
Standard Document	The standard document number

Assigning Procurement Controls

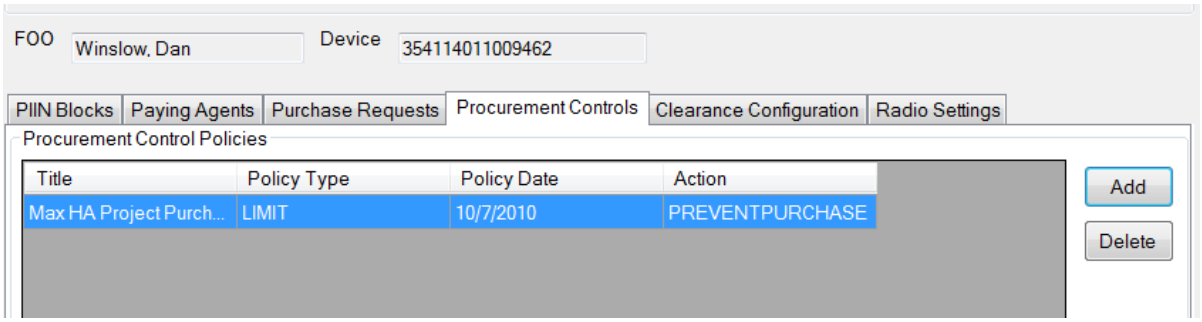
The next step is to assign procurement controls to the device, by assigning existing item or limit policies. FOO purchases using the device will be restricted by the procurement control policies configured using the **Procurement Controls** tab. (Procurement control policies were explained *Module 6: Configuring the 3in1 Tool Workstation, Lesson 2: Defining Procurement Control Policies.*

Note that selected procurement controls apply to the selected FOO and device.

Applying procurement controls is a two-step process. First, select only an AOR and apply AOR-wide controls. Then later, return to this same screen and select an AOR and a Contracting Office to apply Contracting Office-specific controls.

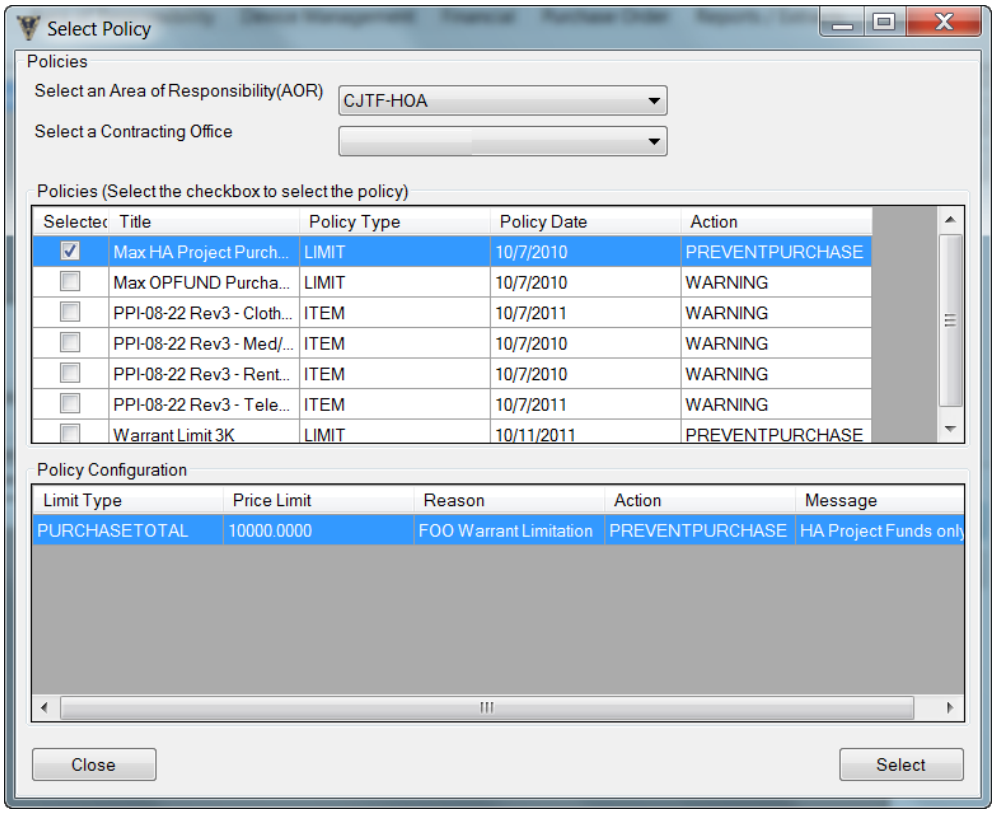
To assign procurement controls to the device and FOO:

1. Select the **Procurement Controls** tab.



Provision Device – Procurement Controls Tab

2. Click the **Add** button.
   - The *Select Policy* window opens.
3. Select the applicable **AOR** from the drop-down list.
   - As noted above, you should first apply AOR-wide controls, and then later return to this screen and select both an **AOR** and a **Contracting Office** to apply Contracting Office-specific controls.
   - Policies associated with the selected AOR are displayed in the Policies table.
4. Select the checkbox beside the policies that should be applied.
   - Details about the selected policy display in the **Policy Configuration** section, for your review.



Select procurement policies to apply to the device and FOO

5. Click the **Select** button.
   - The selected policy/policies display in the **Procurement Controls** tab.

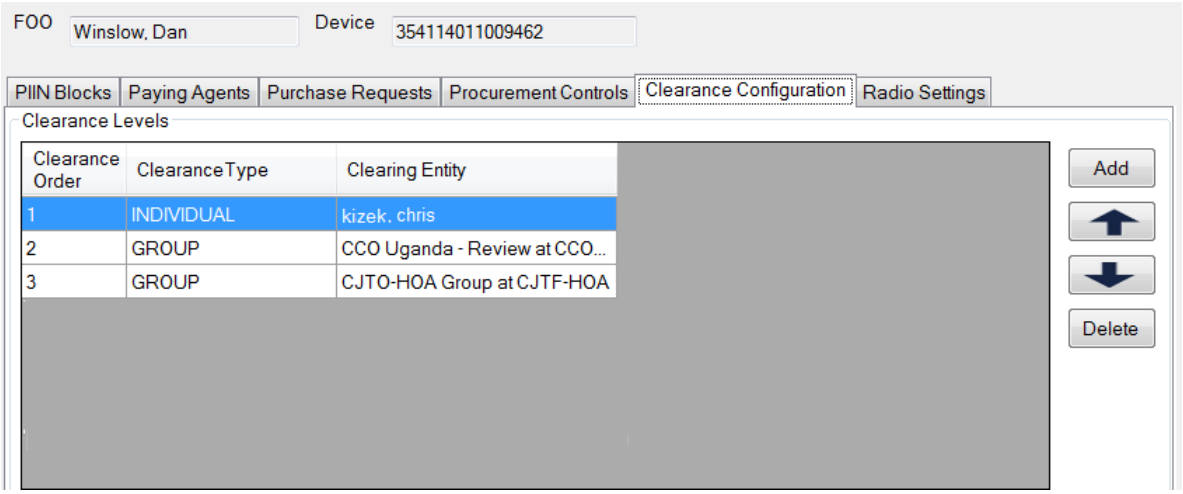
To remove a policy, select it in the Procurement Control Policies table, then click the **Delete** button.

Configuring Clearance

The **Clearance Configuration** tab specifies the sequence of approval required for purchase orders. 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.

By default, the Clearance Configuration defined for the Contracting Office is displayed on this tab. You can customize the required clearance by changing the personnel involved and/or the sequence of approval. Any changes to this screen will only apply to the selected FOO's provisioning setup.

Refer to *Module 6: Configuring the 3in1 Tool Workstation, Lesson 3: Defining Clearance Flow* for additional details on clearance configuration.



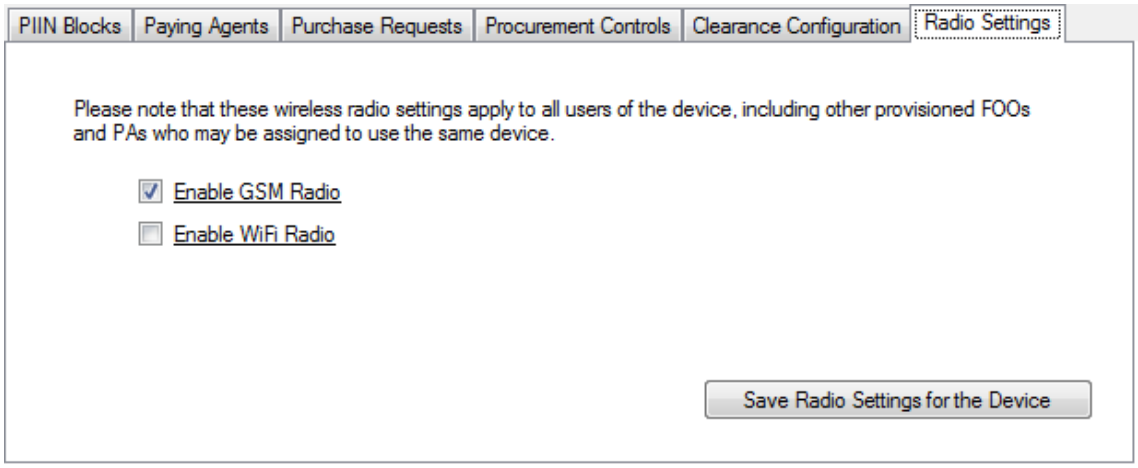
Configuration Clearance Tab

Use the **Add** button on the right side of the tab to add a clearing entity, which is a person whose approval is needed to clear purchase orders. The person can be a named individual or anyone in a specific role who is assigned to the reviewing office (Office/Role). Use the up and down arrow buttons to change the order in which a selected clearing entity reviews purchase orders.

After provisioning is complete, it is possible to change the clearing individuals or offices on the Clearance Configuration tab. However, if orders are already in an individual's or office's queue, and you delete the clearance entity, using the **Delete** button, those orders will be orphaned and must be re-assigned by a system administrator.

Radio Settings

Use the **Radio Settings** tab to assign wireless radio settings for the 3in1 handheld device to all FOOs and PAs who are assigned to use the same device. Mark one or both check boxes, depending on which are applicable to the selected device and click the **Save** button.



Radio Settings Tab

After filling in the tabs associated with a device, you may close the *Provision Device* window to end the provisioning process, or continue by selecting a different device for provisioning.

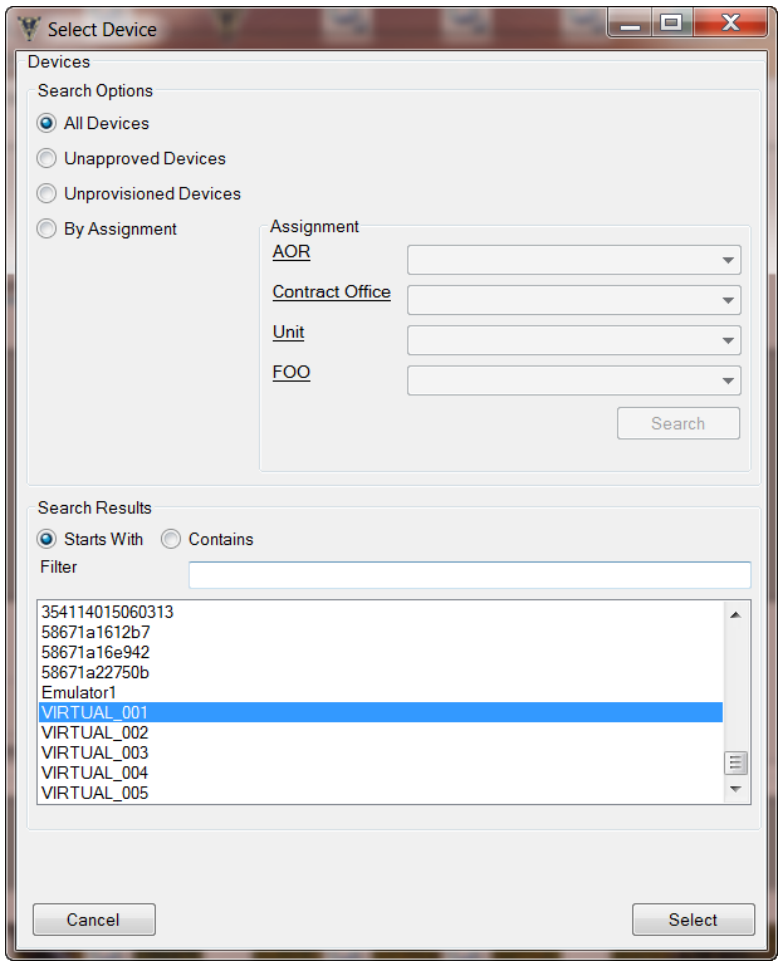
The next step is to download the data to the device and issue it to the FOO. See *Module 7: Activating Devices for FOO/PA Teams, Lesson 2: Downloading Data to the 3in1 Device for the First Time*.

Provisioning Virtual Devices

The virtual device feature enables all teams in an AOR to use the 3in1 prime database to track funding, not only those personnel who are assigned a handheld device. The virtual device feature can be used by teams that draw emergency funds, but do not spend anything, and by team members who do not make enough purchases to justify assignment of a handheld device.

Step 1: Provisioning a Virtual Device

Using the "Provision Device" feature in the 3in1 Workstation, Contracting Officers (KOs) select a clearly identified virtual device ID, as shown in the following figure.

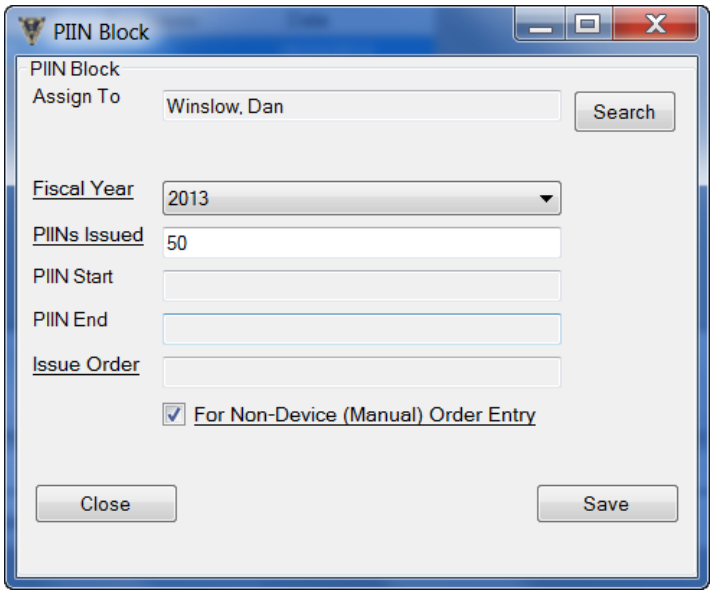


Virtual Devices are clearly identified on the Select Device screen

KOs then provision the virtual device as they do actual handheld devices – selecting a FOO/PA team, assigning purchase orders, procurement controls, etc. When assigning PIINs, it is necessary to select the "Assign Manual PIIN" checkbox. The remaining provisioning

steps are the same as for provisioning to an actual handheld device. If purchases increase later, the data on the virtual device can be transferred to an actual handheld device.

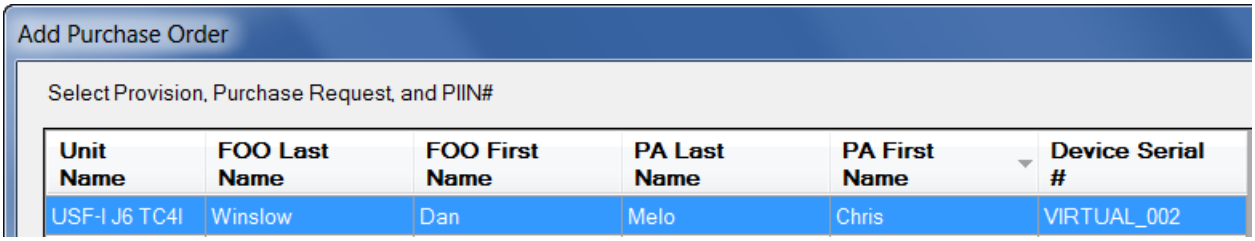
Note: It is highly recommended that each virtual device be assigned to only one FOO/PA team, unless a PA supports multiple teams.



PIINs are assigned to virtual devices; be sure to select the "For Non-Device (Manual) Order Entry" check box

Step 2: Creating and Clearing Purchase Orders

After purchase requests have been assigned to the FOO/PA team's virtual device, purchase orders can be added manually, using the **Purchase Order**, **Add Purchase Order** command. Users then follow the normal clearance process. Order data from virtual devices can be exported to DDS; DDS import is also functional.



Important Differences between Virtual and Actual Devices

Users involved in the ordering and clearance processes need to be aware of significant differences between virtual and actual devices:

- The Shopping List feature is not available to FOOs using virtual devices.
- The PA cannot conduct exchanges using virtual devices. The DA will need to return a cash advance in one currency, and then issue a cash advance in a different currency.
- The PA cannot create a cash advance or return cash on a virtual device. The DA can perform these actions on the Workstation.

- The Workstation allows you to flag orders and submit comments to a FOO who is assigned a virtual device, but the FOO will not receive those comments since the physical device doesn't exist. Instead, there must be some type of dialogue between the clearing entity and the FOO to clear the flag and get the orders approved.
- Purchase requests associated with a virtual device cannot be closed by users. They must contact the 3in1 Help Desk to request closing the purchase request.

Lesson Summary

In this lesson, you learned to:

- ❑ Reserve FOO Identifiers
- ❑ Identify unprovisioned devices in the 3in1 Tool Workstation
- ❑ Provision devices to FOOs
- ❑ Customize settings for provisioned devices
- ❑ Provision virtual devices

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Lesson 2: 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

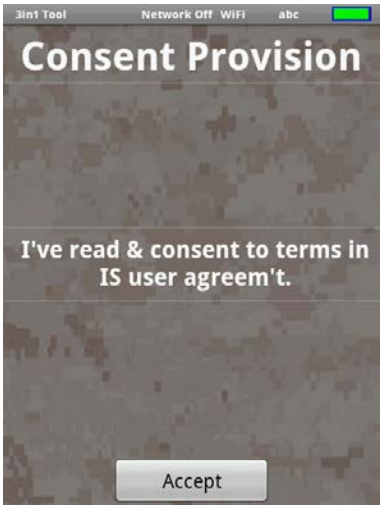
First-Time Downloading of FOO Data

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.

Before the FOO/PA team can download this data, the KO must register and approve the device, and assign the device to a team consisting of a FOO and a PA, as described in the last lesson. Also see *Module 4: Registering New Devices, Lesson 1: Registering & Approving New Devices*.

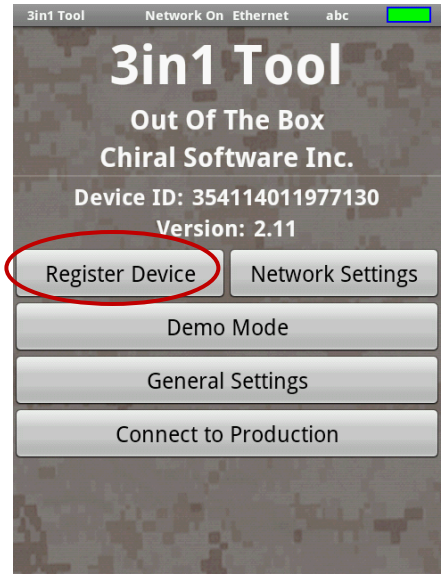
To log in to the device and download data from the Workstation:

1. Power on and unlock the device, as described in *Module 3: Application Familiarization, Lesson 3: Navigating the 3in1 Device Application*.
2. Ensure the device is connected and ready to receive data from the prime database. Read about network settings in *Module 16: 3in1 Device Tools & Settings, Lesson 2: Device Settings*.
3. Tap the **Accept** button on the *Consent Provision* screen.
4. The *Out of the Box* screen is displayed after the *Consent Provision* screen when the device is used for the first time or after a reset to factory. Tap the **Register Device** button.
   - The device must be registered and approved in the Workstation, as described in *Module 2: Hardware/Application Setup, Lesson 1: Registering & Approving New Devices*. The KO uses the Workstation to provision the device to a FOO/PA team. (See *Module 7: Activating Devices for FOO/PA Teams*, *Lesson 1:*

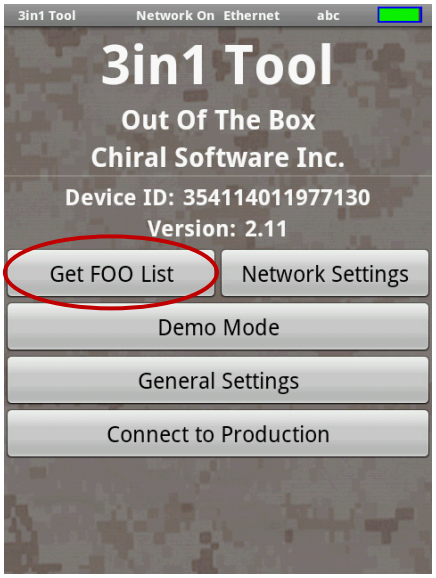


Provisioning Devices from the Workstation.)

5. The **Register Device** button changes to **Get FOO List** after the device receives approval from the Workstation. Tap the **Get FOO List** button.
   - This occurs only when there are no FOOs already downloaded to the device.

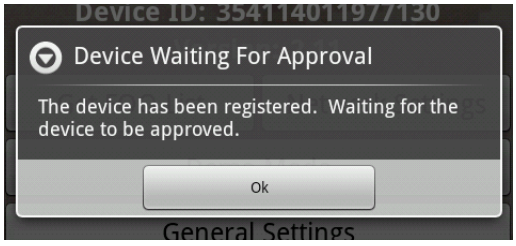


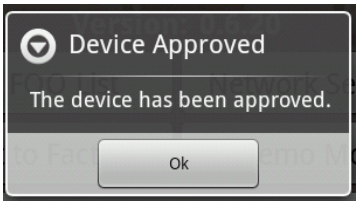
This screen is displayed while awaiting approval from the Workstation



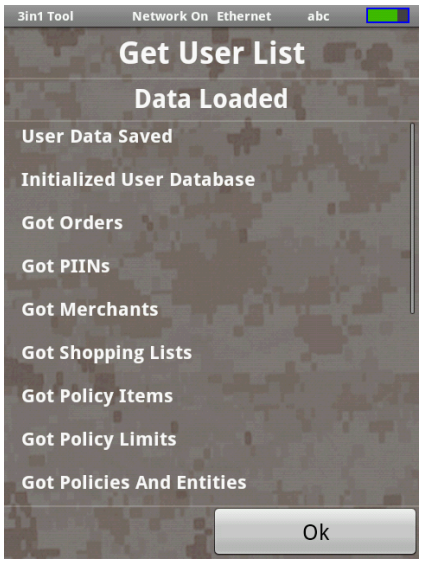
This screen is displayed when there are no active FOOs assigned to the device

6. 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 *Select Network Settings* in *Module 2: Hardware/Application Setup, Lesson 1: Registering & Approving New Devices* for details.





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

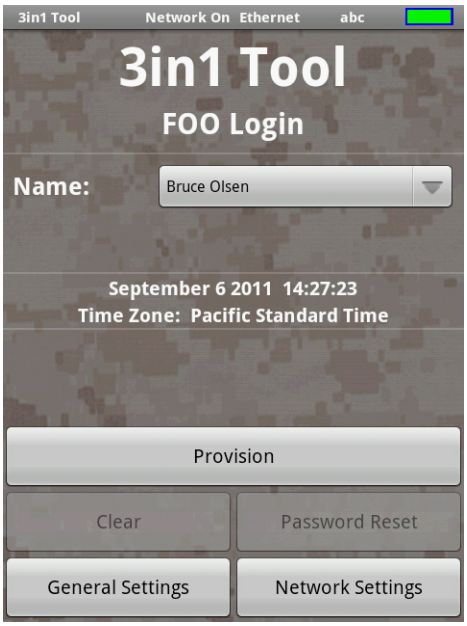


8. The *Login* screen is displayed. Verify that the FOO or PA name is listed in the drop-down list.

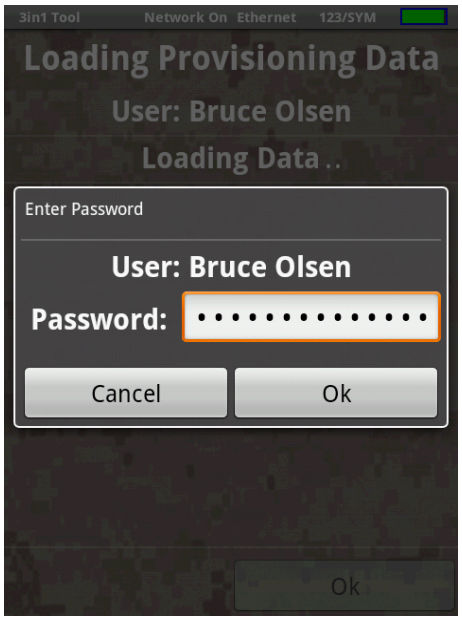
Issuing the Device to the FOO

To issue the device to the FOO:

1. On the device *Login* screen, tap the **Provision** button.
2. Enter the user login password in the **Enter Password** pop-up screen. This is the password created when the user registered on the 3in1 Workstation.

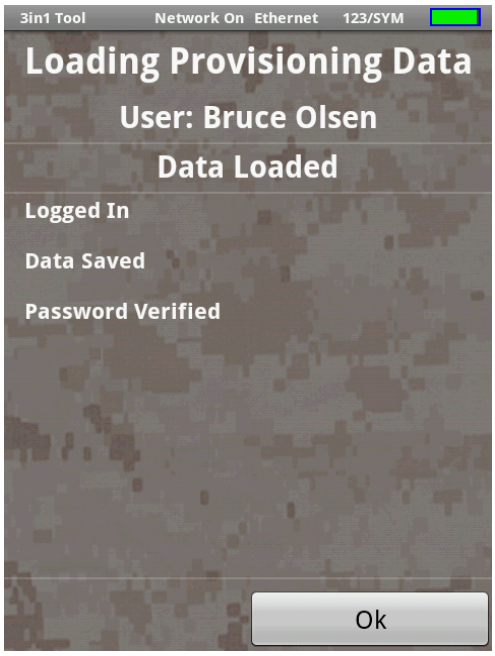


Login Screen



Entering Login Password

The *Loading Provisioning Data* screen shows the password is verified. Click OK to continue to the device *Dashboard*. Note the user's role is displayed in the title bar of the *Dashboard* screen.



Click OK after password has been verified

The Dashboard screen is displayed after a successful login

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 3b: Execution: Purchasing Process

Module 8: The Ordering Process

Lesson 1: Making a Purchase

Objectives

After completing this lesson, the participant will be able to describe how the FOO uses the 3in1 device to:

- ❑ Create a merchant directory on the device
- ❑ Use shopping lists on the device
- ❑ Select funding for a purchase
- ❑ Select a merchant to use for the order
- ❑ Add items to an order
- ❑ Add tax, shipping and discounts to orders
- ❑ Capture signatures from 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

The FOO will use the 3in1 device features to complete orders in the field. This lesson summarizes the ordering process using the device, so the KO understands the process used by the FOOs. This manual provides only general information on the use of the 3in1 device. For more specific information on how to use the device, see the *FOO/PA Reference Guide*.

Instead of using the paper SF-44, the 3in1 Tool records all the necessary purchase information.

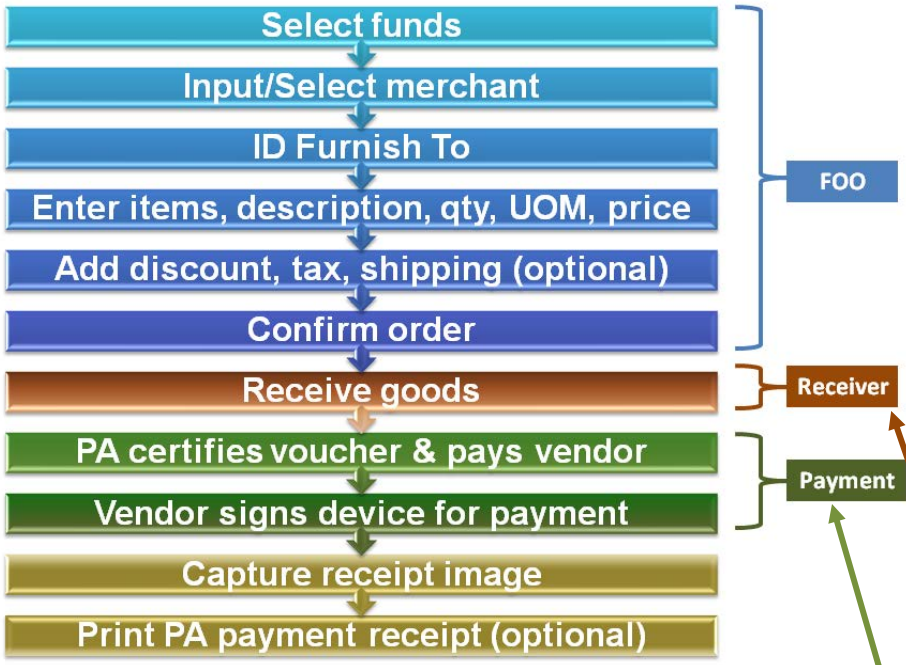
Due to the fact that this is a contract, it cannot be edited after it is agreed upon by the FOO and the merchant. In fact, the purchase data are cryptographically signed by a key on the microSD card in the device, so it is impossible to alter them.

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 9: Ordering Features on the Device and Lesson 1: Returning and Rerunning Purchase Orders on the Device.*

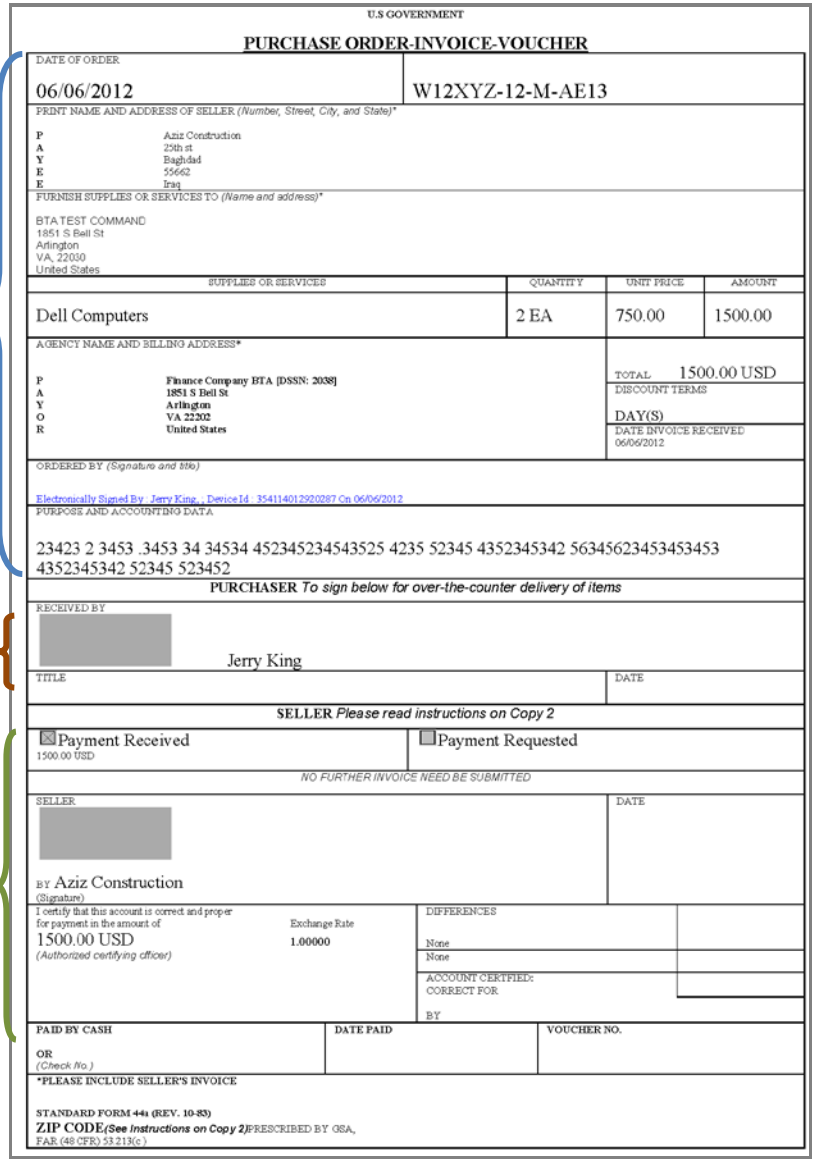
It is also important to understand that when a purchase is finalized, it is assigned a PIIN. Once a PIIN is assigned, it cannot be unassigned and the order cannot be altered.

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



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 | DATE

BY Aziz Construction (Signature)

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 | 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)

Before Starting an Order

FOOs can view procurement controls before starting orders, to understand which items cannot be purchased or require special authorization. View Procurement Controls is a feature available on the device Tools tab. See *Module 16: 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.

Market Research Tool

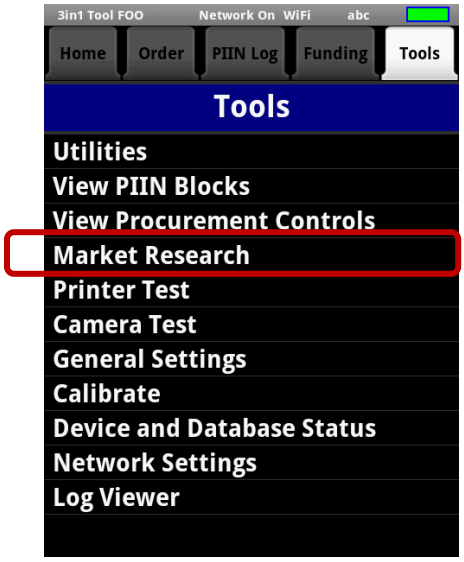
The Market Research tool is useful for price comparisons before making a purchase. Perform three types of market research:

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.



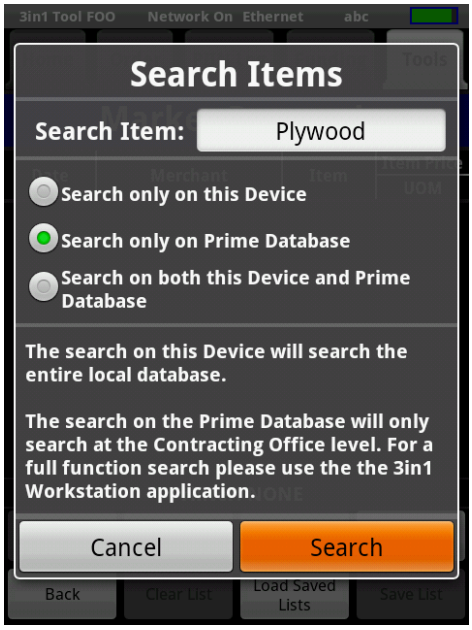
General Steps to Search for Vendors

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 additional 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.

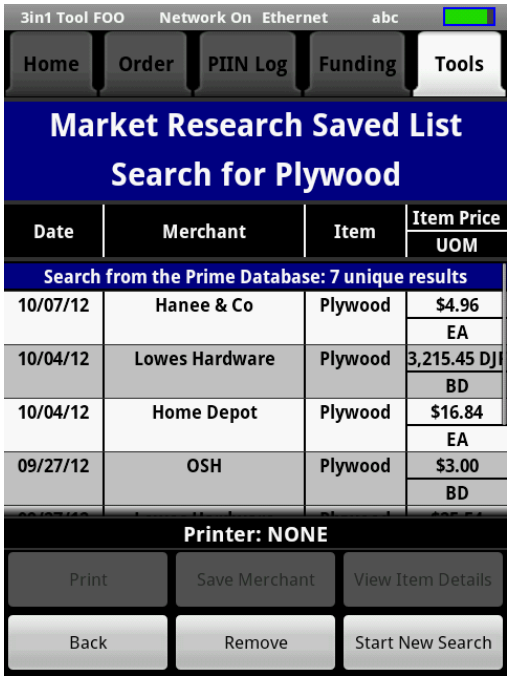
Market Research Screen – Search Results

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

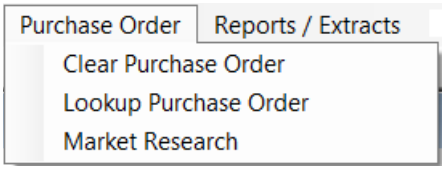
Printing Market Research Information

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.

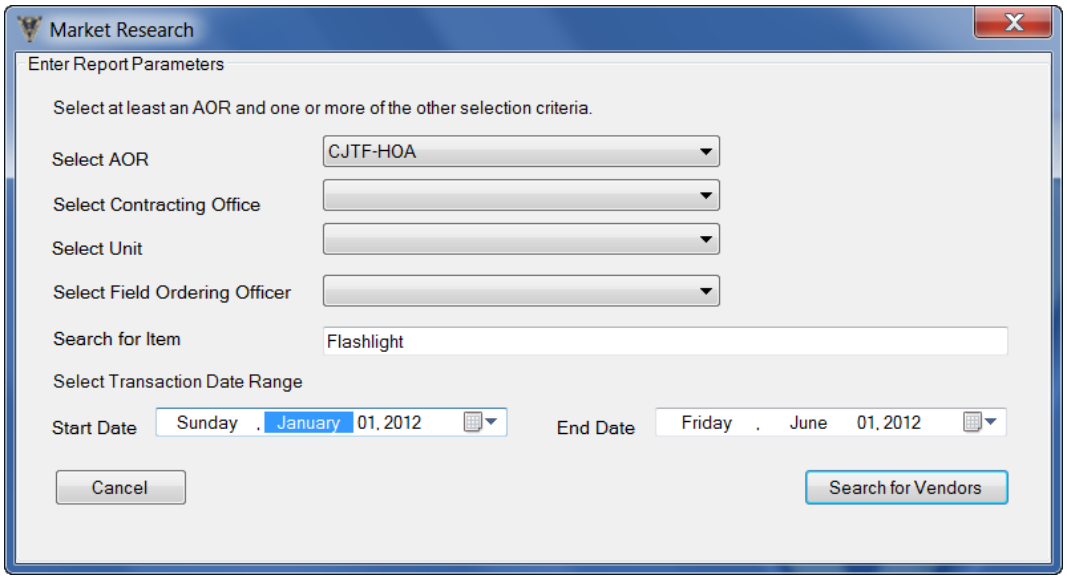
Market Research on the Workstation

The Market Research tool on the Workstation can be accessed through the **Purchase Order** menu. Enter the name of the item to be purchased 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:

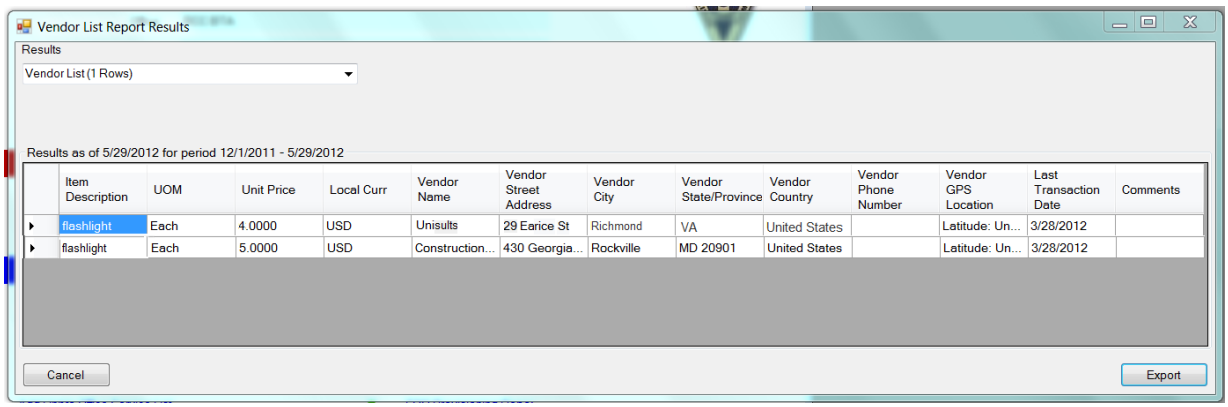


1. Select **Purchase Order**, **Market Research** to open the *Market Research* dialog box.
2. Select the AOR. The other search criteria drop-down fields are optional.
3. In the **Search for Item** field, type the full name of the purchase item.
4. Specify the **Start** and **End Dates** for the purchased 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.



An exact match will be made for the item typed in the Search for Item field

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	

Search results show the vendors from whom the specified item was purchased, as well as the price

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.

Merchant Directory

The device has the capability to store a directory of merchants. The Vendor (Merchant) List is accessed from the *Dashboard*.

- The FOO doesn't need to re-type the merchant's information for every 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.

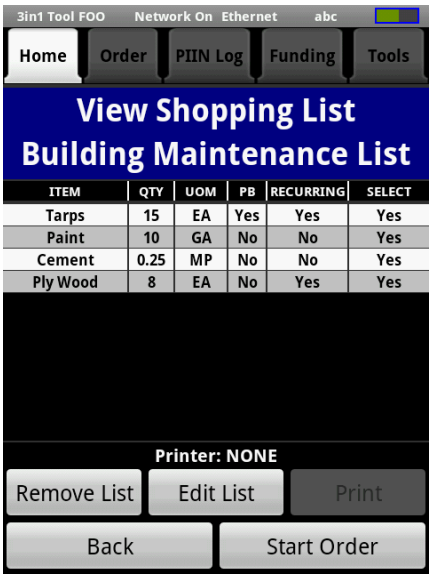
The merchant directory can be edited and merchants can also be deleted from the list, if needed.

Merchant Directory

Shopping Lists

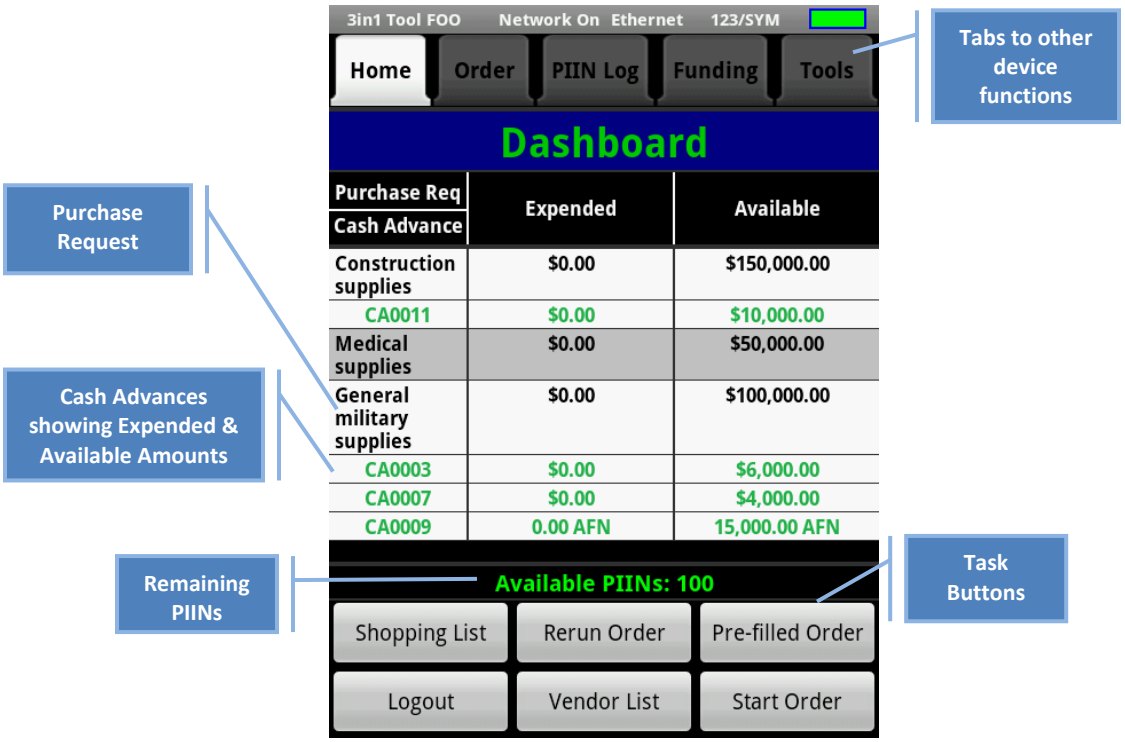
Shopping Lists can be created and stored on the device. They are helpful for remembering items, and also save time in the market by automatically populating the order. For each line item on a Shopping List, specify the Item Name, Unit, Quantity and Property Book. Shopping lists are accessed from the *Dashboard*.

Note: FOOs can also create and manage shopping lists on the Workstation. Shopping lists on the Workstation and device are synchronized. Other roles can only view the shopping lists on the Workstation. Shopping Lists are available on the Workstation's **Purchase Order** menu.



1. 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. These buttons are explained in *Module 3: Application Familiarization, Lesson 1: Navigating the 3in1 Workstation Application.*



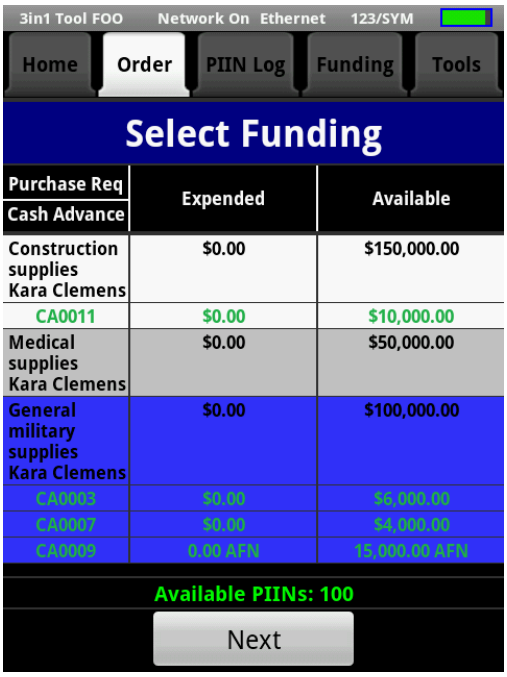
FOO Dashboard Screen

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

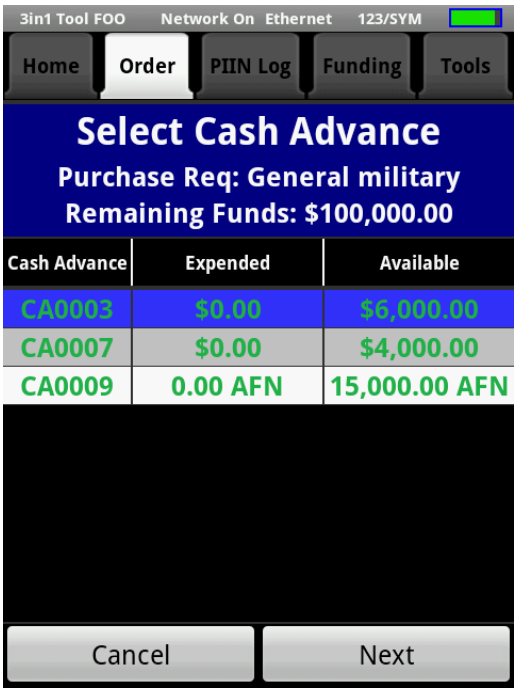
Only the absence of an active cash advance or insufficient PIINs can prevent starting an order. It is recommended, but not required, **to create a shopping list** and **enter the vendor information** before starting the order; this saves time during the ordering process, at the merchant location.

To start an order from the handheld device:

1. To start an order, from the *Dashboard*, tap the **Start Order** button.
   - Orders can also start from a shopping list.
2. The next step is to select a purchase request and cash advance on the *Funding* screen.
   - 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.



Select a Purchase Request first.

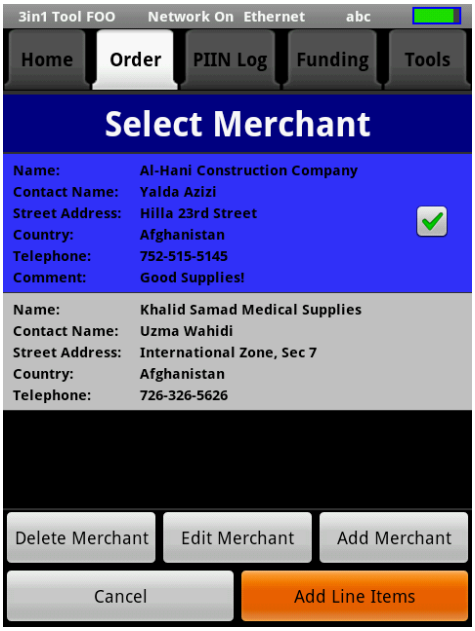


Select a Cash Advance (Green Text)

3. Next, on the *Furnish To* screen, specify the unit that will be furnished with the ordered supplies.
   - 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.

4. Select a merchant by tapping one on the *Select Merchant* screen.

– The background turns blue and a check mark is displayed, to indicate the merchant is selected. The **Edit Merchant, Delete Merchant,** and **Add Line Items** buttons are enabled.



Select Merchant screen

Funding Changes Made on the Workstation

FOOs should be aware that a purchase request can be increased, decreased, closed or cancelled by the originator on the Workstation. The FOO will see a change in the available amount of funding for the PR. When the close or cancel action is received and acknowledged by the device, the closed or cancelled PR is removed from the device.

The Cancel, Close and Decommit PR features are discussed in *Module 13: Updating Financial and Procurement Information*, *Lesson 1: Updating Purchase Requests*.

2. Adding Line Items to an Order

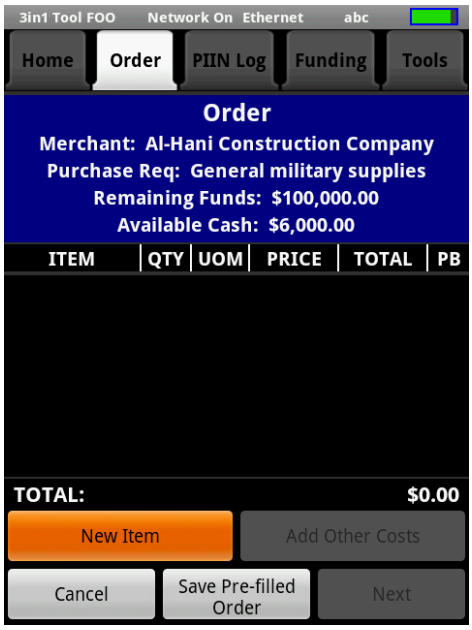
The next step is adding line items to an order. The FOO records a quantity, a description, a unit of measure, and a price. If a shopping list was not created earlier, items can be added during the ordering process. The device will automatically total the items purchased and calculate the currency exchange based on the exchange rate established when the cash was advanced by the Finance Office.

To add new items to an order:

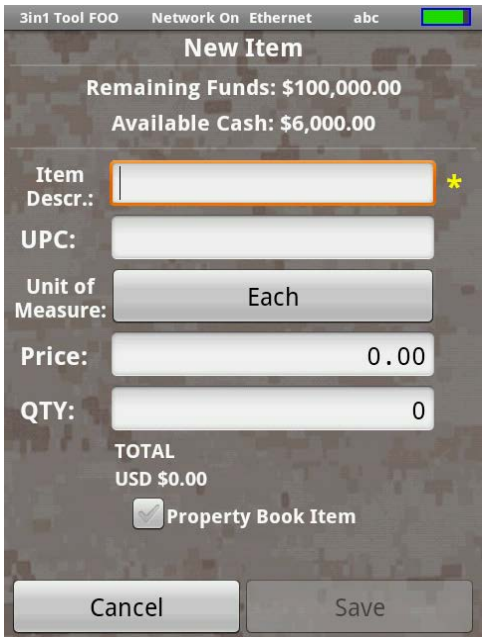
1. Tap **Add Line Items** on the *Merchants* screen.
   – This displays the *Order* screen, which shows a summary at the top, consisting of the selected merchant name, PR description, remaining funds, and available cash.

- 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. Tap the **New Item** button to add an item.



Order screen before items are added

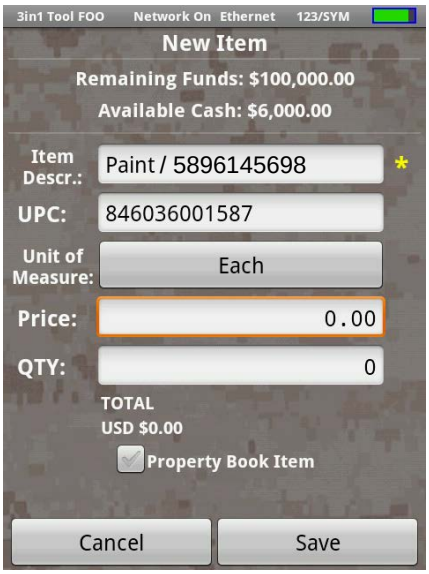


Add New Item Screen

3. On the *New Item* screen, the FOO enters the **item name**, selects a **Unit of Measure**, the **Price** per unit and **Quantity**.

- 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 onscreen calculation of the total price in the pre-selected currency/currencies. Prices are precise to two decimal places.
- The **UPC** field is optional. If the item has a bar code, click the UPC field and scan the bar code by clicking 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.

Sample Bar Code

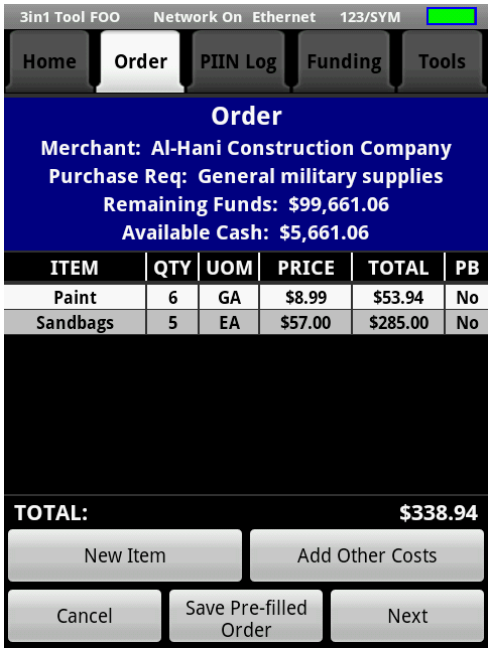


UPC field displays scanned bar code

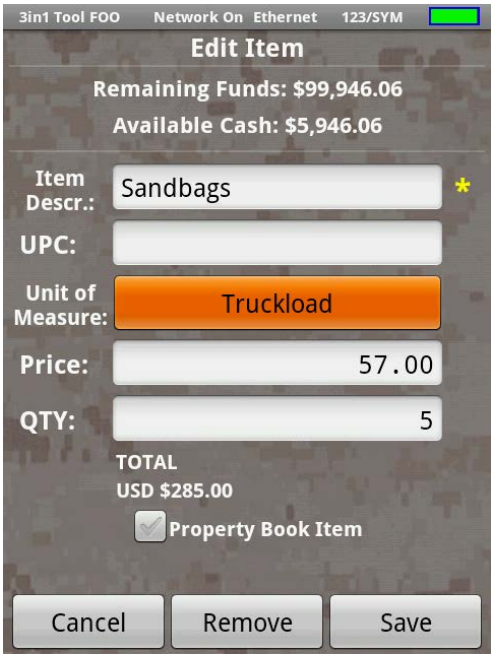
4. The FOO can mark the checkbox beside **Property Book Item** to flag the item for Property Book accounting. (Property Book items are listed in reports produced on the Workstation.)

Tip: For additional assistance, the device has a standard mathematical Calculator and a Generic Currency Convertor, 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 16: 3in1 Device Tools & Settings, Lesson 1: Device Tools*.

The following figure shows an order with line items added.



Order with Line Items

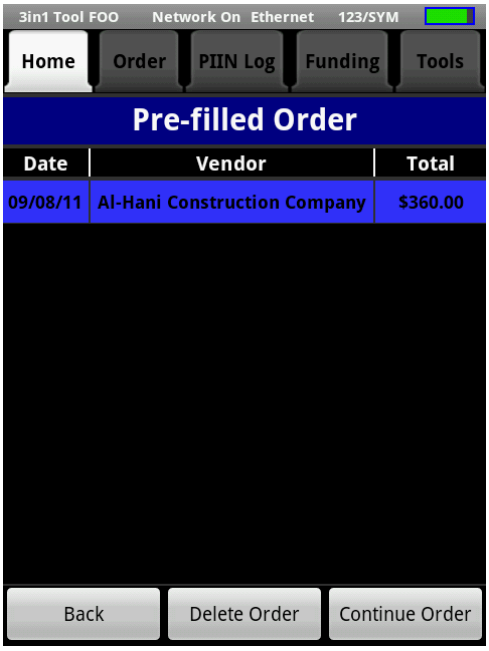


Edit Item Screen

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, completing 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.

The FOO starts an order, then at any time, taps the **Save Pre-filled Order** button on the *Order* screen. Multiple orders can be saved.



Later, the FOO can continue by selecting the **Pre-filled Order** button on the *Dashboard*. The FOO selects an order on the *Pre-filled Order* screen, then taps the **Continue Order** button and completes the order.

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

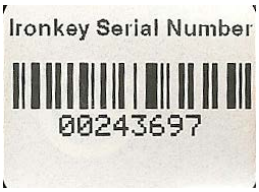
Notes on Scanning the UPC

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 16: 3in1 Device Tools & Settings*.)
2) Click 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.

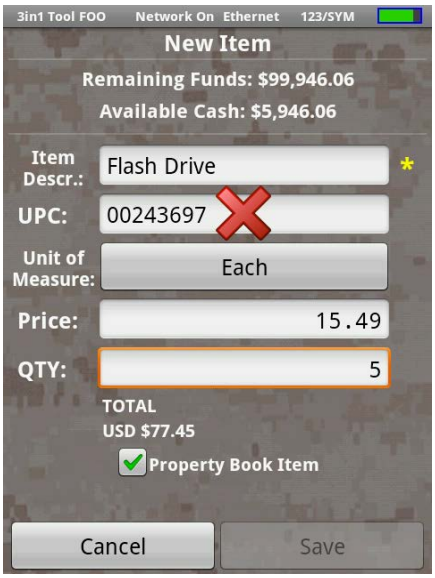
4) The UPC number can be 8, 12, 13 or 14 digits. Some items may have a UPC and a Serial number. Capture the correct bar code. The **Save** button will not be enabled if an incorrect bar code is captured.

Capture this Bar Code

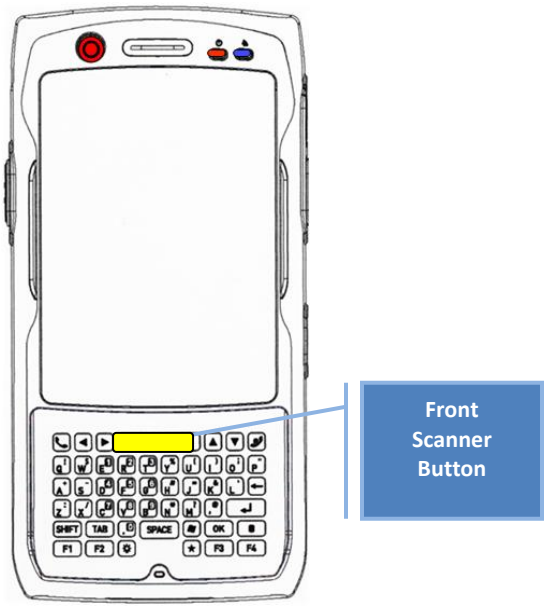


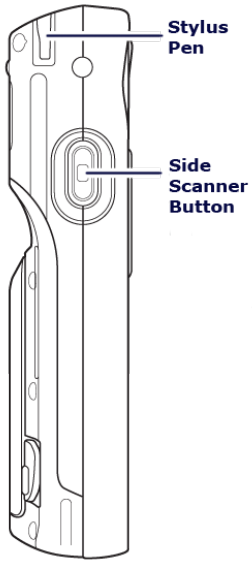
Serial Number

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.

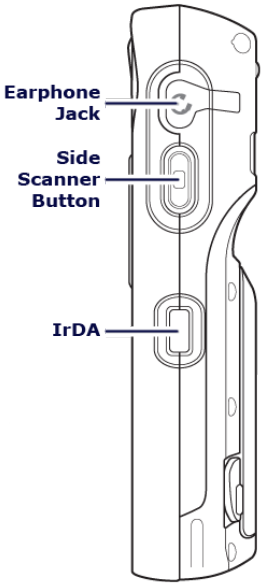


5) To scan bar code, click one of the yellow buttons located on the front or sides of the device, as shown in the figures below.





Device Left Side View



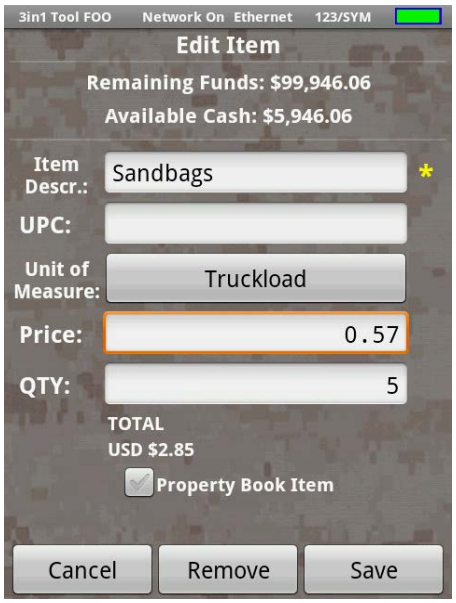
Device Right Side View

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.

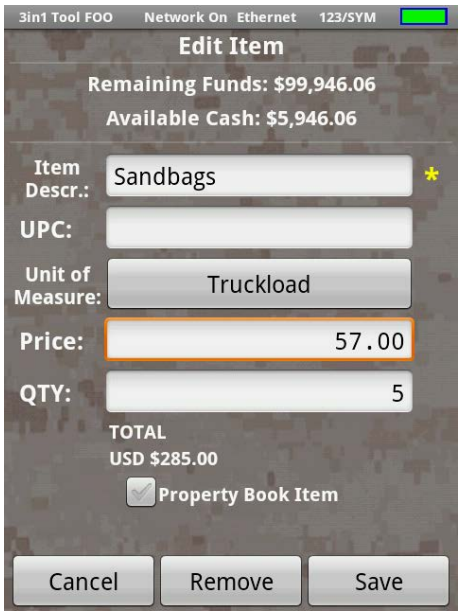
Entering Decimal Amounts on the Device

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.



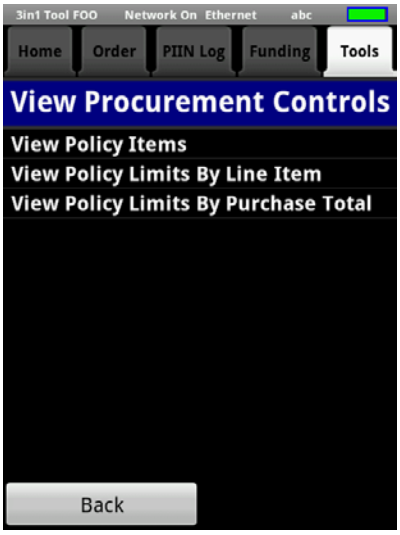
Entering "5 7"



Entering "5 7 0 0"

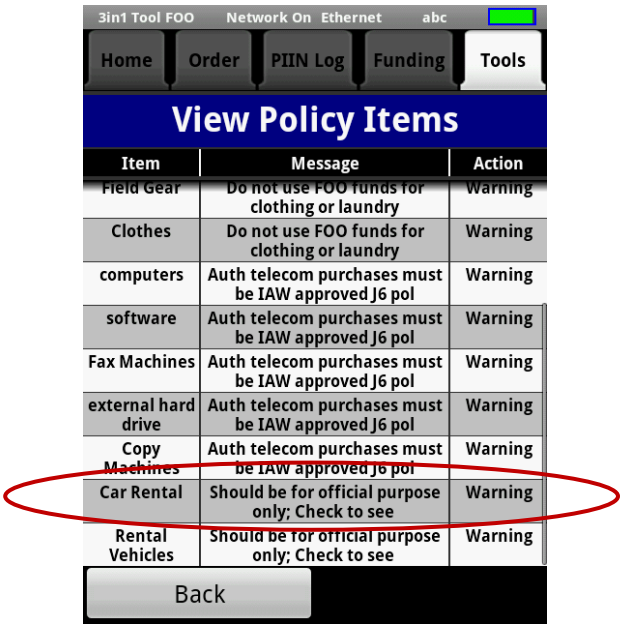
Procurement Controls

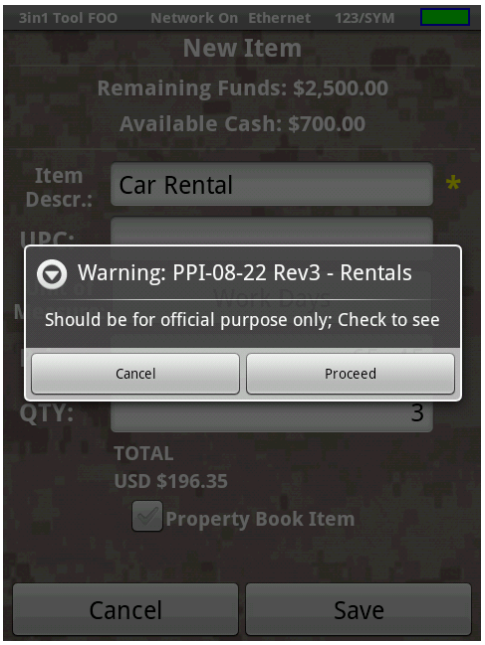
When attempting to make some purchases, warnings may be issued or a purchase may be prevented due to procurement controls. Procurement controls are downloaded from the prime database during provisioning. FOOs can view the procurement control policies on the **Tools** tab.



View Policy Items

Items with restrictions can be viewed by selecting **View Policy Items**. A warning is issued when an attempt is made to purchase any of the items on this list.

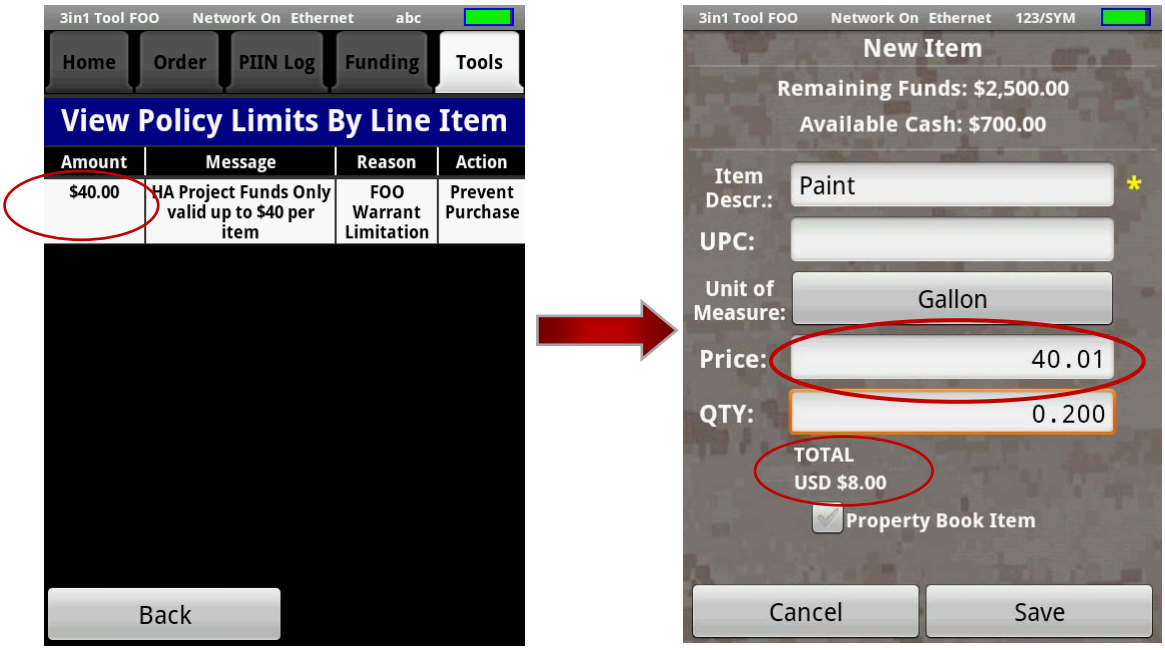




When an attempt is made to purchase an item that is on the View Policy Items list, a warning is displayed. The FOO should check for compliance, then tap Proceed or Cancel.

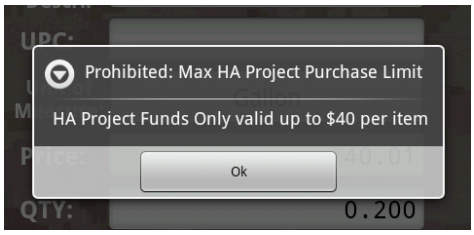
View Policy Limits by Line Item

FOOs can review price-based procurement limits for line items by selecting **View Policy Limits by Line Item.** 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.



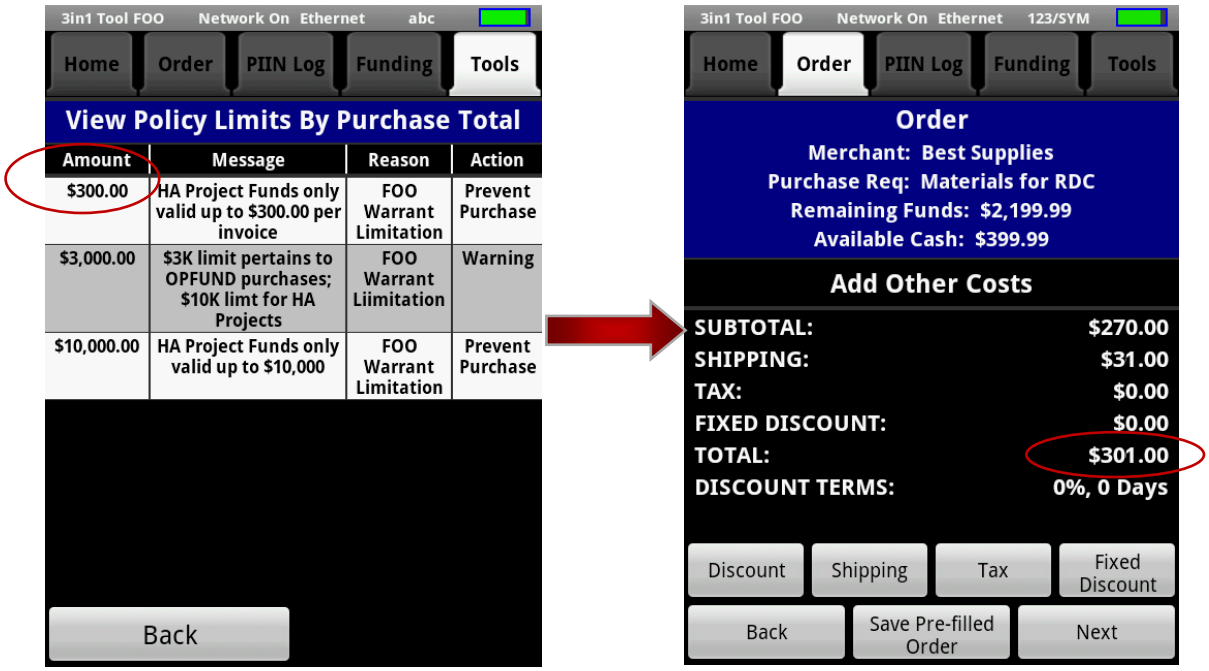
Although the line item total shown is only $8, the Price amount exceeds the policy amount, so the line item policy is enforced; either a warning is displayed or the purchase is prevented.

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



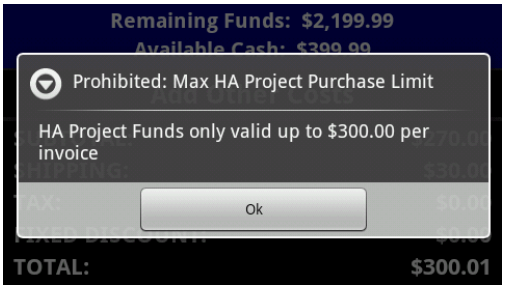
View Policy Limits by Purchase Total

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.



Note: The 3in1 Tool is designed to prevent any purchase if the price and quantity of an item exceed the remaining cash available. Note this is a built-in function, and not a configurable procurement control policy.

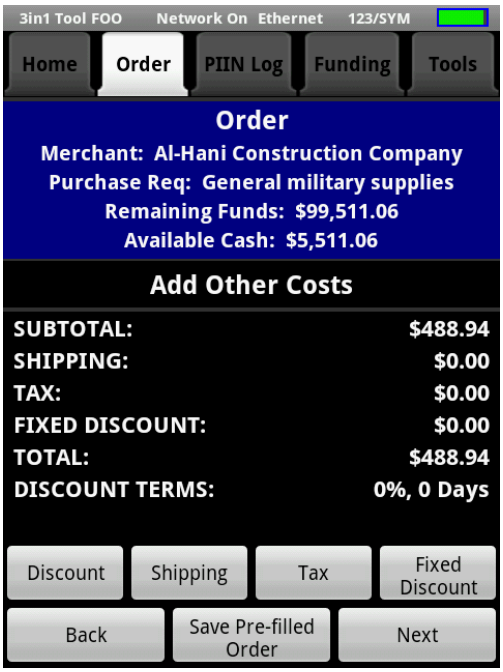
See *Module 6: Configuring the 3in1 Tool Workstation, Lesson 2: Defining Procurement Control Policies* for additional information on defining procurement controls.

3. Additional Fields: Tax, Shipping, and Discounts

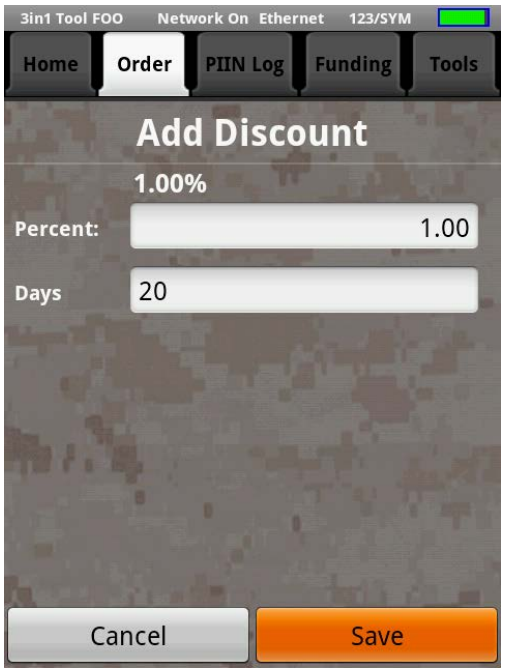
Discounts, shipping costs and taxes can be applied to an order as a whole, but not to individual items. Shipping is a fixed cost, while tax and discount are specified as a percentage of the order total. There is also an option to specify a fixed discount amount. Not all orders will have tax, shipping,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

To add a discount 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, by entering 1 as the number of days.



Add Other Costs Screen



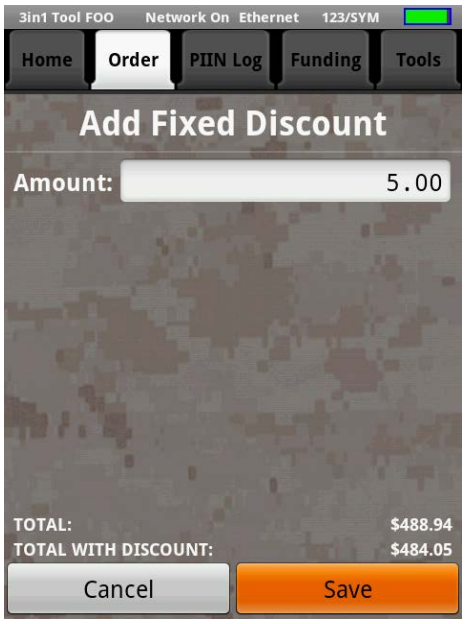
Add Discount to an Order - 1% prompt payment discount on bills paid within 20 days

   - 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.

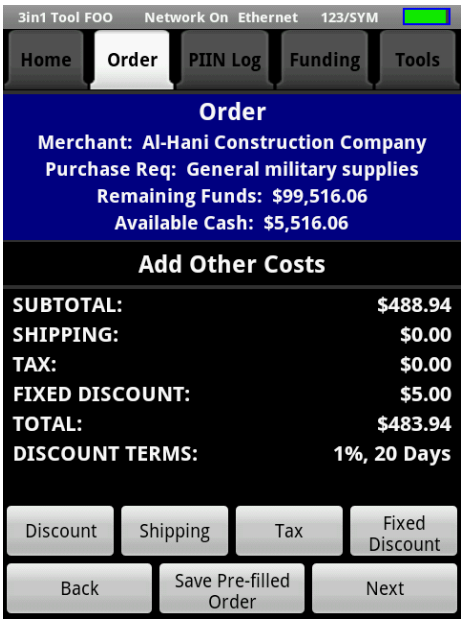
In some situations, a fixed discount amount is applicable. For example, merchants often do not take change, so they may discount the change. Also, a merchant might offer a fixed discount as a coupon: "$10 off if you buy today."

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 the 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	ORDER NO.
7 September 2011	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
Bruce Olsen

TITLE	DATE
NCOIC, 97 LRS/SUPT	7 September 2011

SELLER

X PAYMENT RECEIVED	PAYMENT REQUESTED
$530.27	

NO FURTHER INVOICE NEED BE SUBMITTED

SELLER
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	DATE PAID	VOUCHER NO.
OR..... (Check No.)	7 September 2011	

Terms of Discount

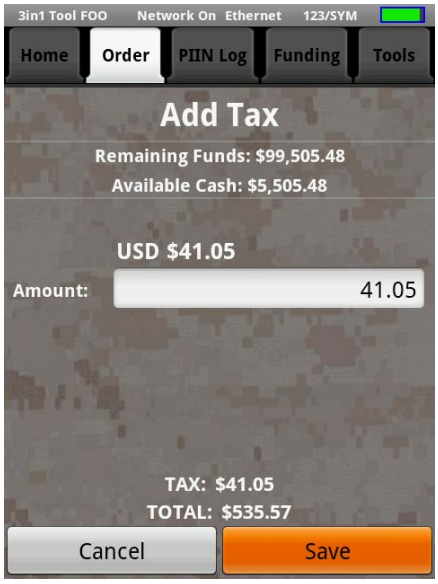
Terms Discount Amount & Fixed Discount Amount

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.

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*:*
There are 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. Term 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.

4. Confirming the Order

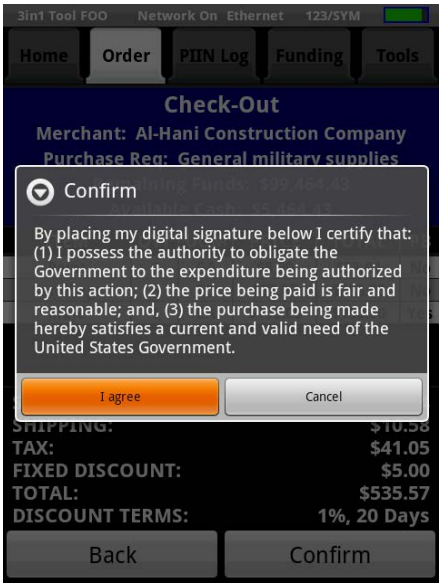
The *Check Out* screen is a summary of the order, with options to go back and make edits or confirm and continue. The order summary consists of:

- The vendor name
- Purchase Request description
- The remaining funds and 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 check out process:

1. 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.

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.

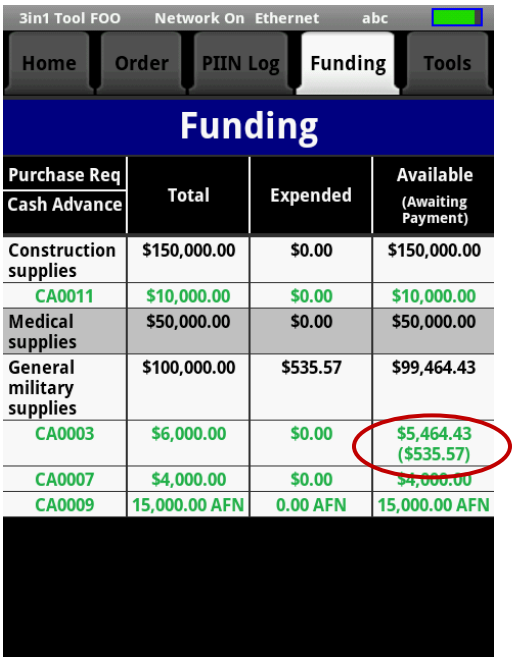


Once the FOO taps **I agree**, a unique PIIN/Order number is assigned to the order and cannot be un-assigned. The next screen is the *Receiver* screen, which is described later in this lesson.

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 Check Out Screen



Post-Order/Pre-Payment Funding Screen

5. Uploading Orders to the Prime Database

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, unless the order has been printed, and the order would be lost if the device is lost or destroyed. If the device has GSM or Wi-Fi installed and activated, it will upload automatically as soon as GSM service becomes available. 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.

If You Make a Mistake…

An order may be cancelled after confirmation, but before payment is made, by the Receiver or Paying Agent clicking the Cancel button on their signature screens, or by using the Return Order feature, which is described in *Module 9: Ordering Features on the Device, Lesson 1: 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.

After payment if it is realized that a mistake has been made or the item is defective and must be returned, the FOO may return the order by tapping the **Return Order** button on the *Purchase Details* screen. Note the PIIN number is still considered used if either the **Return Order** or **Cancel** button is selected.

The last seven digits of the PIIN number can be seen on the *PIIN Log* screen, in the column labeled PIIN. See *Module 9: Ordering Features on the Device*, *Lesson 1: Returning and Rerunning Purchase Orders on the Device* for more information on the PIIN Log.

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 tapping 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.

6. Obtaining Signatures

After an order is successfully placed, the next step is to receive the goods/service and pay the vendor. The parties who accomplish these tasks 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.

6a. The Receiver

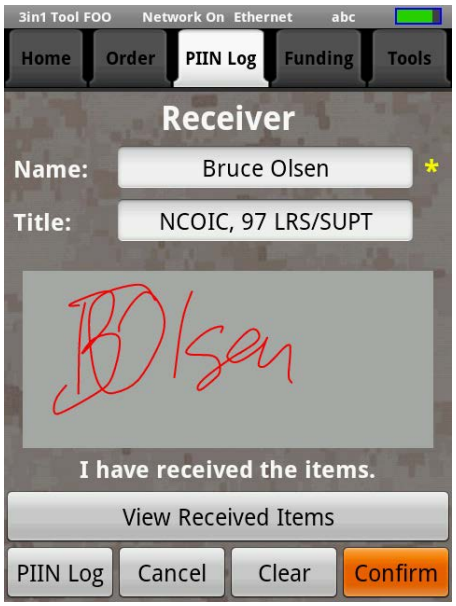
The receiver acknowledges receipt of goods by signing the *Receiver* screen. The government cannot release payment for an order until after the order has been received. Therefore, the paying screen and vendor signing screens are not active until after the Receiver has signed.

On the *Receiver* screen, tap **Select Receiver**. 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** and type the name, if someone other than the FOO or PA is receiving the supplies or services on behalf of the government.

The receiver uses the stylus pen to sign in the Signature block, then taps the **Confirm** button to save and continue.

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

Note: To re-do the signature, tap the **Clear** button. To cancel the order, tap the **Cancel** button. None of the receiver information can be edited after confirmation has occurred.



Receiver Signature Screen

ITEM	QTY	UOM	PRICE	TOTAL	PB
Paint	6	GA	$8.99	$53.94	No
Sandbags	5	TC	$57.00	$285.00	No
Mule	1	EA	$150.00	$150.00	Yes
SHIPPING - No Tracking Number	1	LO	$10.58	$10.58	No
TAX	1	LO	$41.05	$41.05	No
FIXED DISCOUNT	1	LO	$5.00	$5.00	No

View Received Items Screen

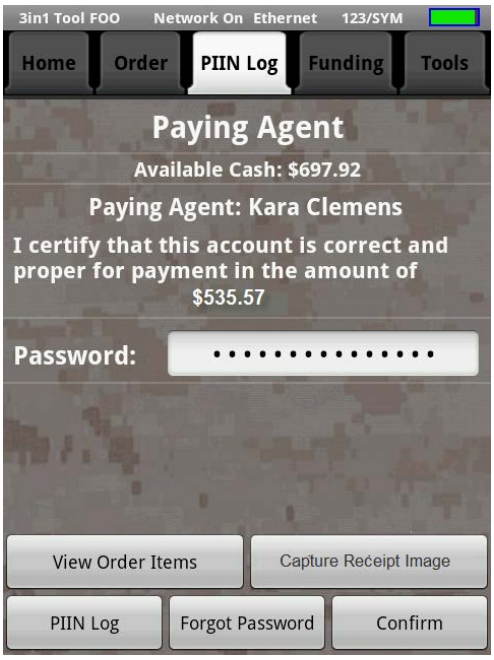
6b. The Paying Agent

After the items have been received by the government, as acknowledged by the Receiver's signature, the order can be paid for by the Paying Agent only.

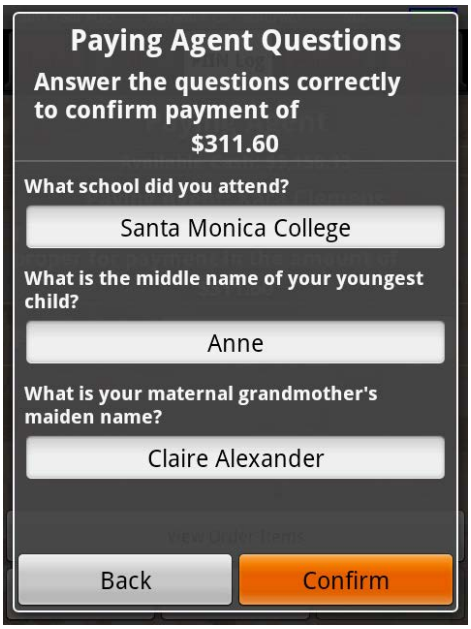
The PA pays for the items by first verifying that the correct amount is displayed on the *Paying Agent* screen, then entering his/her password and tapping the **Confirm** button.

Like the Receiver, the PA can also view the items being purchased and paid for by tapping the **View Order Items** 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

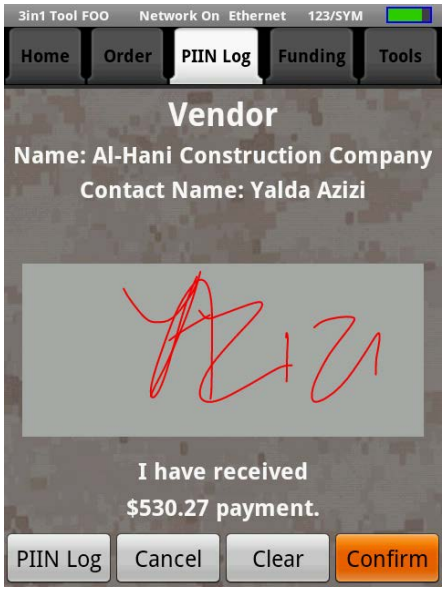


PA Security Questions

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*.

6c. Vendor

The last step in the ordering process is for the vendor to sign that he or she has received the money. The vendor simply enters a signature on the ***Vendor*** screen to verify the amount received. Some vendors may be unwilling to sign. In those instances, 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.

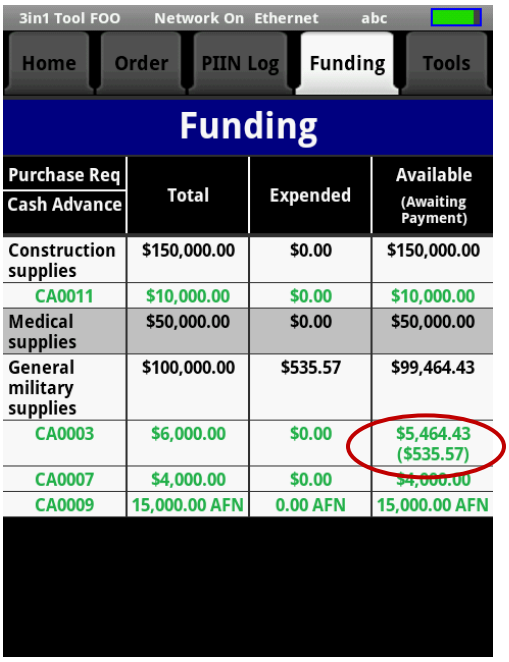


7. Completing the Order

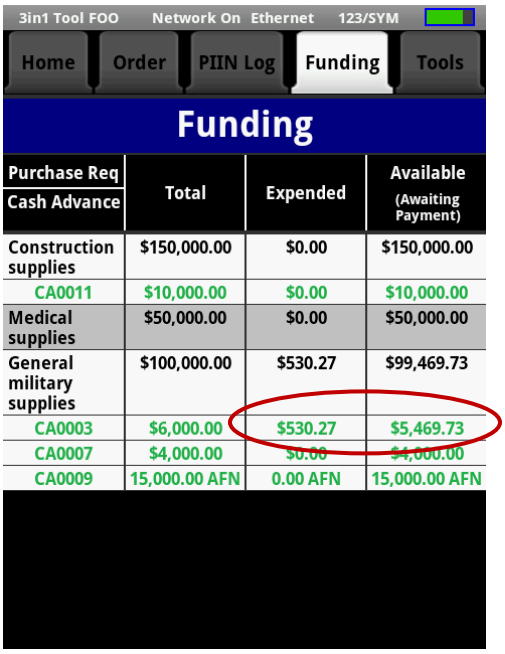
Once the Vendor uses the stylus to sign on the device screen, the order is complete. Tap the **Confirm** button to advance to the *Purchase Details* screen.

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



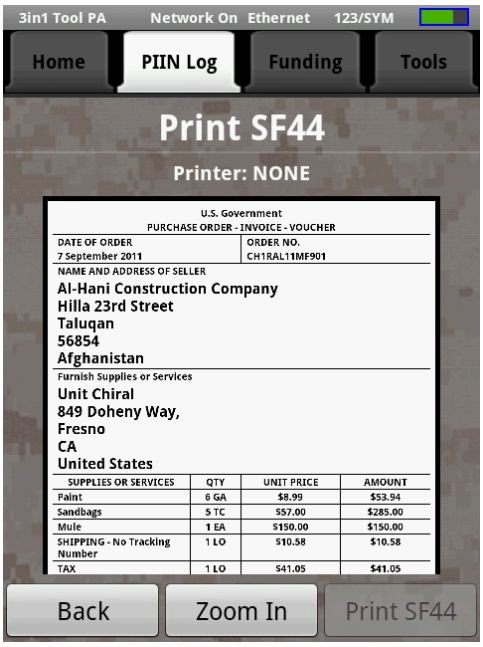
Post-Payment Funding Screen

Viewing Purchase Details

The *Purchase Details* screen on the PIIN Log tab lists the ordered items. Use the buttons on this screen to perform the actions as described in *Module 3: Application Familiarization, Lesson 3: Navigating the 3in1 Device Application.*

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.

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.

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.

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.

Printing from the Handheld Device to the FieldPro RT43 Printer

Capturing Receipt, Images and GPS Coordinates for an Order

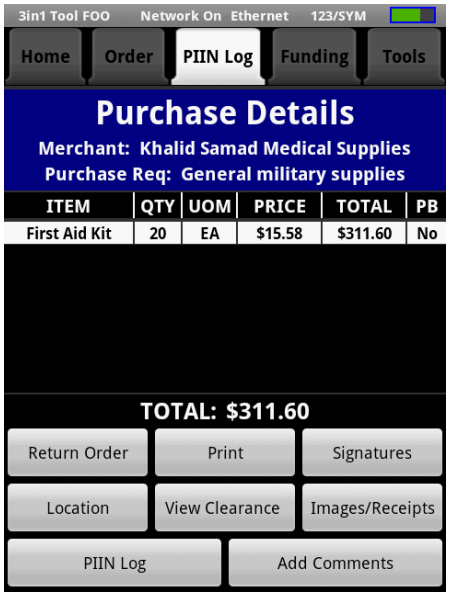
Taking a Picture of a Receipt

If a vendor provides a paper receipt for records, the FOO 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.

If an approval letter is required and the FOO does not have access to a scanner, he/she can use the camera to take a picture of the letter and then upload it with the order.

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

After all the signatures have been recorded, the *Purchase Details* screen becomes available. The FOO tap the **Images/Receipt** button to capture the image. Individual images can be viewed and deleted from the Image Gallery.

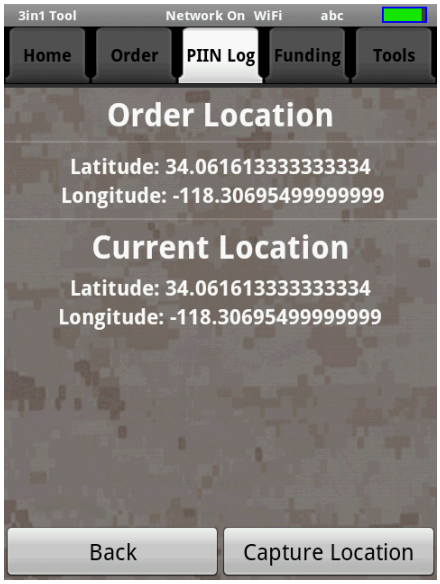


Purchase Details Screen – Click Images/Receipts

Click Take Picture to activate the camera

Capturing GPS Coordinates

The device has the ability to capture the GPS coordinates of the vendor's location. From the *Purchase Details* screen, the FOO taps the **Location** button. GPS relies on an unobstructed line of sight to four or more GPS satellites. The FOO must go outdoors to a location with a clear view of the sky in order to capture the current location longitude and latitude. Also, GPS must be authorized to be available.



Lesson Summary

In this lesson, you learned the FOO uses the 3in1 device to:

- ❑ Create a merchant directory on the device
- ❑ Use shopping lists on the device
- ❑ Select funding for a purchase
- ❑ Select a merchant to use for the order
- ❑ Add items to an order
- ❑ Add tax, shipping and discounts to orders

- ❑ Capture signatures from 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

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Lesson 2: Uploading Orders to the 3in1 Workstation

Objectives

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

- ❑ Describe how orders are uploaded 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

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 and Receipt Images?

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

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. See *Module 16: 3in1 Device Tools & Settings, Lesson 2: Device Settings*.

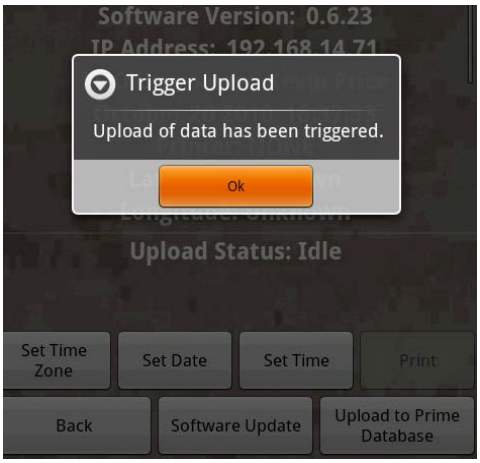
If the device is configured for Ethernet or USB connection, the device will only transmit orders when it is physically connected, as described in *Module 2: Hardware/Application Setup, Lesson 1: Registering & Approving New Devices* .

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.

1. On the device, tap the **Tools** tab.

2. Tap **Device and Database Status**.
3. On the *Device and Database Status* screen, tap the **Upload to Prime Database** button to prompt uploading pending orders.
4. A dialog box confirms that the upload has been triggered. Tap **OK**.
5. The **Upload Status** setting on the *Device and Database Status* screen will inform you when the uploading is finished.



Confirmation that data upload has been triggered

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:

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

Lesson 3: Post-Order Actions

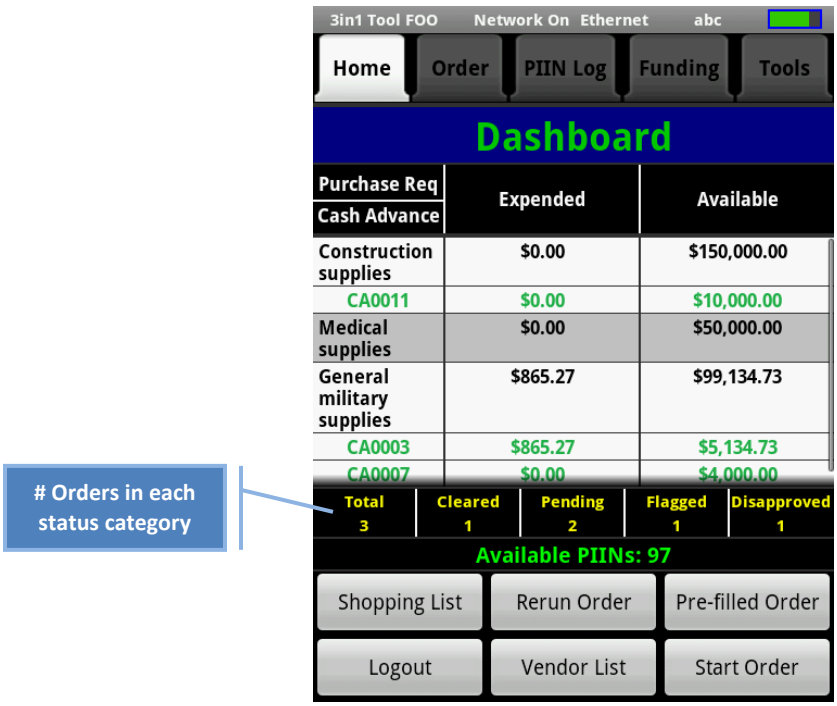
Objectives

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
- ❑ Add general clearance comments

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.

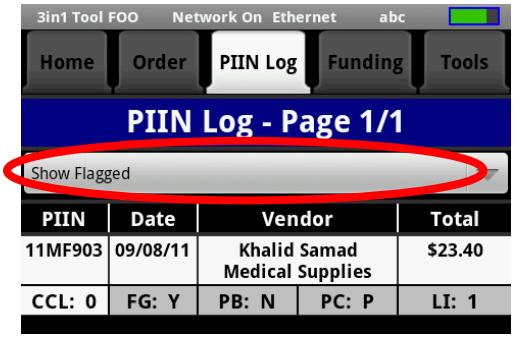


Dashboard showing status of orders

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, select the *PIIN Log* tab. Then tap the **PIIN Log** button at the bottom of the screen.

At the top of the screen, use the drop-down filter to select *Show Flagged*. Only flagged orders display. Tap on the order on the *PIIN Log* screen to open the *Purchase Details* screen. From *the Purchase Details* screen, tap the **View Clearance** button.

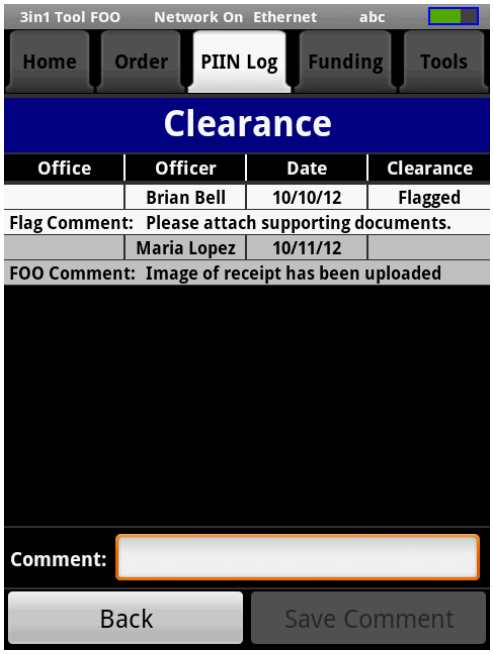


The *Clearance* screen is displayed. Orders that have been flagged display as line items. Review the **Comments** column to determine your response.

To respond to a flag, tap the comment to which you want to respond and enter your response in the **Comment** text box at the bottom of the screen, and then tap **Save Comment**.

The response is displayed on the *Clearance* screen 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

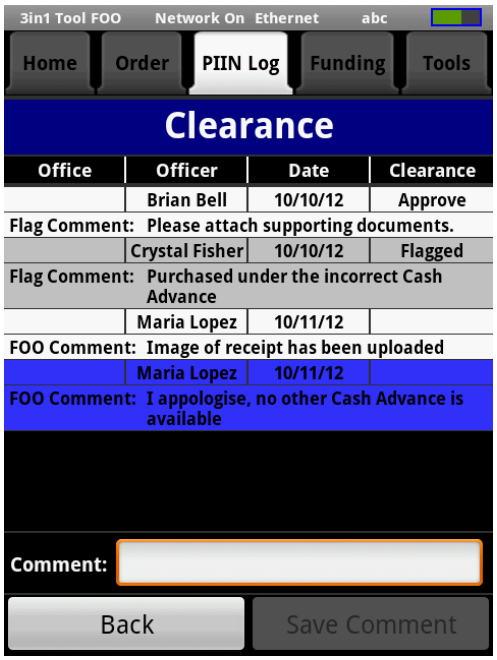


Saved FOO Comment

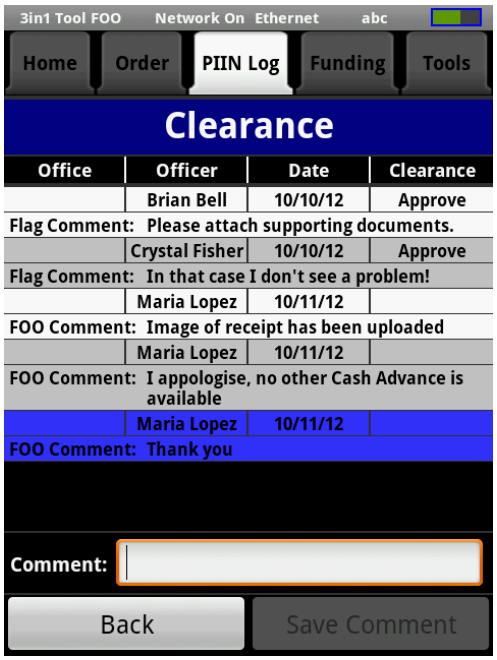
Adding General Clearance Comments

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
- ❑ Add general clearance comments

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Module 9: Ordering Features on the Device

Lesson 1: Returning and Rerunning Purchase Orders on the Device

Objectives

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

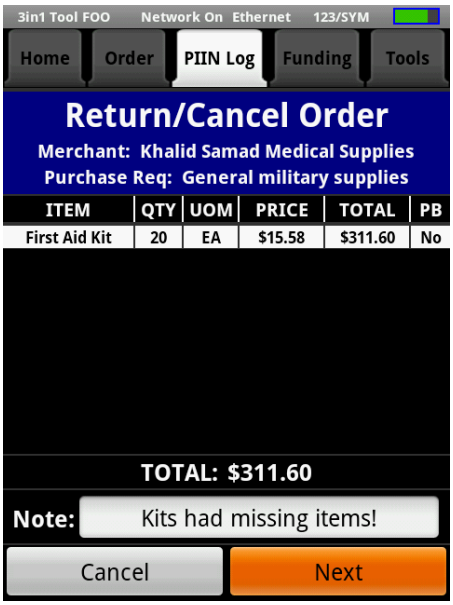
- ❑ Cancel (return) a purchase order
- ❑ Describe the advantages of rerunning an order from the handheld device
- ❑ Understand how to use the rerun order feature to make changes to an order after the order has been placed
- ❑ Rerun an order that appears in the PIIN Log

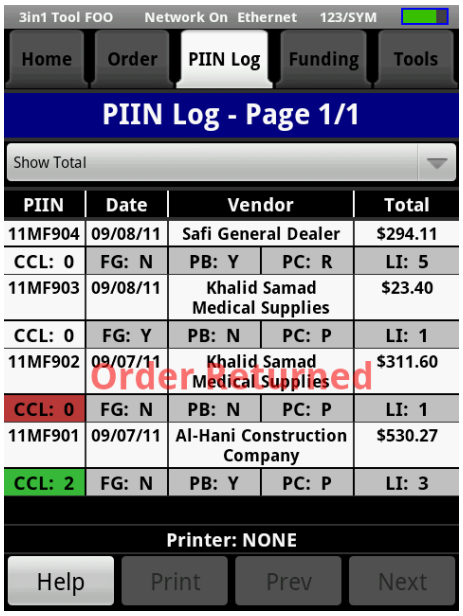
Returning a Purchase Order

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.

To return an order, go to the PIIN Log to select the order to return. Then from *Purchase Details* screen, tap **Return Order**. Add an appropriate return note and tap **Confirm,** and **Yes** to verify your confirmation.

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



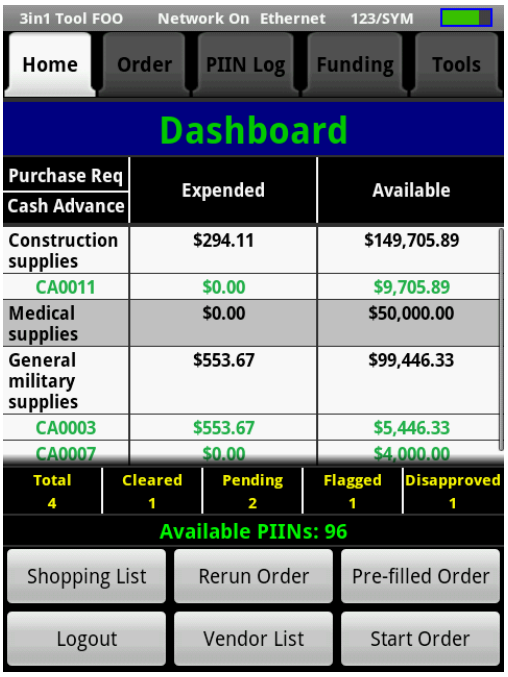


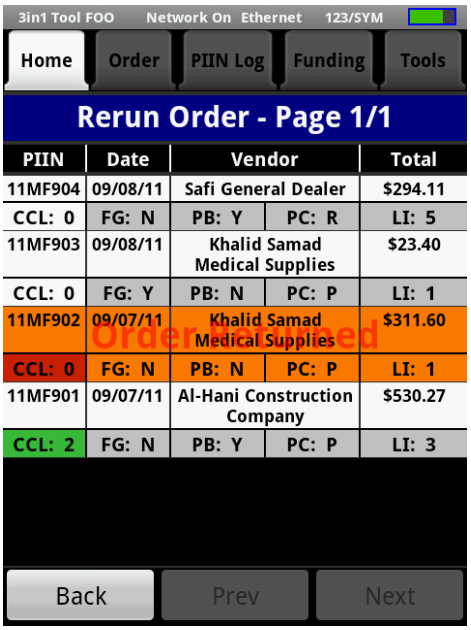
About Rerunning an Order

The main objective of rerunning an order is to save time and make the ordering process quick and efficient. Any order 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.

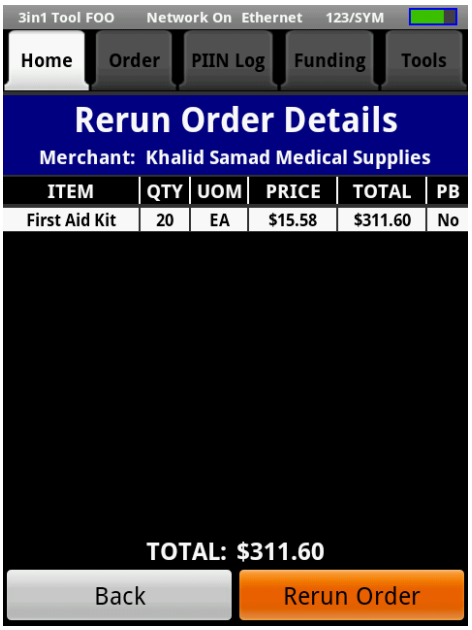
To rerun an order:

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



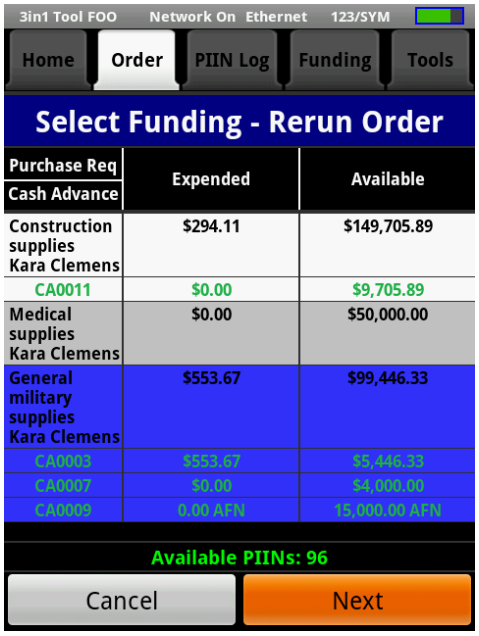


Rerun Order Screen

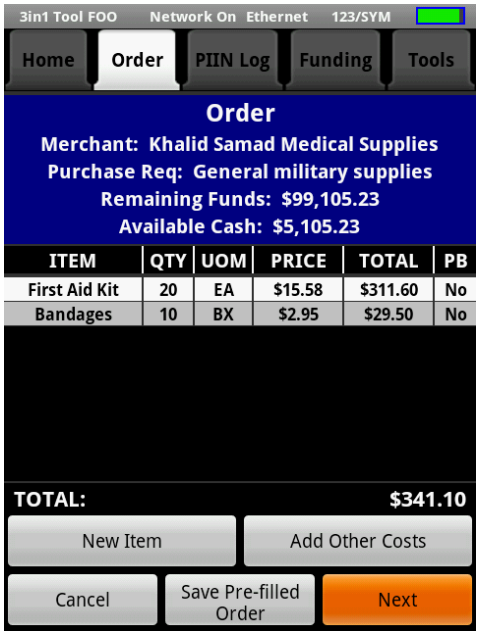


Rerun Order Details Screen

2. Select an order to rerun and tap **Next**. The *Rerun Order Details* screen is displayed.
3. Review the order details. If this is the correct order to rerun, tap **Rerun Order**. If it is not correct, tap **Back** to return to the *Dashboard*.
4. On the *Select Funding* screen, select the funding for the order that is being rerun. 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

5. If needed, tap **New Item** and **Add Other Costs** to complete the order. Then follow the standard check out procedures described in *Module 8: The Ordering Process, Lesson 1: 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 2: Managing Cash Advances on the Handheld Device

Objectives

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

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

The Funding tab enables the Paying Agent, when authorized, to manage cash advances 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.

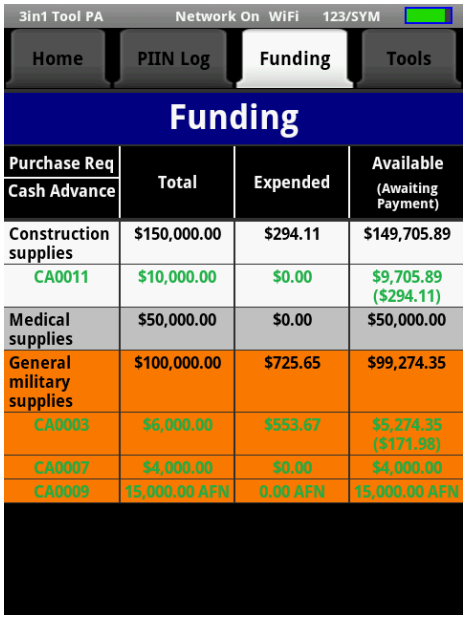
Note: Paying Agents may initiate cash advances from the handheld device only if they have permission. The KO provides this permission on the *User Profile* window; see *Module 5: Managing 3in1 Workstation Users, Lesson 2: Managing User Roles and Accounts*.

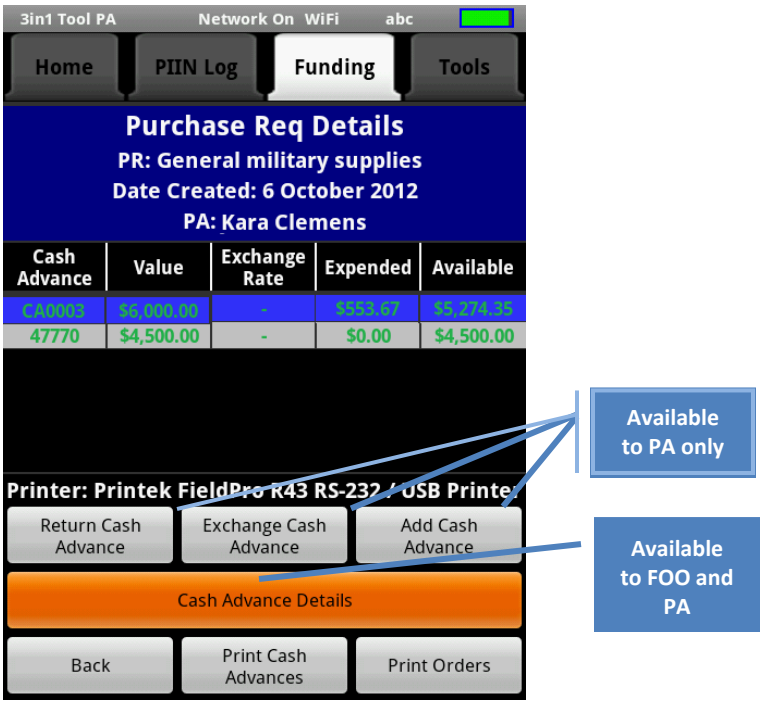
Review Cash Advance Details

Use the *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.

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 **Back** to return to the *Purchase Request Details* screen.

Add a Cash Advance

PAs may initiate cash advances from the handheld device only if they have permission. The KO authorizes the PA to initiate cash advances from the device using a setting on the Workstation's user Profile Management.

To add a cash advance:

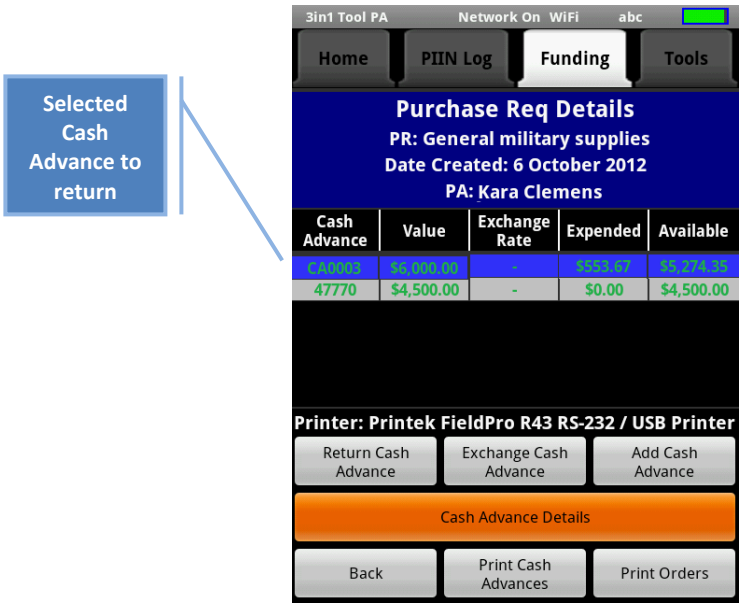
1. On the **Funding** tab, tap a purchase request to select it.
2. On the *Purchase Request Details* screen, tap the **Add Cash Advance** button.
   - The *Enter Cash Advance* screen is displayed.
3. Specify the cash advance amount. Verify the disbursement currency code (the Disbursing Agent should tell 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 Finance Officer will advise what currency code to use if using DDS.

4. Tap **Save**.

Return a Cash Advance

To return a cash advance in the field to a traveling Finance Officer:

1. On the *Purchase Request Details* screen, select a cash advance.

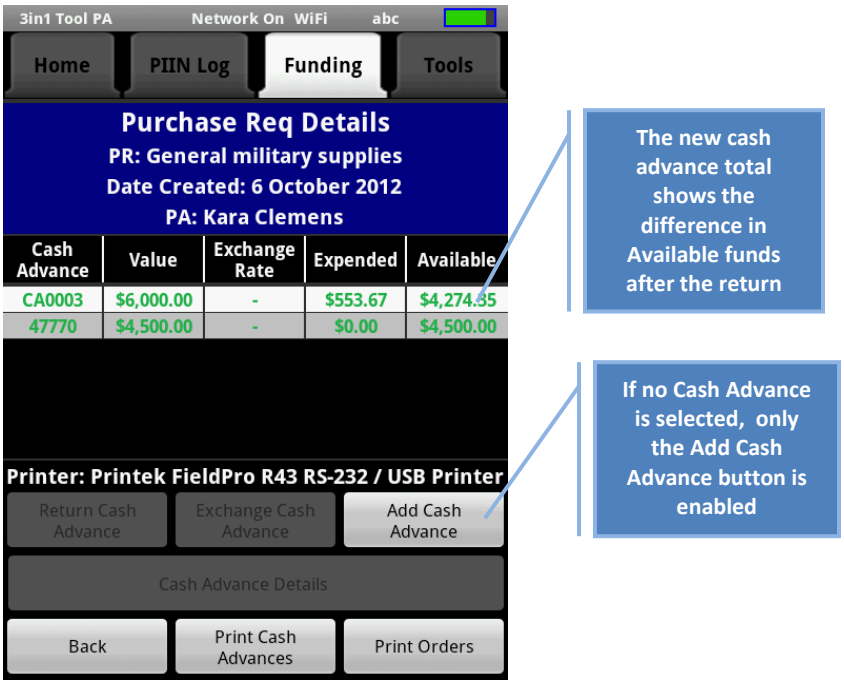


2. Click the **Return Cash Advance** button.
3. Enter the amount you want to return. Optionally enter a comment.
   – If a foreign currency is used, specify the current exchange rate.

For USD amounts, simply enter the amount to return.

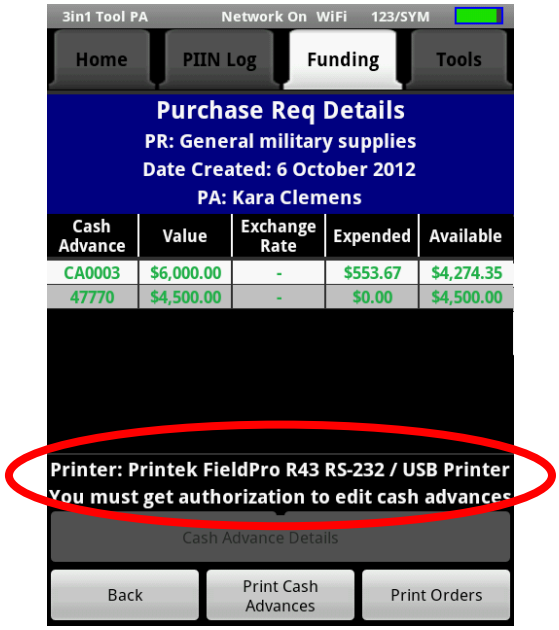
For foreign currencies, enter the current exchange rate.

4. Tap **Save**.



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

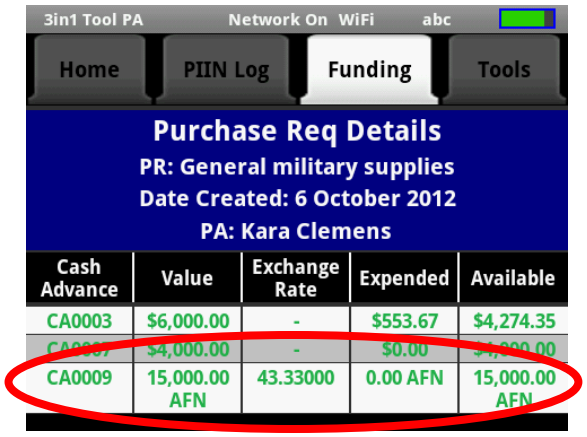
A cash advance in a foreign currency may be changed to USD, and a cash advance in USD may be changed to a foreign currency. A foreign currency cannot be changed to another

foreign currency. The entire remaining cash advance amount or part thereof may be exchanged into a different currency.

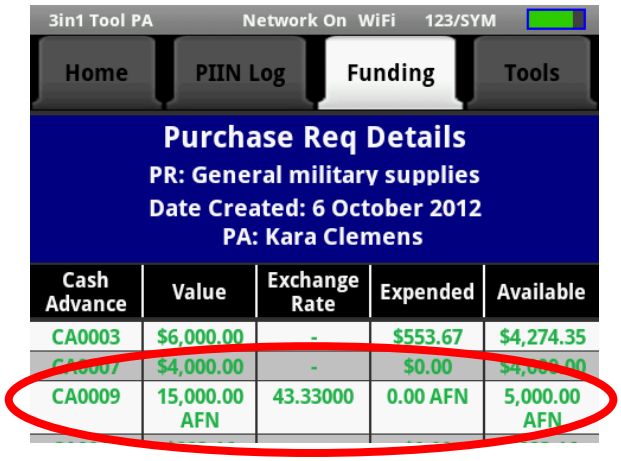
To exchange cash from a foreign currency to USD:

1. On the *Purchase Request Details* screen, select a cash advance.
2. Tap **Exchange Cash Advance**.
   - 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 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 to select the currency.
2. On the *Exchange Cash Advance* screen, enter the amount to convert and the exchange rate.
3. Tap **Save**.

The cash advance amount that was exchanged is displayed as a new line item on the *Purchase Request Details* screen. A supporting receipt will be issued to verify the currency exchange. Use the Attach Document feature to capture the receipt.

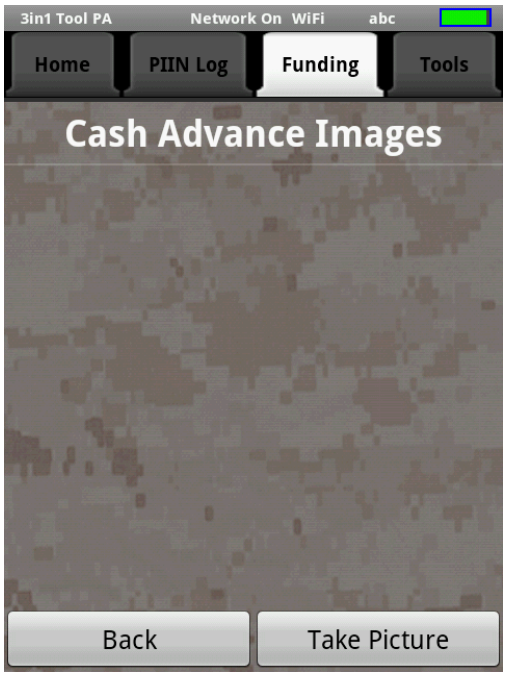
Attach Document Images

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 image using the onboard camera.

To attach an image to a cash advance:

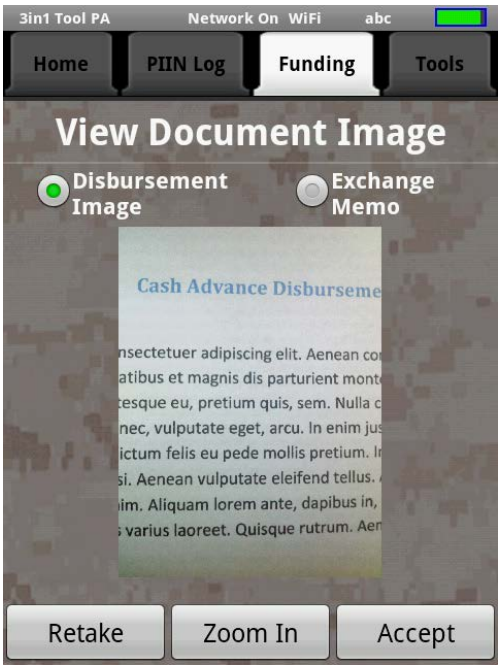
1. Tap the **Documents** button on the *Cash Advance Details* screen.
2. On the *Cash Advance Images* screen, tap the **Take Picture** button.

Cash Advance Details Screen



Cash Advance Images Screen

3. Use the device camera to capture an image of the document. (*See Module 8: The Ordering Process, Lesson 1: 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

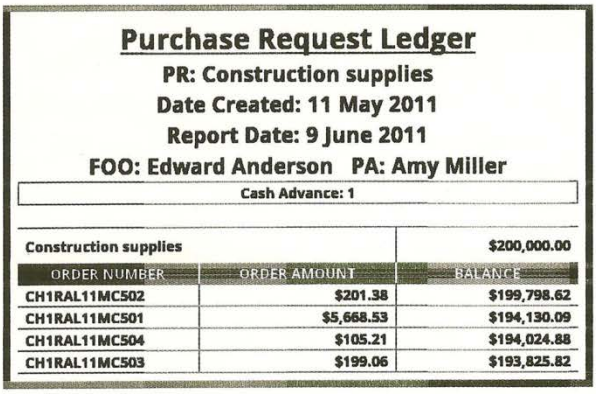
Once images are taken, they are listed on the *Cash Advance Images* screen. To view an image, tap one. The *View Document Image* screen then displays options to delete, print (if a printer is connected), or view the image in detail.

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.

Printing Reports from the Device

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.



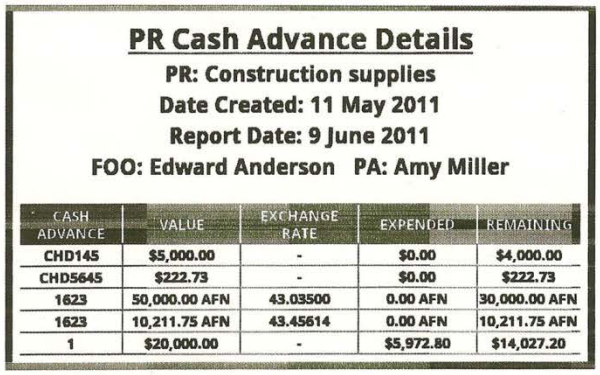
Purchase Request Ledger

PR: Construction supplies
Date Created: 11 May 2011
Report Date: 9 June 2011
FOO: Edward Anderson PA: Amy Miller

Cash Advance: 1

Construction supplies		$200,000.00
ORDER NUMBER	ORDER AMOUNT	BALANCE
CH1RAL11MC502	$201.38	$199,798.62
CH1RAL11MC501	$5,668.53	$194,130.09
CH1RAL11MC504	$105.21	$194,024.88
CH1RAL11MC503	$199.06	$193,825.82

Purchase Request Ledger Report



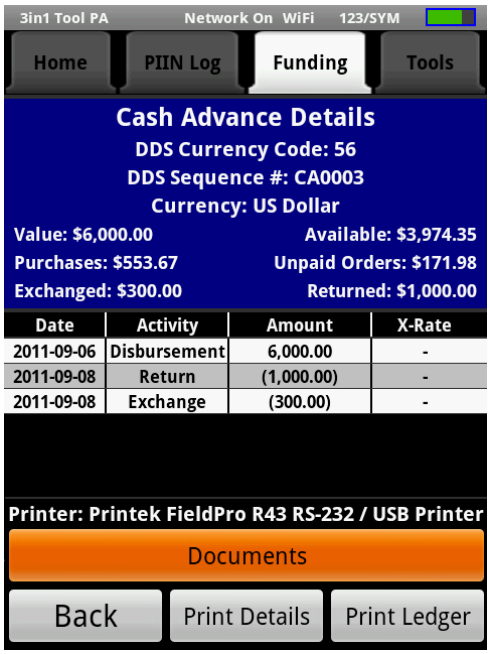
PR Cash Advance Details

PR: Construction supplies
Date Created: 11 May 2011
Report Date: 9 June 2011
FOO: Edward Anderson PA: Amy Miller

CASH ADVANCE	VALUE	EXCHANGE RATE	EXPENDED	REMAINING
CHD145	$5,000.00	-	$0.00	$4,000.00
CHD5645	$222.73	-	$0.00	$222.73
1623	50,000.00 AFN	43.03500	0.00 AFN	30,000.00 AFN
1623	10,211.75 AFN	43.45614	0.00 AFN	10,211.75 AFN
1	$20,000.00	-	$5,972.80	$14,027.20

Purchase Request Cash Advance Details Report

The *Cash Advance Details* screen shows a listing of all cash activity (returns, exchanges, advances) for a specific cash advance. Tap **Print Details** to print the Cash Advance Details report and or tap **Print Ledger** to print a Cash Advance Ledger report, which shows the activity history of a cash advance.



All cash activities are listed for the 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 Ledger Report

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	-	-

Cash Advance Details Report

Note: The PIIN Log and Shopping list can also be printed from the device.

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

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Module 10: Managing Purchase Orders on the Workstation

Lesson 1: 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.

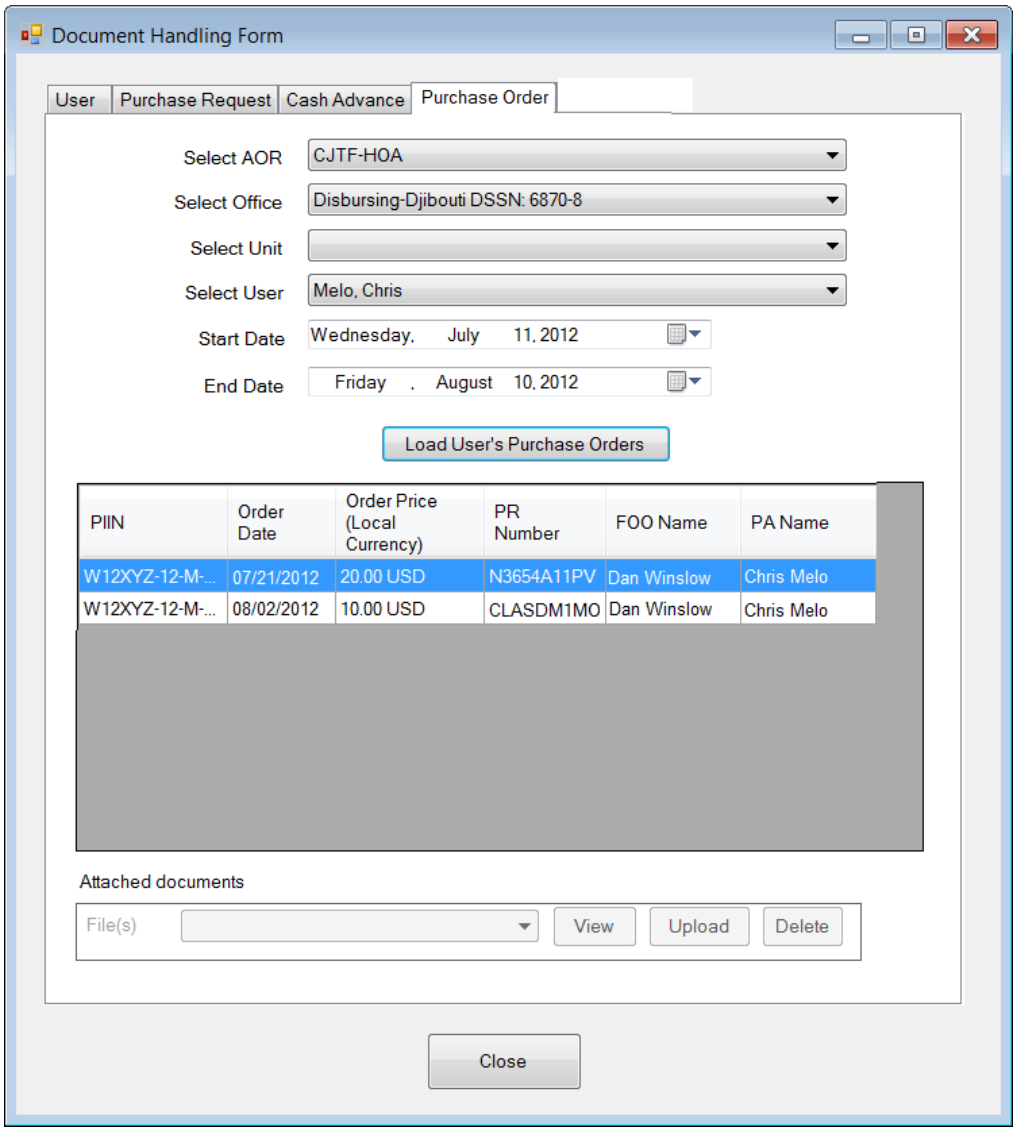
Looking Up POs by User

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.



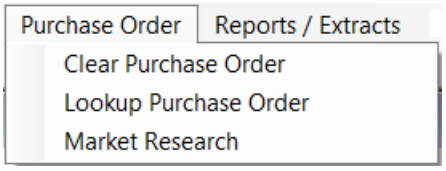
Purchase orders associated with the selected user are listed in the table

Looking Up POs by PIIN

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

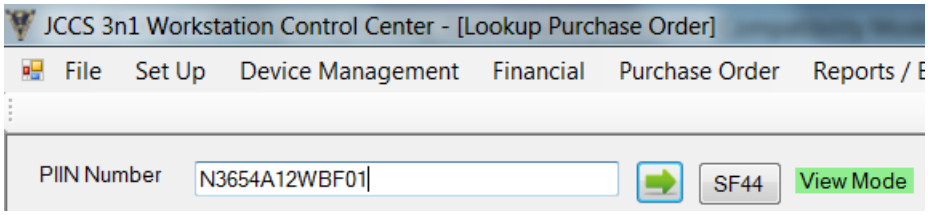
To look up a purchase order by PIIN:

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



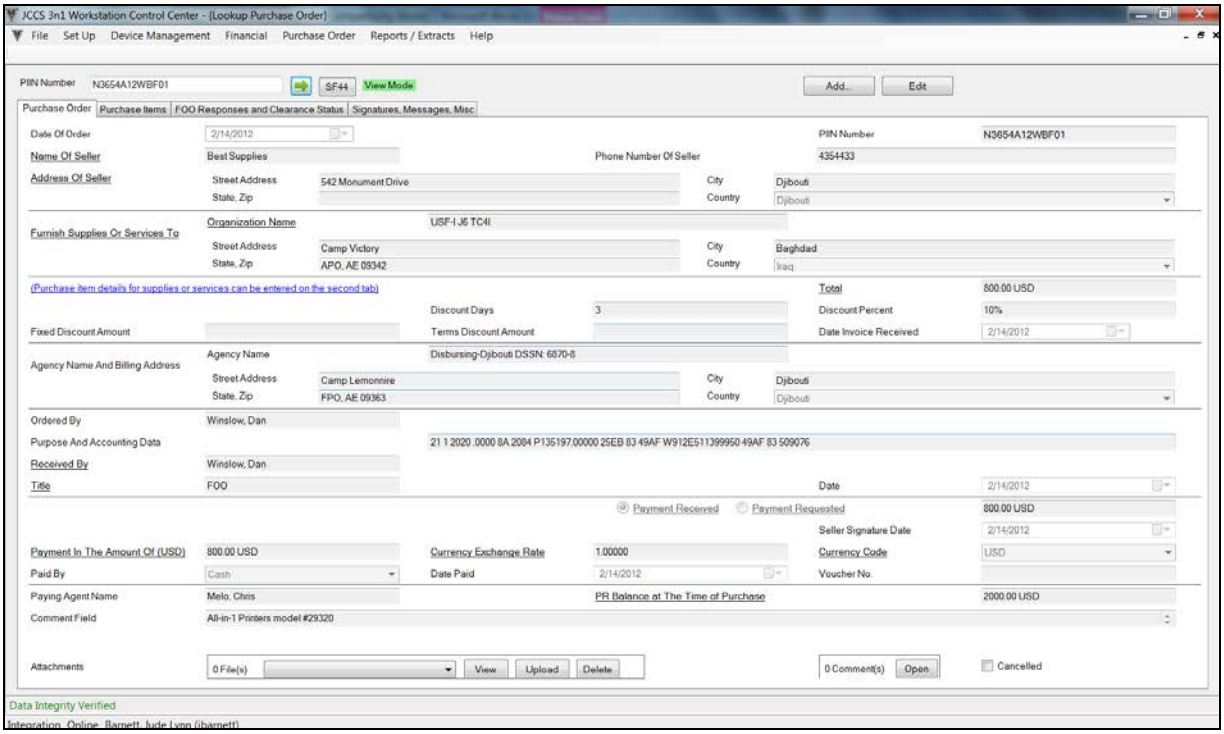
– The *Lookup Purchase Order* window opens.

2. 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

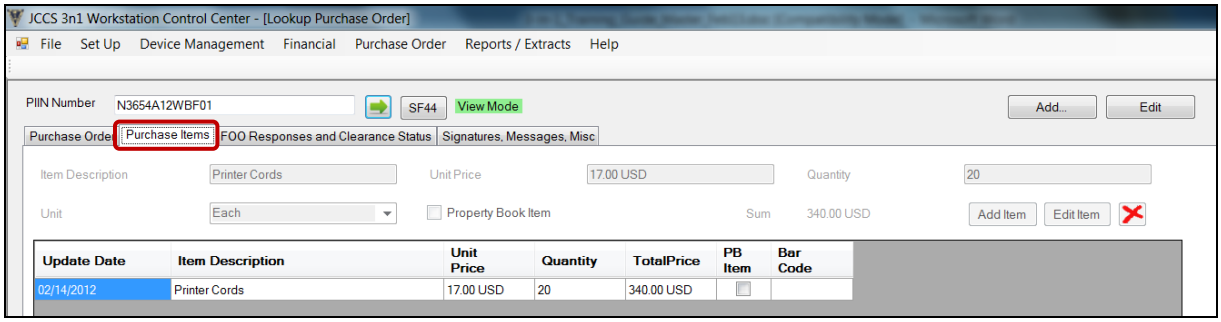
– The screen updates with the purchase order (PO) information.



Purchase Order Window

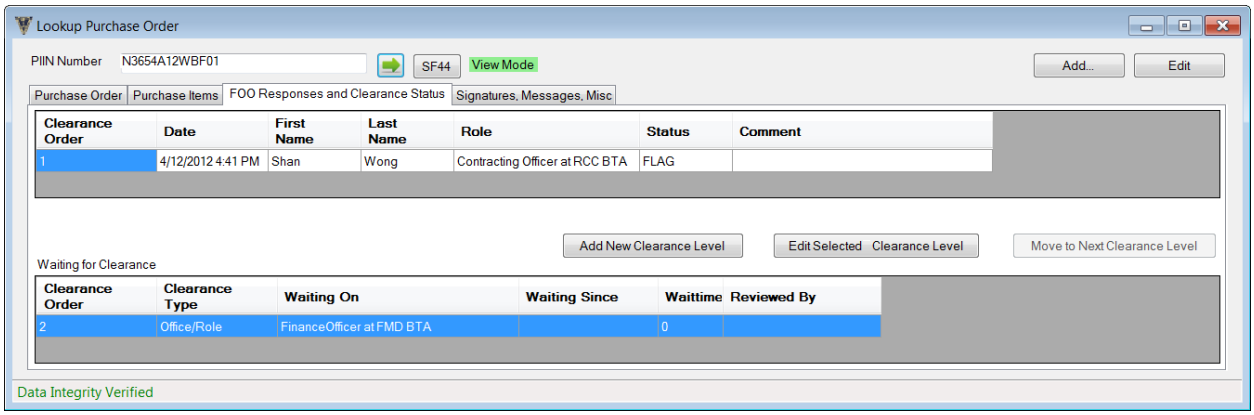
Viewing Purchase Items

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



Viewing FOO Responses and Clearance Status

To view comments made by various reviewers during the PO purchase or clearance process, as well as FOO responses, click the **FOO Responses and Clearance Status** tab.



FOO Responses and Clearance Status Tab

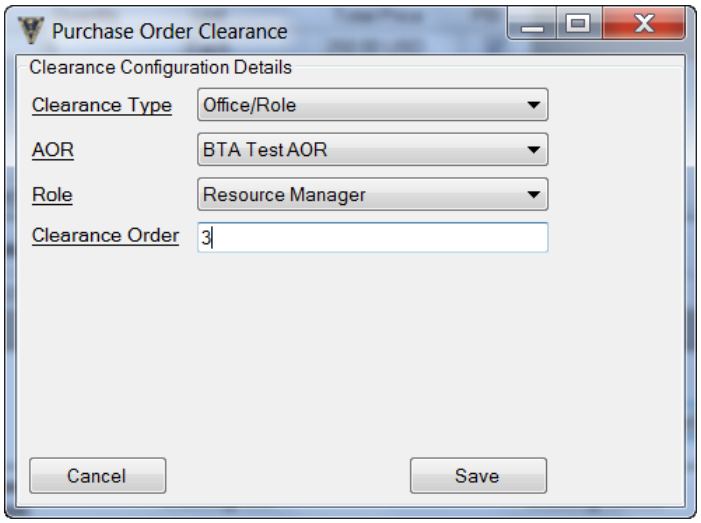
In the top table of the **FOO Responses and Clearance Status** tab, the Clearance Order column lists the clearance levels that have reviewed the PO. The other columns provide information on the reviewer and the status. In the figure above, the first level (1) reviewer has flagged the PO.

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

The three buttons on the screen provide options for changing the clearance process for this PO: **Add New Clearance Level**, **Edit Selected Clearance Level**, and **Move to Next Clearance Level**.

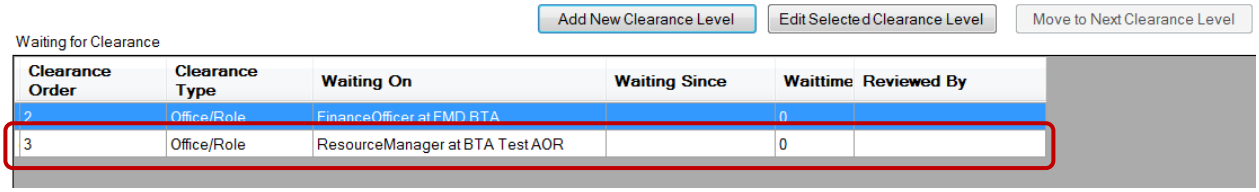
Add New Clearance Level

Click the **Add New Clearance Level** button to add a reviewer for the PO. The *Purchase Order Clearance* window is displayed. Select the Clearance Type, AOR, Role and Order for the new reviewer. Click the **Save** button.



Purchase Order Clearance Window

The new reviewer is added to the **Waiting for Clearance** table.



Edit Selected Clearance Level

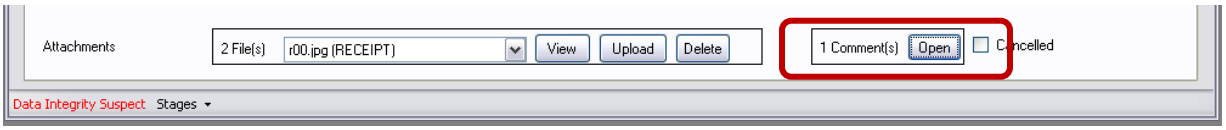
If it is necessary to change a clearance level, click the **Edit Selected Clearance Level** button. On the *Purchase Order Clearance* window, change any of the fields and then click the **Save** button.

Move PO to Next Clearance Level

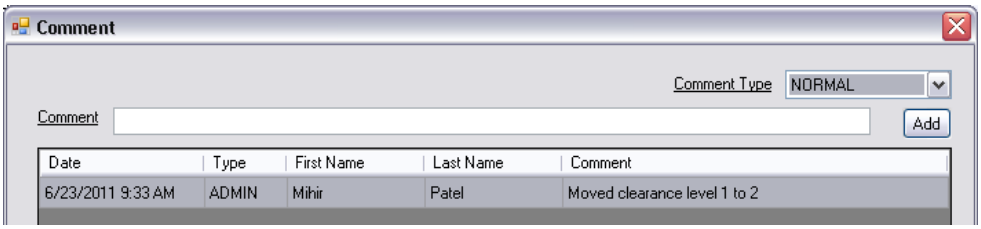
There may be situations where it is necessary to manually advance a PO to the next clearance level. For example, if a reviewer goes on R&R or medical leave, or is transferred to a different job location before clearing his or her queue, someone in the System Administrator role can look up the assigned purchase orders and move each one to the next level in the clearance process.

To manually advance the PO to the level, click the **Move to Next Clearance Level** button.

The PO is 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.



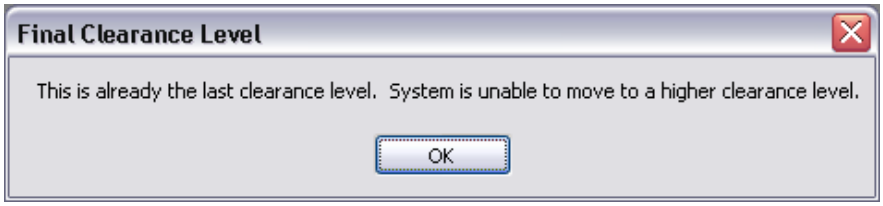
Purchase Order Window – Comment Added After PO is Manually Moved to the Next Clearance Level



Comment Regarding Move to Next Clearance Level

Note that when an order is at the last level of the clearance queue, it cannot be moved to the next level, which would be to pass clearance. The final reviewer must log in to the Workstation and review the purchase order from Clearance screen.

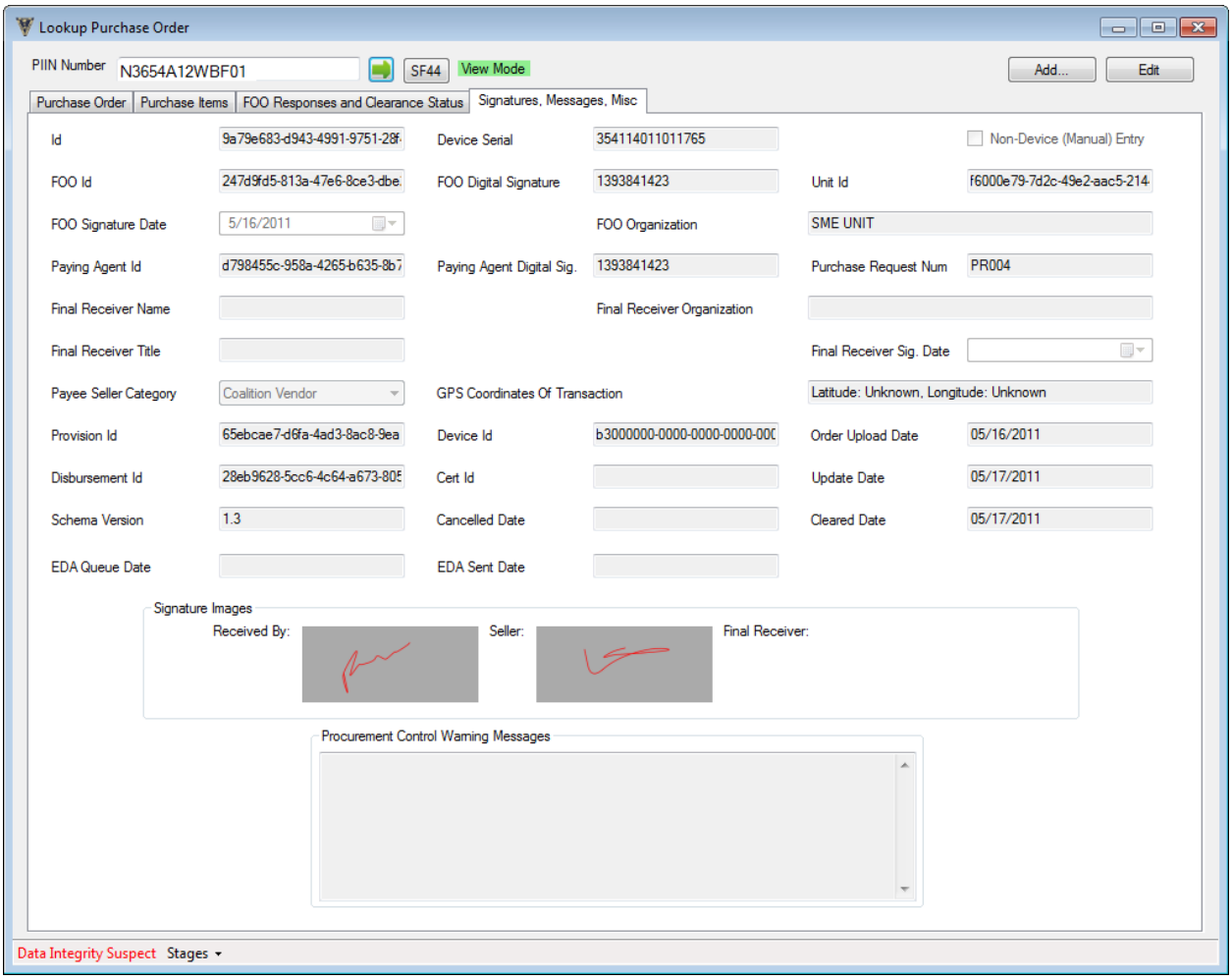
The following error message is displayed when the System Admin tries to move an order from the last clearance level.



If this final reviewer is not available for some reason, please contact the local help desk support team for assistance.

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. This information is captured on the **Signatures and Messages** tab.



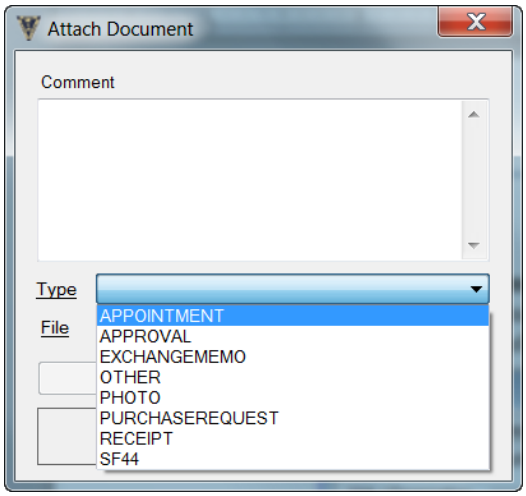
Signatures and Messages Tab

Adding Attachments to a Purchase Order

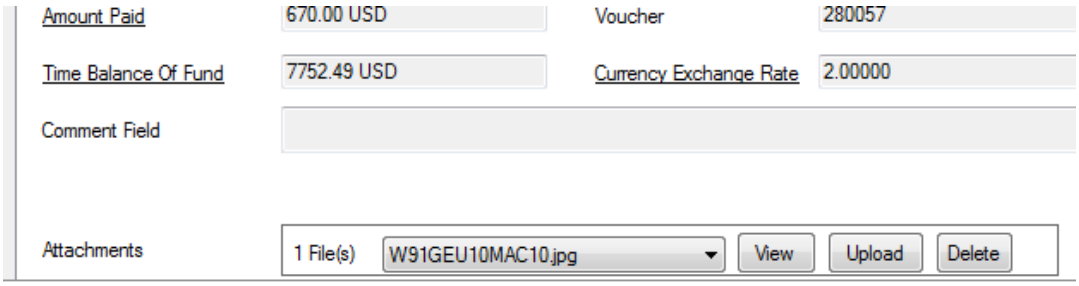
A purchase order may require an approval or justification letter to support the order and for it to be cleared. You can upload documents to attach to an order on this screen.

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., Approval Letter)
5. Click the **Upload File** button.



6. Close the *Attach Document* dialog box. The attached file is displayed in the **Attachments** section.



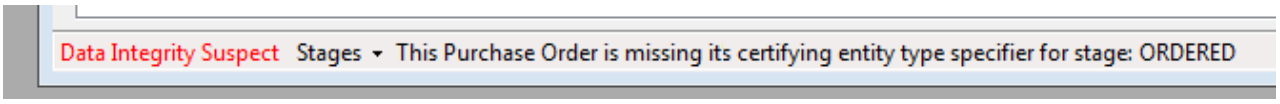
Purchase Order Window Attachments Section

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.



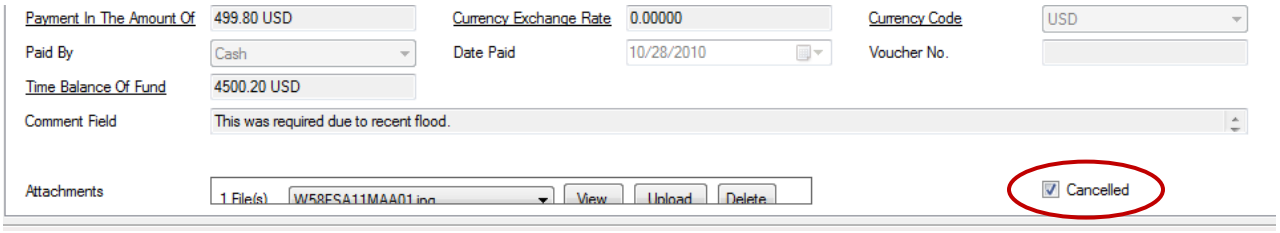
Verifying Purchase Order Data Integrity

Cancelled Purchase Orders

Purchase order may be cancelled on the device or on the Workstation by a person with the appropriate authorization.

A cancelled PO has a marked **Cancelled** check box in the bottom right corner of the **Purchase Order** tab.

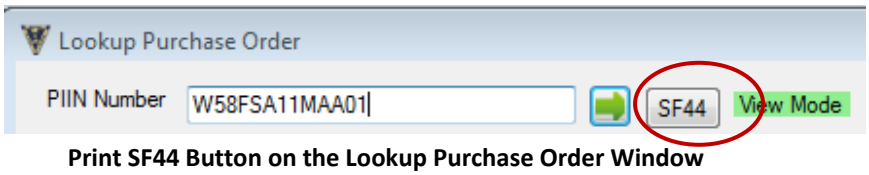
Cancelling a purchase order returns the funds, but the PIIN remains expended. A cancelled purchase order can be retrieved using the Lookup feature, but cannot be edited. Orders cancelled on the Workstation will be transmitted to the device during the next data upload.



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.



Print SF44 Button on the Lookup Purchase Order Window

When you click the **SF44** button, the report will be displayed as a PDF file and can then be printed or saved to your 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)**

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	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)

Printed SF44

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
- ❑ View attachments
- ❑ View FOO and Clearance comments and signatures associated with a purchase order
- ❑ Print a SF44 from the Purchase Order screen

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Module 11: 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
- ❑ Upload cleared orders to Electronic Data Access (EDA)

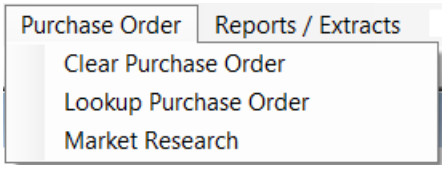
Clearing Purchase Orders

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. Reviewers can see all SF44 information, receipt image, signatures, and required approval letters. Reviewers can approve, disapprove, or flag an order for follow-up and transmit comments or questions to the fielded device for response.

The clearance process for orders established during the provisioning process was described in *Module 6: Configuring the 3in1 Tool Workstation*, *Lesson 3: Defining Clearance Flow.* 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:

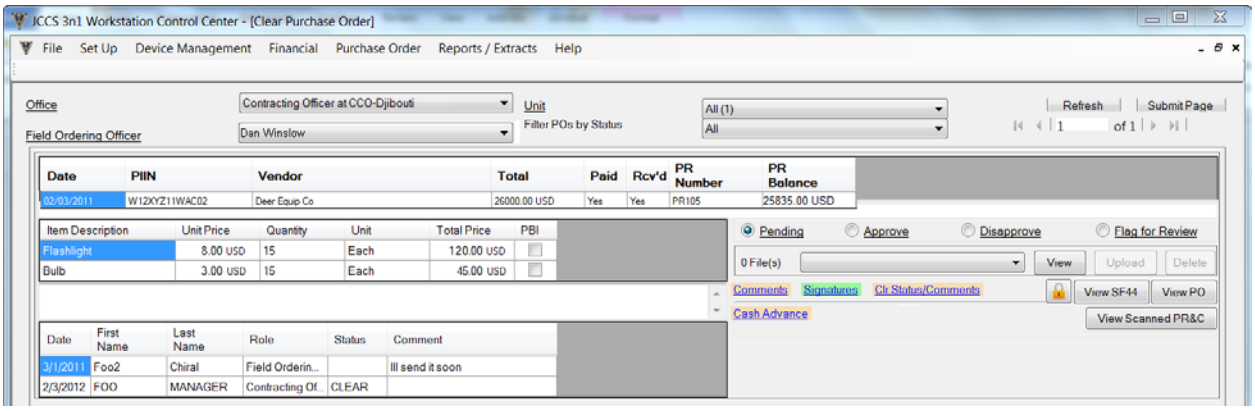
1. Select **Purchase Order**, **Clear Purchase Order** from the main menu.



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

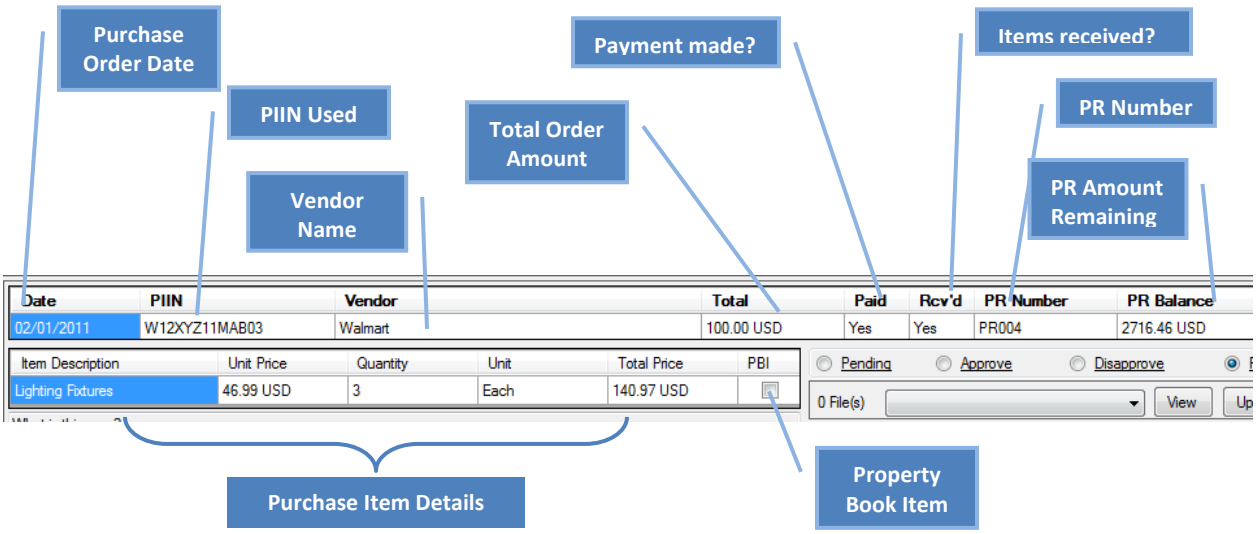
2. Select a **Unit** and **Office** from the drop-down list. (To select all units, select the **All** option. This enables viewing orders associated with FOOs in all units.)
3. Select the **FOO** whose purchase orders you would like to review.
4. If there are many orders, use the **Filter POs by Status** 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 displays in a separate block, with associated purchase items displayed beneath.



Purchase Order Components

Reviewing and Responding to Comments

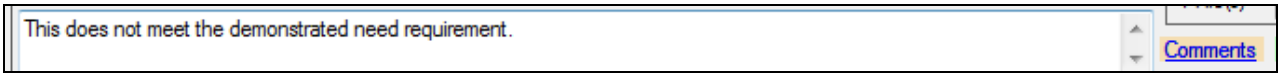
Comments regarding purchase orders may be exchanged between a FOO, using the handheld device, and a reviewer who types in the **Comments** section on the Clearance screen.

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...

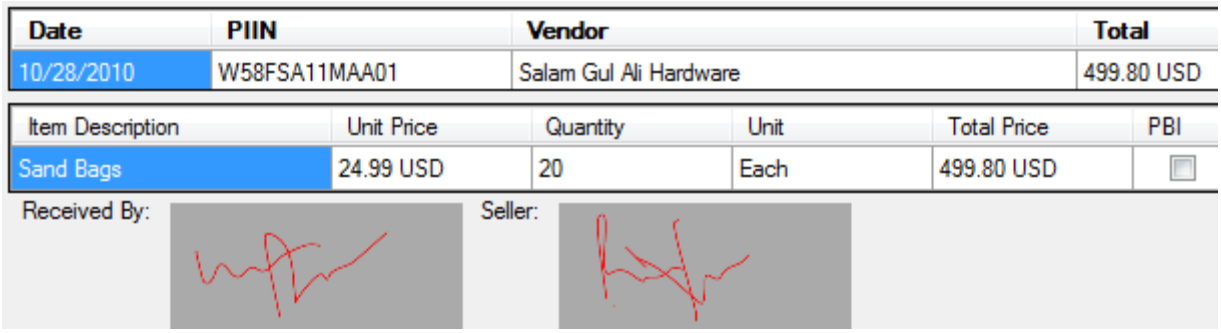
Clr (Clearance) Status/Comments

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 the **Flag for Review** radio button and enter comments in the **Comments** text area. (All of the links toggle between show and hide.)



Reviewer Comments

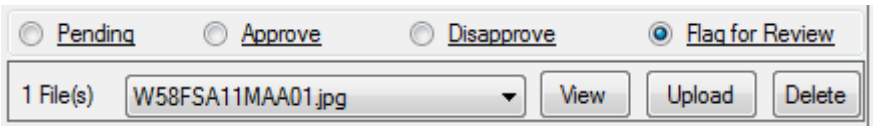
In addition to the item details, you can view or hide reviewer comments and signatures by clicking the **Show/Hide Signatures** links.



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.



File Attachment

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

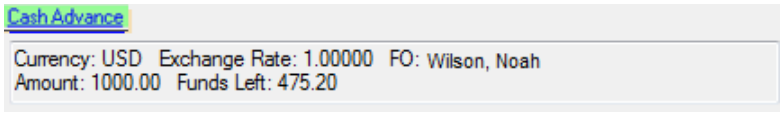
If a FOO attempted purchase triggers a procurement control, a **Warning** link is displayed. Click the link to view the warning message.

Warning Message Exists for this Purchase

Viewing the SF44 and Cash Advance and Discount

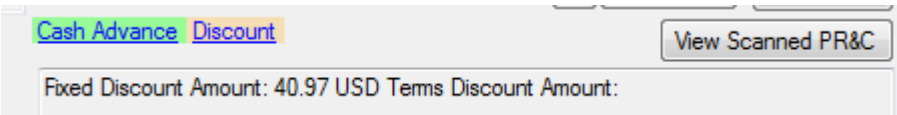
Two other features on the Clearance screen are viewing the SF44 associated with the purchase order, and viewing the cash advances associated with the purchase request.

Click **View SF44** to open the SF44 in a separate Microsoft Word 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.



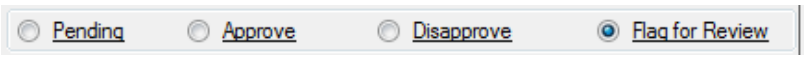
Viewing Discount Amounts

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.

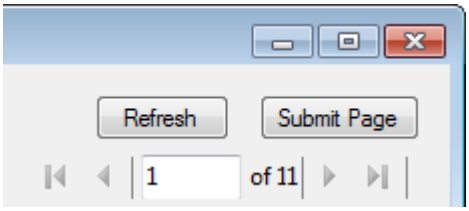


The selected radio button represents the appropriate action for the selected PO.

- **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.com", 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.

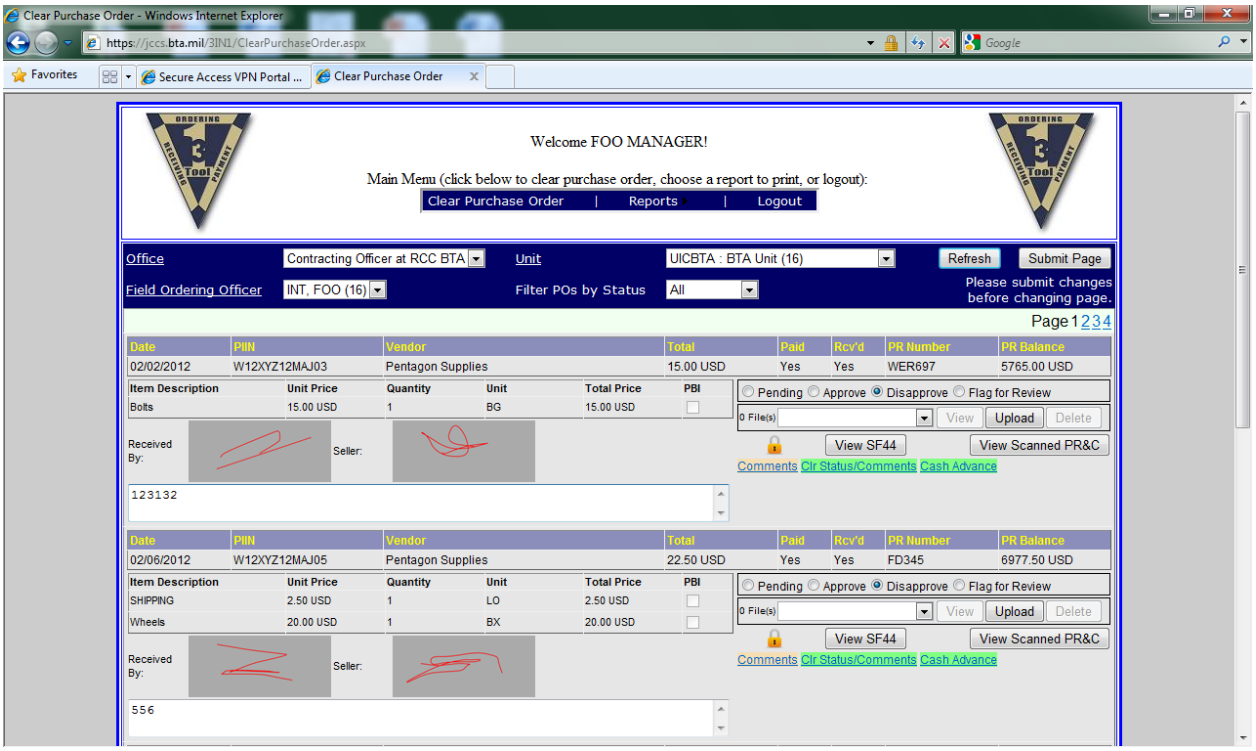
In order to receive email notification, users must provide valid email addresses in their Workstation user profiles, which should be reviewed and updated on a regular basis.

Manually Moving POs to the Next Level

There may be situations where it is necessary to manually advance a PO to the next clearance level. For example, if a reviewer is transferred to a different job location before clearing his or her queue, someone in the System Administrator role can look up the assigned purchase orders and move each one to the next level in the clearance process. The **Move to Next Clearance Level** feature is available on the *Lookup Purchase Order* window, as explained earlier in *Module 10: Managing Purchase Orders on the Workstation, Lesson 1: Looking Up and Completing Purchase Orders on the Workstation*.

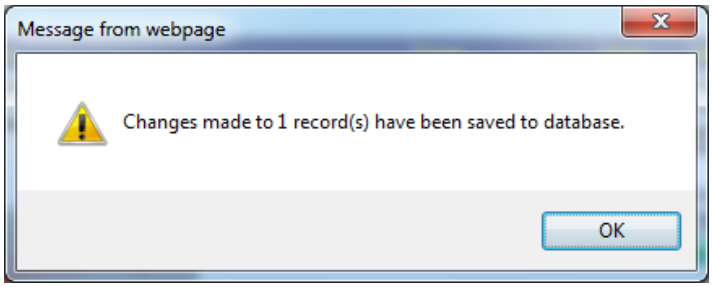
Web-Based Clearance

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.



Web-Based 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

EDA Upload

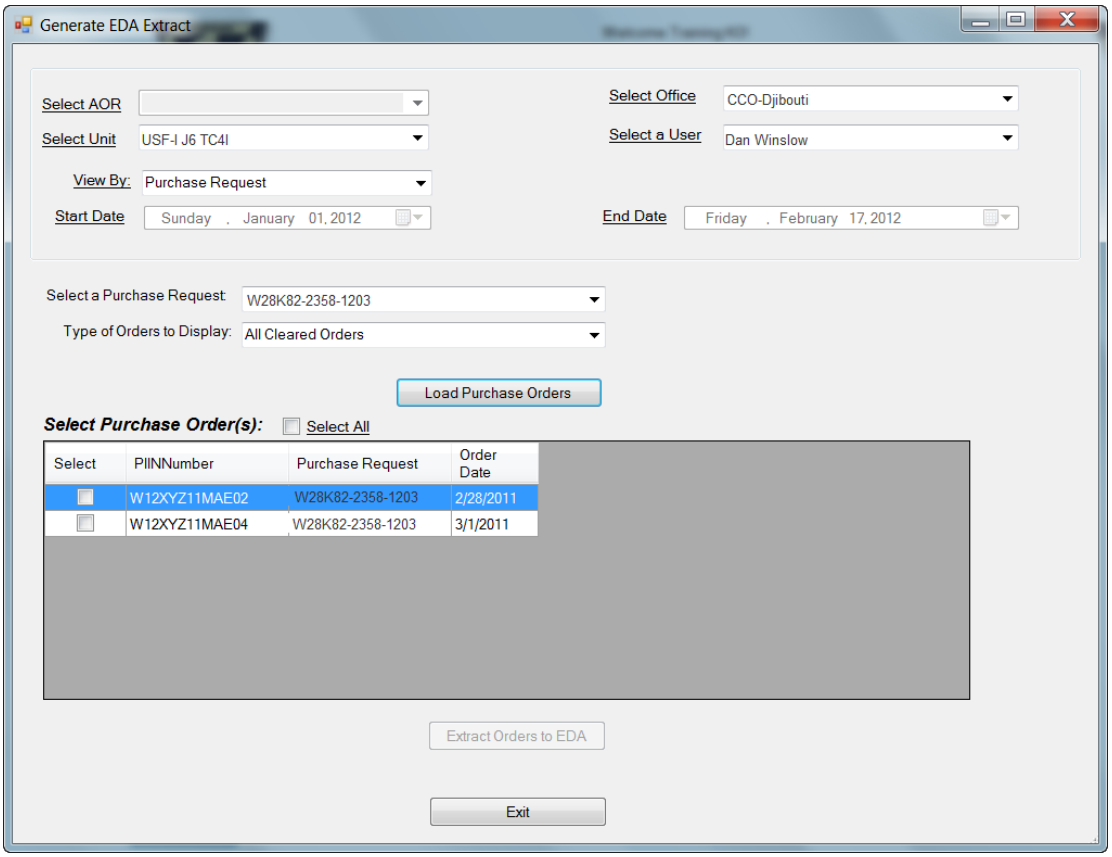
The **EDA Upload** is used by a KO, AOR Administrator, or System Administrator (SA) to extract data from cleared purchase orders and send to the Global Exchange Service (GEX), which will automatically send the data to Electronic Data Access (EDA). Once an order is extracted, it is marked in the database, so it cannot be re-sent to EDA.

Note: SAs can view any order from any AOR. KOs and DAs can view only the orders associated with the AORs to which they are assigned.

To select and upload orders to GEX:

1. Select **File**, **EDA Upload** from the main menu.
   - The *Generate EDA Extract* window is displayed.
2. Select the AOR and Unit.
3. Select the Office and User.
4. Purchase orders can be selected based on a specific Purchase Request or by a specified date range.
   - To view POs 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 POs associated with a specific PR, select **By Purchase Request**.
5. Specify the type of orders to display:
   - **Cleared Orders with Voucher Numbers**: Cleared orders (have been approved by all clearance levels) have voucher numbers. Orders that have gone through DDS receive voucher numbers.
   - **Cleared Orders without Voucher Numbers:** Cleared orders that do not have voucher numbers. Organizations that do not use the DDS financial system can select this option to send orders to EDA for archival purposes.
   - **All Cleared Orders**: Selects all cleared orders with or without voucher numbers.
6. Click the **Load Purchase Orders** button.
   - Purchase orders that meet the specified criteria are listed.
7. Mark the check box beside the POs that should be extracted to EDA.

– To extract all POs listed, select the **Select All** check box.



8. Click the **Extract Orders to EDA** button.
   – Data from the selected orders is extracted and sent to GEX, which will send the data to EDA. This extraction and sending process is not visible to the user.
   – Once an order has been selected for EDA extraction, it marked in the database and cannot be re-sent to EDA.
9. Click the **Exit** button to exit the Upload EDA feature.

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
- ❑ Upload cleared orders to Electronic Data Access (EDA)

Part 3c: Execution: Post Purchase Process

Module 12: Post-Clearance Operations

Lesson 1: Exporting and Importing Payment Information

Objectives

After completing this lesson, the participant will understand that:

- ❑ Purchase orders can be exported from the Workstation to DDS to obtain voucher numbers
- ❑ The 3in1 Tool Workstation interacts with DDS in terms of issuing payments and assigning voucher numbers to orders
- ❑ The DA can import voucher numbers for purchase orders in the 3in1 Workstation, or manually add voucher numbers to purchase orders
- ❑ After an order has completed clearance, payment processing, and voucher number assignment, it can be uploaded to EDA for permanent storage.

Exporting Purchase Orders

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.

The Deployable Disbursing System (DDS) is a Defense Finance and Accounting System (DFAS) used in Contingency environments by the U.S. Army and Marine Corps services.

Extracts are based on orders that have been cleared by the DA for a PA. Typically the DA exports the purchase orders.

Processing 3in1 Data in DDS

The exported data from the 3in1 Tool Workstation is uploaded and processed in DDS. After payments are issued and voucher numbers are assigned, accountability is posted and the data can be imported back to the 3in1 Tool Workstation.

Adding Voucher Numbers to Purchase Orders in 3in1 Tool Workstation

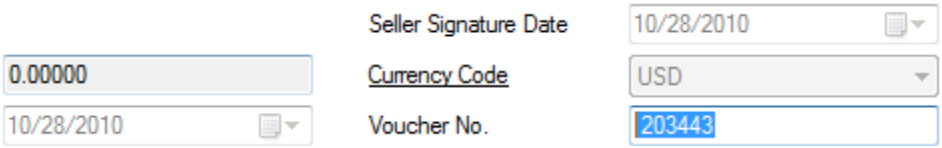
After voucher numbers are assigned to purchase orders outside the 3in1 Tool system, it is necessary to add these voucher numbers to purchase orders in the 3in1 Workstation. There are two ways to do this. If your finance office uses DDS, the voucher numbers can be imported, usually by the DA. Alternatively,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

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. For additional reference on inputting SF44 information into DDS, please see the DFAS 3in1 DDS manual.

The Deployable Disbursing System (DDS) is a Defense Finance and Accounting System (DFAS) used in Contingency environments by the U.S. Army and Marine Corps services.

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

After an order has completed clearance, payment processing, and voucher number assignment, it can be uploaded to EDA for permanent storage. The 3in1 prime database will transmit the SF44 order/voucher information and receipt images for official document storage to Electronic Data Access (EDA). This eliminates the need for FOOs/PAs or KO/DA to retain paper copies of the SF44s.

Lesson Summary

In this lesson, you learned:

- ❑ Purchase orders can be exported from the Workstation to DDS to obtain voucher numbers
- ❑ The 3in1 Tool Workstation interacts with DDS in terms of issuing payments and assigning voucher numbers to orders
- ❑ The DA can import voucher numbers for purchase orders in the 3in1 Workstation, or manually add voucher numbers to purchase orders
- ❑ After an order has completed clearance, payment processing, and voucher number assignment, it can be uploaded to EDA for permanent storage.

Lesson 2: Deactivate/Reactivate FOOs/PAs from Devices and Workstation

Objectives

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

- ❑ Deactivate a device for a PA/FOO team whose assignment has ended
- ❑ Reactivate a device for a FOO who has been deactivated
- ❑ Remove a PA/FOO from accessing the Workstation

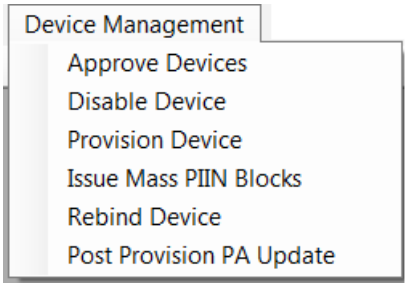
A FOO/PA team may be de-provisioned after all their orders have been cleared from the 3in1 system. When a FOO's assignment has ended, the System Administrator or Contracting Officer needs to deactivate the FOO from the device and purge the FOO's order data from the device.

Workstation: Remove PA and FOO from a Device

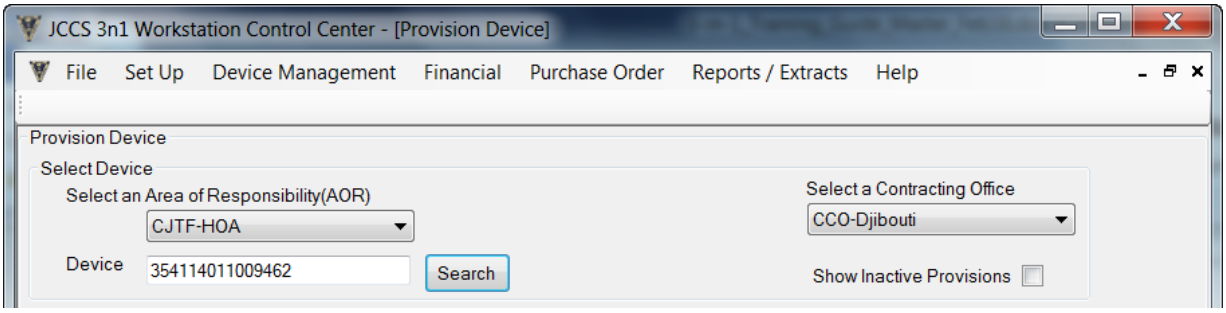
Remove the PA first, then remove the FOO, unless multiple FOOs are assigned to the same device with which the PA is associated.

To deauthorize a PA from a device:

1. Select **Device Management**, **Provision Device** from the Workstation main menu.

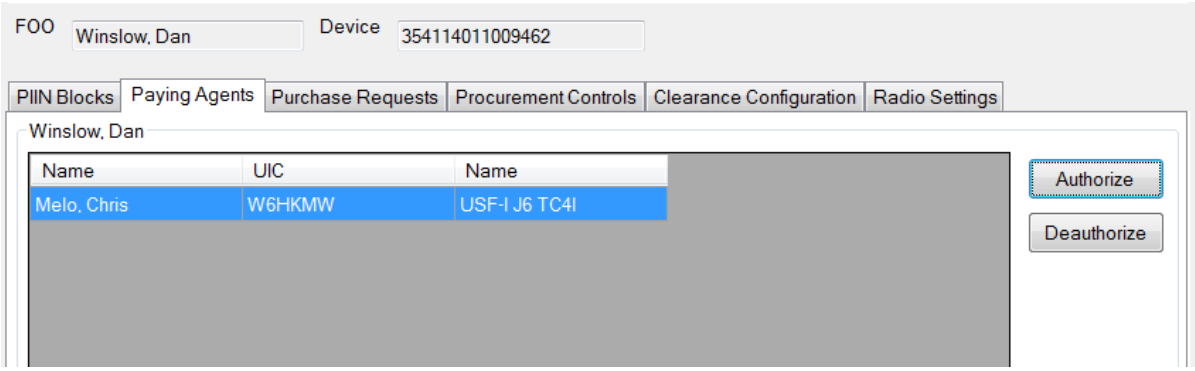


2. Use the selection criteria and **Search** button to locate the appropriate device.



3. Select the appropriate FOO name in the Provisions table.
4. Click the **Paying Agent**s tab.
5. Select the PA name on the list.

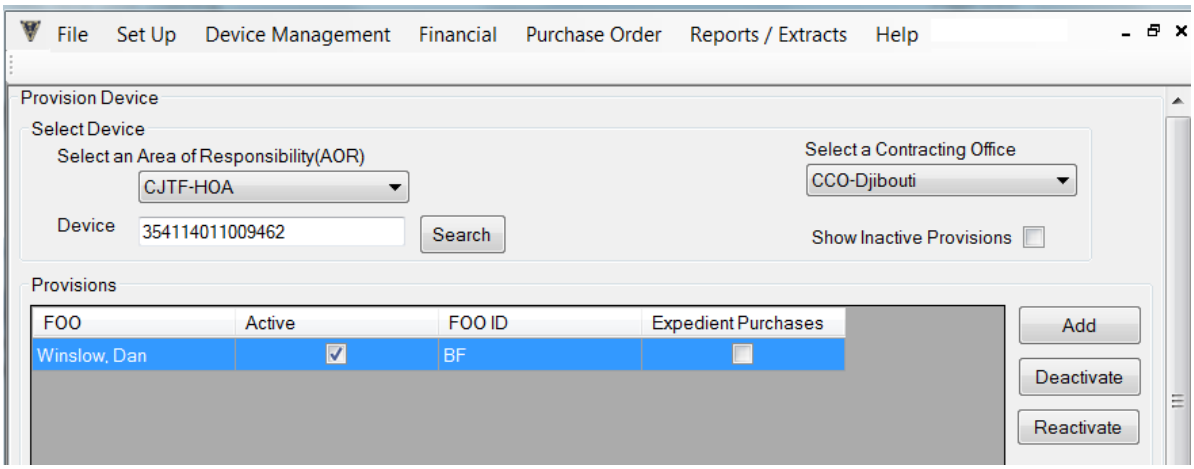
6. Click the **Deauthorize** button.



Provision Device Window – Paying Agents Tab

Next, deactivate the FOO:

1. Select the FOO name in the Provisions table.
2. Click the **Deactivate** button. At this point the FOO is no longer associated with the device.



Provision Device Window – Deactivate FOO

Device: Deactivate FOOs

The Workstation deactivation action is stored in a message queue which is transmitted to the device the next time is it powered on. After receiving the message, the device removes the FOO from the list of FOOs who can log on to the device. Any current orders created by this FOO will be uploaded to the Workstation before the FOO data is purged from the device. The FOO can no longer log in to the device.

The device must be synchronized with the 3in1 prime database at least three times to remove all provisioning.

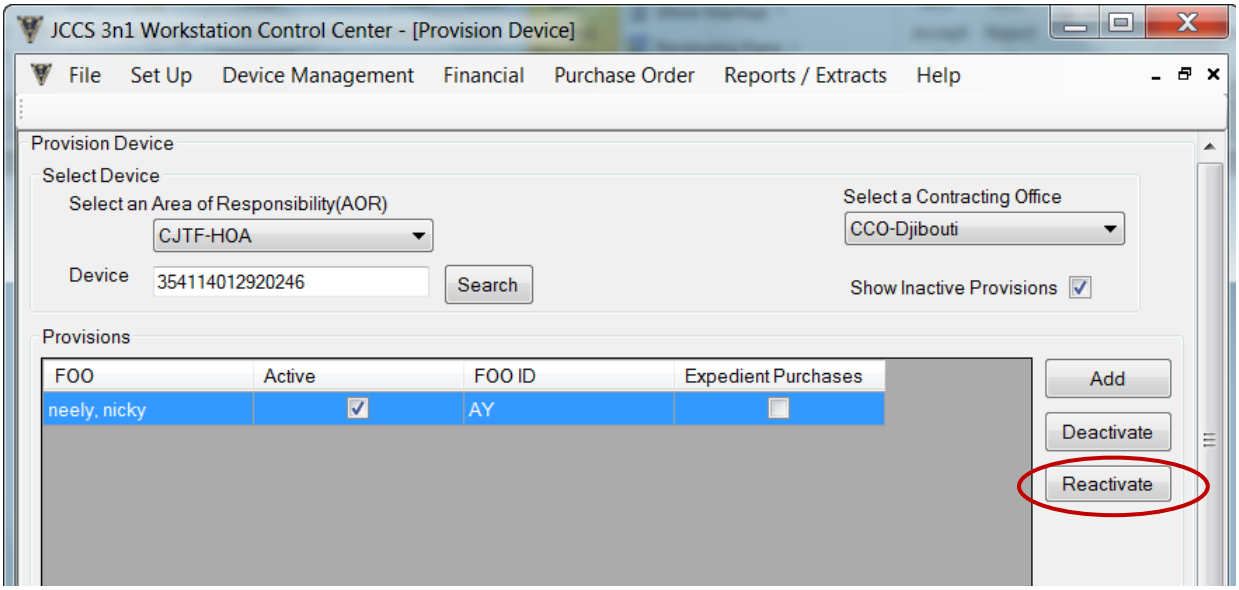
Note that at this point, the FOO or PA can still log in to the Workstation.

Workstation: Reactivate FOO

If a FOO has been deactivated, but has not been removed from the Workstation (as explained in the following section), it is possible to re-associate (reactivate) the FOO with a device.

To reactivate a FOO:

1. On the *Provision Device* window, mark the **Show Inactive Provisions** checkbox to display inactive FOOs who were at one time provisioned to the selected device.
2. Select the FOO name, then click the **Reactivate** button. This action will mark the **Active** check box beside the reactivated FOO name.



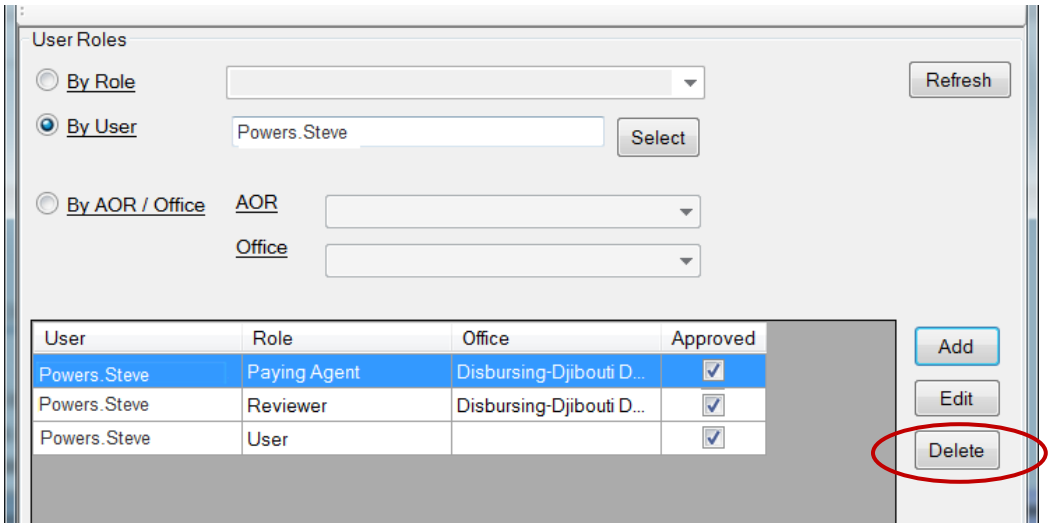
Provision Device Window – Reactivate a FOO

The reactivation action is stored in a message queue which is transmitted to the device the next time is it powered on. After receiving the message, the device adds the FOO to the list of FOOs who can log on to the device.

Removing Users from the Workstation

To prevent a deactivated FOO/PA from logging in to the Workstation:

1. Select **Set Up**, **Manage User Roles** from the main menu.
2. Select the user with the assigned role of FOO/PA (and any other role they may have) and click the **Delete** button.



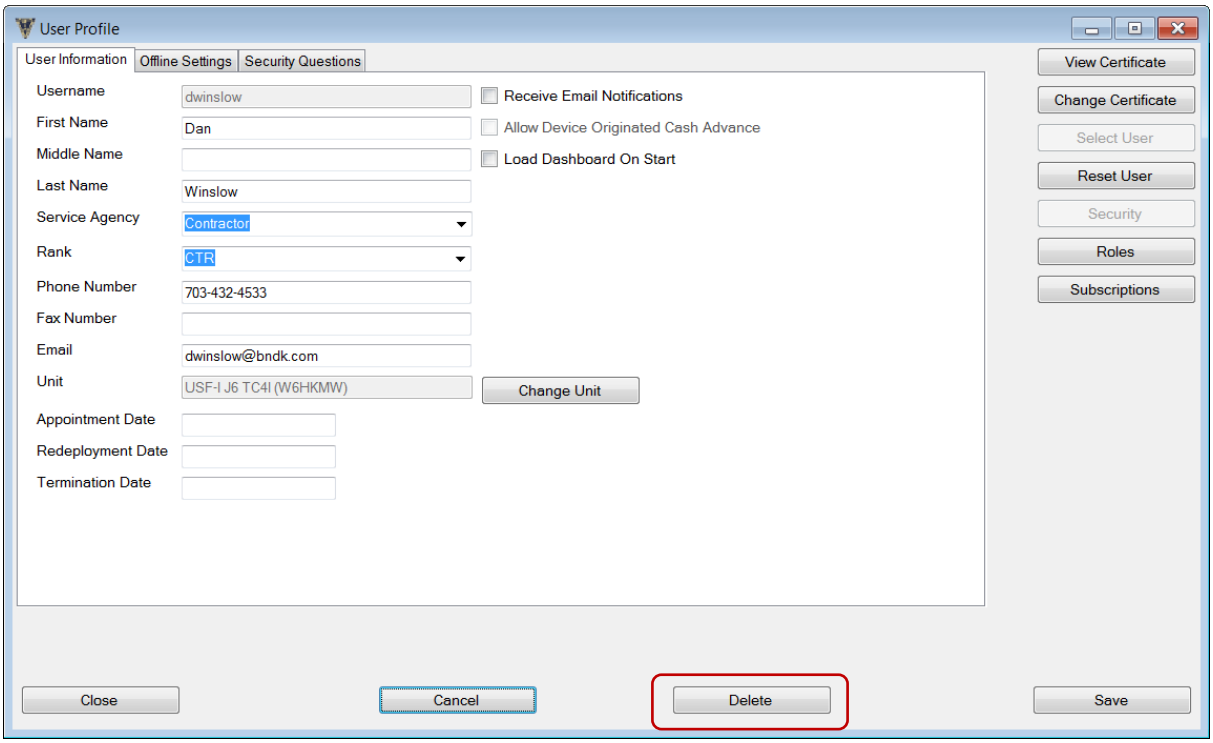
Mange User Roles Window – Delete a User from the Workstation

When a user has no approved role, the user can no longer access the 3in1 system. However, the user remains in the 3in1 system and can be reassigned to the same role or assigned to a different role and AOR office as needed.

Only users who are assigned the System Administrator role can delete the user from the system. This is performed using the **Delete** button on the **File**, **Profile Management**, **User Profile**, *User Profile* window.

To remove a deactivated FOO/PA from the Workstation:

1. From the main menu, select **File**, **Profile Management**, **User Profile.**
2. Click the **Edit** button at the bottom of the *User Profile* window.
3. Click the **Select User** button on the right side of the window.
4. Select the user to delete.
5. Click the **Delete** button at the bottom of the window.



User Profile window

Note: All users should be deleted from the system when their duties are completed.

Lesson Summary

In this lesson, you learned to:

- ❑ Deactivate a device for a FOO/PA team whose assignment has ended
- ❑ Reactivate a device for a FOO who has been deactivated
- ❑ Prevent a FOO/PA from accessing the Workstation

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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

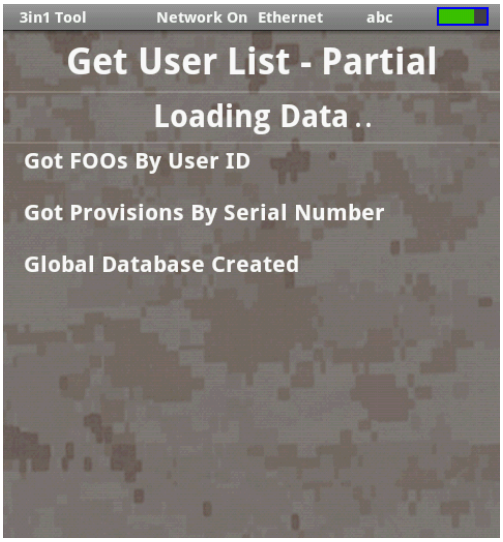
Reprovisioning FOO Data on a Device

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. To use the Workstation Provision Device feature, see *Module 7: Activating Devices for FOO/PA Teams, Lesson 1: Provisioning Devices from the Workstation*.

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

Module 13: Updating Financial and Procurement Information

Lesson 1: Updating Purchase Requests and Cash Advances

Objectives

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

- ❑ Look up purchase requests from the Financial Administration
- ❑ Decommit, increase, return, or transfer purchase request funds
- ❑ Cancel or close purchase requests
- ❑ Attach documents to purchase requests using the Document Handling feature
- ❑ View orders associated with a purchase request

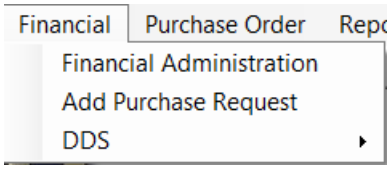
Use the *Financial Administration* screen to perform updates when funds need to be added to or removed from a purchase request; a PR needs to be closed out; or cash needs to be transferred from one PR to another at the end of the fiscal year. If the RM is managing the PRs, the KO should not need to accomplish these tasks.

Looking Up a Purchase Request

The *Financial Administration* window displays purchase requests, cash advances and purchases associated with a specific Field Ordering Officer or Paying Agent. Information displayed on the *Financial Administration* window may be exported to MS Excel using the **Export** button in the bottom right corner of the window.

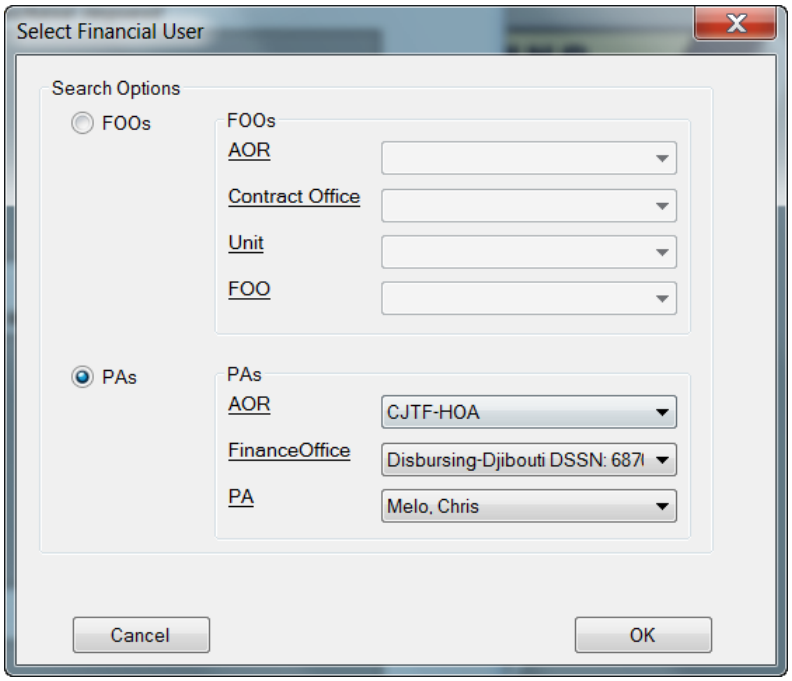
To access the *Financial Administration* window:

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

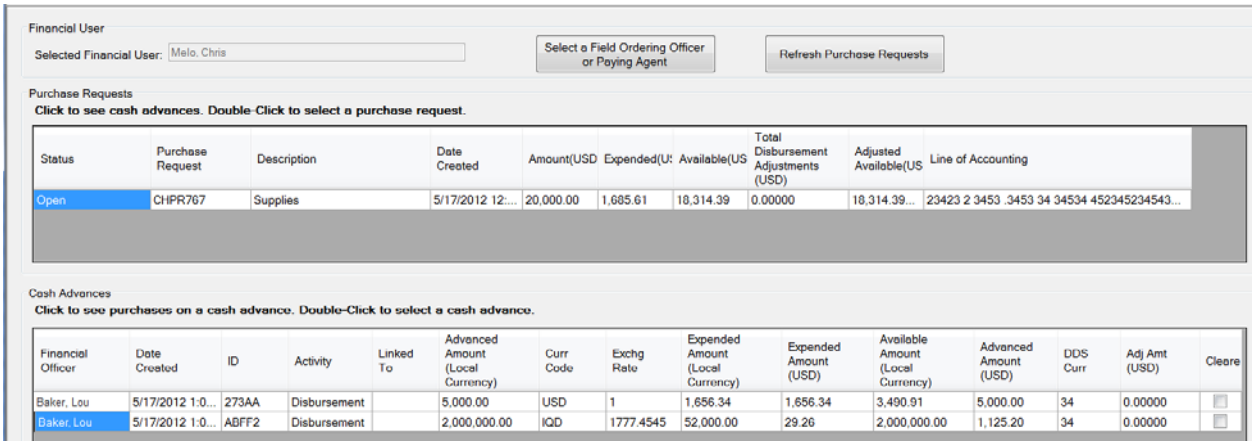


   – The *Financial Administration* window opens.

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 opens.



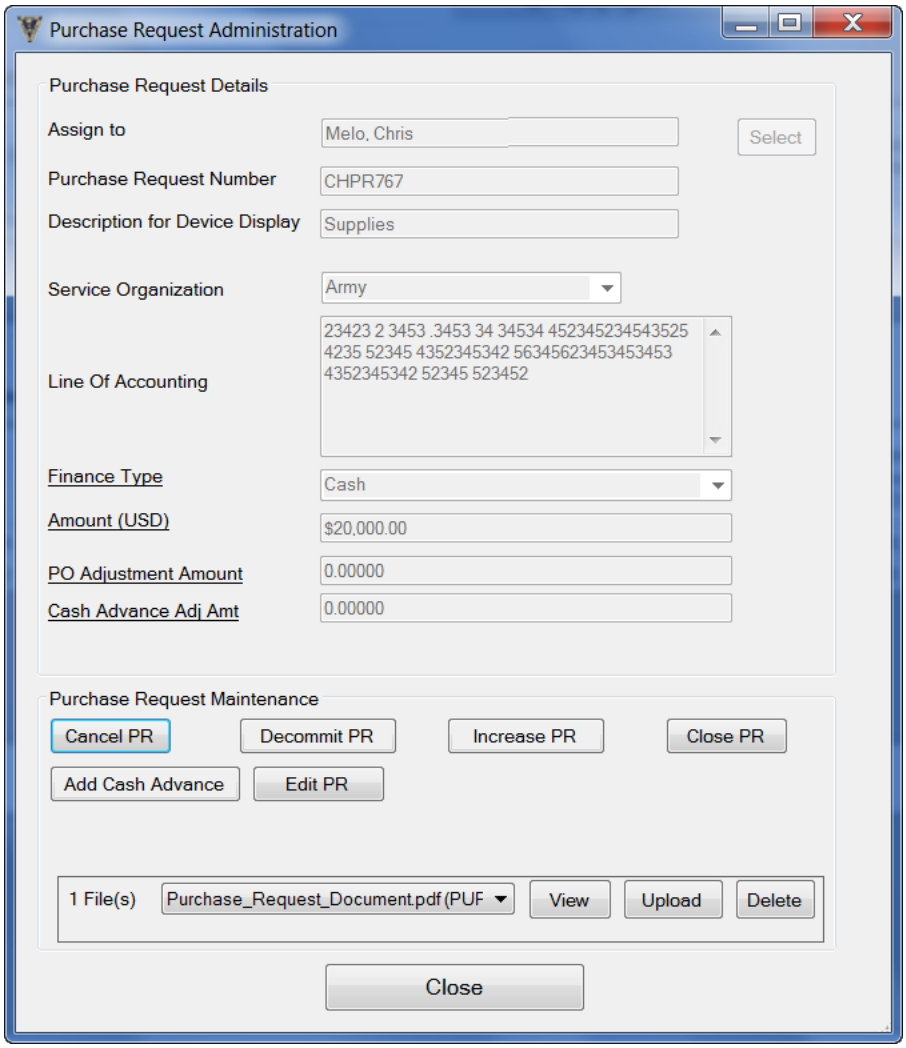
3. Select the FOO or PA whose purchase requests should be accessed.
   - Select the **FOOs** or **PAs** radio button, then select the appropriate AOR and office from the drop-down lists.
   - If selecting a FOO, you may select a unit from the Unit drop-down list.
   - Select a name from the FOO or PA drop-down list.
4. Click OK.
   - Purchase requests associated with the selected paying agent or FOO are displayed in the table.



Financial Administration Window – Purchase Requests and Cash Advances Sections

5. In the Purchase Requests section of the *Financial Administration* window, **double-click** a purchase request.
   – The *Purchase Request Administration* window opens.

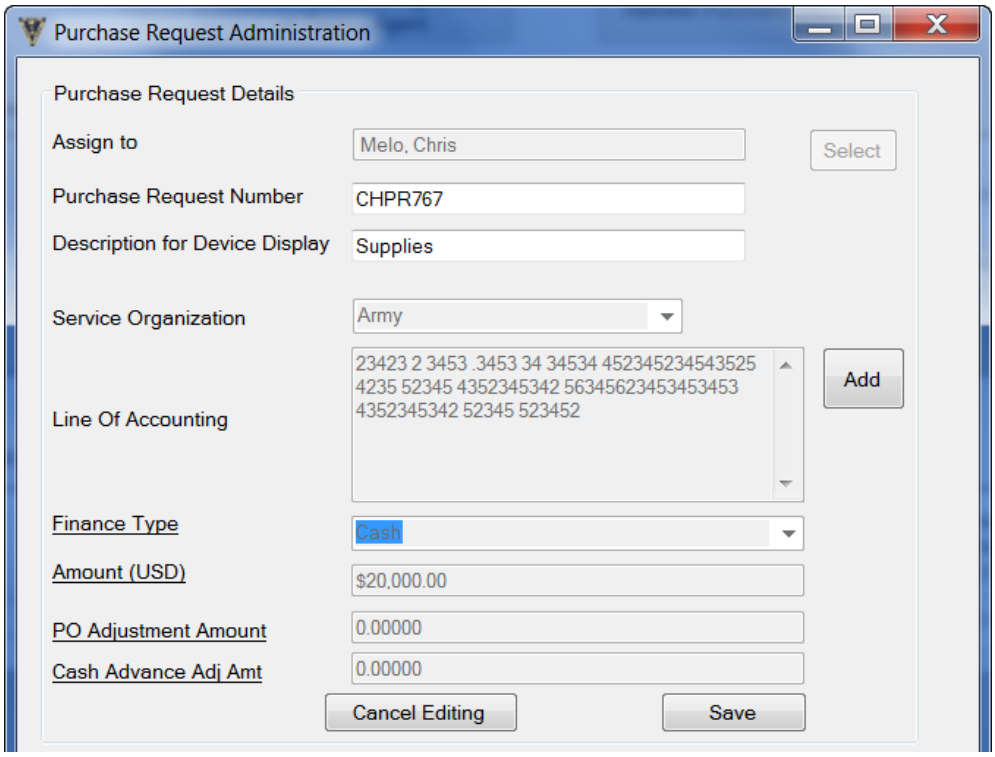
Use the buttons displayed at the bottom of the window to perform actions on the purchase request. Only the Disbursing Agent/Resource Manager and KO can use the **Edit PR** button.



Purchase Request Administration Window

Edit Purchase Request

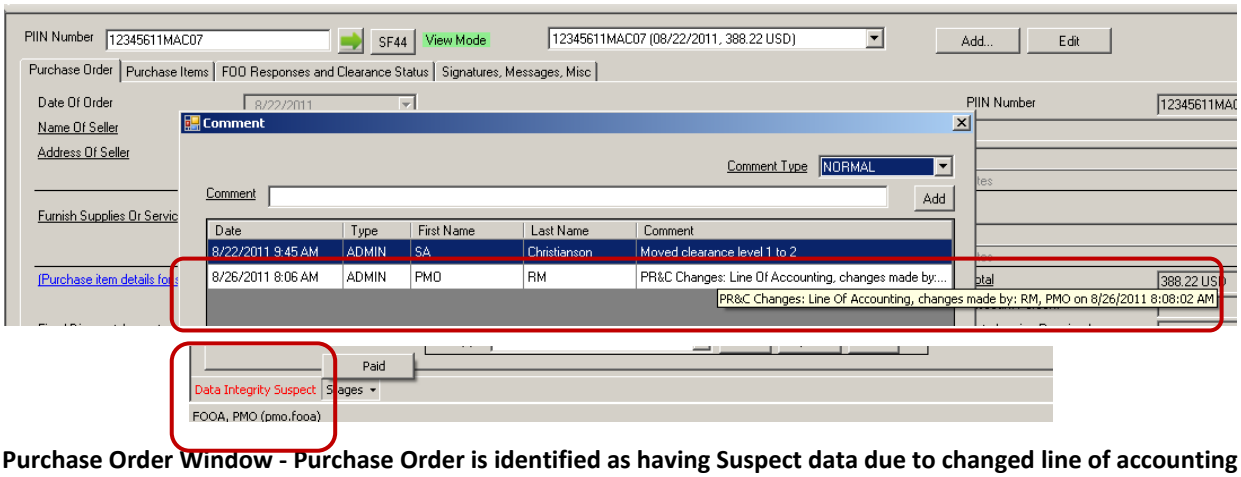
Contracting Officers, Disbursing Agents or Resource Managers may edit a purchase request using the **Edit PR** button on the *Purchase Request Administration* window. The fields that can be edited: **PR Number, Description, Line of Accounting**. Click the **Save** button to save the changes. To abandon the edits, click the **Cancel Editing** button.



Edit Purchase Request

If You Edit the Line of Accounting…

It is possible to edit the Line of Accounting when editing a purchase request, as shown above. However, please note that if the Line of Accounting 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.

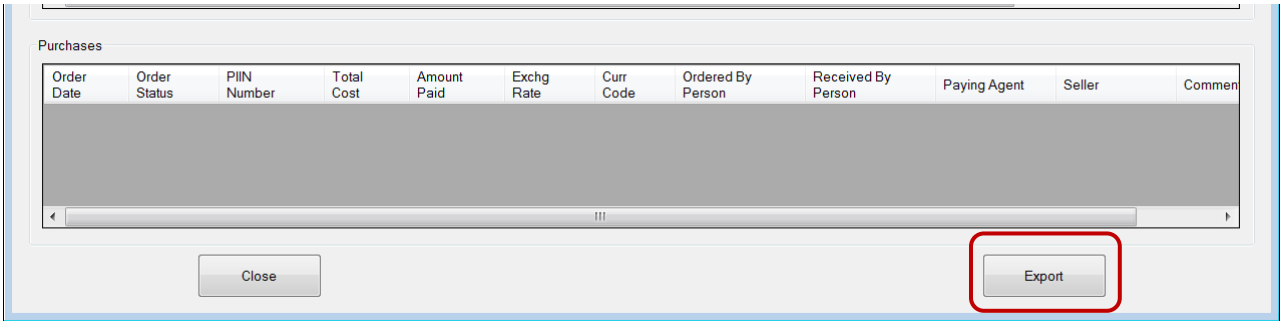


Purchase Order Window - Purchase Order is identified as having Suspect data due to changed line of accounting

After editing purchase requests, click the **Refresh Purchase Requests** button to update the table displayed in the *Financial Administration* window.

Financial Administration Window - Click the Refresh Purchase Requests button to update the table displayed in the Financial Administration window

Use the **Export** button in the bottom right of the *Financial Administration* window to export all data on the *Financial Administration* window to an Excel file, including rows that are not visible due to screen display limitations.

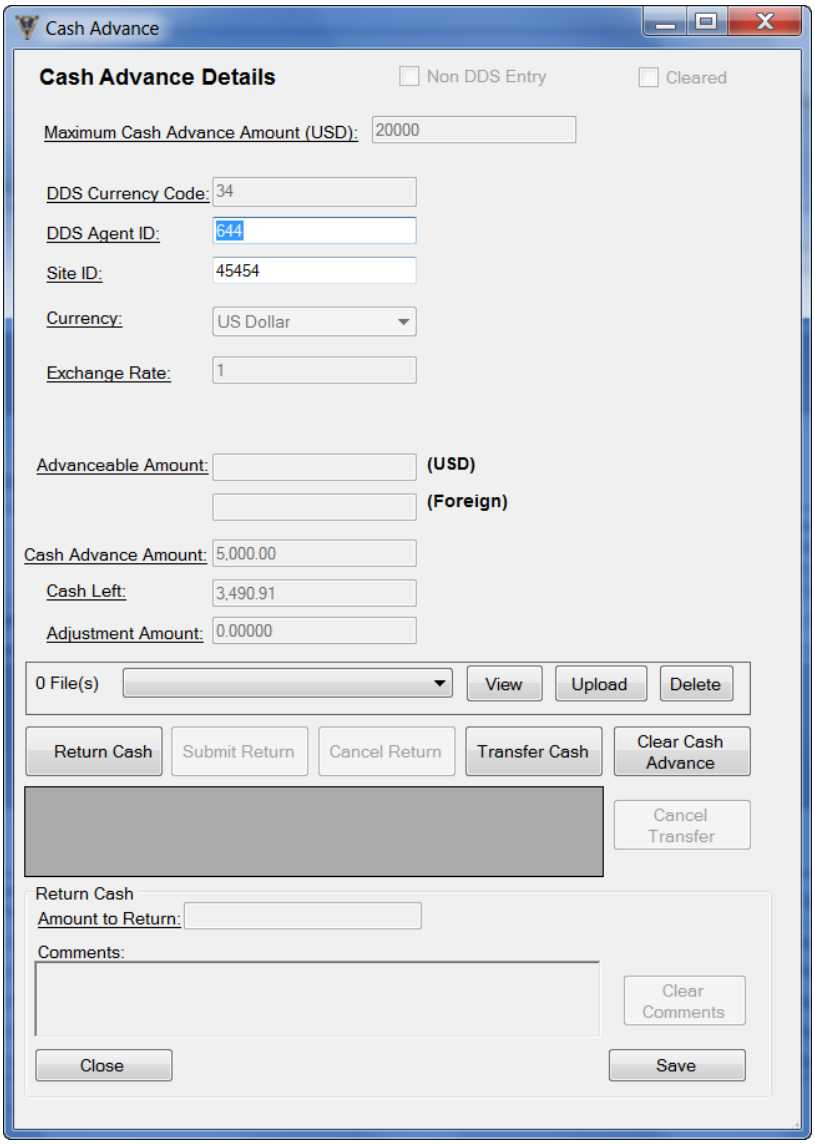


Editing Cash Advances

If a mistake was made in entering the DDS Agent ID or Site ID for a cash advance, it is possible to edit these fields.

To edit a cash advance:

1. Double-click a cash advance on the *Financial Administration* window.
2. On the *Cash Advance* window, click the **Edit** button.
3. Modify the **DDS Agent ID** and/or **Site ID** field.
4. Click the **Save** button.



Cash Advance Details Window

Viewing Cash Advances by User

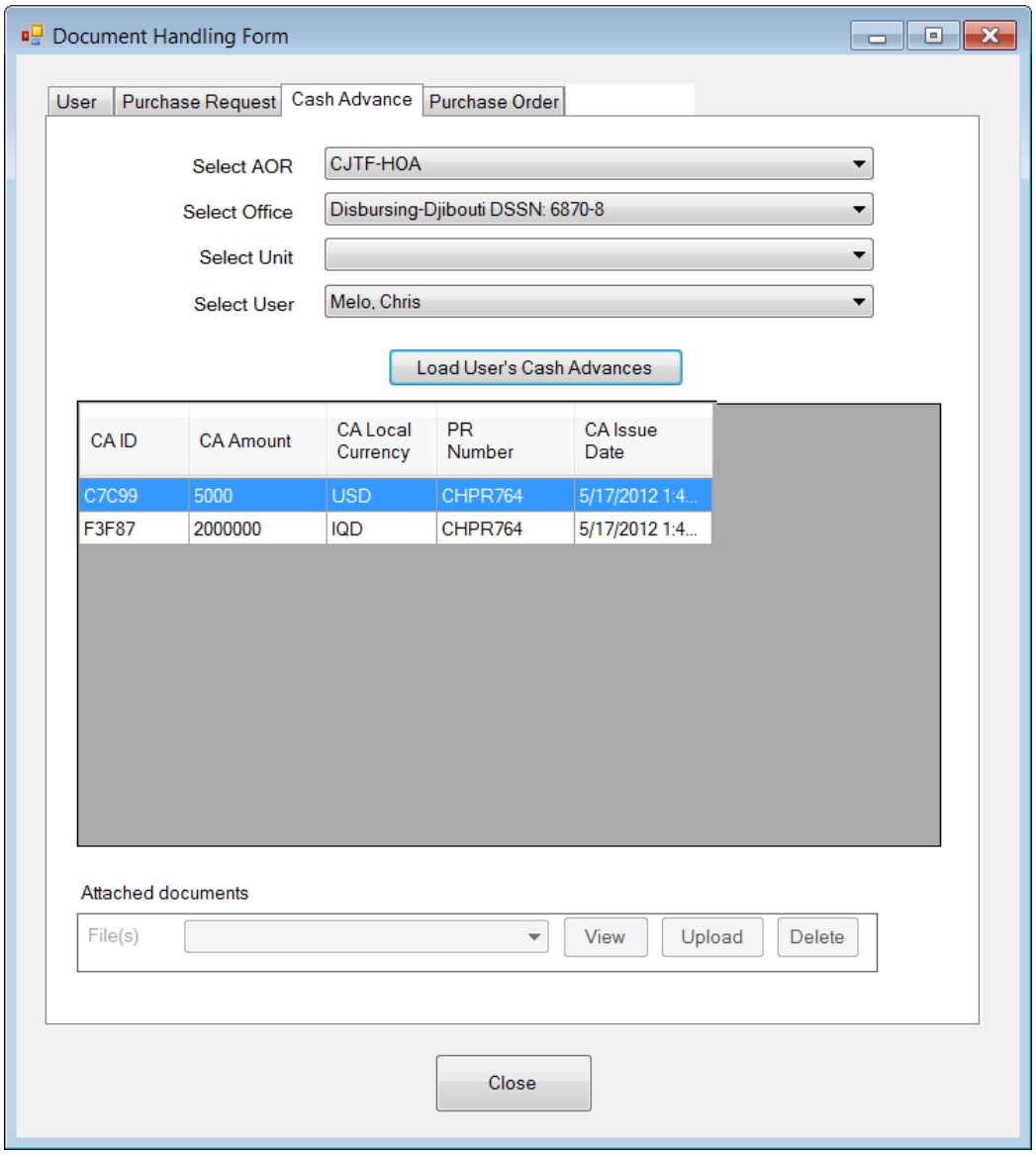
To view cash advances by user:

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

Viewing Linked Transactions

The Linked To column in the Cash Advances section of the *Financial Administration* window is used to identify the cash advance associated with subsequent exchanges that are made. A cash advance exchange is equivalent to a cash advance return in one currency and adding a CA for the same amount in a different currency; and one of the currencies involved is USD.

Each cash advance is assigned a sequence number. The Linked To column identifies the sequence number of the cash advance associated with subsequent returns/exchanges.

Cash Advances

Click to see purchases on a cash advance. Double-Click to select a cash advance.

Financial Officer	Date Created	Seq No.	Activity.	Linked To	Amount	Curr Code	Exchg Rate	Expended	Expended USD	Available	Amount(USD	DDS Curr	Adj Amt(USD)	Cleare
TEST, RM	2/21/2012 4:35 ...	1	Disbursement		1,000.00	USD	1	1,000.00	800.00	0.00	1,000.00	US	0.00000	☑
(Device Originat...	2/21/2012 4:40 ...	1	Exchange	1	-361.38	USD	1	0.00	0.00	0.00	-361.38	US	0.00000	☑
(Device Originat...	2/21/2012 4:40 ...	De	Exchange	1	64,144.95	ALL	177.5	64,144.95	0.00	0.00	361.38	DF	0.00000	☑
(Device Originat...	2/21/2012 4:43 ...	De	Return	De	-0.95	ALL	177.5	0.00	0.00	0.00	-0.01	DF	0.00000	☑
(Device Originat...	2/21/2012 4:45 ...	1	Exchange	1	-361.39	USD	1	0.00	0.00	0.00	-361.39	US	0.00000	☑
(Device Originat...	2/21/2012 4:45 ...	D2	Exchange	1	64,146.72	CDF	177.5	64,146.72	0.00	0.00	361.39	FC	0.00000	☑
(Device Originat...	2/21/2012 4:46 ...	D2	Return	D2	-0.72	CDF	177.5	0.00	0.00	0.00	0.00	FC	0.00000	☑
TEST, RM	2/21/2012 5:09 ...	1	Return	1	-277.23	USD	1	0.00	0.00	0.00	-277.23	US	0.00000	☑

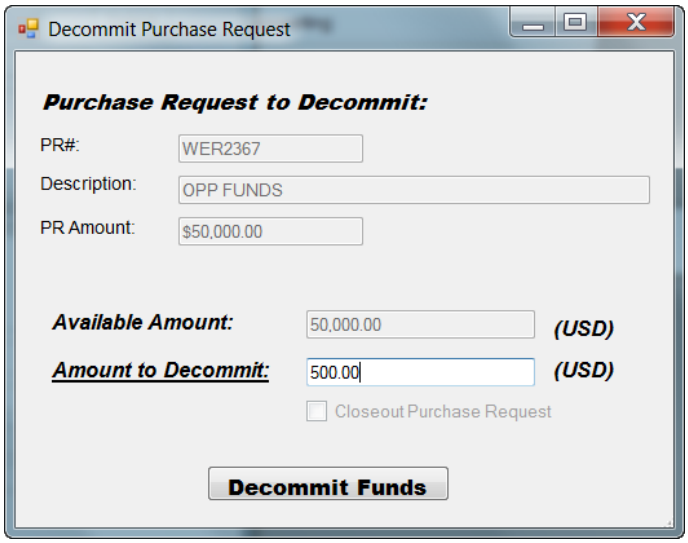
The sequence numbers displayed in the Linked To column help identify the original cash advance linked to the subsequent returns and exchanges.

Decommitting Funds from a Purchase Request

If funds have been decommitted from a purchase request, the amount loaded on the Workstation should also be decreased.

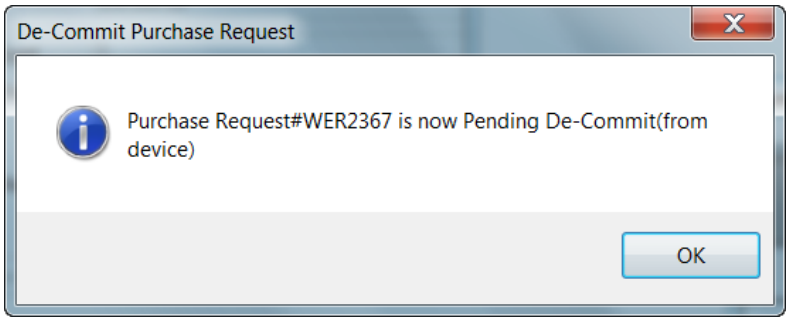
To decommit funds from a purchase request:

1. In the Purchase Requests section of the *Financial Administration* window, double-click a purchase request.
   - The *Purchase Request Administration* window opens.
2. On the *Purchase Request Administration* window, click the **Decommit PR** button.
   - The *Decommit Purchase Request* window opens.
3. Type the amount to decommit.
4. Select the **Closeout Purchase Request** checkbox to automatically close out a PR after a successful decommitment of funds. This saves users the extra step of having to select the **Close PR** button.
   - The PR will be closed out if the decommitted amount equals the remaining funds amount.
   - Additionally, all cash advances associated with the PR must be cleared before the PR can be closed.

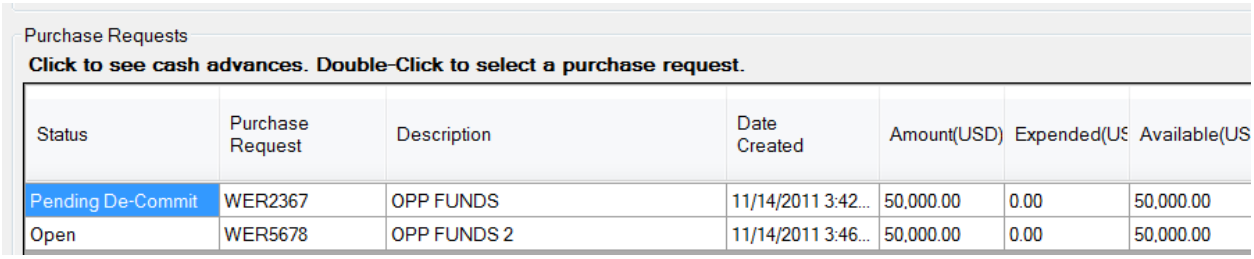


5. Click the **Decommit Funds** button.

The following message confirms the decommitment is pending, awaiting confirmation from the device.



The purchase request status changes to "Pending De-Commit," in the *Financial Administration* window.



Purchase Requests

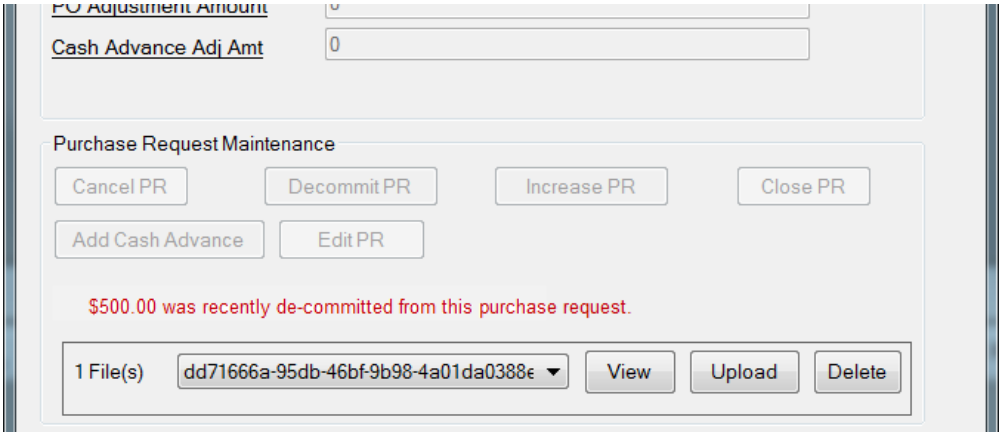
Click to see cash advances. Double-Click to select a purchase request.

Status	Purchase Request	Description	Date Created	Amount(USD)	Expended(US	Available(US
Pending De-Commit	WER2367	OPP FUNDS	11/14/2011 3:42...	50,000.00	0.00	50,000.00
Open	WER5678	OPP FUNDS 2	11/14/2011 3:46...	50,000.00	0.00	50,000.00

Financial Administration Window – Purchase Requests section show status of a PR pending decommitment

The Workstation must communicate the pending decommitment to the handheld device. Read the section below for details.

When the Workstation receives acknowledgement from the handheld device confirming the decommitment of the requested amount, the Workstation automatically decommits the amount and changes the PR status to "Decommitment Acknowledged". In addition, the available purchase request amount is re-calculated automatically. An acknowledgement message is displayed in red, as shown in the following figure.



Purchase Request Administration Window – Message indicates recent successful decommitment

If the device denies the decommitment amount, based on calculations using the current available PR amount, the device also sends a message, displayed in red, as shown in the following figure. The PR status is "Decommit Rejected."

The message notifies the Workstation user of the correct available amount, so the user can re-enter the amount on the *Decommit Purchase Request* window and click the **Decommit Funds** button.

Purchase Request Administration Window – Message indicates a rejected decommitment

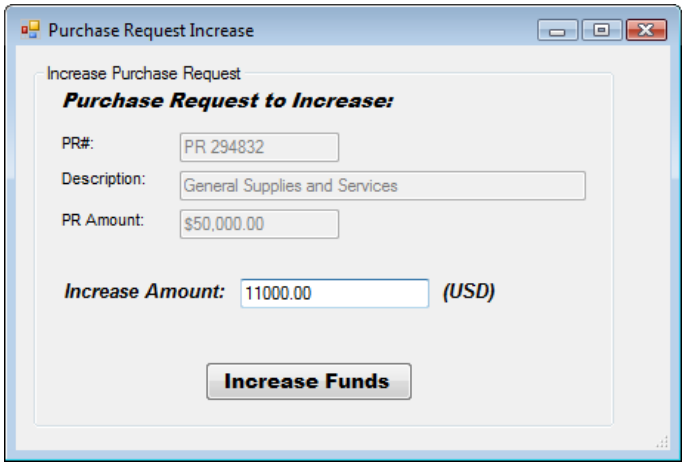
Communication between the Workstation and Device During Decommit

Once the **Decommit Funds** button is selected, the PR moves to a "Pending Decommit" status and a message is sent to the 3in1 device, requesting to decommit the specified amount. If the device also shows the amount requested to decommit is available, the device acknowledges the requested amount. However, if the device does not show sufficient funds available for decommitment, it will identify a different amount available to decommit. Once the Workstation receives the message, the decommitment can proceed. Purchase requests are automatically decommitted if the handheld device verifies that the PR balance is sufficient to support the de-commit.

Note that the device must be powered on and connected to the network in order for the communication to occur. If the device is disconnected, it will not receive the message and will not allow the Workstation user to decommit funds.

Increasing Funds for a Purchase Request

To increase funds for a purchase request:



1. In the Purchase Requests section of the *Financial Administration* window, double-click a purchase request.
   - The *Purchase Request Administration* window opens.
2. On the *Purchase Request Administration* window, click the **Increase PR** button.
   - The *Purchase Request Increase* window opens.
3. In the **Amount** field, type the amount of funds to add to the purchase request.

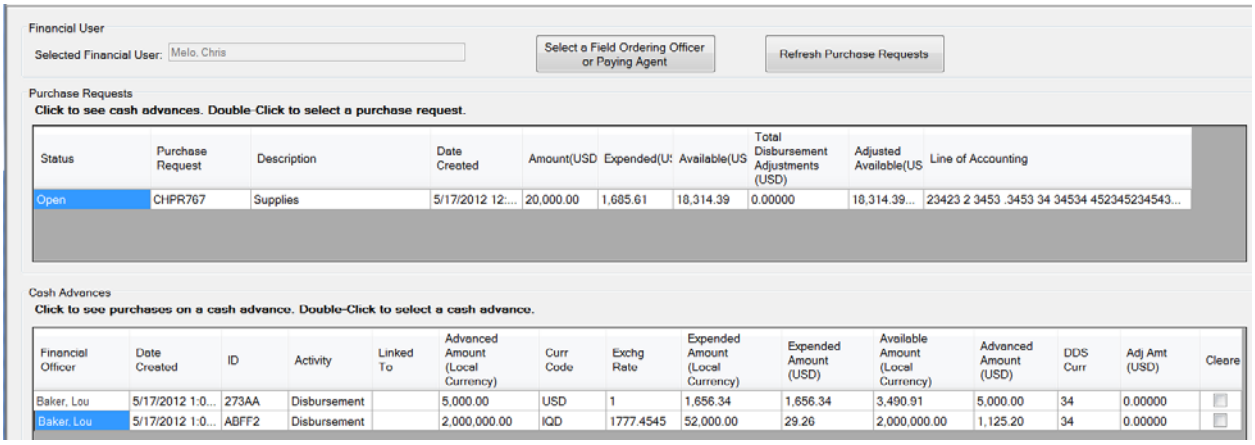
4. Click the **Increase Funds** button.

Transferring Cash between Purchase Requests

At the end of the Fiscal Year, it may be necessary to transfer cash out in the field from one PR to another PR. The transfer avoids requiring the PA to return cash and get additional cash under a new PR. The RM or KO should coordinate these actions with the FOO/PA in the field.

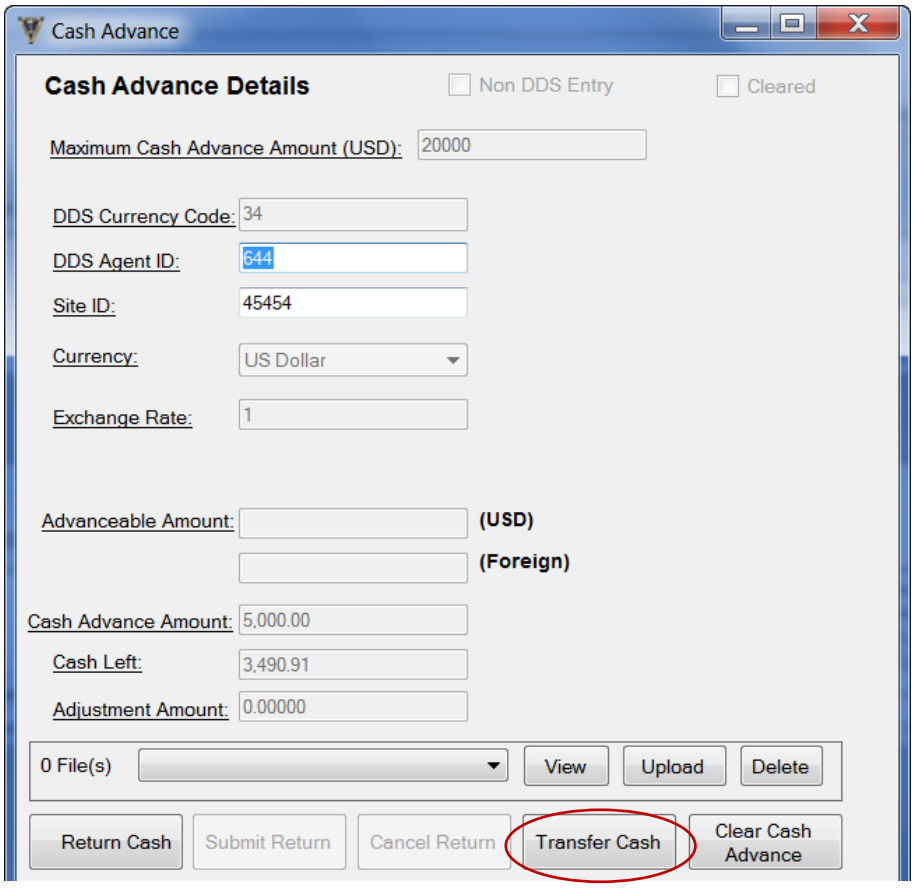
To transfer cash from one PR to another:

1. Add the new Purchase Request for the Paying Agent as outlined *in Module 7: Activating Devices for FOO/PA Teams, Lesson 1: Provisioning Devices from the Workstation*.
2. Follow the steps outlined above to look up a Purchase Request for a Paying Agent.
3. In the Purchase Requests section of the *Financial Administration* window, click the purchase request from which funds will be transferred.
   - Cash advances issued for the purchase request display in the Cash Advances table.

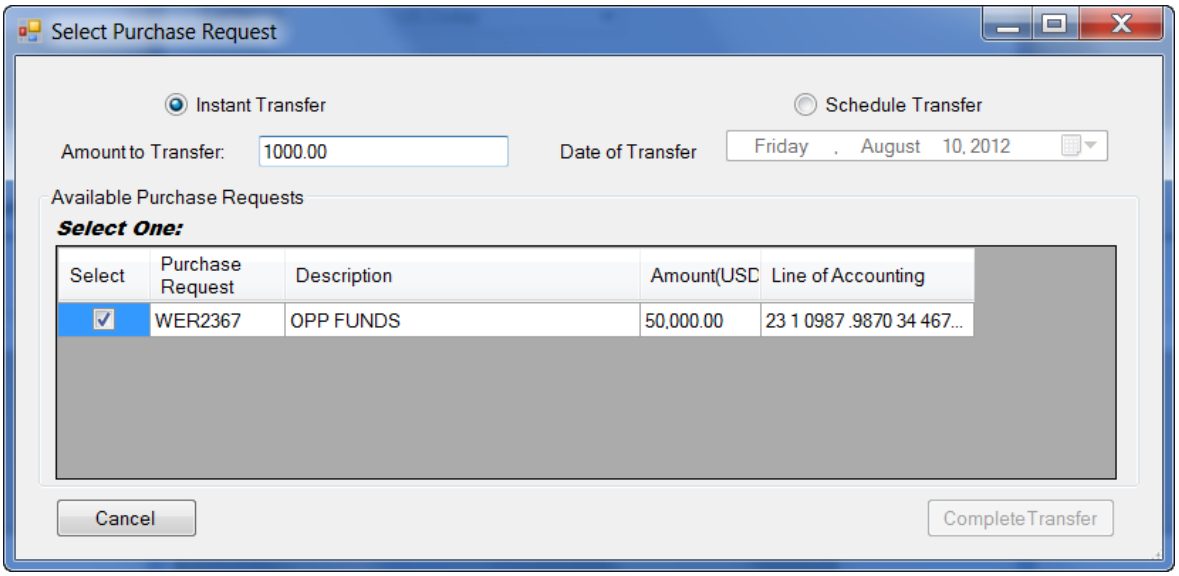


Cash advances are displayed for the selected purchase request

4. Double-click the cash advance which will be transferred to the new purchase request; the *Cash Advance* window opens.

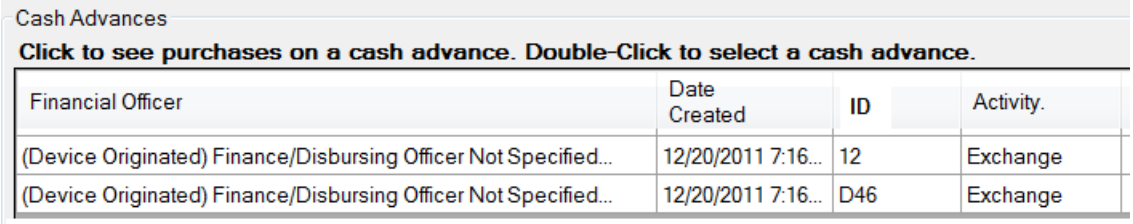


5. On the *Cash Advance* window, click the **Transfer Cash** button.
   - The *Select Purchase Request* window opens.
6. Select the **Instant Transfer** radio button to transfer funds immediately, or select the **Schedule Transfer** radio button to schedule a date using the calendar button directly beneath the radio button.
   - To cancel a scheduled transfer, select the **Cancel Transfer** button on the *Cash Advance* window.
7. Type the **Amount to Transfer**.
8. Select the checkbox beside the purchase request to which funds should be transferred.
9. Click the **Complete Transfer** button.



Select purchase request to receive transferred funds

Note: If a disbursement was issued from the 3in1 handheld device, the Financial Officer column displays "Finance/Disbursing Office Not Specified" as shown in the following figure.

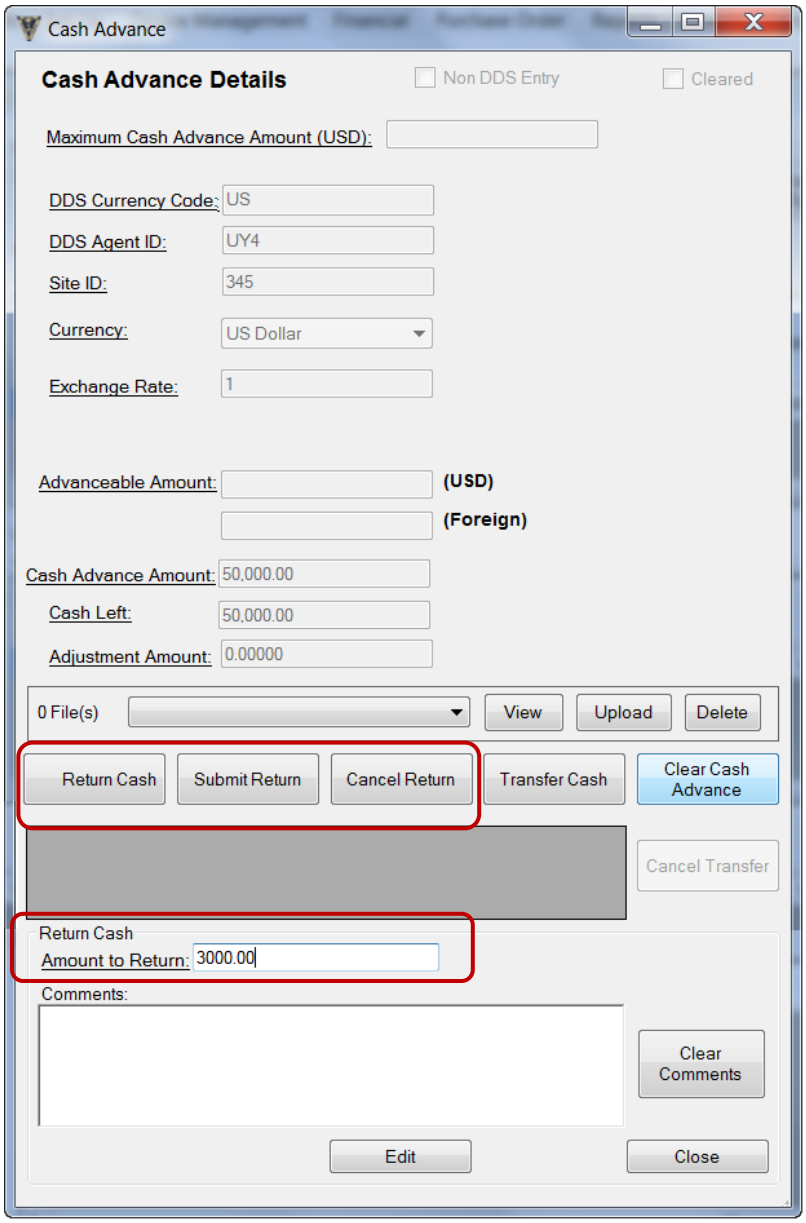


Financial Administration Window – Cash Advances section shows disbursements that were issued from the 3in1 device

Returning Cash

To return leftover cash from a cash advance:

1. In the Purchase Requests section of the *Financial Administration* window, click the purchase request from which funds will be returned.
   - Cash Advances issued for the purchase request display in the Cash Advances table.
2. Double-click a cash advance to open the *Cash Advance* window.
3. On the *Cash Advance* window, click the **Return Cash** button.
   - The **Amount to Return** field is enabled.
4. Type the **Amount to Return** and any **Comments**.
5. Click the **Submit Return** button. This change will be transmitted to the device.
   - To cancel the transaction and clear the **Amount to Return** field, click the **Cancel Return** button.



Cash Advance Window – Returning Cash

Cancelling a Purchase Request

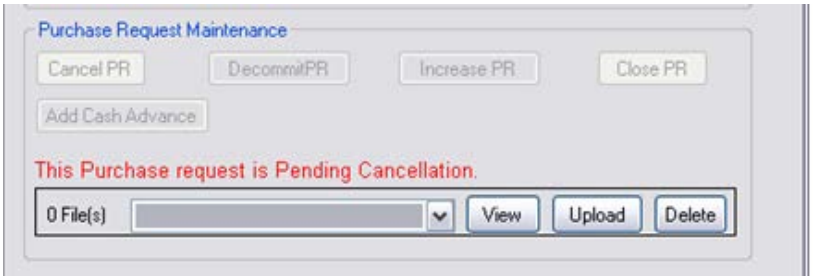
A purchase request can be cancelled only if no purchases or cash advances have been issued against it. Please read the section below on how the cancel PR action is communicated from the Workstation to the 3in1 device.

To cancel a purchase request:

1. Follow the steps outlined above to look up a Purchase Request for a FOO or PA.
2. In the Purchase Requests section of the *Financial Administration* window, double-click a purchase request.

- The *Purchase Request Administration* window opens.

3. Click the **Cancel PR** button.
4. A confirmation dialog asks you to proceed. Click the **Yes** button.
   - The purchase request remains in a Pending status until an acknowledgement of the closing is received from the handheld device. The following message is displayed at the bottom of the *PR Administration* window.



5. You may continue working. At some point later, navigate back to *PR Administration* window for the same PR.
   - A message at the bottom of the screen will indicate the device has sent an acknowledgement of the cancel action. Otherwise, the message will say it is still waiting for the device to acknowledge the request. Check back later for the acknowledgement.
6. Once the acknowledgment from the device is received, the **Cancel PR** button becomes active. Click the **Cancel PR** button.
7. Click the **Yes** button on the confirmation dialog. The purchase request is now cancelled.

Closing a Purchase Request

A purchase request can be closed only if there are no remaining funds available on the purchase request. Please read the section below on how the close PR action is communicated from the Workstation to the 3in1 device.

Example:

a) Purchase request amount equals $5000.00
b) Cash Advance 1 = $2500.00 and Cash Advance 2 = $2500.00
c) Total purchases using Cash Advance 1 and 2 - $3900.00

Since the cash advances and purchases ($5000) equal the total amount of the PR ($5000), the PR is ready to be closed.

A more complex scenario involves increasing funds or decommitting funds from the purchase request in order to make the purchase amounts and cash advances equal the purchase request amount. For example:

a) Purchase request amount equals $5000.00
b) Cash Advance equals $4000.00

c) Total purchases made using the Cash Advance equal $4000.00

The RM/KO cannot close out the PR because the cash advances and purchases do not equal the PR total amount. The PR has $1000 remaining to make purchases and $100 remaining against the cash advance.

In order to close out this PR, the DA must return $100 in cash, then the RM/KO has to decommit the remaining amount, which is $1100 in this example, using the Decommit PR feature described earlier. This would reduce the cash advance amount to $3900 and the PR to $3900, so the PR could be closed.

Note: Closed or cancelled purchase requests cannot be modified later (i.e., the PR amount cannot be increased).

To close a purchase request:

1. Follow the steps outlined above to look up a Purchase Request for a FOO or PA.
2. In the Purchase Requests section of the *Financial Administration* window, **double-click** a purchase request.
   – The *Purchase Request Administration* window opens.
3. Click the **Close PR** button.
4. A confirmation dialog asks you to proceed. Click the **Yes** button.
   – The purchase request remains in a Pending status until an acknowledgement of the closing is received from the handheld device. The following message is displayed at the bottom of the PR Administration window.

5. You may continue working. At some point later, navigate back to *PR Administration* screen for the same PR.
   – A message at the bottom of the screen will indicate the device has sent an acknowledgement of the closing. Otherwise, the message will say it is still waiting for the device to acknowledge the request. Check back later for the acknowledgement.
6. Once the acknowledgment from the device is received, the **Close PR** button becomes active. Click the **Close PR** button.
7. Click the **Yes** button on the confirmation dialog. The purchase request is now closed and its status changes to “Closed”.

Communication between the Workstation and Device During Cancel/Close

When the Cancel PR or Close PR button is selected on the Workstation, a message is sent to the device, asking for acknowledgement of the cancellation or closeout. The PR moves to a status of "Pending" and remains until an acknowledgement is received from the device. At that point, the user can cancel/close out the PR on the Workstation.

There may be cases where the device cannot send an acknowledgement immediately. For example, if pending orders on the device that are related to the cancelled or closed PR have not yet been transmitted to the Workstation, the device must first upload these orders and then provide the acknowledgement.

Note that the device must be powered on and connected to the network in order for the communication to occur. If the device is disconnected, it will not receive the message and will not allow the Workstation user to cancel or close the PR.

Clearing Cash Advances

In some situations, it may be necessary to make a minor adjustment in order to clear a cash advance and close out a purchase request. For example, there may be a fractional value difference due to foreign currency conversions; there may be a gain or loss due to a fluctuation in the exchange rate.

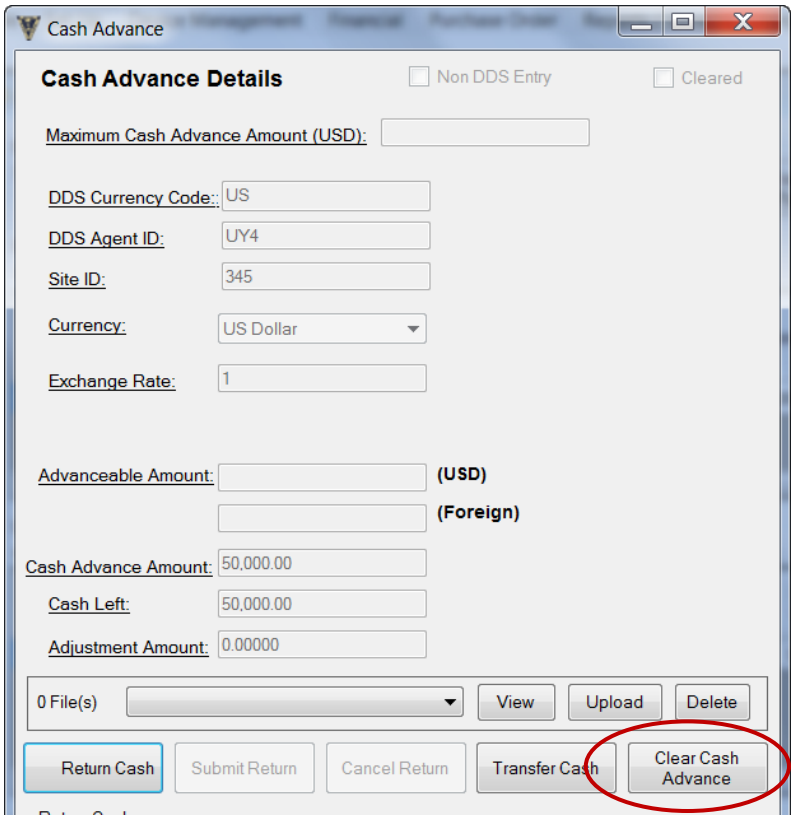
As a general rule, before clearing a cash advance, return all leftover funds from that cash advance. Once all leftover funds from the cash advance are returned, proceed to clearing the cash advance.

Also, it is advisable that the DA clear all cash advances before the RM attempts to close out a purchase request. The DA can manually clear a cash advance using the **Clear Cash Advance** button on the *Cash Advance* window.

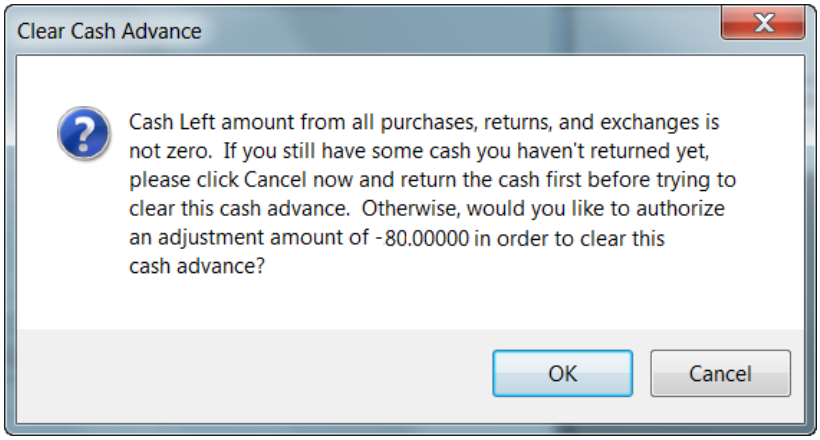
The Clear Cash Advance feature will be available only for "Top Level" disbursement activities. The best way to spot "Top Level" disbursement activity is to look at "Disbursements" inside the Activity column of the Cash Advances table. All of the associated transactions, such as Exchanges or Return, will be automatically cleared when Disbursements are cleared by the DA.

To manually clear a cash advance:

1. On the *Cash Advance* window, click the **Clear Cash Advance** button.

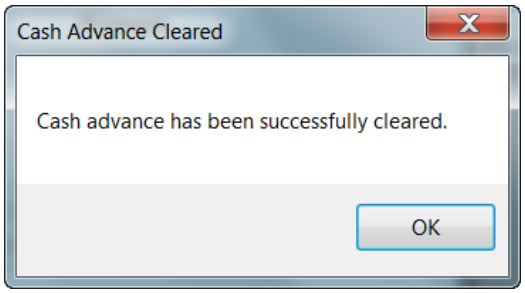


2. The Workstation calculates the amount of the adjustment that is required, then displays the following message.



   - At this point, if you determine that you need to return some cash before clearing this cash advance, click the **Cancel** button and use the **Return Cash** feature, then go back to step 1 and try to clear the cash advance.
   - The other option is to click OK, which means that you authorize the Workstation to enter the value shown in the message in the Adjustment Amount field for the cash advance, and then clear the cash advance.

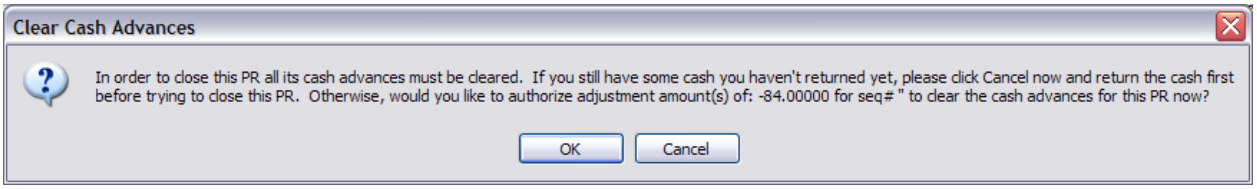
The following message confirms the cash advance has been cleared successfully.



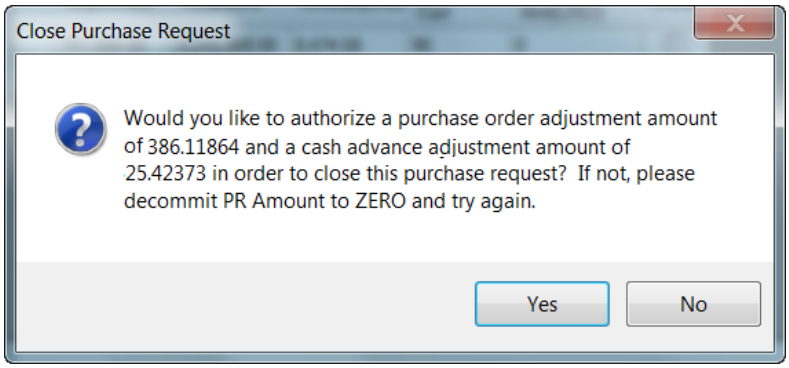
Authorizing Cash Advance Adjustments during PR Close Out

If the RM attempts to close a PR using the **Close PR** button on the *Purchase Request Administration* window, and some of the associated cash advances have not yet been cleared, the 3in1 system will request to "force" clear them.

Click **OK** to authorize an adjustment in the amount shown in the message below and clear the cash advance.



If the RM attempts to close a PR without first decommitting the remaining funds, the 3in1 system will request to "force" the closeout through PO and CA adjustments. Clicking Yes will force the closeout of the PR.



Close Purchase Request Dialog Box – PO Adjustment Required

The other option is to click **No** and then use the **Decommit Funds** button to decommit the remaining funds from the PR and select Close PR again. It is recommended that the remaining PR funds be decommitted before closing out a PR.

Summary

To recap, the recommended sequence of events regarding the reconciliation of funds for a PR in the 3in1 system is as follows:

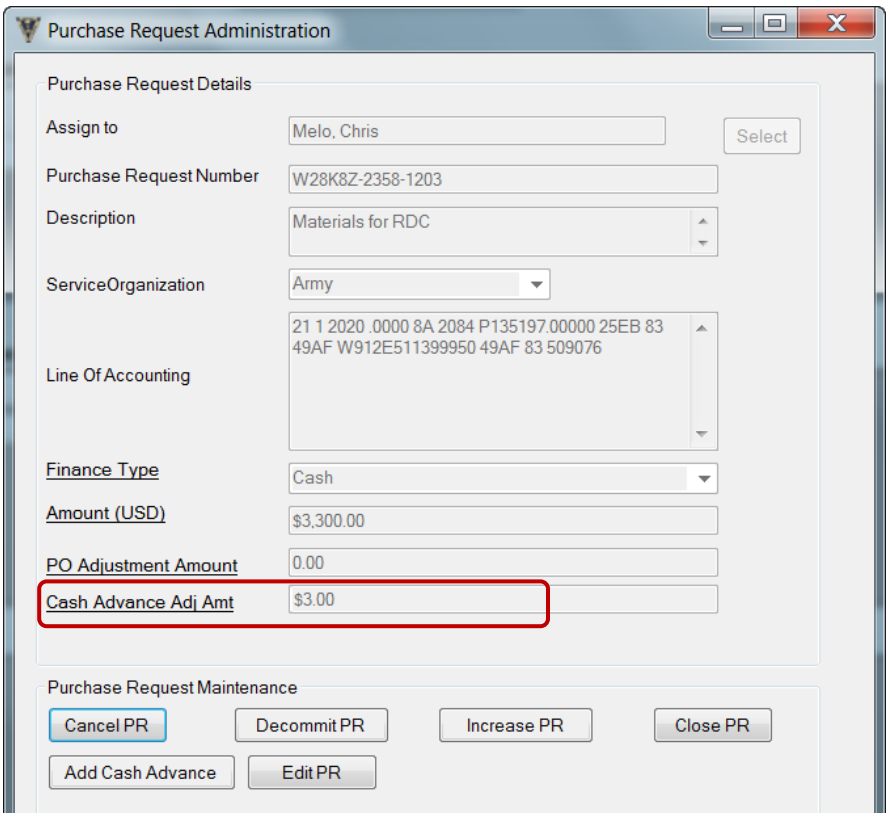
1. Return all available cash for all cash advances associated with the PR

2. Clear all cash advances associated with the PR
3. Decommit remaining PR funds
4. Close out the PR

PR and Cash Advance Adjustments Display Onscreen Only

The cash advance adjustments are displayed only on the Workstation screens. They do not affect the original purchase request nor are they displayed on the printed SF44.

In the *Purchase Request Administration* window, the Cash Advance Adjustment and PO Adjustment fields display any adjustments made to the purchase request.



Purchase Request Administration Window Displays Cash Advance Adjustment Amount

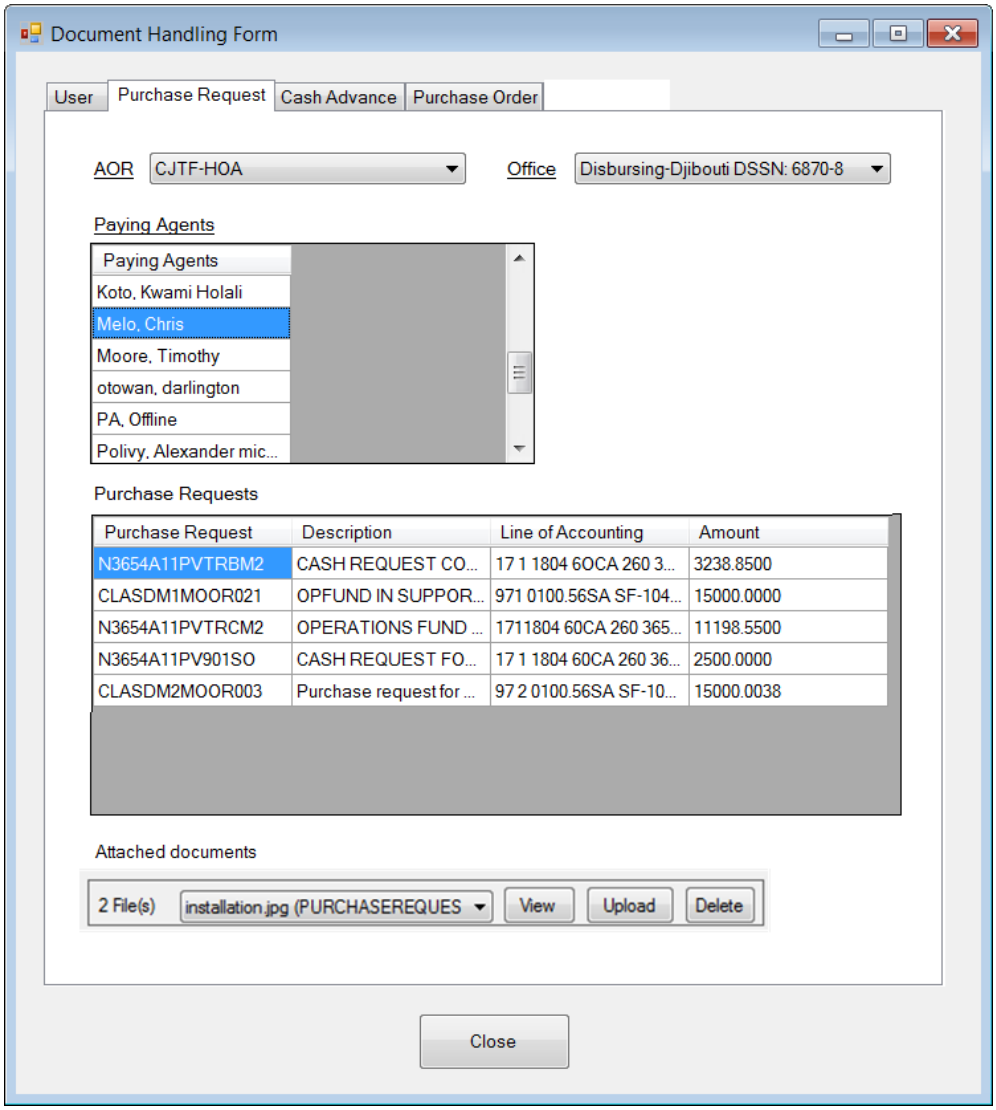
Working with Attached Documents

The scanned copy of the actual purchase request can be attached to purchase request files on the Workstation using the **Document Handling** feature, in addition to using the document upload feature on the Purchase Request screen, which is explained in *Module 7: Activating Devices for FOO/PA Teams, Lesson 1: Provisioning Devices from the Workstation.*

Attaching Documents to Purchase Requests using the Document Handling Feature

To attach files to a purchase request, such as a copy of the PR document:

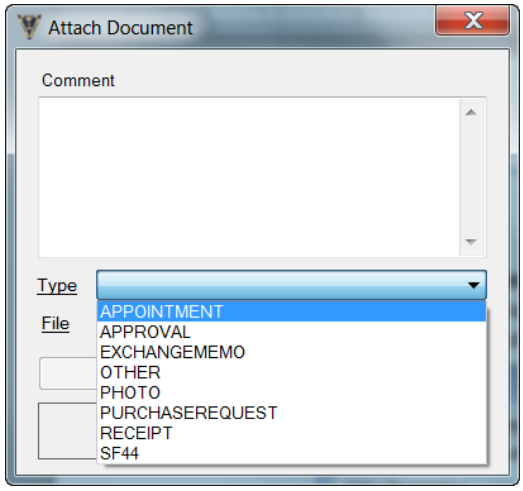
1. Select **File**, **Documents, Document Handling** from the main menu.
2. In the *Document Handling Form* window, at the top of the **Purchase Request** tab, select an AOR and Finance Office.
3. In the Paying Agent table, select a Paying Agent. The purchase requests assigned to the Paying Agent display.
   – If there is a need to upload a document for a FOO, use the **User** tab in the *Document Handling Form* window, as explained in *Module 5: Managing 3in1 Workstation Users, Lesson 2: Managing User Roles and Accounts*.
4. Select a purchase request in the Purchase Requests table.



Document Handling Window, Purchase Request Tab

To attach a file to a purchase request:

1. Click the **Upload** button. The *Attach Document* dialog box opens.



Select the document type

2. Use the **Browse** button to locate and select the file.
3. Provide a comment about the attachment.
4. Select the file **Type**.
5. Click the **Upload File** button.
6. Close the *Attach Document* dialog box.
   – The file is now attached to the purchase request.
7. Click the **Close** button to close the *Document Handling Form* window.

Viewing or Removing Attachments

Documents that are attached to a purchase request can be viewed in the application associated with the document file type. For example, view an .XLS spreadsheet file in Microsoft Excel. Then use the application to print or save the file locally.

To view file attachments:

1. In the *Document Handling Form* window, select the file attachment (if there is more than one) from the drop-down list.
2. Click the **View** button.

Attached Document

The selected document opens in the application that is associated with the document type. A system setting on your computer associates file types with applications. For example, .XLS (spreadsheet files) are usually associated with Microsoft Excel.

To remove a file attachment from a purchase request:

1. In the *Document Handling Form* window, select the file attachment, if there is more than one, from the drop-down list.
2. Click the **Delete** button.

Viewing Orders

The orders associated with a selected purchase request and cash advance are displayed in the bottom section of the *Financial Administration* window.

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.

Purchases

Order Date	Order Status	PIIN Number	Total Cost	Amount Paid	Exchg Rate	Curr Code	Ordered By Person	Received By Person	Paying Agent	Seller	Comments
10/19/2011	Cleared	N3654A12MA1...	23,900.00	134.65	177.50	DJF	JOHNA JOSEPH	JOHNA JOSEPH	Chris Melo	ETS WASSEL	

Purchases Section of Financial Administration Window

Lesson Summary

In this lesson, you learned to:

- ❑ Look up purchase requests from the Financial Administration
- ❑ Decommit, increase, return, or transfer purchase request funds
- ❑ Cancel or close purchase requests
- ❑ Attach documents to purchase requests using the Document Handling feature
- ❑ View orders associated with a purchase request

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Lesson 2: Updating Procurement Information from the Workstation

Objectives

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

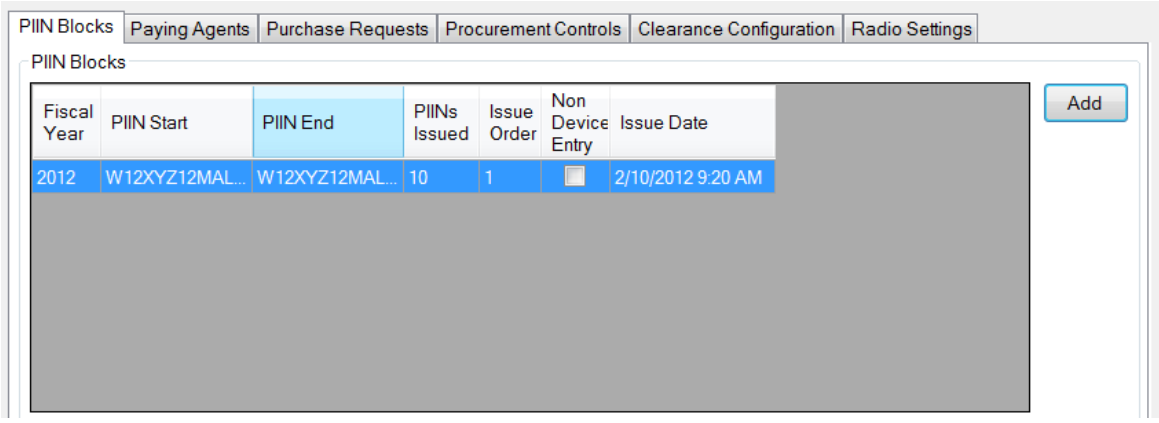
- ❑ Update procurement information using the Provision Devices tabs
- ❑ Issue Mass PIIN blocks
- ❑ Make financial updates, such as adding or returning funds to purchase requests

Updating Procurement Information

A KO can update procurement information using the Provision Devices feature described in *Module 7: Activating Devices for FOO/PA Teams, Lesson 1: Provisioning Devices from the Workstation*. The prime database/server transmits the status of and procurement/financial updates back to the device as they are processed.

After selecting the appropriate device and FOO, the KO can:

- Add PIINs
- Assign purchase requests
- Add or delete procurement controls
- Customize the clearance flow
- Change the device wireless connection settings



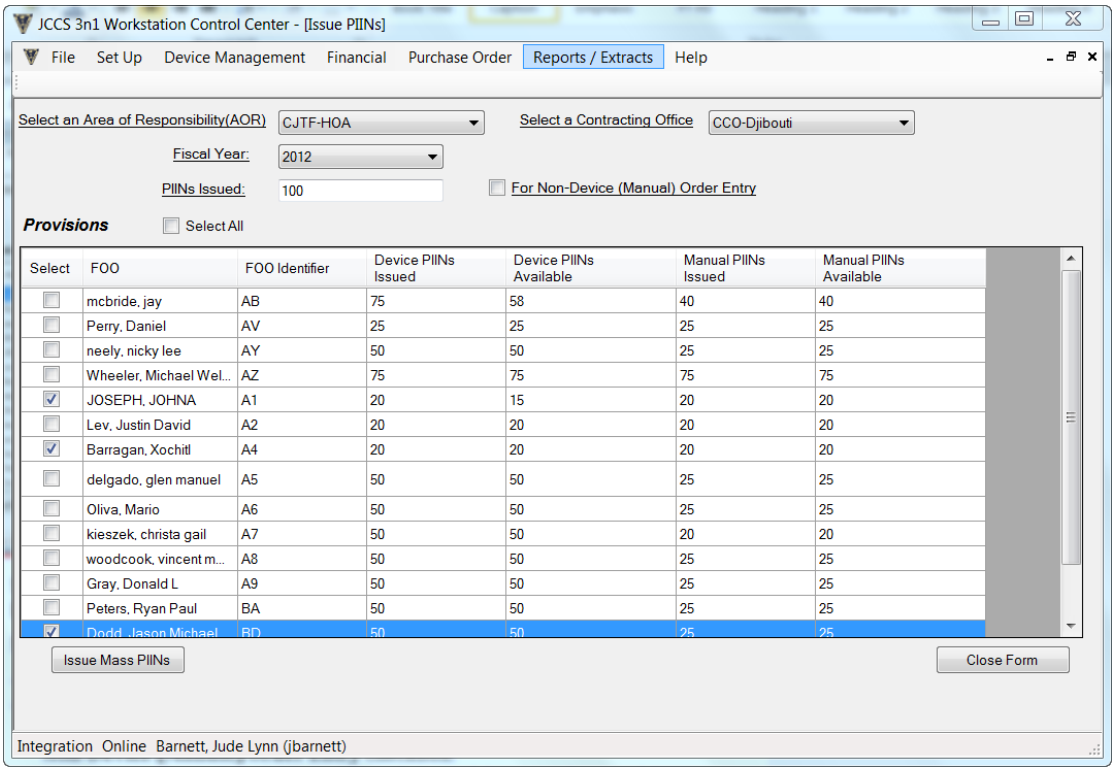
Provision Device Tabs

Issuing Mass PIIN Blocks

When there is a need to issue PIINS to a large group of FOOs in the field, such as at a change of Fiscal Year, the KO can quickly perform this task.

To issue PIINs to a large group of FOOs:

1. Select **Device Management**, **Issue Mass PIIN Block**s from the 3in1 Tool Workstation main menu.
   - The *Issue PIINs* window opens.
2. Select the appropriate **AOR** and **Contracting Office** from the drop-down lists.
   - A list of FOOs assigned to the selected office is displayed in the table.



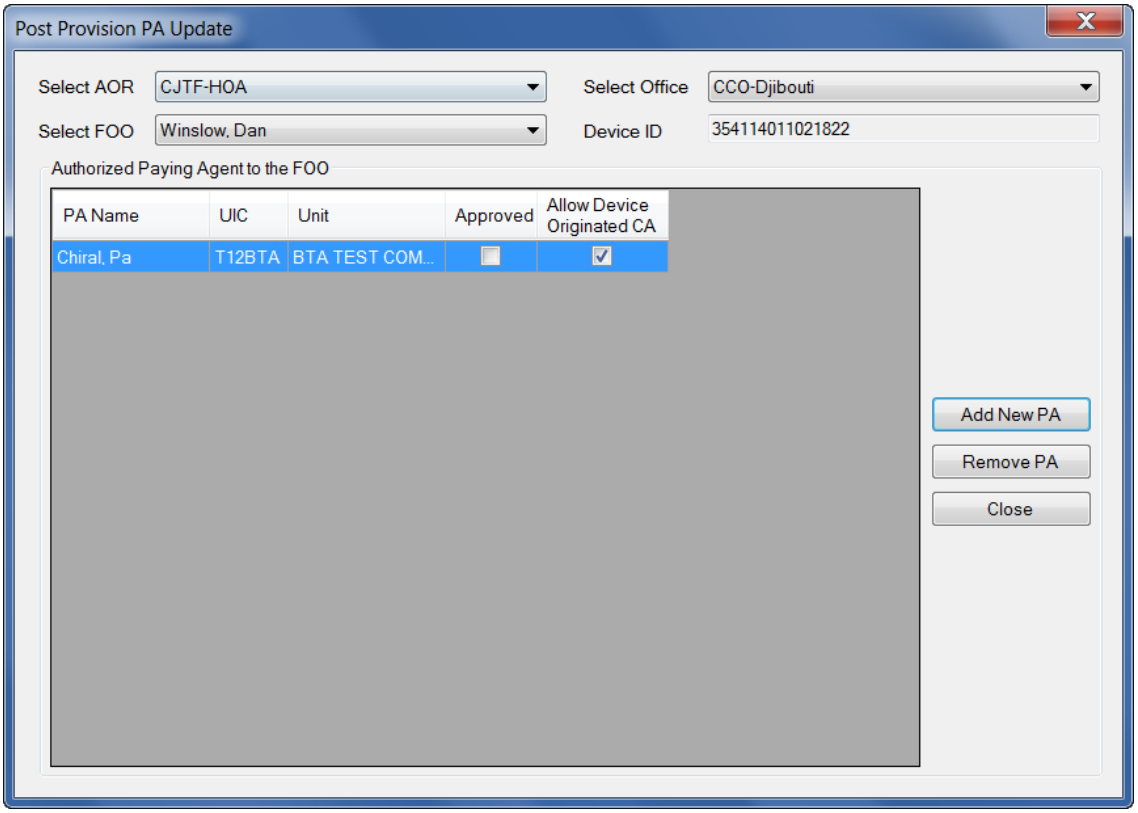
Issue Mass PIINs Window

3. Select the Fiscal Year and specify the number of PIINs to be issued to each of the FOOs.
4. Mark the **Select** checkbox beside the FOO(s) who should be assigned new PIINs.
   - To select all FOOs, mark the **Select All** check box.
   - If the PIINs will be used for manual purchase orders that are added using the 3in1 Tool Workstation, instead of the 3in1 handheld device, then select the **For Non-Device (Manual) Order Entry** checkbox.
   - Note the numbers of available and already issued device and manual PIINs are displayed in separate columns for your reference.
5. Click the **Issue Mass PIINs** button.
6. Click the **Close** button.
   - The new PIINs are issued to the FOOs, who can begin using them.

The FOO will receive these PIINs the next time they are connected to the network.

Post Provision PA Update

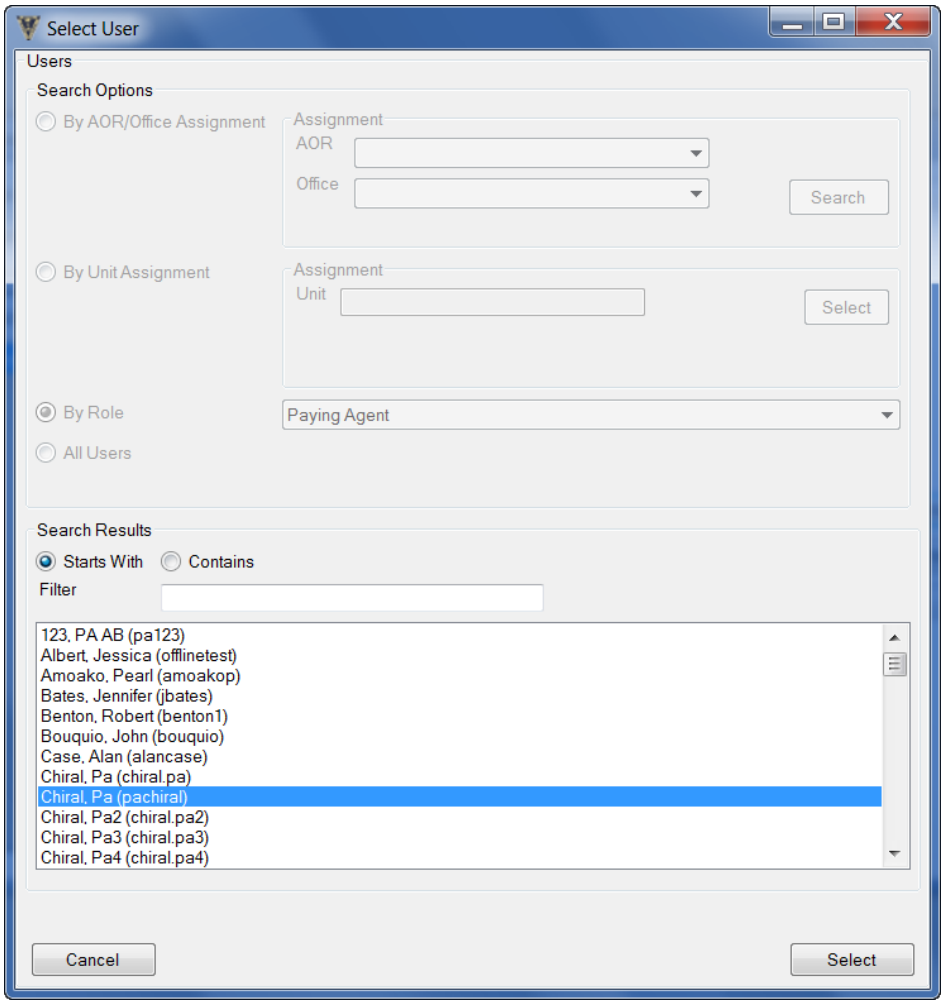
After provisioning a device to a FOO/PA team, a fast way to add or remove authorized paying agents is to use the **Device Management**, **Post Provision PA Update** command. Select the AOR, Office, and FOO. Currently assigned PAs are displayed in the *Post Provision PA Update* dialog box. The associated device ID is also displayed.



Post Provision PA Update Dialog Box

To remove the PA, click the **Remove PA** button. Click **Yes** on the confirmation screen.

To add a PA, click the **Add New PA** button. Select a PA name from the list.



Select User Window – Only Paying Agents are listed

Optionally modify a PA's privileges on this screen. Select the **Approved** checkbox to approve the PA role; unmark the check box to deny the PA role assignment to the user. Select the **Allow Device Originated CA** (cash advances) checkbox to enable Paying Agents to initiate cash advances from the handheld device.

Lesson Summary

In this lesson, you learned to:

- ❑ Update procurement information using the Provision Devices tabs
- ❑ Issue Mass PIIN blocks
- ❑ Make financial updates, such as adding or returning funds to purchase requests

Lesson 3: 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 (local computer) 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

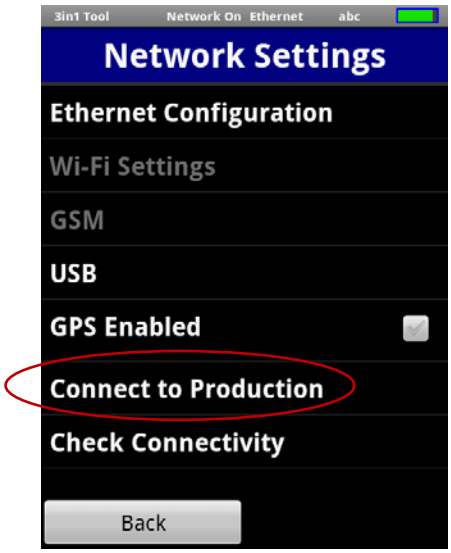
The detailed steps to generate a local replica of the 3in1 prime database on the local Workstation computer were explained in *Module 3: Application Familiarization, Lesson 2: Going Offline with the 3in1 Workstation*. The steps are summarized below.

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.

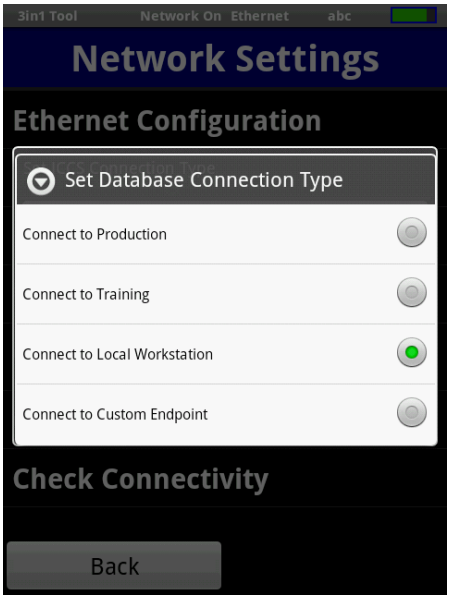
On the computer desktop screen, ensure the 3in1 icon for 3in1 Service Manager appears in the System Tray by the clock. Do no close the 3in1 Service Manager. Always minimize when running the 3in1 workstation in offline mode.

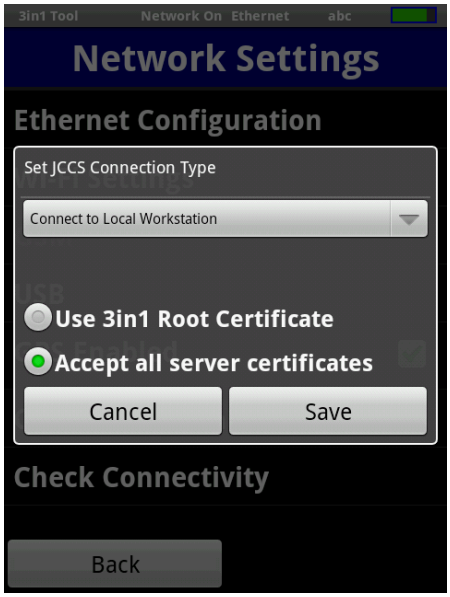
Step 2: Connect the Device to the Workstation and Transfer Orders

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**).

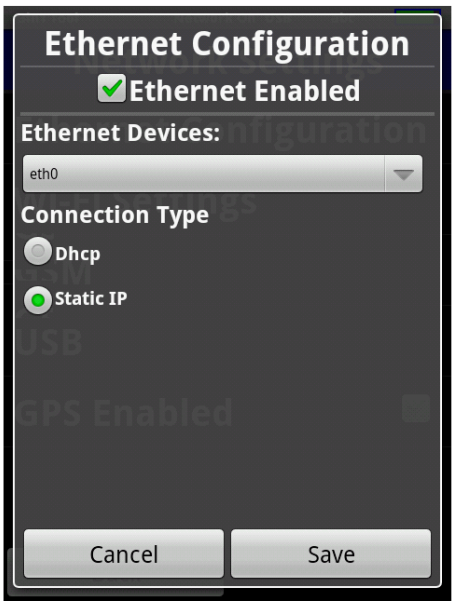


5. In the **Set Database Connection Type** field, click the drop-down and select **Connect to Local Workstation**.
6. Tap **Save** on the *Set JCCS Connection Type* popup.





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

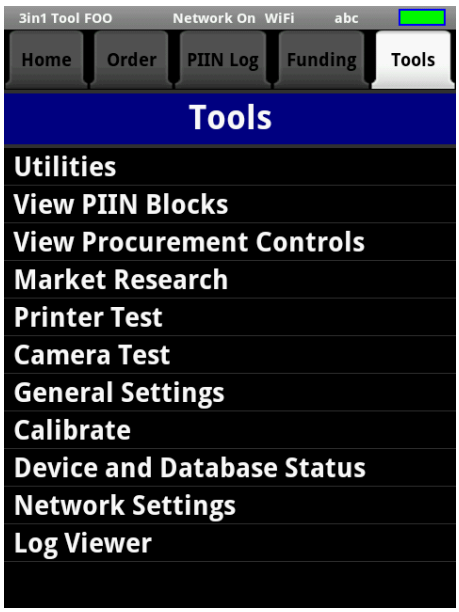


9. Tap the **Static IP** radio button.
10. Tap **Save** to save the Ethernet settings.

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.

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

Module 14: Reporting from the Workstation

Lesson 1: Generating Reports

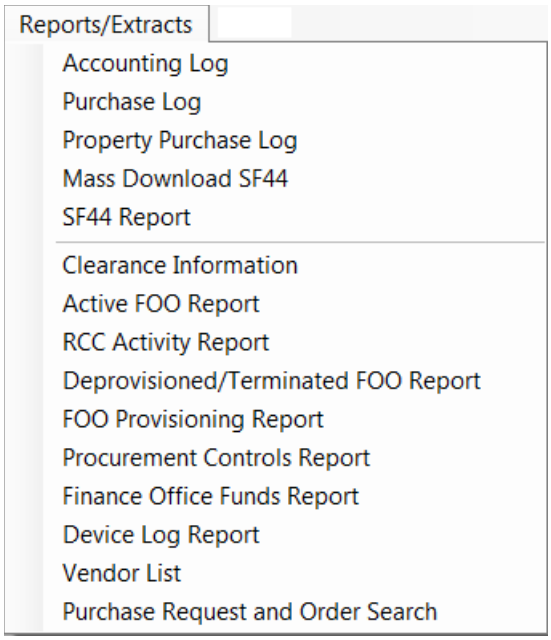
Objectives

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

- ❑ Identify the various reports available in 3in1 Tool Workstation
- ❑ Generate each type of report
- ❑ Print and save each type of report

Report 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.

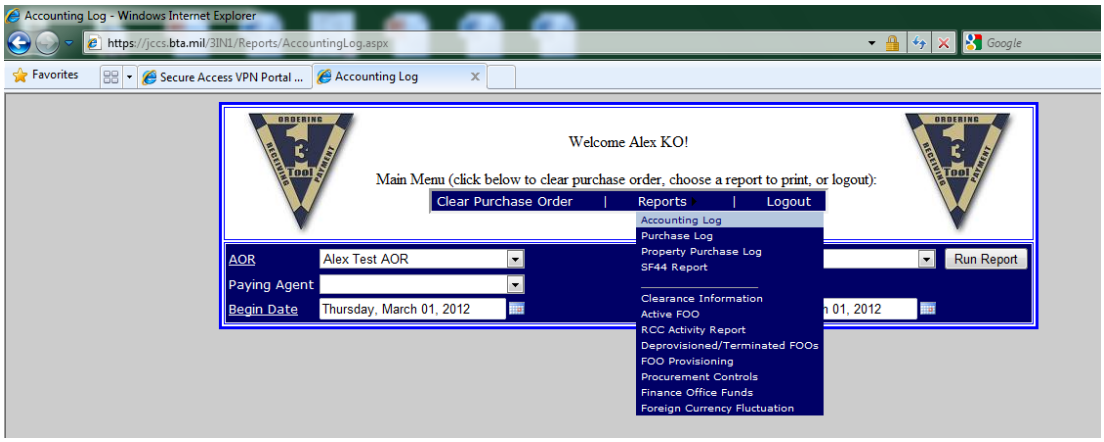


- **Accounting Log**: Enables an analysis of purchase requests and cash advances associated to each order/voucher placed during a period, for a selected paying agent.
- **Purchase Log**: Report showing orders placed by a FOO, unit, RCC, or AOR during a specified period. This report is similar to a PIIN Log.
- **Property Purchase Log**: Identifies accountable items purchased, quantities and prices, for a specific AOR office, unit, or 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. See *Lesson 2: Mass Download SF44s*.
- **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 FOOs 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 Report**: 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 by 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.

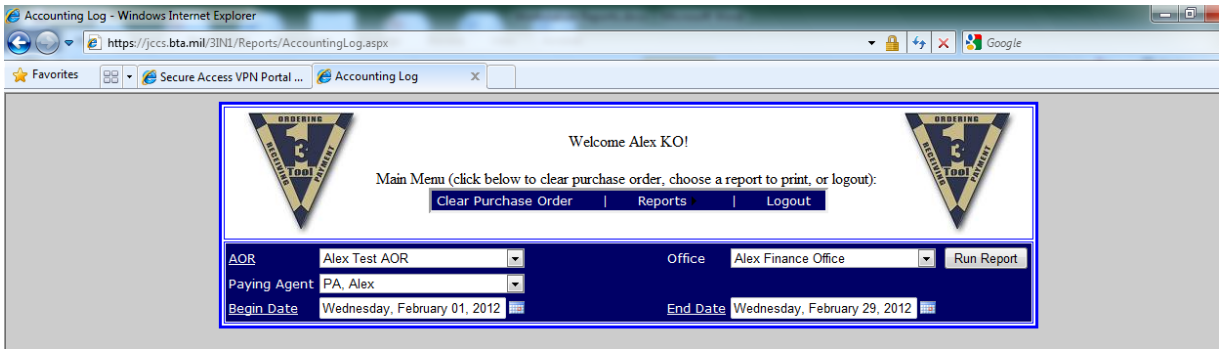
Web-Based Reporting

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 is displayed either directly in Excel or in a browser, depending on the report type.

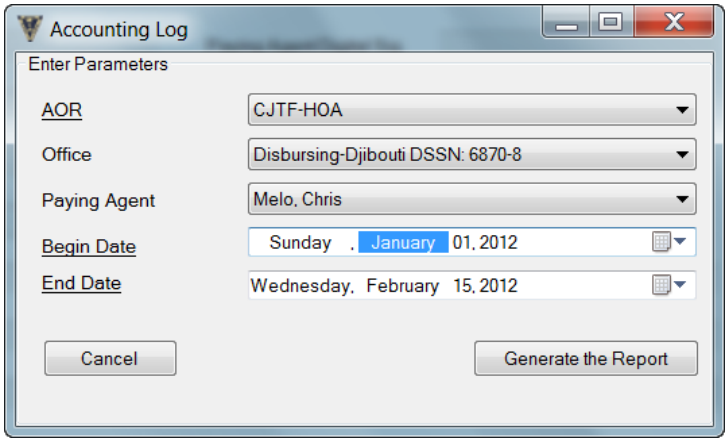


Accounting Log Report Parameters

Accounting Log Report

The Accounting Log report 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 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 report 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	Id	Activity	Linked To	Currency	Exchange Rate	Amount	Expended	Remaining
N3654A12PV003SB	D21FE	Disbursement		DJF	177.50000	213,000.00	93,407.55	119,592.45
N3654A12PV003SB	D22FE	Disbursement		USD	1.00000	-1,200.00	0.00	0.00
N3654A12PV003SB	D23FE	Disbursement		USD	1.00000	1,250.00	0.00	50.00
N3654A12PV007SB	D24FE	Disbursement		USD	1.00000	-3,000.00	0.00	0.00
N3654A12PV007SB	D25FE	Disbursement		DJF	177.50000	532,500.00	433,200.00	99,300.00
N3654A12PV007SB	D26FE	Disbursement		USD	1.00000	3,000.00	0.00	0.00
N3654A12PV008SB	D27FE	Disbursement		USD	1.00000	300.00	0.00	0.00
N3654A12PV008SB	D28FE	Disbursement		DJF	177.50000	53,250.00	23,900.00	29,350.00
N3654A12PV008SB	D29FE	Disbursement		USD	1.00000	-300.00	0.00	0.00
N3654A12PV009SB	D30FE	Disbursement		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

***Notes*:**

PBI = Property Book Item. Identifies items that have been flagged as accountable

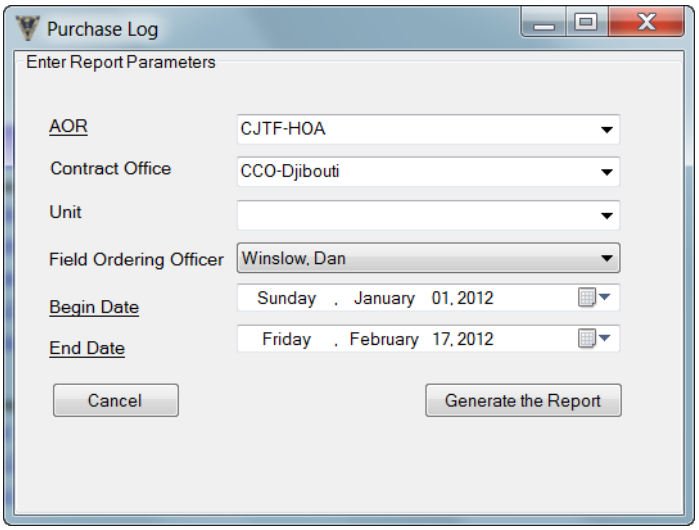
LC = Level Cleared. Displays the sequence number the order is currently awaiting clearance/review, based on the clearing workflow

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

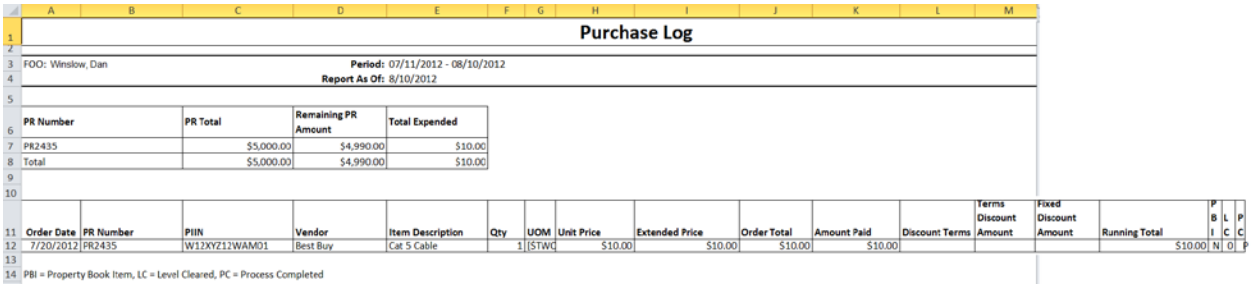
The Purchase Log shows orders placed during a specified time period for a FOO, Unit, Contract Office, or AOR. To facilitate analysis, details about purchase requests assigned to the FOO/PA are also listed in the report.

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 a Contract Office, 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.
6. The report is displayed in MS Excel. You may print the report from Excel.
7. 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 Report

Notes:

PBI = Property Book Item. Identifies items that have been flagged as a accountable

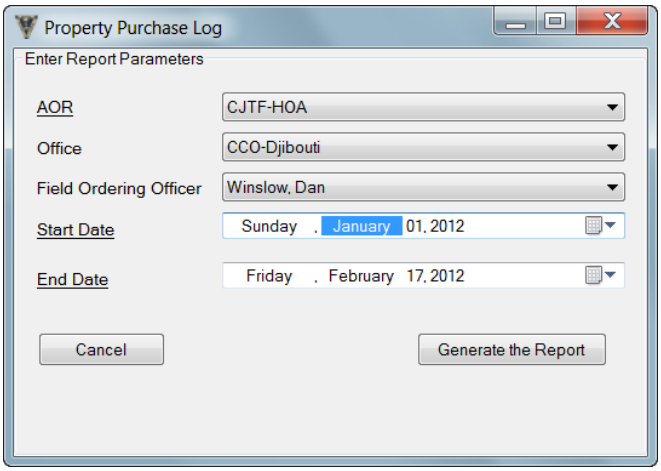
LC = Level Cleared. Displays the sequence number the order is currently awaiting clearance/review, based on the clearing workflow

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

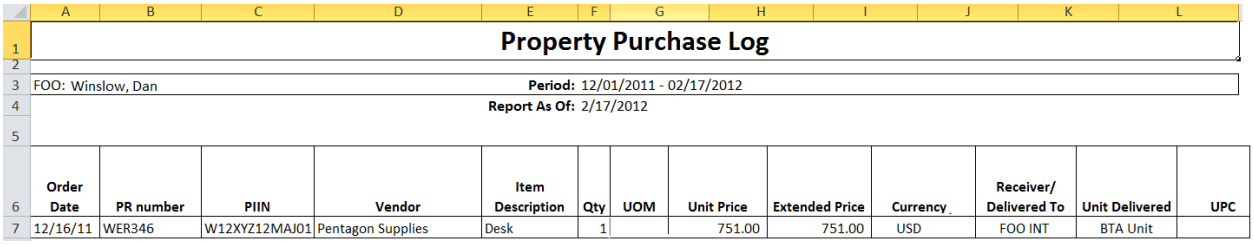
The Property Purchase Log identifies purchased items that were flagged for property book accountability, quantities and prices, for a specific AOR office and FOO, within a defined time period.

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.



Property Purchase Log Setup Window

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	

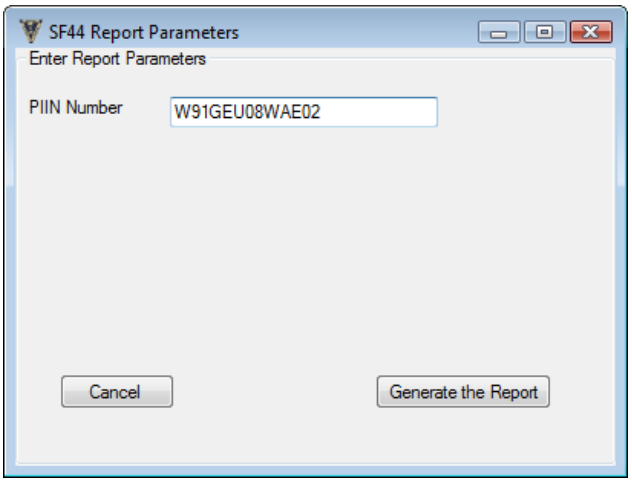
Property Purchase Log Report

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 displays 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 Aziz Construction
A 25th st
Y Baghdad
E 55662
E 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 Finance Company BTA [DSSN: 2038]
A 1851 S Bell St
Y Arlington
O VA 22202
R 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	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

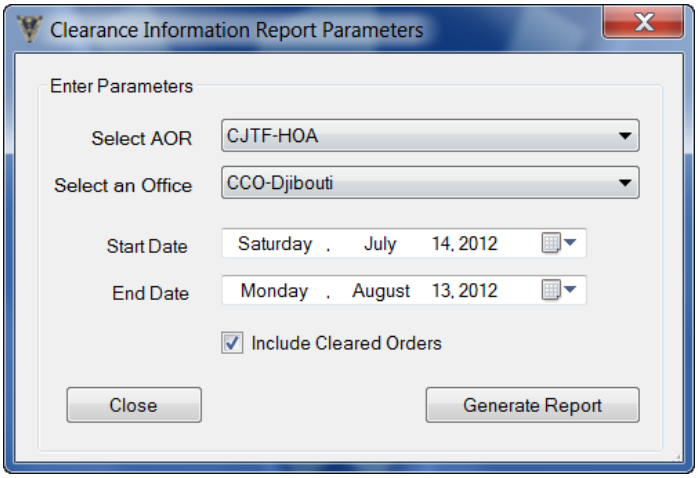
Clearance Information Report

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.

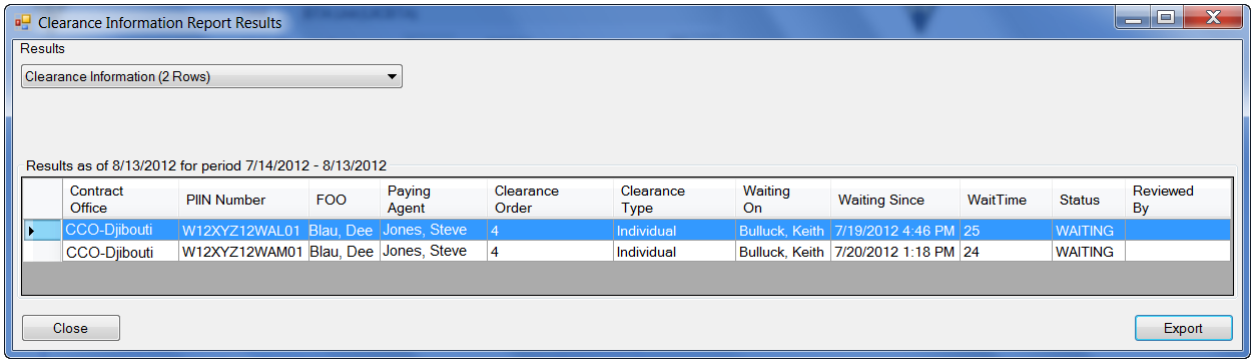
– The *Clearance Information Report Parameters* window is displayed.

2. Select an AOR and Office from the drop-down lists, and then click the **Generate Report** button.
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.



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.



Contract Office	PIIN Number	FOO	Paying Agent	Clearance Order	Clearance Type	Waiting On	Waiting Since	WaitTime	Status	Reviewed By
CCO-Djibouti	W12XYZ12WAL01	Blau, Dee	Jones, Steve	4	Individual	Bulluck, Keith	7/19/2012 4:46 PM	25	WAITING	
CCO-Djibouti	W12XYZ12WAM01	Blau, Dee	Jones, Steve	4	Individual	Bulluck, Keith	7/20/2012 1:18 PM	24	WAITING	

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.

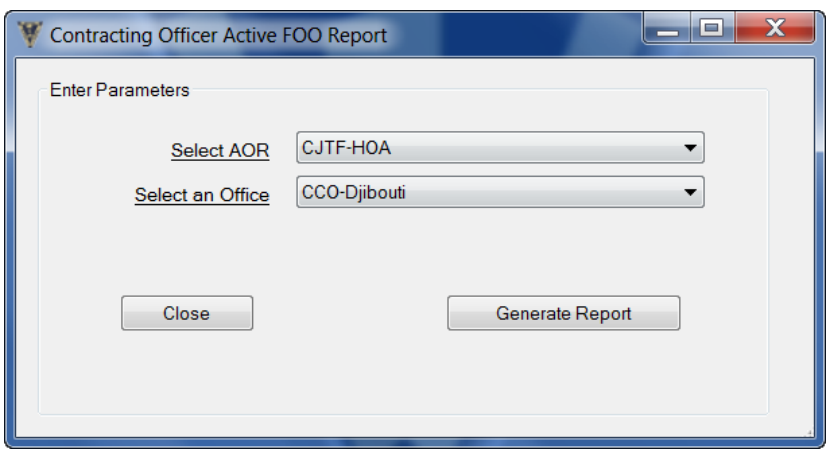
	A	B	C	D	E	F	G	H	I	J	K	L
1	Contract Office	PIIN Number	FOO	Paying Agent	Clearance	Clearance	Waiting On	Waiting Sir	WaitTime	Status	Reviewed By	
2	CCO-Djibouti	W12XYZ12WAL01	Blau, Dee	Jones, Steve	4	Individual	Bulluck, Keith	07/19/2012	25	WAITING		
3	CCO-Djibouti	W12XYZ12WAM01	Blau, Dee	Jones, Steve	4	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

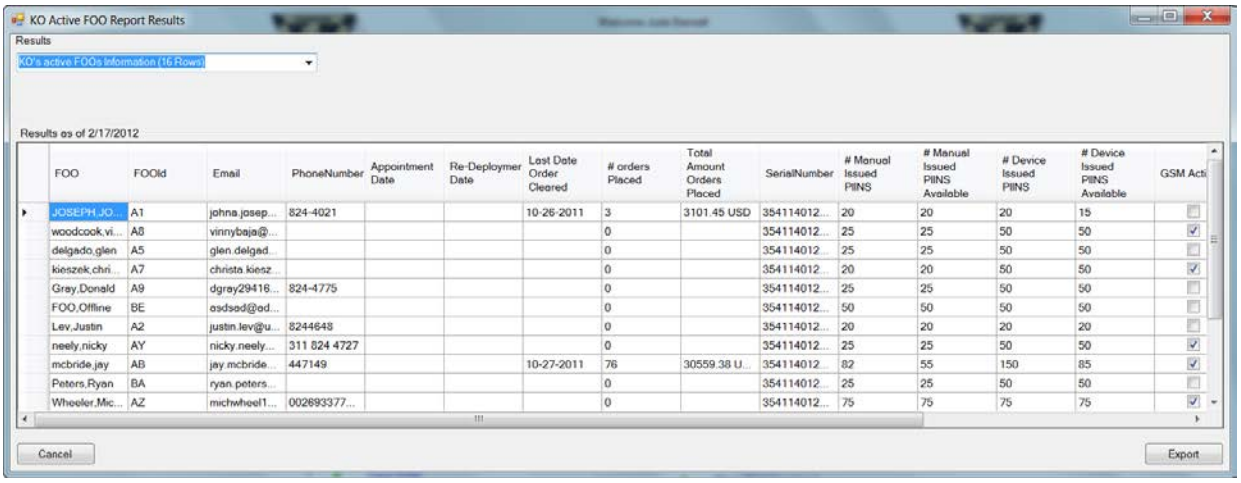
The Active FOO report prints a list of active FOOs at a specified AOR contract office. A FOO is considered active if they are currently assigned to a device. The FOO contact information, appointment date, associated PA, and latest order information, including PIINs and device ID numbers, are listed in spreadsheet format.

1. Select **Active FOO Report** from the **Reports/Extracts** 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.



FOO	FOOId	Email	PhoneNumber	Appointment Date	Re-Deployment 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	☑

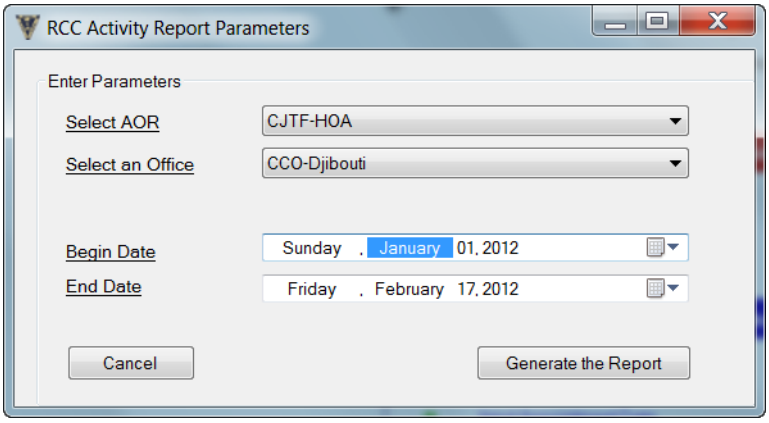
KO Active FOO Report Results

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.

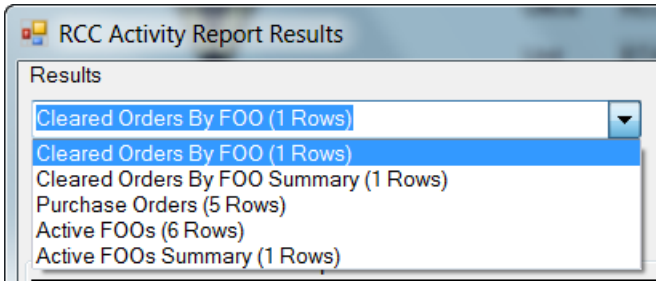


RCC Activity Report Parameters

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

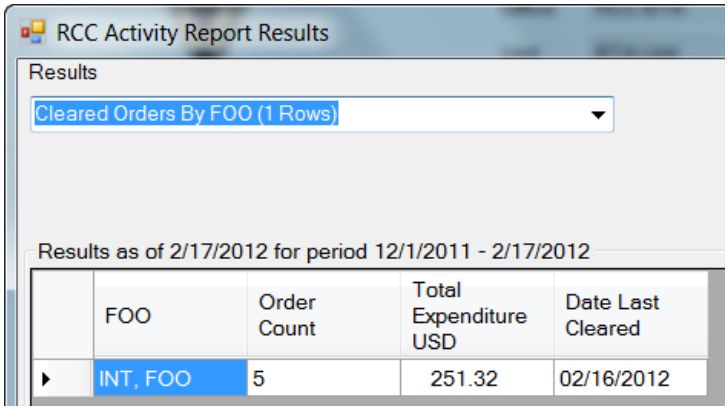
of the last cleared order. Note: these only show orders that have completed the clearance cycle.

- **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.



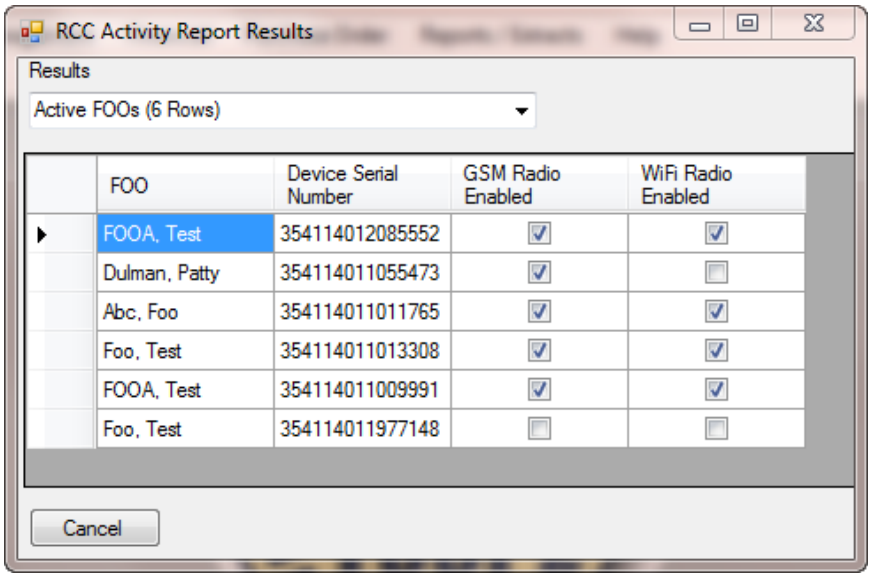
RCC Activity Report Options

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:

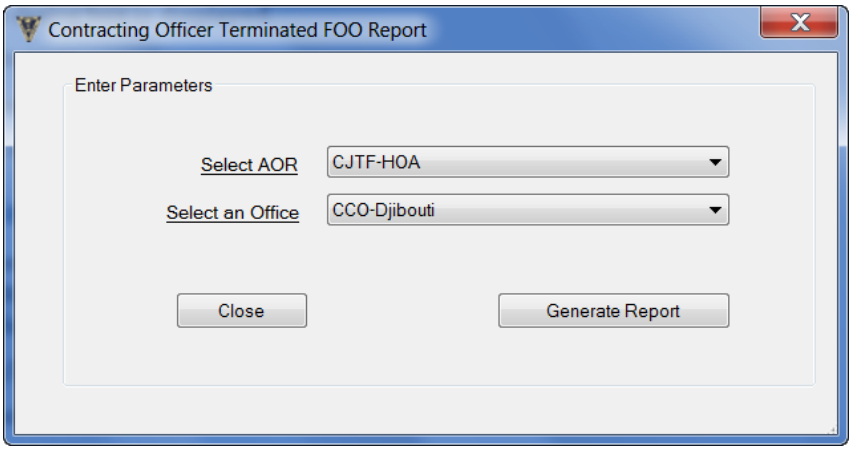
1. Click the **Export** button.
   - The *Save As* dialog box is displayed.
2. Click the **Save** button.
   - The report is displayed in Excel.

Note that each type of report is displayed on a separate tab in Excel.

Deprovisioned/Terminated FOO Report

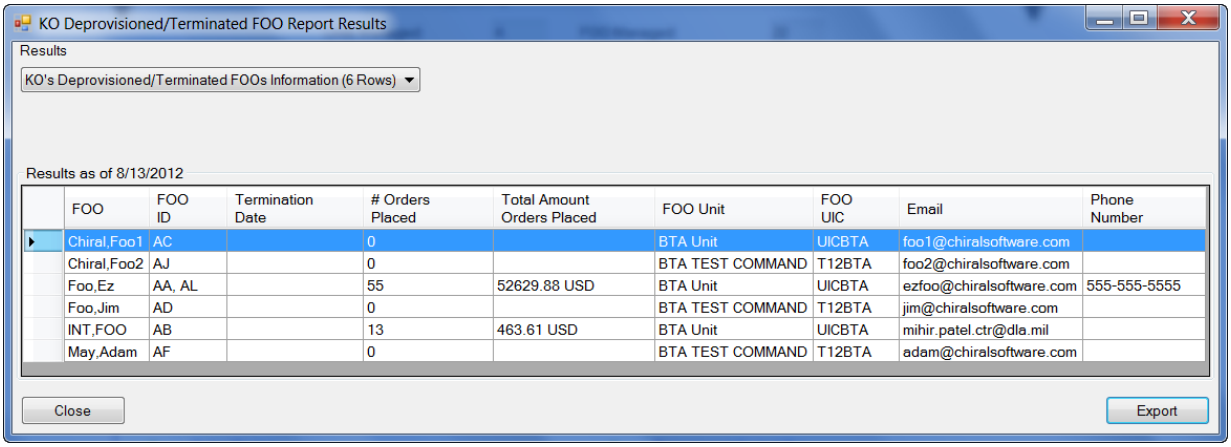
The Deprovisioned/Terminated FOO report prints a list of inactive FOOs at a specified AOR contract office. The FOO contact information, termination date, order information, and associated PA list are displayed in spreadsheet format.

1. Select **Deprovisioned/Terminated FOO** from the main menu.
   - The *Contracting Officer Terminated FOO Report* window is displayed.
2. Select an AOR and Office.



Contracting Officer Terminated FOO Report

3. Click the **Generate Report** button.
   - The report is displayed in a new window. Use the horizontal scroll bar to view additional columns.



FOO	FOO ID	Termination Date	# Orders Placed	Total Amount Orders Placed	FOO Unit	FOO UIC	Email	Phone Number
Chiral,Foo1	AC		0		BTA Unit	UICBTA	foo1@chiralsoftware.com	
Chiral,Foo2	AJ		0		BTA TEST COMMAND	T12BTA	foo2@chiralsoftware.com	
Foo,Ez	AA, AL		55	52629.88 USD	BTA Unit	UICBTA	ezfoo@chiralsoftware.com	555-555-5555
Foo,Jim	AD		0		BTA TEST COMMAND	T12BTA	jim@chiralsoftware.com	
INT,FOO	AB		13	463.61 USD	BTA Unit	UICBTA	mihir.patel.ctr@dla.mil	
May,Adam	AF		0		BTA TEST COMMAND	T12BTA	adam@chiralsoftware.com	

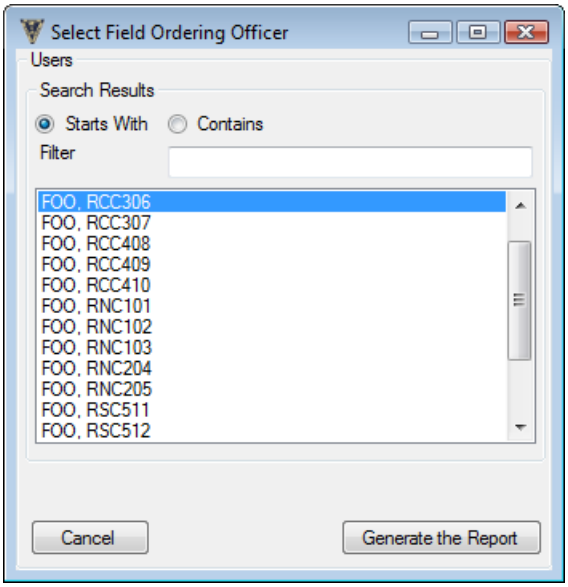
KO Deprovisioned/Terminated FOO Report Results

4. Click the **Export** button to export the report to Excel.

FOO Provisioning Report

The FOO Provisioning report lists the provisioning setup parameters for each FOO, including assigned PIIN blocks and procurement control policies.

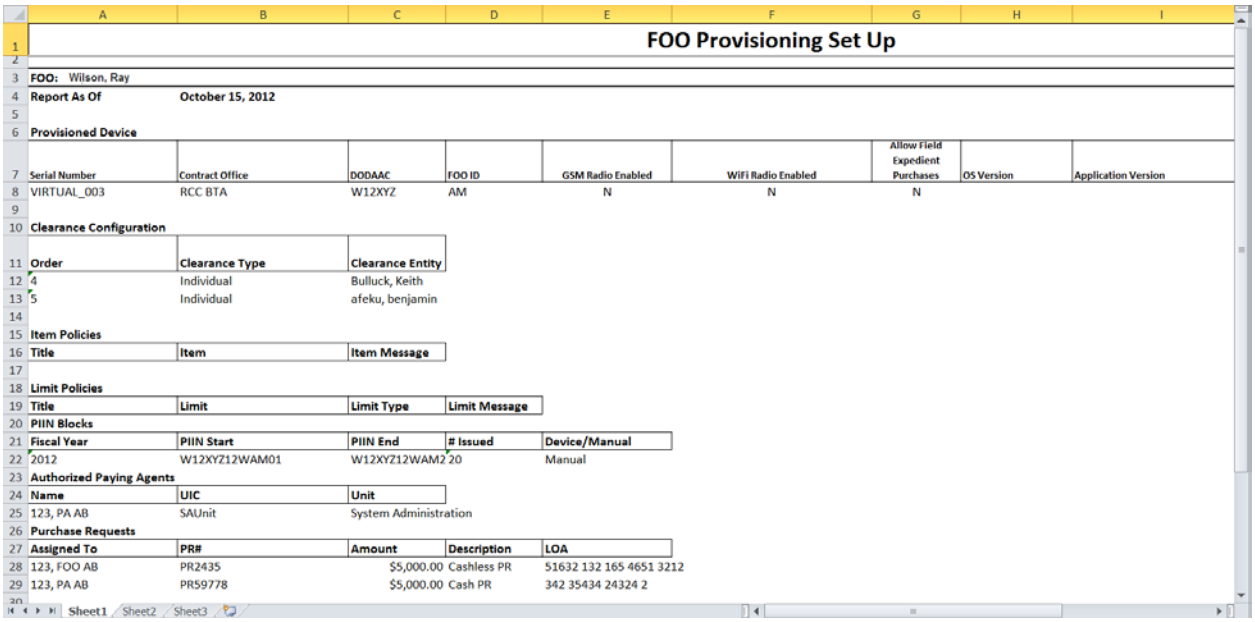
1. Select **Reports/Extracts**, **FOO Provisioning** from the main menu.
   - The *Select Field Ordering Officer* window opens.



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:

- Information about the provisioned device
- 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 Set Up

FOO: Wilson, Ray

Report As Of October 15, 2012

Provisioned Device

Serial Number	Contract Office	DODAAC	FOO ID	GSM Radio Enabled	WiFi Radio Enabled	Allow Field Expedient Purchases	OS Version	Application Version
VIRTUAL_003	RCC BTA	W12XYZ	AM	N	N	N		

Clearance Configuration

Order	Clearance Type	Clearance Entity
4	Individual	Bulluck, Keith
5	Individual	afeku, benjamin

Item Policies

Title	Item	Item Message

Limit Policies

Title	Limit	Limit Type	Limit Message

PIIN Blocks

Fiscal Year	PIIN Start	PIIN End	# Issued	Device/Manual
2012	W12XYZ12WAM01	W12XYZ12WAM2	20	Manual

Authorized Paying Agents

Name	UIC	Unit
123, PA AB	SAUnit	System Administration

Purchase Requests

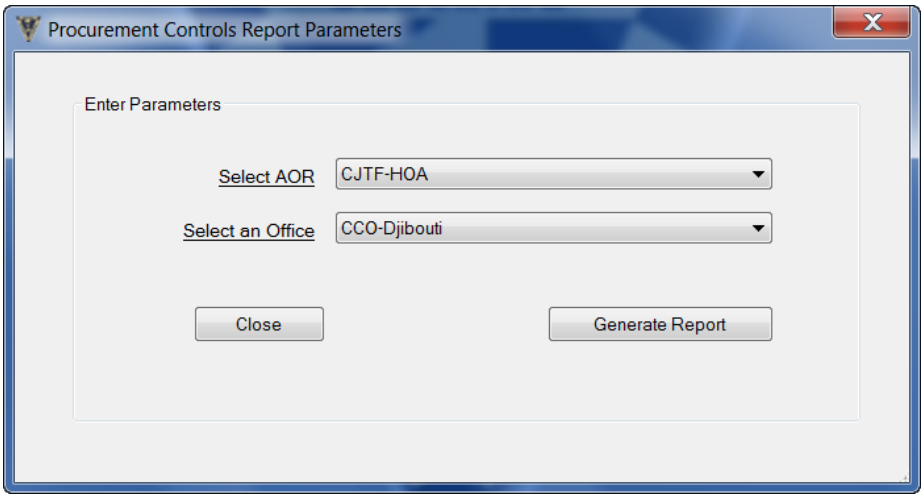
Assigned To	PR#	Amount	Description	LOA
123, FOO AB	PR2435	$5,000.00	Cashless PR	51632 132 165 4651 3212
123, PA AB	PR59778	$5,000.00	Cash PR	342 35434 24324 2

FOOs 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.
2. Select the **AOR** and **Office**, then click the **Generate Report** button.



Procurement Controls Report Parameters

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:

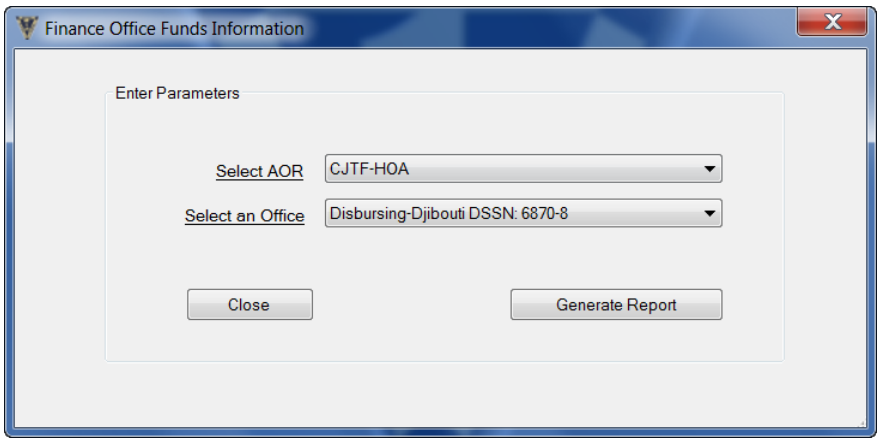
Policy Title	Policy Message	Limit	Limit Type	Limit Message
Max HA Project Purchase Limit	Max HA Project Limit- $10K	$10,000.00	PURCHASETOTAL	HA Project Funds only valid up to $10,000
		$40.00	LINEITEM	HA Project Funds Only valid up to $40 per item
Max OPFUND Purchase Limit	Not auth over $3000 (Tm support/life 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.

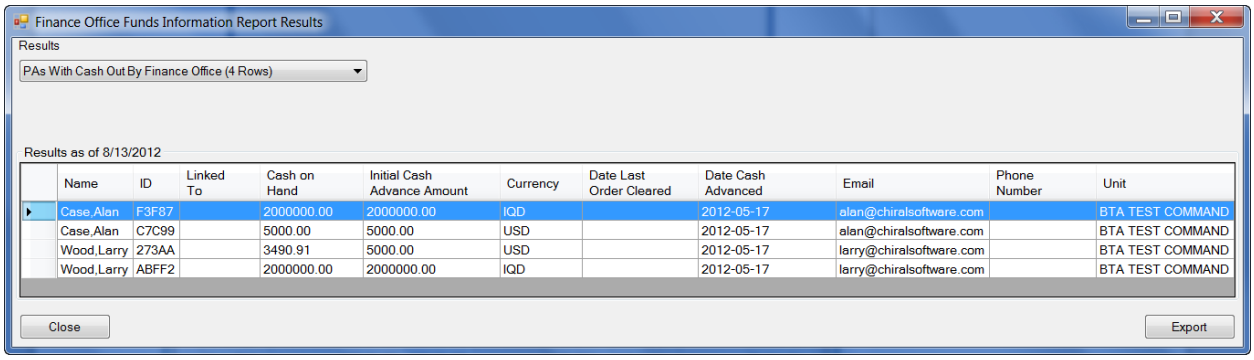
1. Select **Reports/Extracts**, **Finance Office Funds Report** from the main menu.
   - The *Finance Office Funds Information* window is displayed.
2. Select the AOR and Office from the drop-down lists.



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.

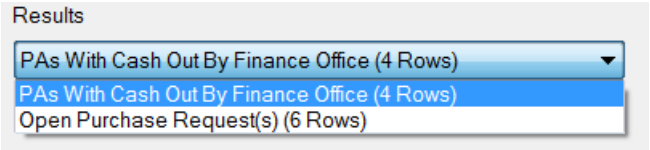


Name	ID	Linked To	Cash on Hand	Initial Cash Advance Amount	Currency	Date Last Order Cleared	Date Cash Advanced	Email	Phone Number	Unit
Case,Alan	F3F87		2000000.00	2000000.00	IQD		2012-05-17	alan@chiralsoftware.com		BTA TEST COMMAND
Case,Alan	C7C99		5000.00	5000.00	USD		2012-05-17	alan@chiralsoftware.com		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

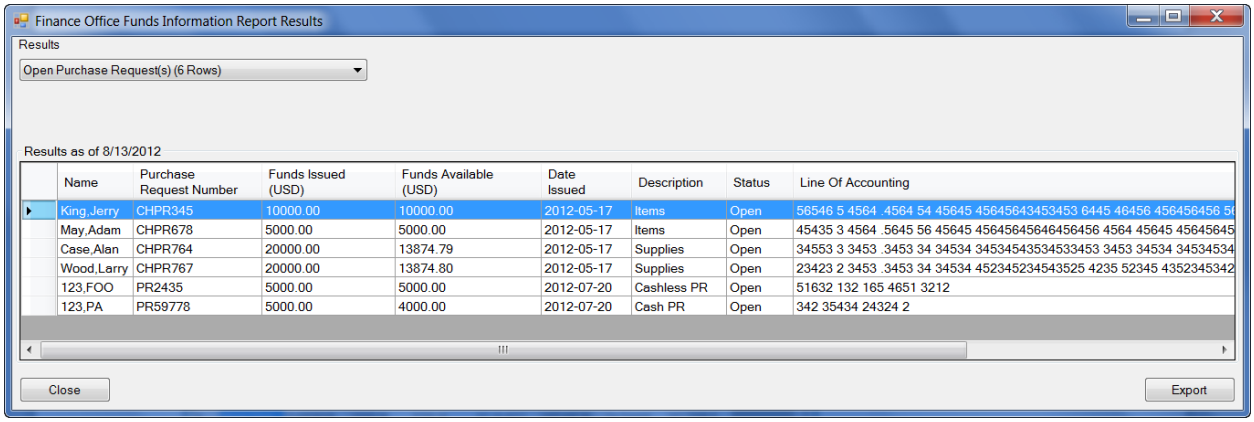
Finance Office Funds Report Results – PAs with Cash Out by Finance Office

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 45645645646456456 4564 45645 45645645
Case,Alan	CHPR764	20000.00	13874.79	2012-05-17	Supplies	Open	34553 3 3453 .3453 34 34534 345345435345334 53 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

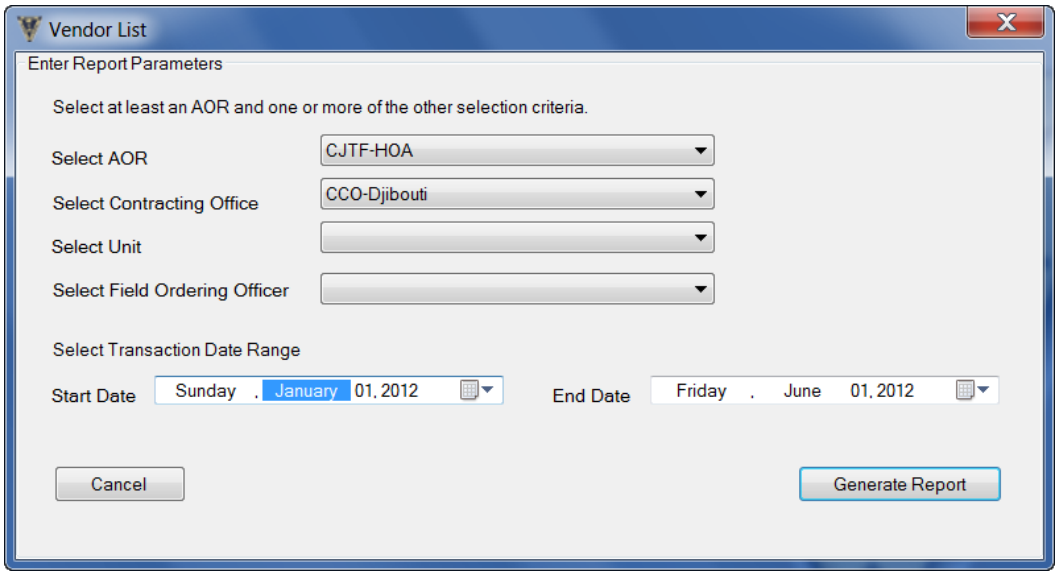
You can export the file to MS Excel for further data analysis or printing. To export the data to Excel:

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

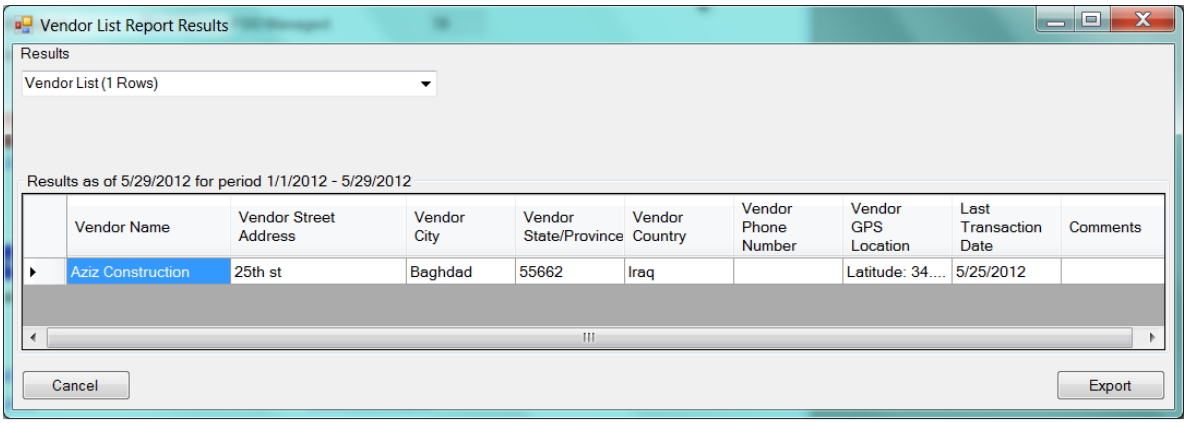
The Vendor List report identifies vendors with whom an AOR has conducted business during a specific time period. The report provides vendor contact information, last transaction date and comments.

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.



Vendor List Dialog Box

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.



Vendor List Report Results

To export the report to Microsoft Excel, where it can be edited and/or saved, click the **Export** button.

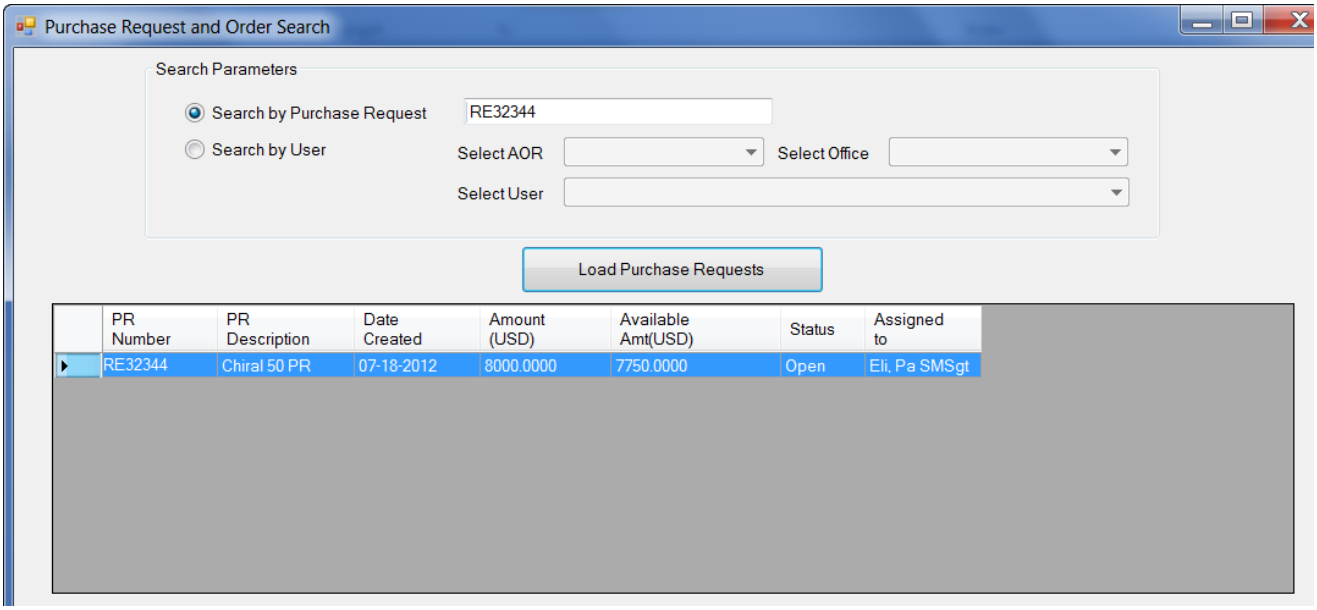
Purchase Request and Order Search Report

The Purchase Request and Purchase Order Search report enables searching for PRs by user or PR number.

To search by PR number:

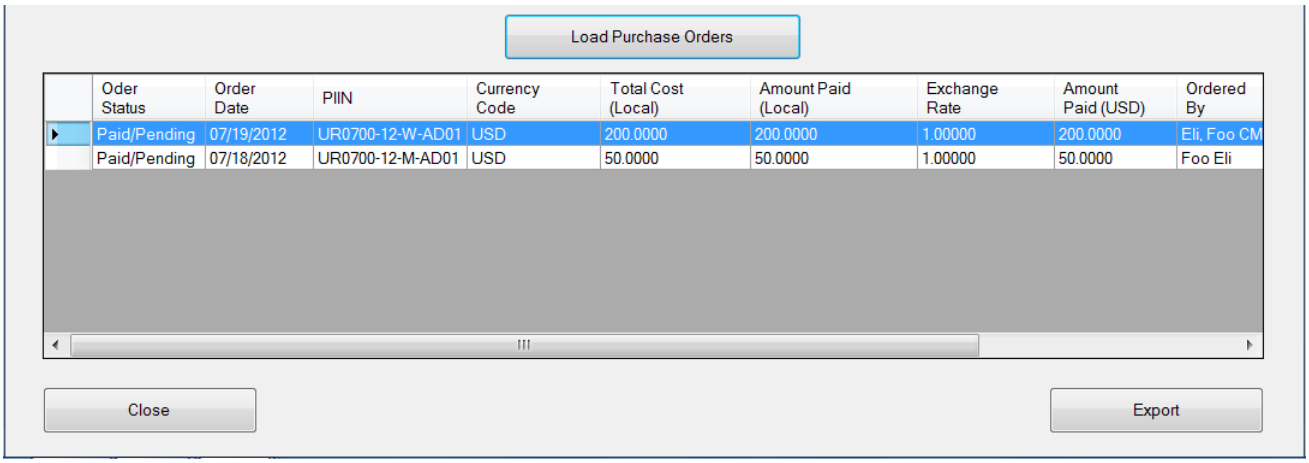
1. Select **Report/Extracts**, **Purchase Request and Purchase Order Search**. The *Purchase Request and Purchase Order Search* dialog box opens.
2. Select the **Search by Purchase Request** radio button and enter the PR number.

3. Click the **Load Purchase Requests** button to view the PR.



Purchase request located by PR number

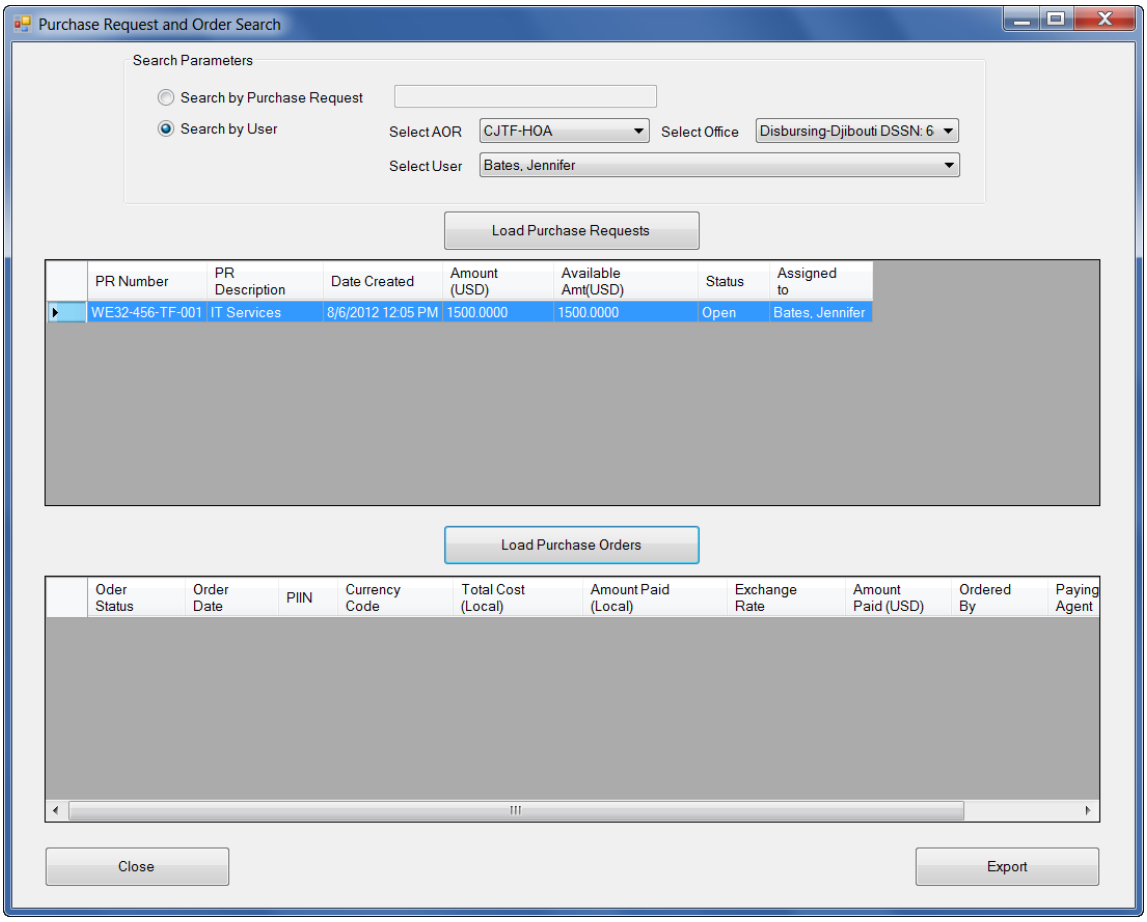
4. Click the **Load Purchase Orders** button to view the POs associated with the PR.



Purchase orders associated with the selected purchase request

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 located by user

3. Select a purchase request in the table.
4. Click the **Load Purchase Orders** button to view the POs associated with the purchase request.

Click the **Export** button to export the report to Excel.

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

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Lesson 2: Downloading Orders/Vouchers

Objectives

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

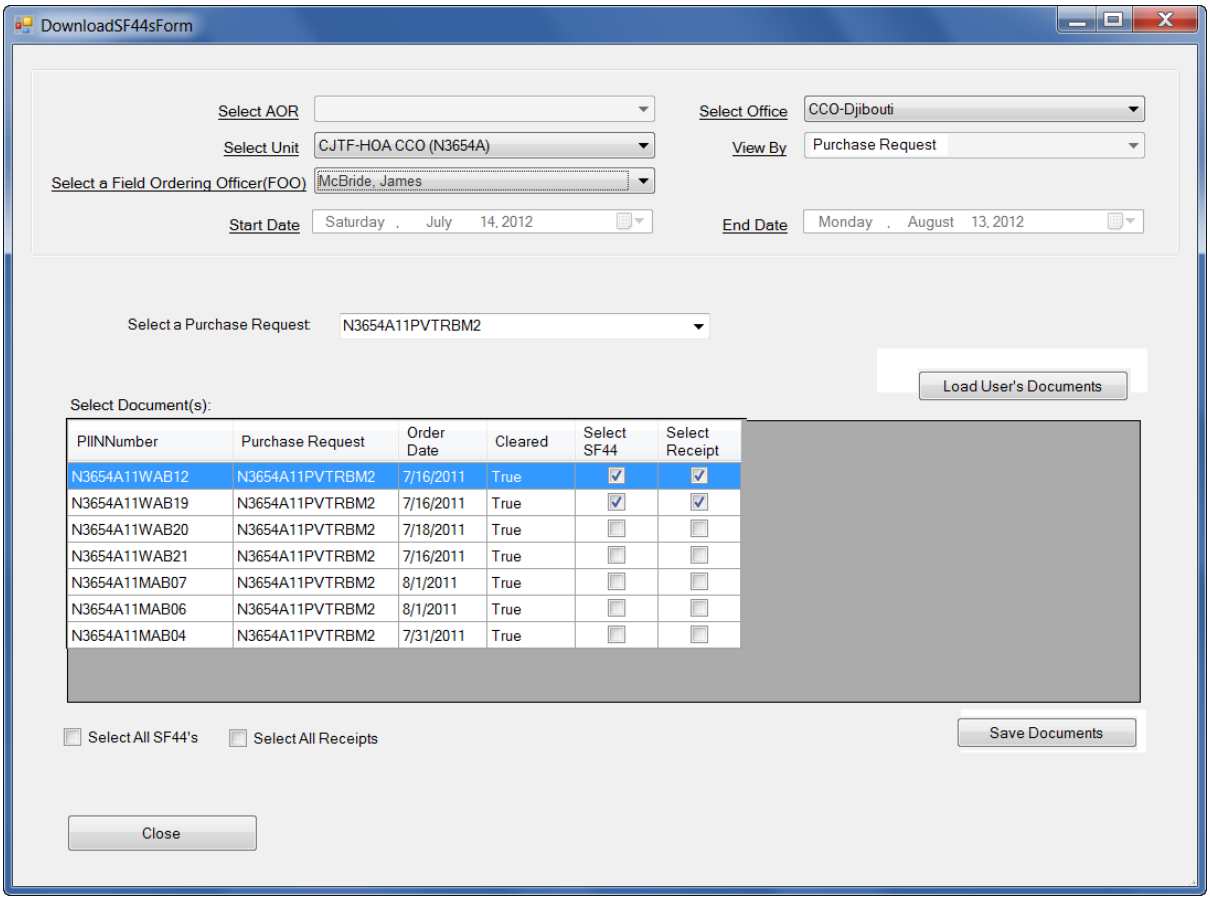
- ❑ Download orders/vouchers

Mass Download SF44s

The Mass Download SF44s command enables a FOO or PA to download the SF44s and receipts they have executed or scanned into the 3in1 system, as a backup for their use. Users with other roles can also download SF44s by user.

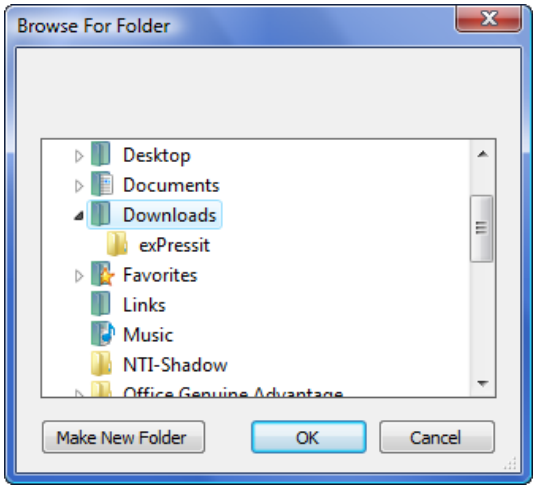
To download a batch of SF44s:

1. Select **Mass Download SF44s** from the **Reports/Extracts** menu.
   - The *Download SF44 Form* window is displayed.
2. Select the AOR, Office, and Unit.
   - FOOs and PAs can only select their own documents, so they cannot select a different office, unit or user.
3. Select a name from the **Select a FOO** drop-down list.
4. SF44 documents can be selected 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**.
5. Click the **Load User's Documents** button.
   - Executed orders will be listed for the specified user within the above parameters.
6. Mark the **Select SF44** check box beside each document that will be downloaded.
   - To download all the SF44 documents that are listed, select the **Select All SF44s** check box that appears beneath the list of documents.
7. Mark the **Select Receipt** check box to download the receipt for a document.
   - To download all receipts that are listed, select the **Select All Receipts** check box that appears beneath the list of documents.



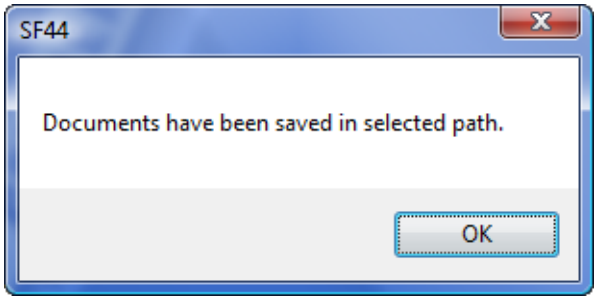
Download SF44 Form Window

8. Click the **Save Documents** button.
   – The *Browse for Folder* dialog box is displayed.



9. Locate the folder to store the downloaded documents, or create a folder.
10. Click OK.
   – A confirmation dialog box is displayed.

11. 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 15: Device Management Tools

Lesson 1: Resetting a Password on the Device and Workstation

Objectives

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

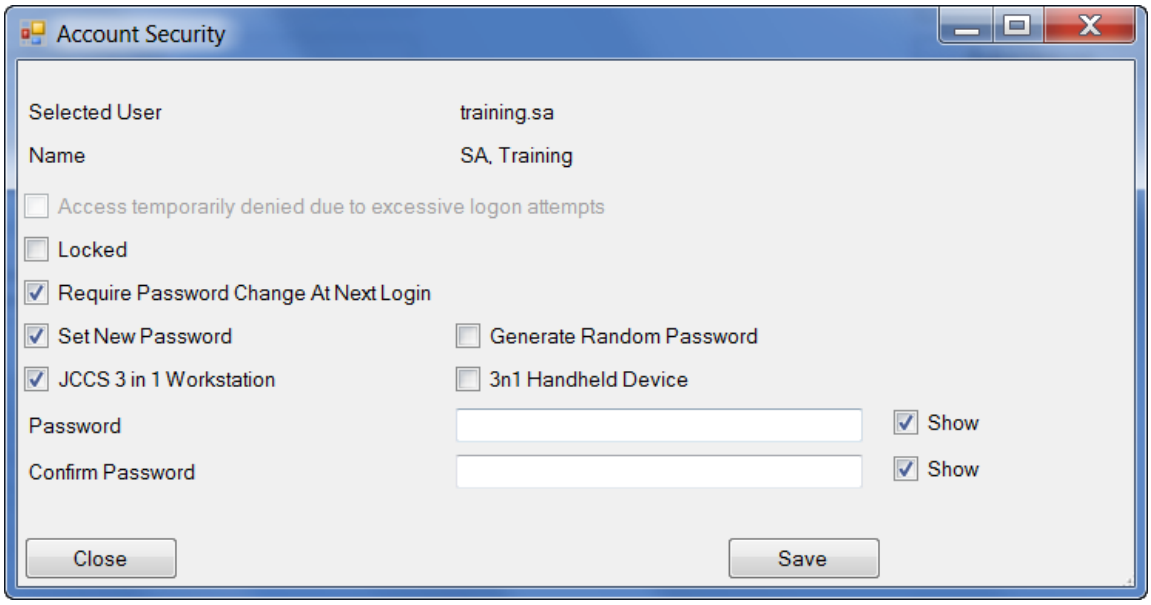
- ❑ Understand password synchronization rules between the Workstation and handheld device
- ❑ Unlock a locked user account
- ❑ Reset a user password on the 3in1 Workstation
- ❑ Reset a user password for a 3in1 handheld device

Device and Workstation Password Synchronization

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 during initial provisioning. Any password changes after a device is initially provisioned will need to be manually accomplished on both systems. It is recommended to use the same password for both the workstation and the device.

Administrators Manage User Account Security

The system administrator uses the features on the *Account Security* window to resolve several types of user password issues. To access the *Account Security* window, select **File**, **Profile Management, User Profile.** Only users with the System Admin role have access to the **Security** button on the *User Profile Management* window. Selecting this button opens the *Account Security* window.



Account Security Window for a User

Users can become permanently locked out of their account, if the login rules listed above are violated. The system administrator can unlock the account from this window.

The Security feature is also used to reset the password when the user forgets the password and cannot reset the password by answering the security questions provided during registration. Note that the user account will be locked after three invalid attempts to answer security questions.

To obtain a new password from the help desk, the user must send an encrypted email to the help desk, which will reply with a new password.

To unlock the user account, the system administrator opens the *Account Security* window and notes the **Locked** checkbox is marked. This means the user account is permanently locked. (If the Locked checkbox is unmarked, the user account is temporarily locked and user has to wait 20 minutes and then try log in again.)

The system administrator unmarks the **Locked** checkbox and clicks the **Save** button. At this point, the system administrator can also reset the password if the user does not remember the password.

When the system administrator/help desk receives a request to reset the password, click the **Set New Password** button. Either type a new password or click the **Generate Random Password** button to create a random, system-generated password that adheres to password guidelines. Also specify whether to set the new password on the **JCCS 3in1 Workstation** and/or the **3in1 Handheld Device** by marking one or both checkboxes.

System administrators must also click the **Require Password Change at Next Login** checkbox to force a password change whenever the user logs in using the password provided by the system administrator.

FOOs Can Reset Device Passwords

FOOs may reset the device password can be reset using any of the following methods:

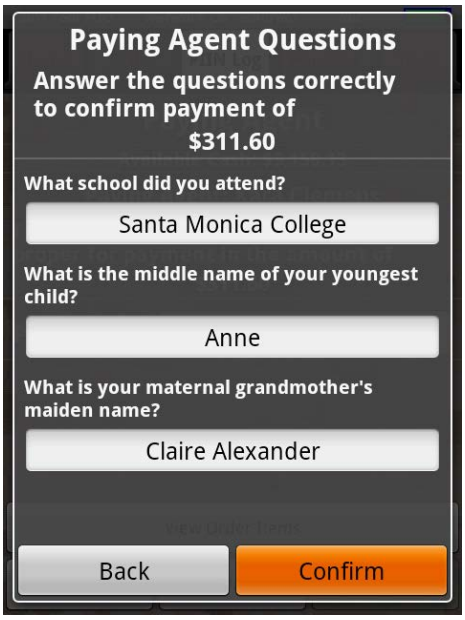
- The **Reset Password** button on the FOO login screen. See the *FOO/PA Reference Manual*.
- The **Change Password** command accessed through the device **Tools** tab, under **General Settings**. See the *FOO/PA Reference Manual*.

Changing PA Passwords

1. If the PA has forgotten the password used on the order signature page, tap the **Forgot Password** button. This opens the *Paying Agent Questions* screen.

Paying Agent Questions 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.

Device Login Rules

On the device, the user can try entering a user name and password three consecutive times during a 20-minute time period. After the third invalid attempt, access will be denied for 20 minutes, after which the user can try to log in again.

After the 20-minute denied access period, if the user tries to log in using invalid credentials, three consecutive times, the user will be asked the three security questions selected on the Workstation during registration. The user will be allowed three attempts at the security questions. If these attempts are invalid, the user will be locked out permanently until the account is unlocked by the system administrator/help desk technician.

Note: The number of invalid attempts resets after the 20 minute period.

What Users Should Do After a Password Reset

As stated earlier, 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.

Lesson Summary

In this lesson, you learned to:

- ❑ Understand password synchronization rules between the Workstation and handheld device
- ❑ Unlock a locked user account
- ❑ Reset a user password on the 3in1 Workstation
- ❑ Reset a user password for a 3in1 handheld device

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Lesson 2: Recovery Operations: Retrieving Data/Rebuilding Databases from Damaged Devices

Objectives

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

- ❑ Rebind an existing memory chip with a new device
- ❑ Reconstitute provisioning data and orders on a new 3in1 device with a new memory chip

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 16: 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**.

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 (also called GD 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.

The Contracting Officer or System Administrator performs the rebinding or reconstituting procedures. They will need the ID numbers from both devices to complete the rebinding process. They can use the Select Device feature described below to locate the device ID number.

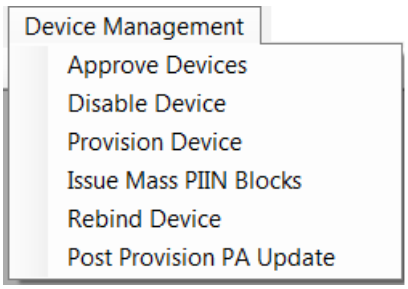
Rebinding a Device

Step 1: Transfer Chip to New Device

Remove the chip from the damaged device and place it in a new device and connect the new device to the network and turn it on. (See *Module 16: 3in1 Device Tools & Settings, Lesson 4: Device Software Updates & Other Information* for pictures of the chip.)

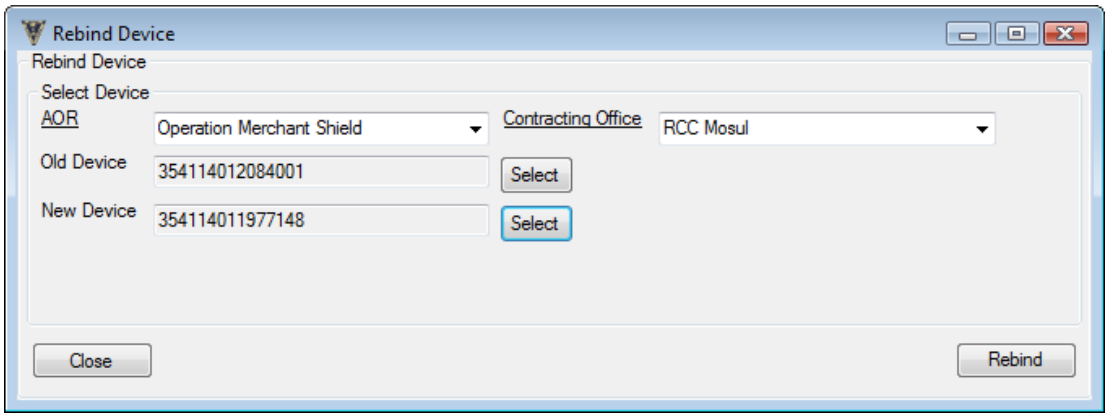
Step 2: Use Workstation Rebind Device Feature

1. From the Workstation main menu, select **Device Management**, **Rebind Device**.

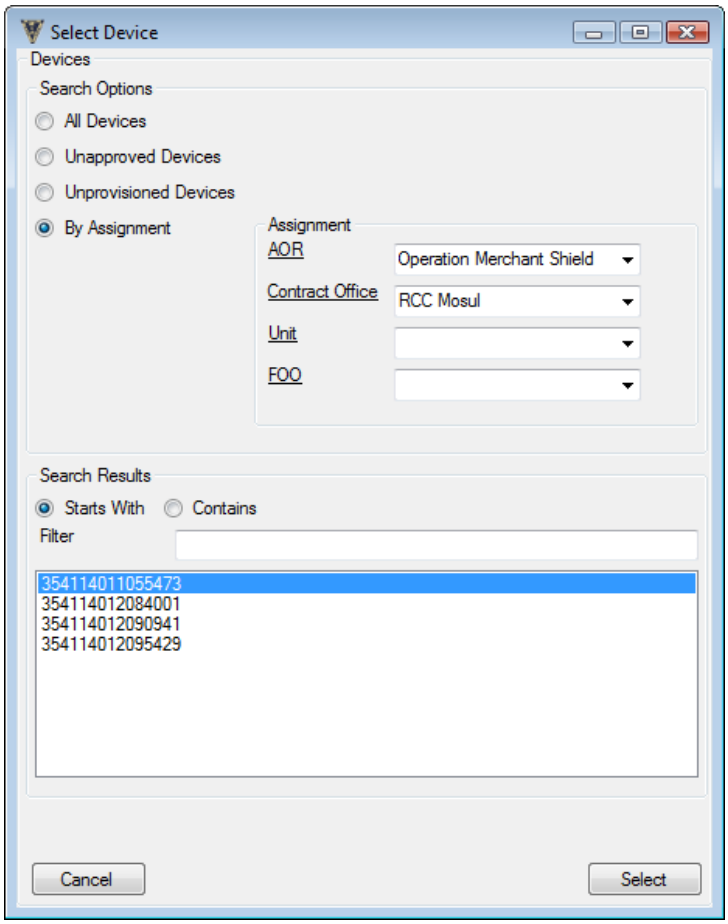


   – The *Rebind Device* window opens.

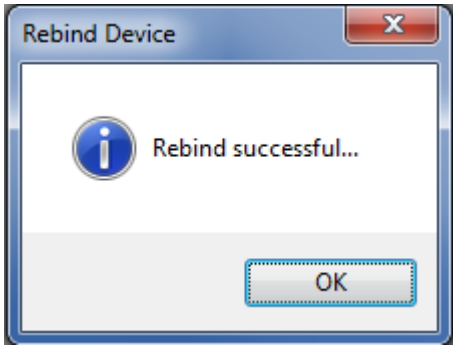
2. Select the AOR and Contracting Office.
3. Click the **Select** button to use filters to locate both the old and new device IDs.



Rebind Device Window



4. Use the filters to locate a device by selecting from a list of All Devices, Unapproved Devices, Un-provisioned Devices or By Assignment, which allows drilling down by AOR, Contract Office, Unit and FOO.
   - ***Note***: On the device, the ID number is located in the battery compartment on the label titled IMEI, and also is displayed on the *Out of the Box* screen, as well as the *Device and Database Status* screen.
5. After selecting a device ID number, click the **Select** button.
6. Click the **Rebind** button on the *Rebind Device* window.

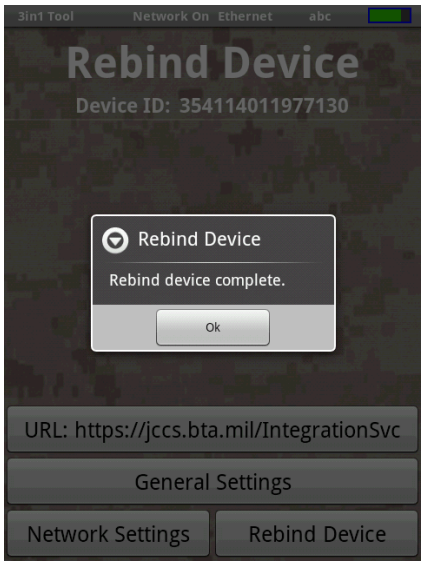


A confirmation screen indicates the operation was successful.

Step 3: Turn on the New Device

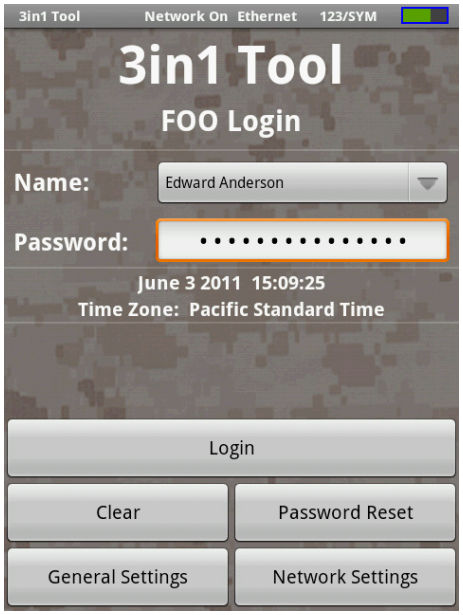
The FOO should then turn on the new device; the *Rebind Device* screen is displayed. After ensuring they have network connectivity, the FOO taps the **Rebind Device** button.

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

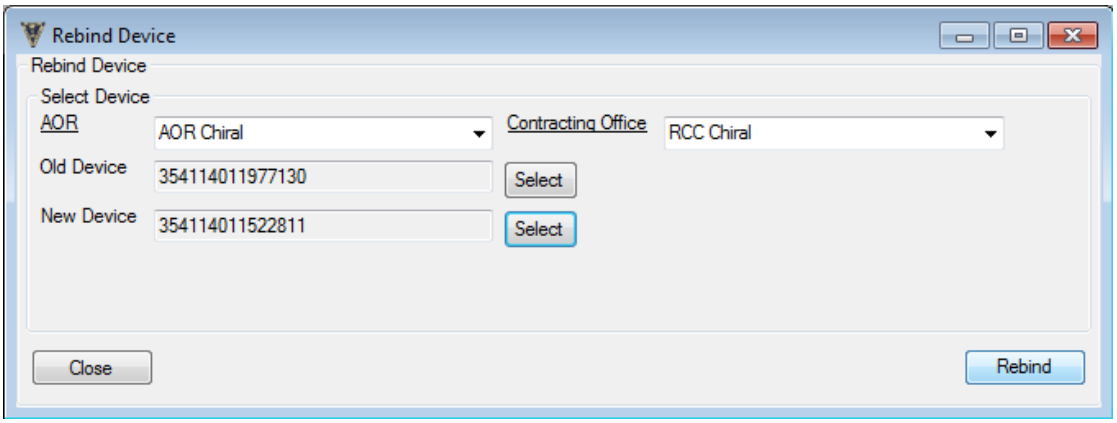
Reconstituting the Device

Step 1: Bind the FOO the new device using the 3in1 Workstation

Select **Device Management**, **Rebind Device** on the Workstation main menu. This function is used to bind an old chip to a new device or an existing FOO to a new device during reconstitution, in order to download all of the data that was created on an old device.

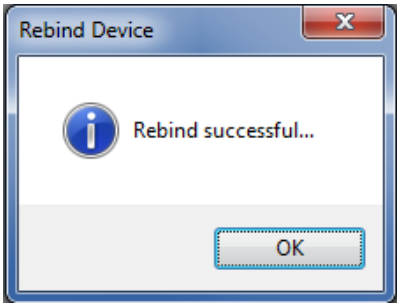
Step 2: Select the old (destroyed) device and the new device.

On the *Rebind Device* window, specify the old and new device IDs. Then click the **Rebind** button.



Rebind Device Window – Select the old and new device IDs

The Workstation confirms that the operation was successful with a "Rebind Successful;" message



Step 3: Log in and Download Provisioning Data

The FOO login process is the same as described previously in *Module 3: Application Familiarization, Lesson 3: Navigating the 3in1 Device Application.* After receiving provisioning data, the FOO logs in as usual.

Go to the ***Status*** screen to confirm the FOO is now associated with the new device ID and a new GD chip (microSD) ID.

At this point, the new device has all the old orders and is in the same state as the device which was lost, as of the last data transmission.

Note that old receipt images that were uploaded to the prime database are not reconstituted on the device.

Lesson Summary

In this lesson, you learned to:

- ❑ Rebind an existing memory chip with a new device
- ❑ Reconstitute provisioning data and orders on a new 3in1 device with a new memory chip

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Lesson 3: Disabling Devices

Objectives

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

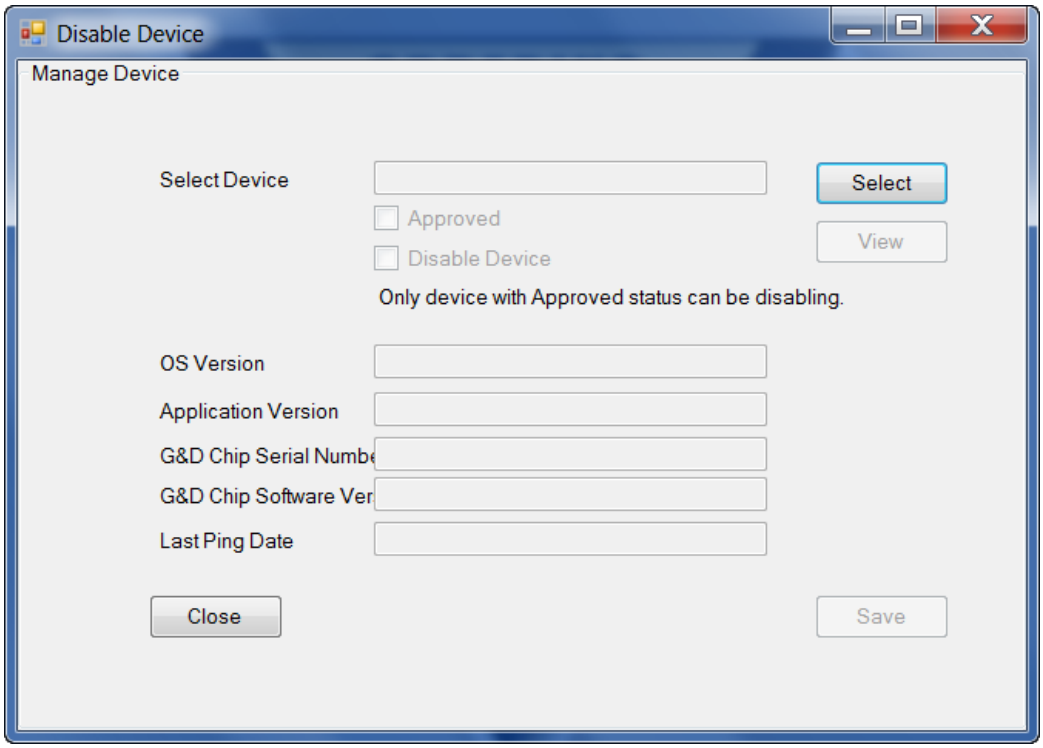
- ❑ Select an approved device and disable it
- ❑ Recognize a "bricked" device

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. This is sometimes referred to as "bricking" the device.

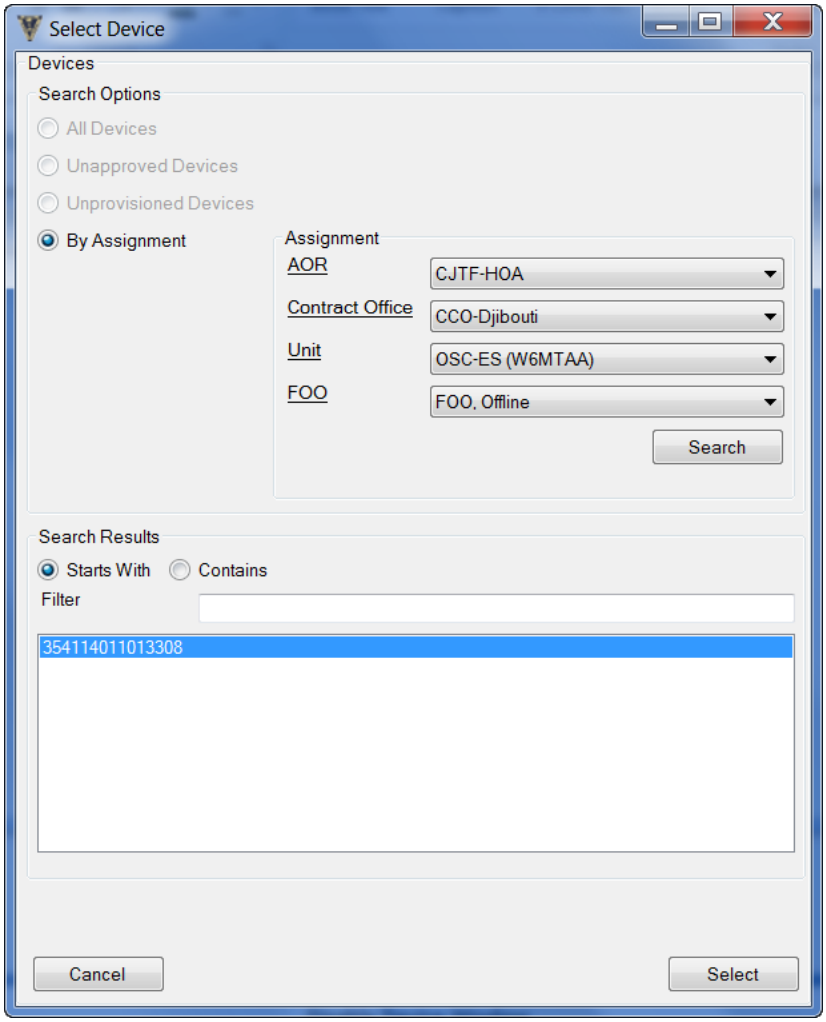
To disable a device:

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.



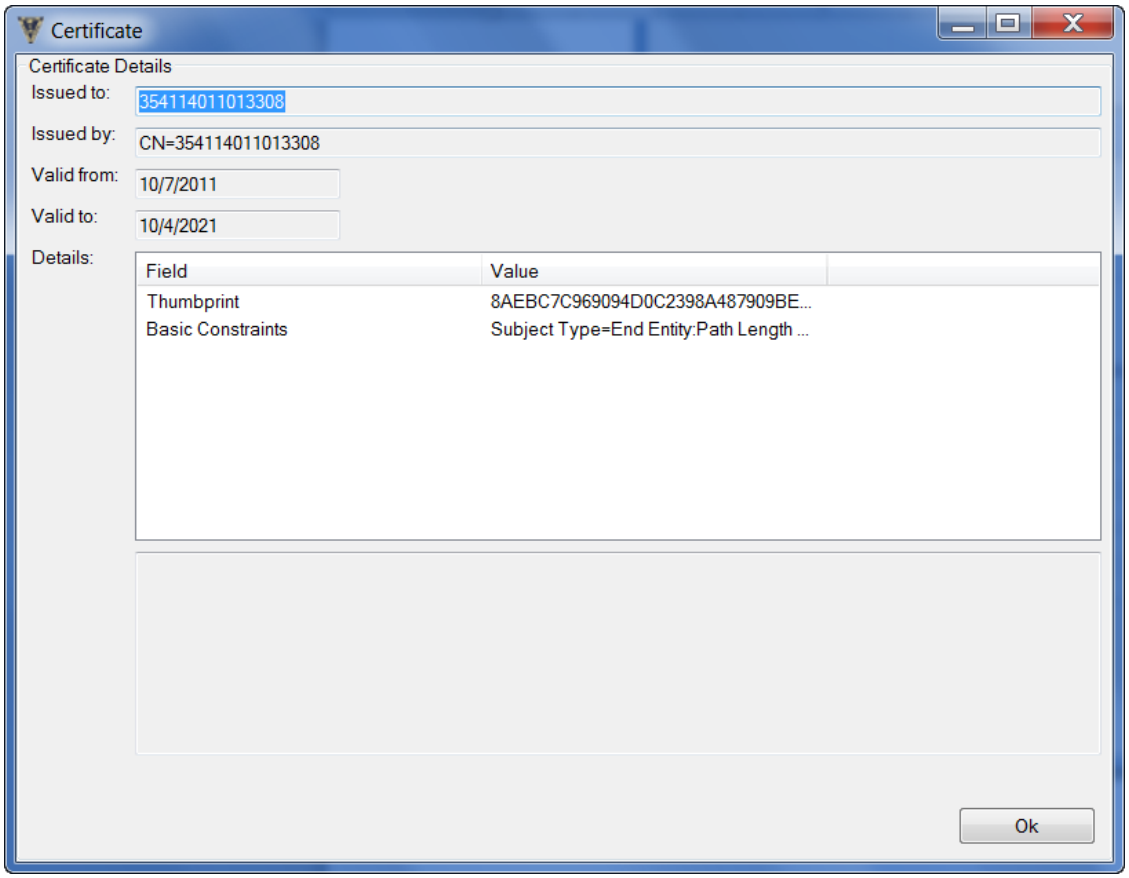
Disable Device Window

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.



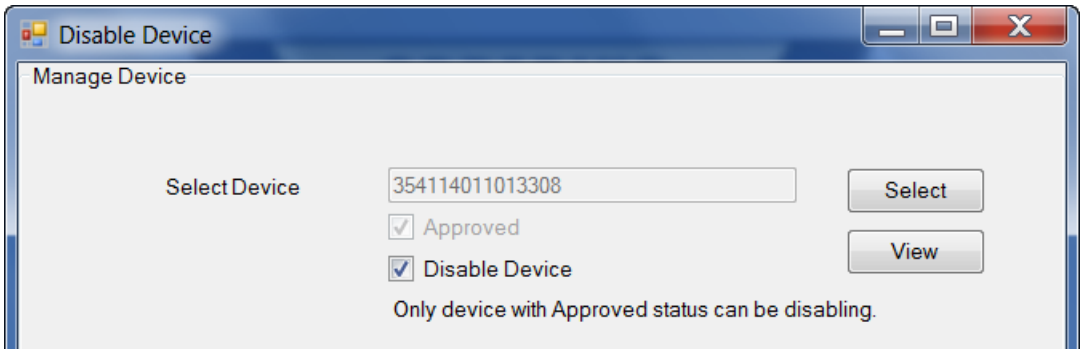
Select Device Window

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.

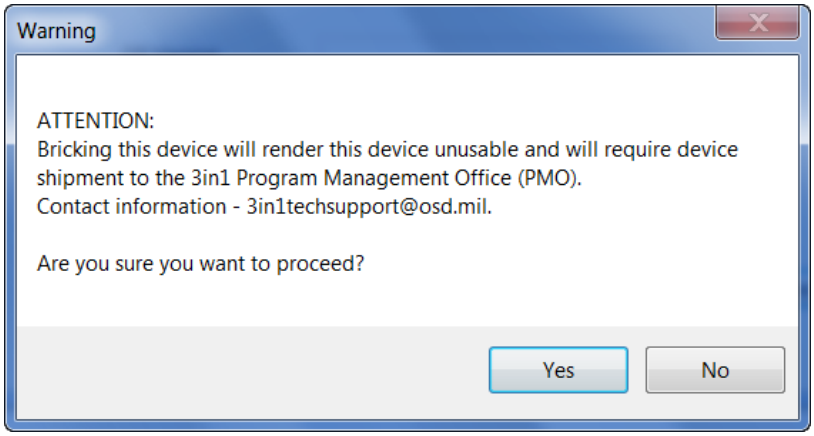


Device Certificate Window

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 ("brick") it
- ❑ Recognize a "bricked" device

Module 16: 3in1 Device Tools & Settings

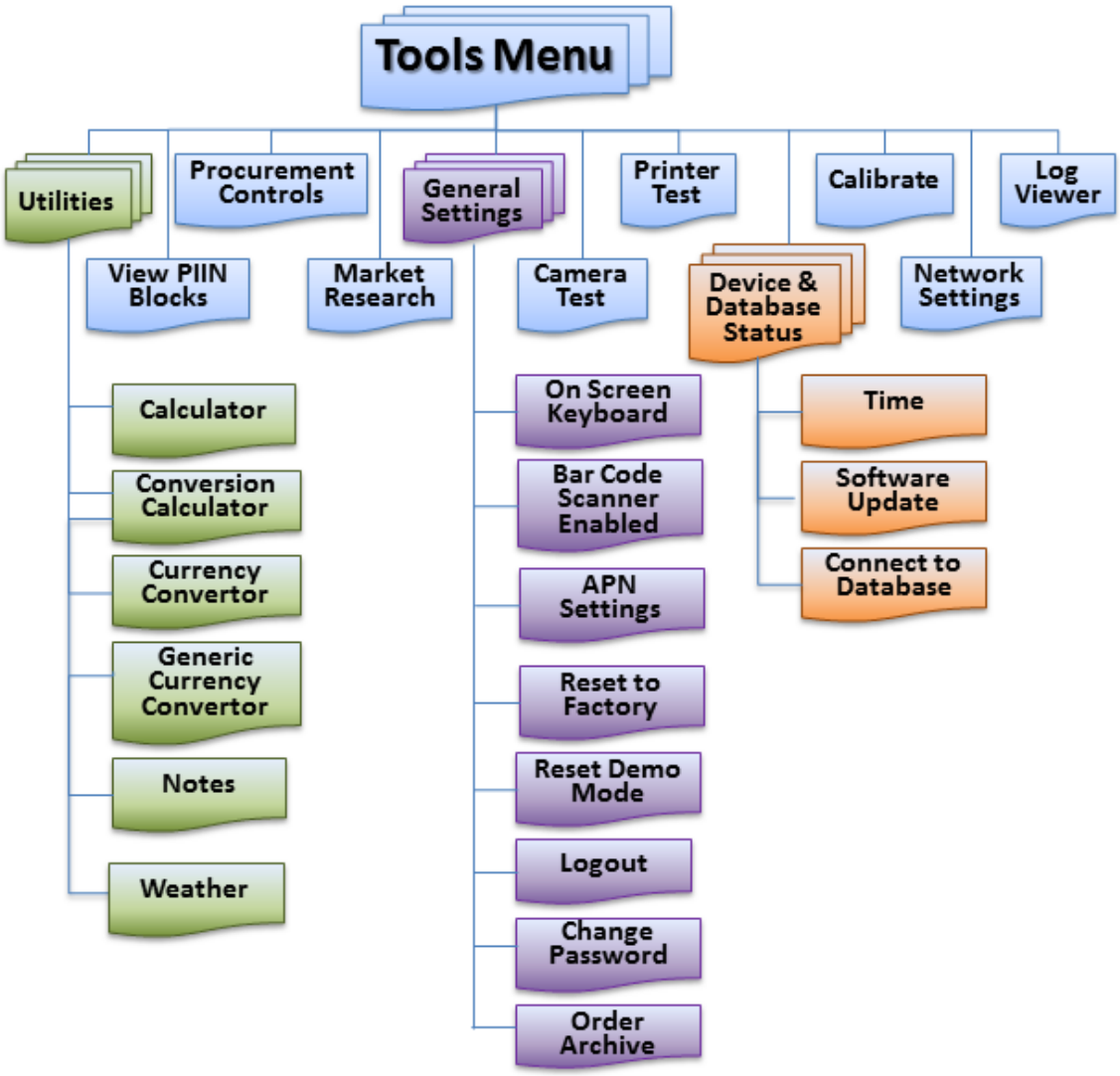
Lesson 1: Device Tools

Objectives

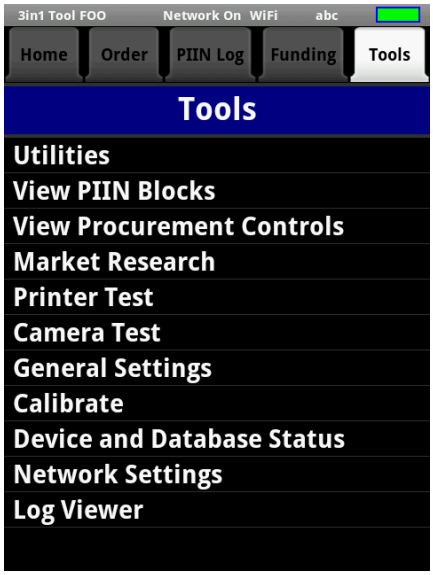
After completing this lesson, the participant will be able to:

- ❑ 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/PA team. The following figure shows the menu hierarchy of all device tools.



Select the **Tools** tab to view the list of available tools. See the *FOO/PA Reference Manual* for additional information on the available tools.



View PIIN Blocks: The PIIN Log displays the last seven digits of the PIIN number for each entry. Select View PIIN Blocks to see the entire 13-character PIIN numbers that mark the beginning and end of the PIIN block. Two types of PIINs can be generated. “M” PIINs are generated on the device, while “W” PIINs are manual orders that are executed as a backup, should the device be inoperable.

View Procurement Controls: Displays procurement controls loaded for that FOO.

Market Research: The Market Research tool is useful for price comparisons among vendors. See *Module 8: The Ordering Process*, *Lesson 1: Making a Purchase* for details.

Printer Test: Prints a test page, which is an image filled with random numbers, lines and ovals. If a printer is not connected to the device the **Print** button will be disabled on the *Printer Test* screen. 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.

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: Calibrates the touch screen

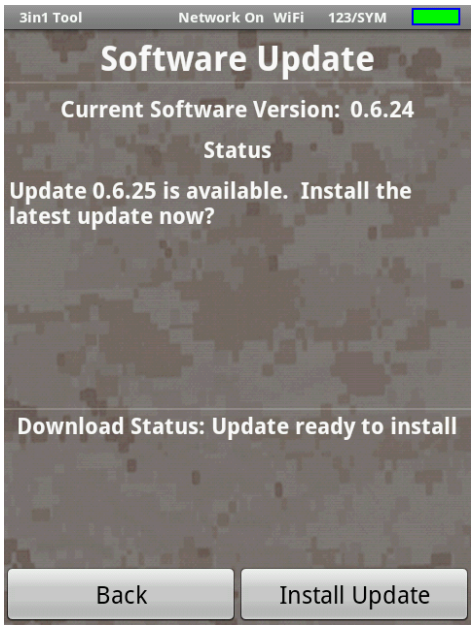
Device and Database Status: Displays key information about the device. Scroll down using the scrollbar to view additional fields.

Device and Database Status Screen - scroll down to view additional fields

- **Device**: The device ID, name, and GD chip (micro SD) ID.
- **Software**: Workstation software version, device operating system (OS) version, 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 date on the *Device and Database Status* screen. ***Note***: The date and time stamp are important data in an order. The Workstation keeps a record of each date and time change.
- **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.

Button	Function
Set Time Zone, Date, Time	Resets date, time and/or time zone on the device. Steps are explained in *Module 2: Hardware/Application Setup, Lesson 1: Registering & Approving New Devices*
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 16: 3in1 Device Tools & Settings, Lesson 4: Device Software Updates & Other Information.*
Upload to 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, displayed as part of the *Device and Database Status* screen, refers to the status of communication between the device and the 3in1 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

Access network settings from different screens on the device: the *Out of the Box* screen, the *FOO Login* screen and 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. See *Module 2: Hardware/Application Setup, Lesson 1: Getting Started with the 3in1 Device and Printer* for setup instructions.

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. Tap 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.

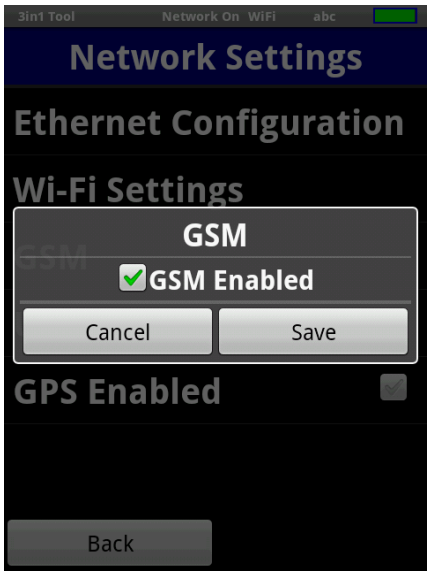
If an access control web page is in use, it may be possible for the network administrator to grant access to the device through some administrative process.

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 displays, select the **Enable** check box. GSM is possible only if it has been authorized. The Access Network Point (APN) must also be defined. See *Lesson 2: Device Settings* for details.

Note: An active GSM SIM chip must be installed in the device for GSM to be activated.



To enable GSM:

1. Tap **GSM**.
   - The **GSM Enabled** check box is displayed.
2. Select the **GSM Enabled** check box and then tap **Save**.
   - If you do not want to activate GSM, tap **Cancel**.

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 8: The Ordering Process, Lesson 1: 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.

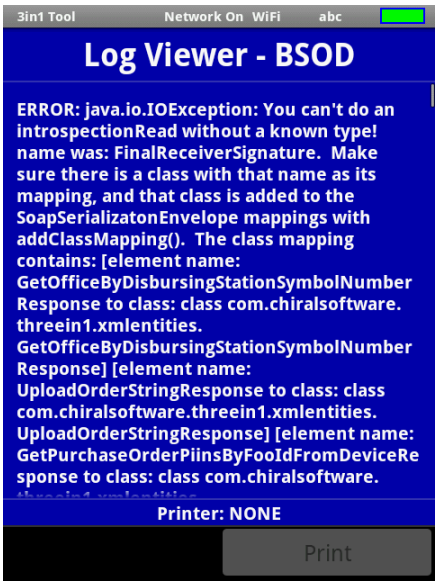
Check Connectivity

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 click on **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.



Utilities

Select **Utilities** on the *Tools* screen to access:

Calculator: Suitable for simple arithmetic calculations.

Conversion Calculator: Converts units of measurement. Conversions can be performed in the categories of length, weight, area, volume and time.

Currency Converter: Enables users to select a disbursement with a foreign currency. The converter uses the foreign currency type and exchange rate to convert the amount entered by the user, both to and from USD.

Generic Currency Convertor: Converts a specified amount from a foreign currency to USD or from USD to a foreign currency.

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.

Weather: 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.

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
- ❑ Identify device utilities

Lesson 2: Device Settings

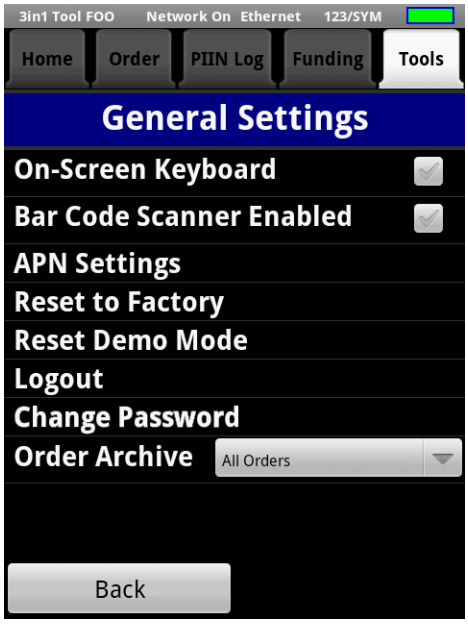
Objectives

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

- ❑ Enable/disable the on-screen keyboard
- ❑ Enable/disable the bar code scanner
- ❑ 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 General Settings Screen

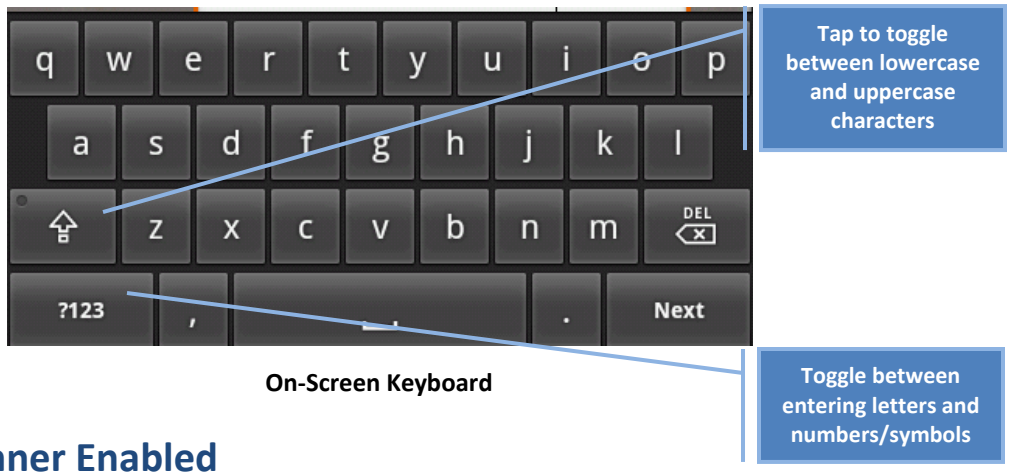
To access the *General Settings* screen, on the device, tap the **Tools** tab and then tap **General Settings**.



General Settings Screen on the Tools Tab

On-Screen Keyboard

The on-screen keyboard toggles on and off. A green checkmark indicates it is toggled on. When working with the device, the on-screen keyboard pops up when you click in a data field. Tap the F4 button to hide the keyboard if it interferes with viewing the device screen.

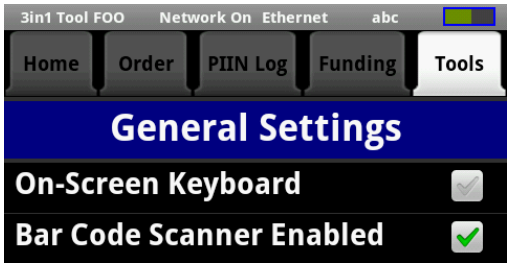


On-Screen Keyboard

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.

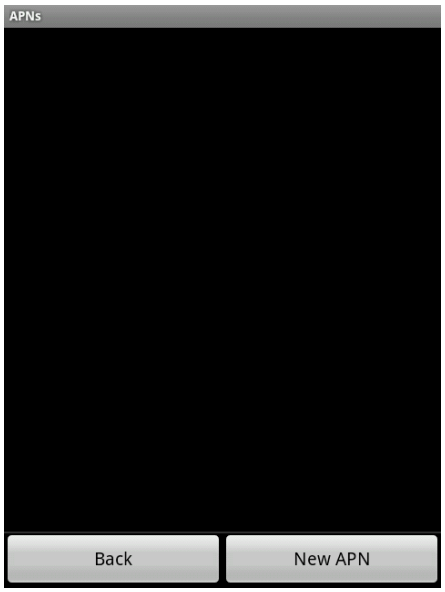


APN Settings with GSM

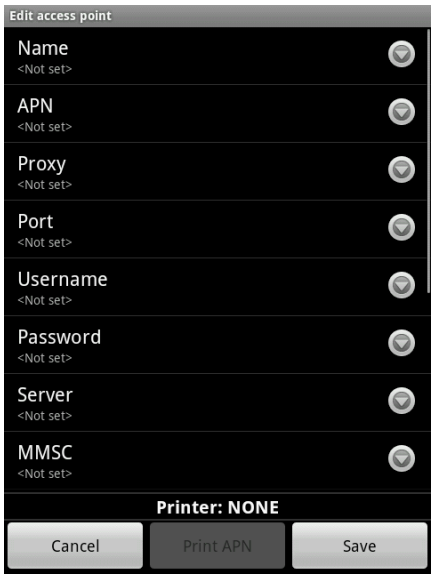
If you are using GSM and need to configure the device, it is necessary to select or set up the Access Point Name (APN) using technical information from the GSM provider. On the device *General Settings* screen shown earlier, select **APN Settings**. The *APNs* screen is displayed.

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.

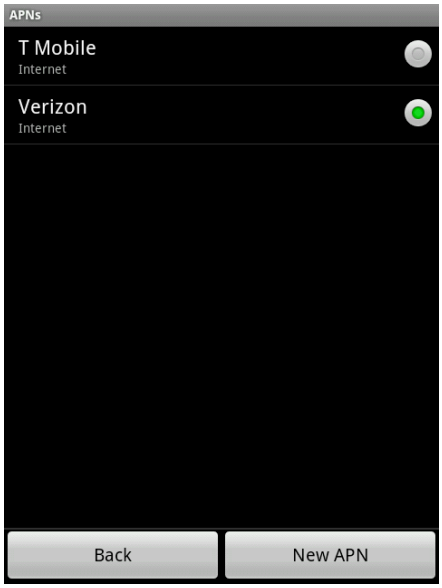


Select the New APN button



Make selections to define the APN and then tap Save

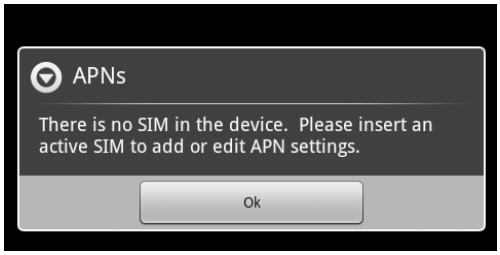
If APNs are already defined, the list is displayed on the *APNs* screen, as shown below. To select an APN, simply tap the button beside it. A green dot identifies the selected APN. Tap the **Back** button to save your selection and exit the *APNs* screen.



Selected APN is marked with a 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 warning message that notifies the user to install a SIM card.



Message displayed when no SIM card is detected 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 16: 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:

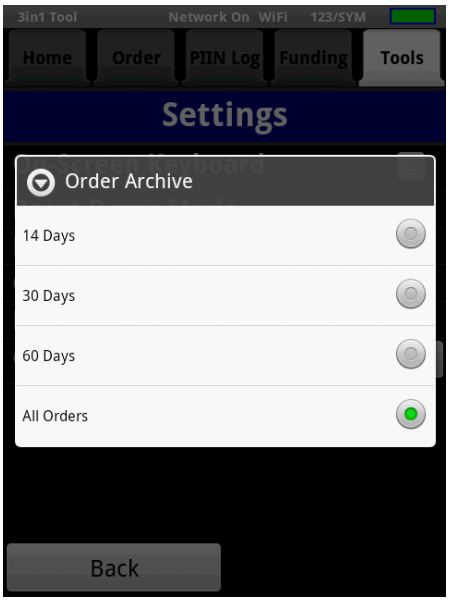
1. On the **Tools** tab, tap **General Settings**.
2. Tap **Change Password**.
   - The *Change Password* pop up is displayed.
3. Enter the current password in the *Current* dialog box.
4. Enter the new password in the *New* dialog box.
5. Re-enter the new password in the *Confirm* dialog box.

See *Module 5: Managing 3in1 Workstation Users, Lesson 1: Registering New Users* for password creation guidelines.

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 16: 3in1 Device Tools & Settings, Lesson 3: Using the Device Demo Mode.*

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, tap **General Settings**.
2. 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?

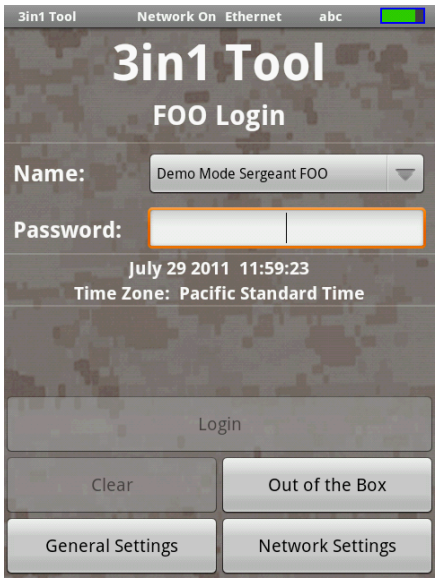
The device has a mode called Demo Mode, which allows a user to experience placing orders, shopping, and all other aspects of using the software, without needing real provisioning data and without uploading any data to the servers.

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 **Demo Mode**.

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**.



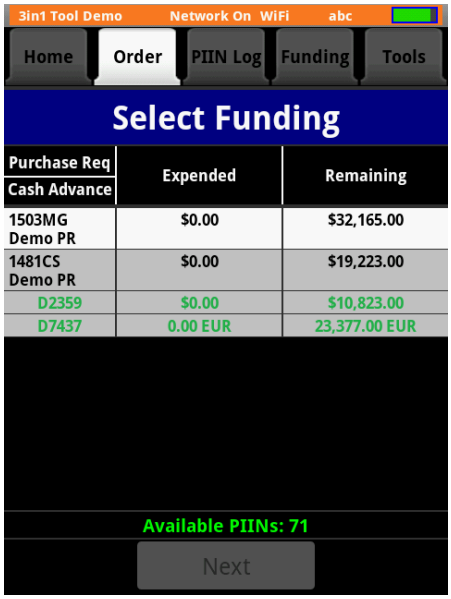
In this case, the Demo Mode FOO's name is Jose Robertson. Note that certain details, such as the Demo Mode FOO name, certain pre-created merchants, PRs, and cash advances, are automatically generated when you enter Demo Mode.

The Demo Mode password is 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.

The figure on the right shows the Demo Mode *Select Funding* screen. It differs from the regular *Select Funding* screen by having an orange Status Bar that is labeled "3in1 Tool Demo". This indicates to the user that the data are not real data and are not uploaded.

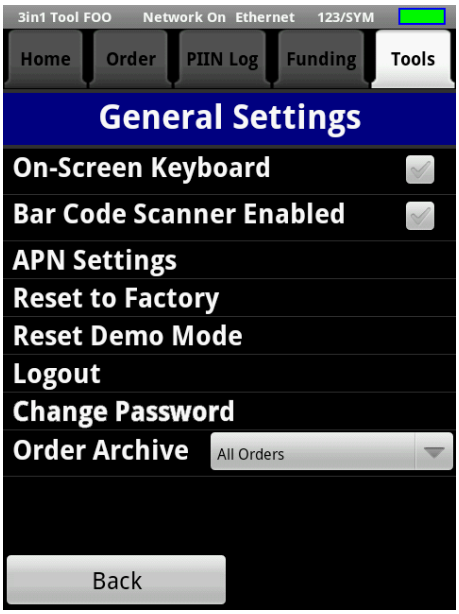
Device features, such as the printer, work in Demo Mode as they do in operational mode. Demo Mode is a good way to become familiar with these features.

Demo Mode never connects to the 3in1 database, so any orders you place within Demo Mode will not be uploaded.

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:

- ❑ 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

Lesson 4: Device Software Updates & Other Information

Objectives

After completing this lesson, the participant will be able 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

3in1 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 enabled devices, this can be any time that GSM connectivity is available. For Wi-Fi enabled devices, this can be any time the device is within the range of the Wi-Fi base station. For Ethernet and USB connected devices, this can be any time the device is plugged in.

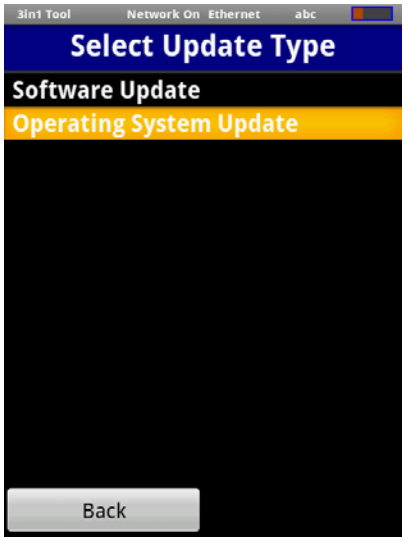
The device checks with the 3in1 server to detect when an update is available. Checking for updates takes place behind the scenes and is not triggered by the user. When an update is available, it is downloaded and stored automatically, without any user interaction.

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, click 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)

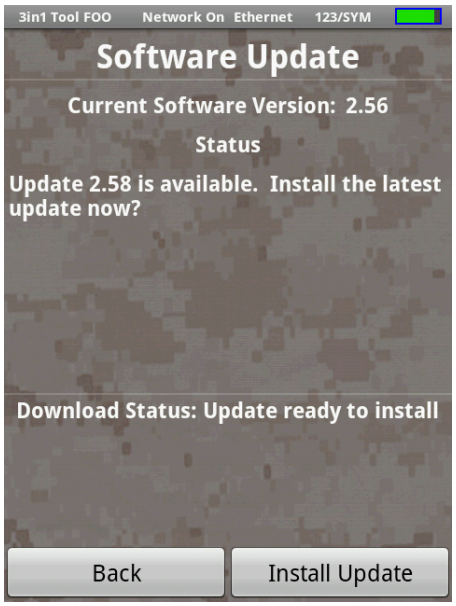
3. If both 3in1 and operating system updates are available, the following screen is displayed. Make a selection.



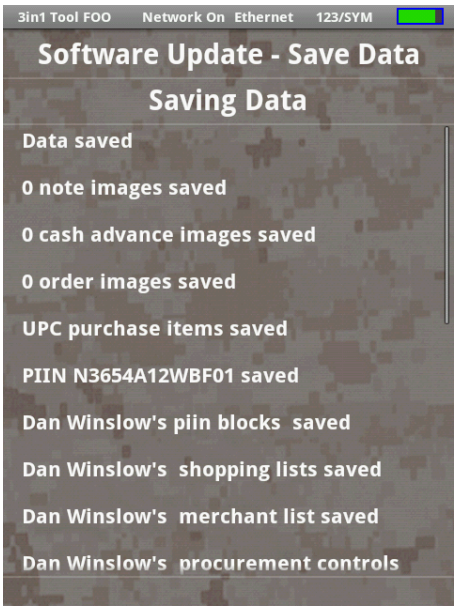
4. A progress bar indicates when the software download to the device is complete. Tap **Install Update**.
   – The software update is then executed.

Notes on Updating the 3in1 Software

When updating the 3in1 software, the device will save all user data before it updates the 3in1 software.

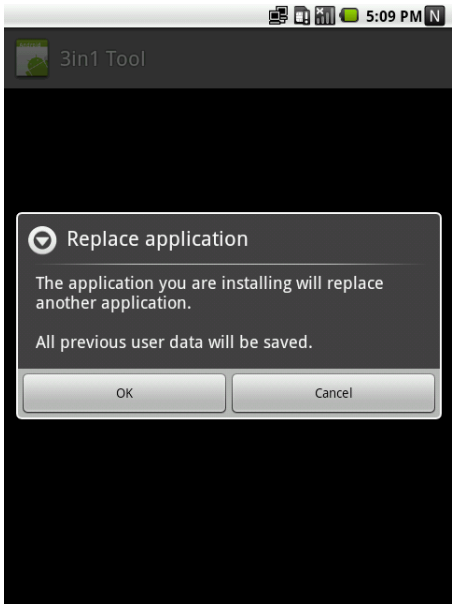


Software Update screen when a new 3in1 version is available

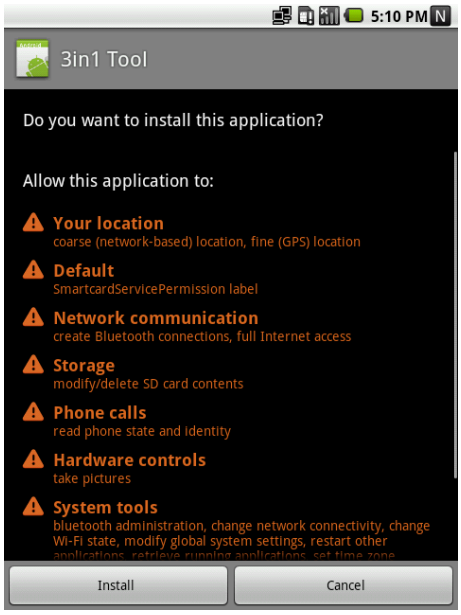


User data is saved prior to the sofware update

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.



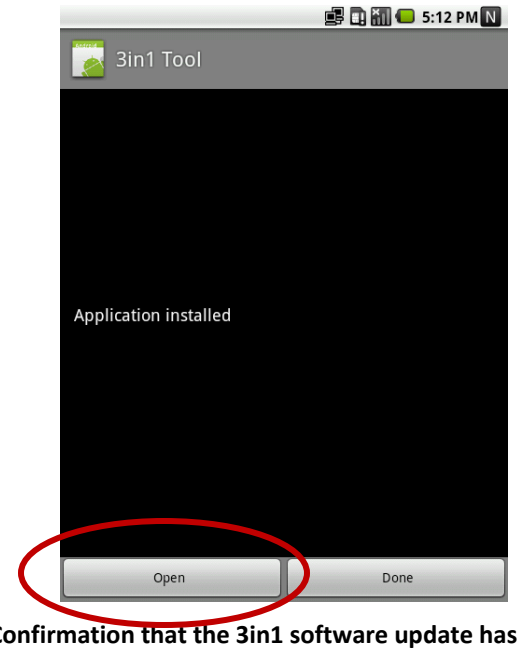
Select the New APN button



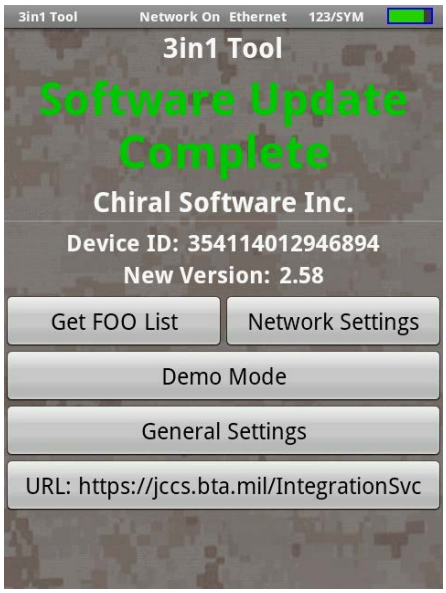
Make selections to define the APN and then tap Save

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.

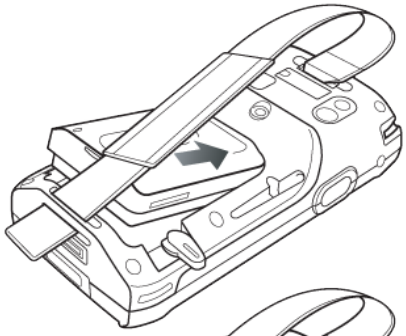
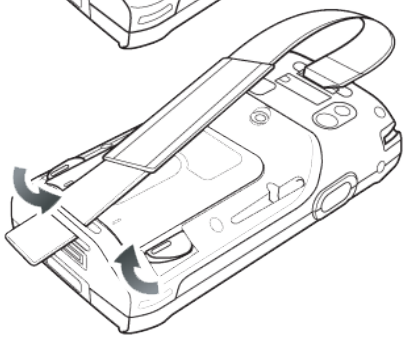


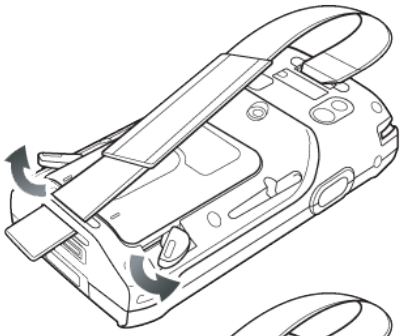
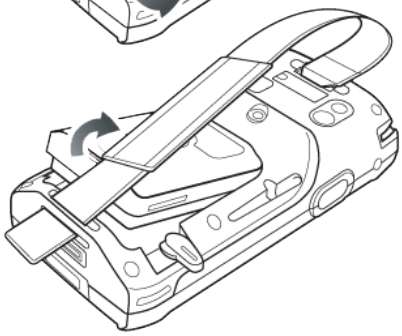
On this screen, tap Get FOO List

Notes:

1. It is important to select 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, clicking 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.

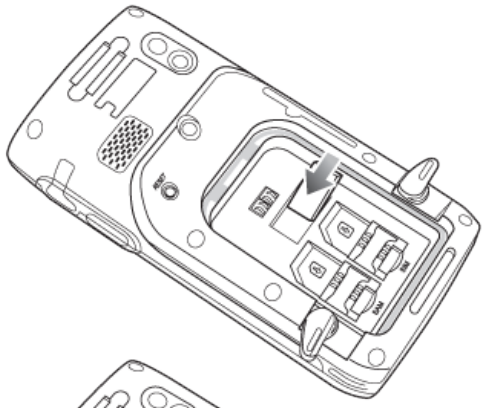
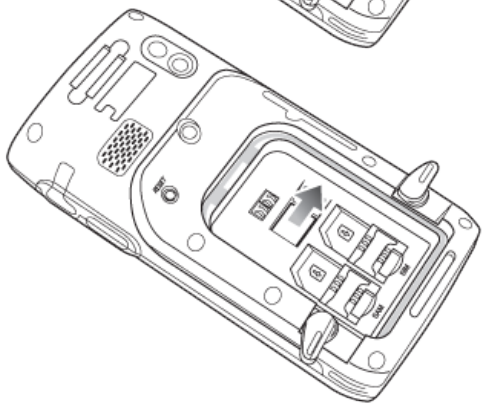
Mounting/Dismounting the Battery

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

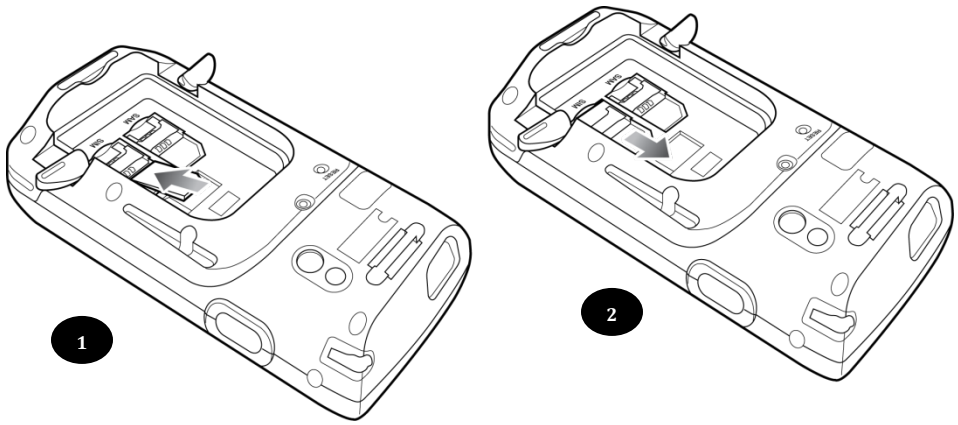
Precautions:

- 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.

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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Module 17: Document Administration

Lesson 1: Replacing and Deleting Document Attachments

Objectives

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

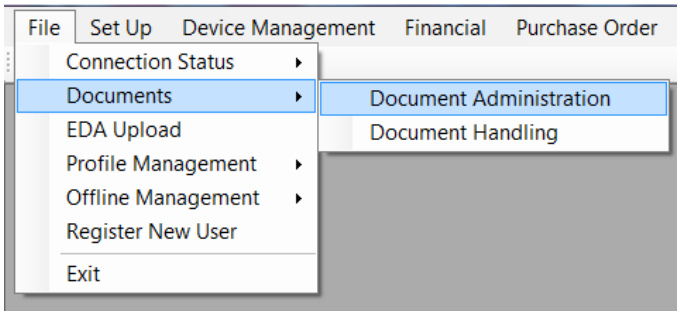
- ❑ Locate and replace document attachments using the Document Administration feature
- ❑ Delete document attachments

What is Document Administration?

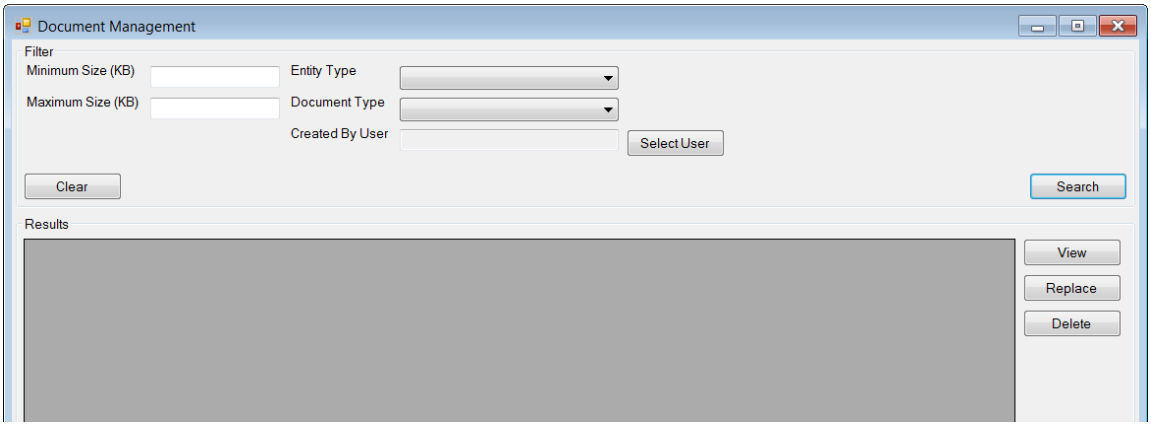
System administrators can easily locate and replace document attachments using the **File**, **Documents**, Document Administration feature. For example, replace a large PDF file with a smaller version in JPEG format. It is also possible to delete a document without replacing it.

To access the Document Administration feature:

– Select **File**, **Documents**, **Document Administration.** Note that only System Administrators may access this feature.



– The *Docment Management* window is displayed.

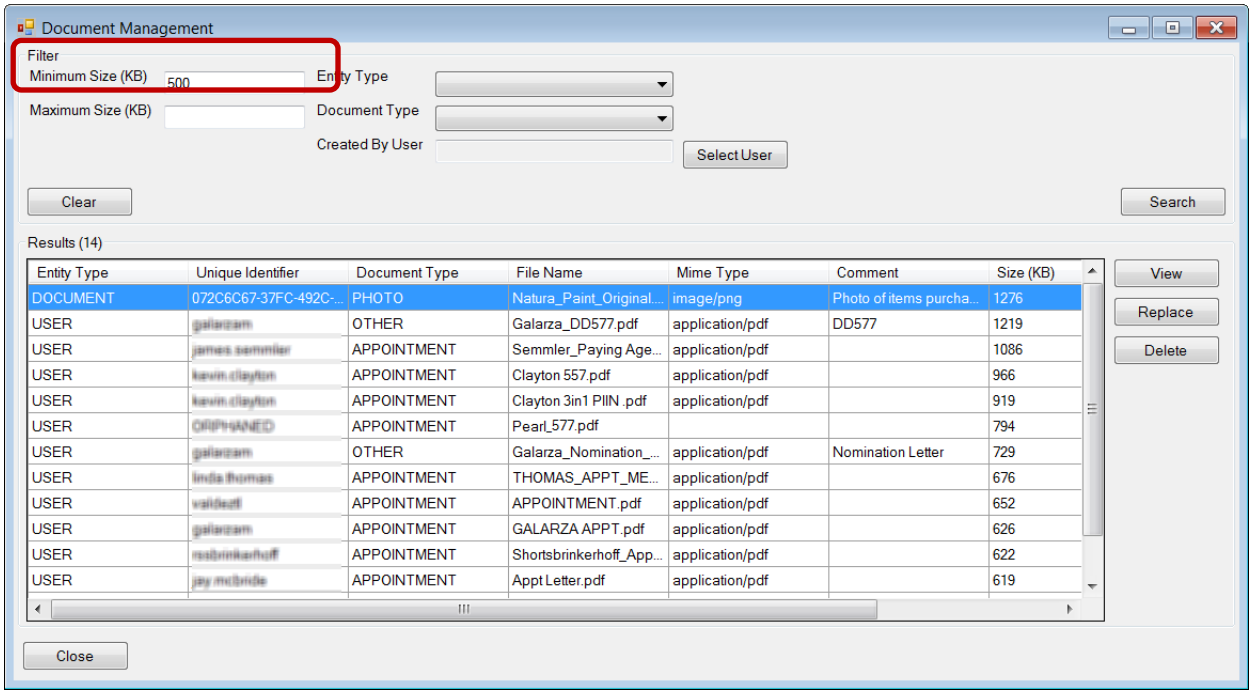


Searching for Documents

On the *Document Management* window, use a combination of search fields to locate documents.

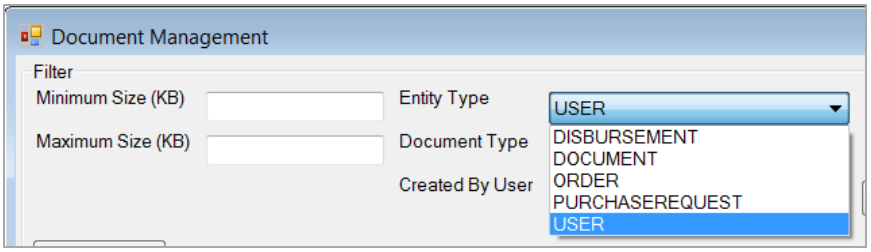
For example, to search for all documents that exceed a certain size, fill in only the **Minimum Size** field and then click the **Search** button.

Search results are displayed in the Results table.

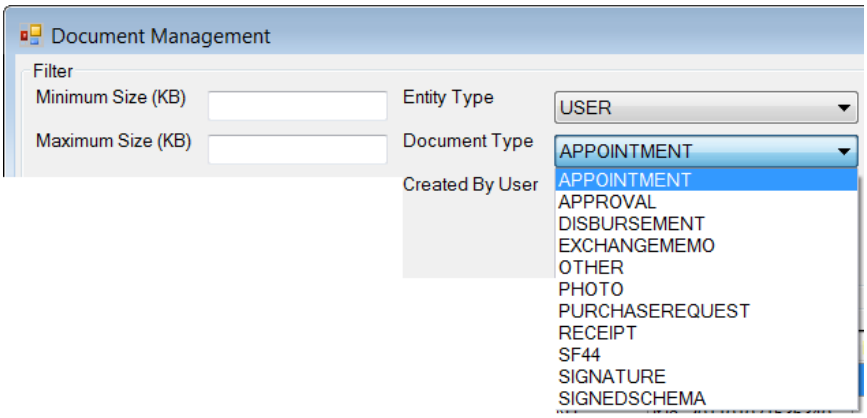


All documents that exceed 500KB are displayed in the Results table. Click the Size column heading to sort the results by file size

Optionally use the **Entity Type** and **Document Type** search fields by selecting from the drop-down list in each field.

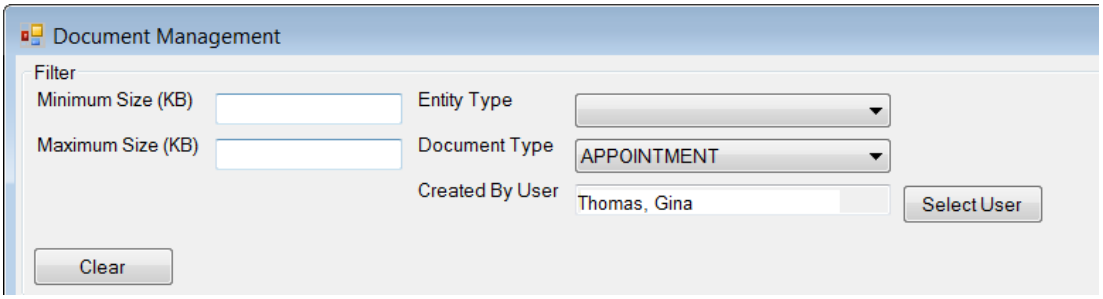


Entity Type Drop-Down List



Document Type Drop-Down List

Keep in mind the results must meet all specified criteria. For example, a restrictive search looks for a specific type of document (APPOINTMENT) created by a specific user.

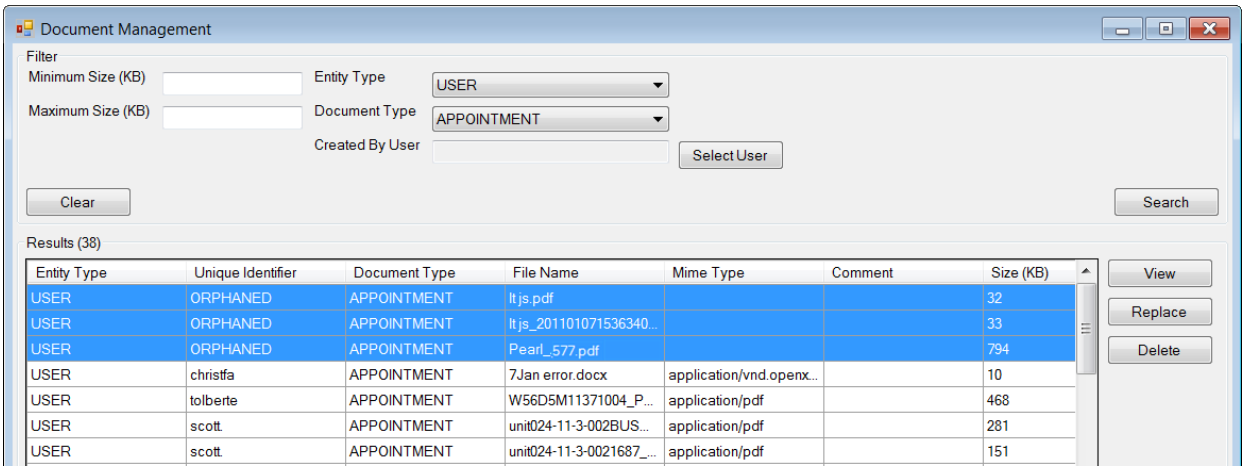


The Results table will display only Appointment documents created by Gina Thomas

To clear all search criteria fields and start over, click the **Clear** button.

Deleting Documents

Once the search results are displayed, you may delete documents by selecting them and clicking the **Delete** button. Consider sorting the documents first, to group similar ones before deleting. Click a column heading to sort.



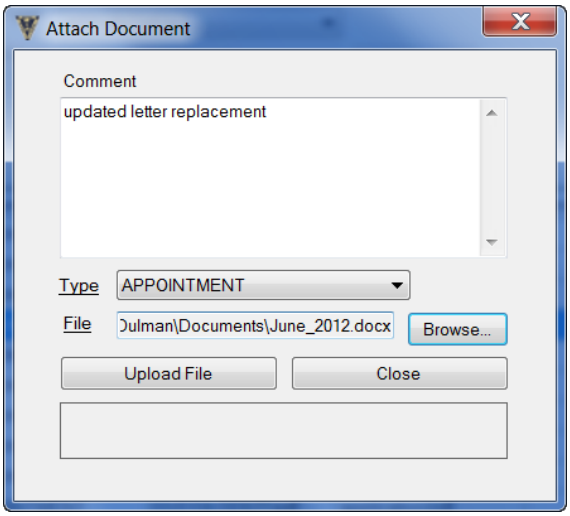
To select multiple documents at once, press the Shift key and click multiple documents

To view the content of a document in a separate window, select the document in the table and then click the **View** button.

Replacing Documents

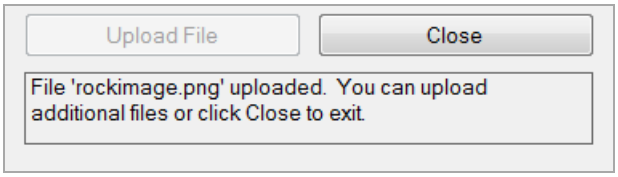
To replace a document:

1. In the Results table, select the document to be replaced.
2. Click the **Replace** button.
3. In the *Attach Document* dialog box, click the **Browse** button to locate and select the replacement file.
4. Optionally enter text in the **Comment** field.
5. Click the **Upload File** button to perform the replacement.



Click the Upload File button to upload the selected file

A confirmation message is displayed after a successful upload.



This message indicates a successful file upload/replacement

Lesson Summary

In this lesson, you learned to:

- ❑ Locate and replace document attachments using the Document Administration feature
- ❑ Delete document attachments

Appendix A: Contracting Officer Tasks Checklists

Contracting 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.

Setup Actions

	Set Up AOR	Page	
1	AOR Admin: Create the AOR if it is not already established	104	
2	AOR Admin: Determine office structure within the AOR and create required offices (i.e. Contracting, Finance, Property Book, Review offices for clearance) (*Note: The unit and FM office will be printed on the SF44. Also include the DSSN at the end of the office name for the Finance office.*)	106	
3	Enter Units to be assigned to the AOR (by UIC and Name). This may be done later when the users register; however, units must be assigned to offices in order to view orders.	108	
4	Associate units to be serviced by Contracting office (AOR Admin can do the same for all other offices)	108	
5	Determine clearance process and set up groups as needed within the offices for multilevel clearance review	110	
6	Set up Default Clearance process for AOR of Individual, Office, or Group and their order of clearance	125	
7	Set up procurement controls for the AOR and enter them for each Contracting Office	117	
8	Configure all Procurement Control item and limit policies within each office	119	

Register Device

	Register Device (New from factory or when changing production versus training)	Page	
1	Device must be connected to the network	49	
2	Set date, time, & time zone on the 3in1 device	50	
3	Connect to network and confirm connection	56	
4	Register the 3in1 device	61	
5	[Workstation] Approve the 3in1 device from the Device Management section	61	

Initiate Teams

	New User/Team	Page	
1	From Manage User Roles screen, approve new users for the role/roles they will perform (Note: System Admin must approve KO, DA, PBO, Reviewer, and RM) (Note: If the FOO is going to be part of their clearing process, also add a "Review" role, assigned to the AOR named office, so they can also view orders in the Clearance screen)	81	
2	If the user's unit is new, add the unit to the list of units serviced, to all offices within the AOR as appropriate. (Note: The AOR Admin access is required to add the units to other offices.)	94	
3	Update appointment/redeployment dates, as required, in the user's profile, and upload appointment letters. (Note: This can also be done later using the "Document Handling" feature.)	95	
4a	If the new person is a FOO, proceed to the **Provision New FOO** checklist.		
4b	If the new person is a Paying Agent being added to an existing provisioned FOO team, add the PA to the FOO's provision information and have the FOO sync the device to obtain the updated PA and associated financial information.	133	
4c	If the new person is a reviewer or clearance approval authority, add them to the appropriate office/group, to allow them to accomplish clearance actions. If they are clearance individuals who should not be assigned to an office, add them to the appropriate FOO clearance provision configuration.	110, 133	

	Provision New FOO	Page	
1	Ensure the FOO has been approved for that role in the 3in1 system. (see **New User** checklist) (Note: If the FOO is going to be part of the clearing process, also add a Reviewer role assigned to the AOR-named office, so the FOO can view orders on the Clearance screen)	81	
2	Ensure the 3in1 device has been registered, if it is a new device from the factory. Note: See **Register Device** checklist.	61	
3	Workstation: Assign the device to the FOO in the 3in1 system using the "Provision Device" screen.	133	
	a. Assign PIIN Blocks (2 sets of PIINs required) "M" PIINs for the device and "W" PIINs for back up manual paper SF44 use, if the device becomes inoperable.	139	
	b. Assign Paying Agent to FOO Team and device.	140	
	c. [Optional] Add Purchase Requests, if not accomplished by the RM or DA.	141	

	Provision New FOO	Page	✓
	d. Select Procurement Controls for the FOO/PA team (create if necessary).	145	
	e. Set up Clearance Configuration for FOO/PA Team. (Note: The FOO may be the first person in the clearance flow to queue orders until they are reviewed and ready to begin clearance.)	147	
	f. [Optional] Authorize appropriate Radio Settings (Enable GSM or Wi-Fi if approved).	148	
4	With device connected, tap Get FOO List button to download FOOs assigned to device. (Note: If "FOO List" button is not displayed, then go to network settings and do a manual upload/download.)	153	
5	Verify FOO and PA are listed in the drop-down menu.	155	
6	Issue the device to the FOO. With the device connected, the FOO must enter a password and tap the Provision button to complete the process and download provisioning data to the device.	155	
7	Provide configuration details to the FOO (available as a provisioning report): - Provide "W" PIINs block to the FOO and paper SF44s for emergency use. - Provide the FOO with the procurement control restrictions and clearance configuration. - Have the FOO sign a hand receipt for the 3in1 Kit as required.	290	

Completions Action

	Clearance Checklist	Page	✓
1	After receiving an email notification of orders awaiting clearance/review, go to the Clearance screen to review and approve/disapprove/flag orders.	227	
2	Review all orders to ensure all required information is provided and either approve or flag the order for further action needed by the FOO. *(Note: The FOO/PA appointment letters can be seen under Document Handling Menu and their appointment/redeployment dates can be seen under Profile Management, User Profile)*	228	
3	As required, download all FOO/PA SF44s for separate electronic file storage, by selecting Mass Download SF44s from the Reports/Extracts menu and selecting FOO and orders by date range or PR number.	299	

	De-Provision FOO/PA From Device	Page	
1	Ensure the FOO/PA is no longer needed on the device. Ensure all orders have cleared the system before proceeding.	227	
2	Workstation: Remove FOO/PA from the 3in1 device.	237	
	a. Select Device Management, Provision Device		
	b. Find the current device that the FOO/PA are assigned to.		
	c. Select Paying Agents tab. (You must remove the PA first, before removing any FOO, unless you have multiple FOOs assigned to the same device that the PA is associated with.)		
	d. Remove the PA that you no longer need provisioned.		
	e. Select the FOO that you want removed from the Provisions list box. (FOO must be the last user assigned to a device before removing all provisioning.)		
3	Once the FOO/PA have been removed using the Workstation, you must sync the handheld at least three times to remove all provisioning.	238	
4	If the FOO is terminating his/her role, remove the individual's access by unapproving the role using the Workstation Manage User Roles feature.	239	

Appendix B: Data Worksheets

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Add AORs and Offices Worksheet

The following information is used to define Areas of Responsibility (AORs) and/or offices in the 3in1 Tool Workstation. Complete the worksheet before logging in to the 3in1 Tool Workstation, to ensure you have all the necessary information. Required fields are marked by an asterisk (*)

AOR

AOR Name *	
Address 1	
Address 2	
Address 3	
Country	
City	
State/Province	
Zip/Postal Code	

Contracting Office

Office Name *	
Address 1	
Address 2	
Address 3	
Country	
City	
State/Province	
Zip/Postal Code	
DODAAC *	
Units Serviced *	

Finance Office

Office Name *	
Address 1	
Address 2	
Address 3	
Country	
City	
State/Province	
Zip/Postal Code	
DSSN *	
Units Serviced *	

Property Book Office

Office Name *	
Address 1	
Address 2	
Address 3	
Country	
City	
State/Province	
Zip/Postal Code	
Units Serviced *	

Default Procurement Control Policy Worksheet

The following information is used to define default procurement control policies in the 3in1 Tool Workstation. Complete the worksheet before logging in to the 3in1 Tool Workstation, to ensure you have all the necessary information.

AOR

AOR Name	
Contracting Office Name	

Procurement Policy

Type: Item or Limit	
Policy Title	
Policy Date	
Action: Warning or Prevent Purchase	
Policy Message (to display)	

Item Policy Details (add more items if necessary)

Item Name1	
Item Name2	
Item Name3	
Item Name4	

Limit Policy Details

Limit Type: Line Item or Purchase Total	
Price Limit (amount)	
Limit Reason	
Action: Warning or Prevent Purchase	
Limit Message (to display)	

Default Clearance Administration Worksheet

The following information is used to define default clearance administration for an AOR Contracting Office in the 3in1 Tool Workstation. Complete the worksheet before logging in to the 3in1 Tool Workstation, to ensure you have all the necessary information.

AOR

AOR Name	
Contracting Office Name	

Clearance Administration

Specify the order in which clearing entities review and clear purchase orders. The number 1 represents the first entity who reviews the POs. The clearing entity can be an individual user or a role in a specific AOR office.

Order	Clearance Type (Individual or Office/Role)	Clearing/Reviewing Entity (Individual name or Role and AOR Office name)
1		
2		
3		
4		
5		
6		

Provision Device Worksheet

The following information is used to provision 3in1 handheld devices to Field Ordering Officers (FOO) in the 3in1 Tool Workstation. Complete the worksheet before logging in to the 3in1 Tool Workstation, to ensure you have all the necessary information.

AOR /Device

AOR Name	
Contracting Office Name	
Device Serial Number	

FOO Information

FOO Name	
Contract Office	
Allow Expedient Purchases?	

PIIN Blocks

Fiscal Year	
Number of PIINs Issued	
PIIN Start (optional)	
PIIN End (optional)	
Issue Order (optional)	

Assigned Paying Agent

Agent Name	

Add Purchase Request Worksheet

The following information is used to manually add a purchase request using the 3in1 Tool Workstation. Complete the worksheet before logging in to the 3in1 Tool Workstation, to ensure you have all the necessary information.

Purchase Request

Assigned to (FOO or Paying Agent name)	
Purchase Request Number	
Description	
Finance Type (Cash or Cashless)	
Amount	
Currency	

Line of Accounting

Dept. Code	
Fiscal Year	
Basic Symbol	
Limit	
Operating Agency	
Allotment Serial	
Program Element	
EOR	
DPICd	
APCCd	
Standard Document	
Fiscal Station	

Cash Advancement Worksheet

The following information is used to issue cash advancements for purchase requests in the 3in1 Tool Workstation. Complete the worksheet before logging in to the 3in1 Tool Workstation, to ensure you have all the necessary information.

Cash Advancement Information

For First Cash Advancement Only

DDS Agent ID	
Purchase Request Number	
Currency Code	
Currency	
Exchange Rate	
Amount	
Sequence Number	
Advanceable Amount	

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?	

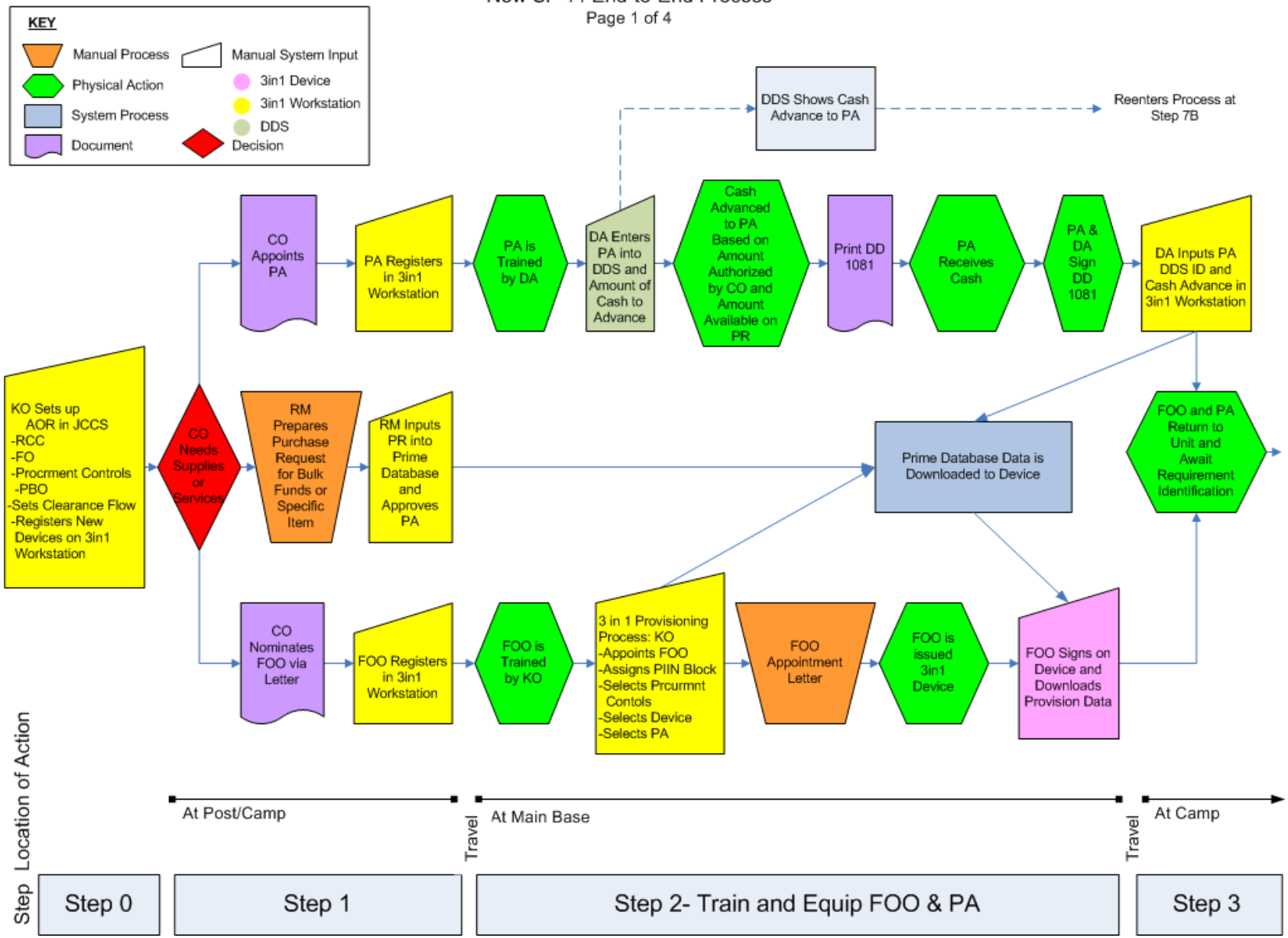
Item Information

Item Description	
Unit Price	
Quantity	
Unit	
Property Book item?	

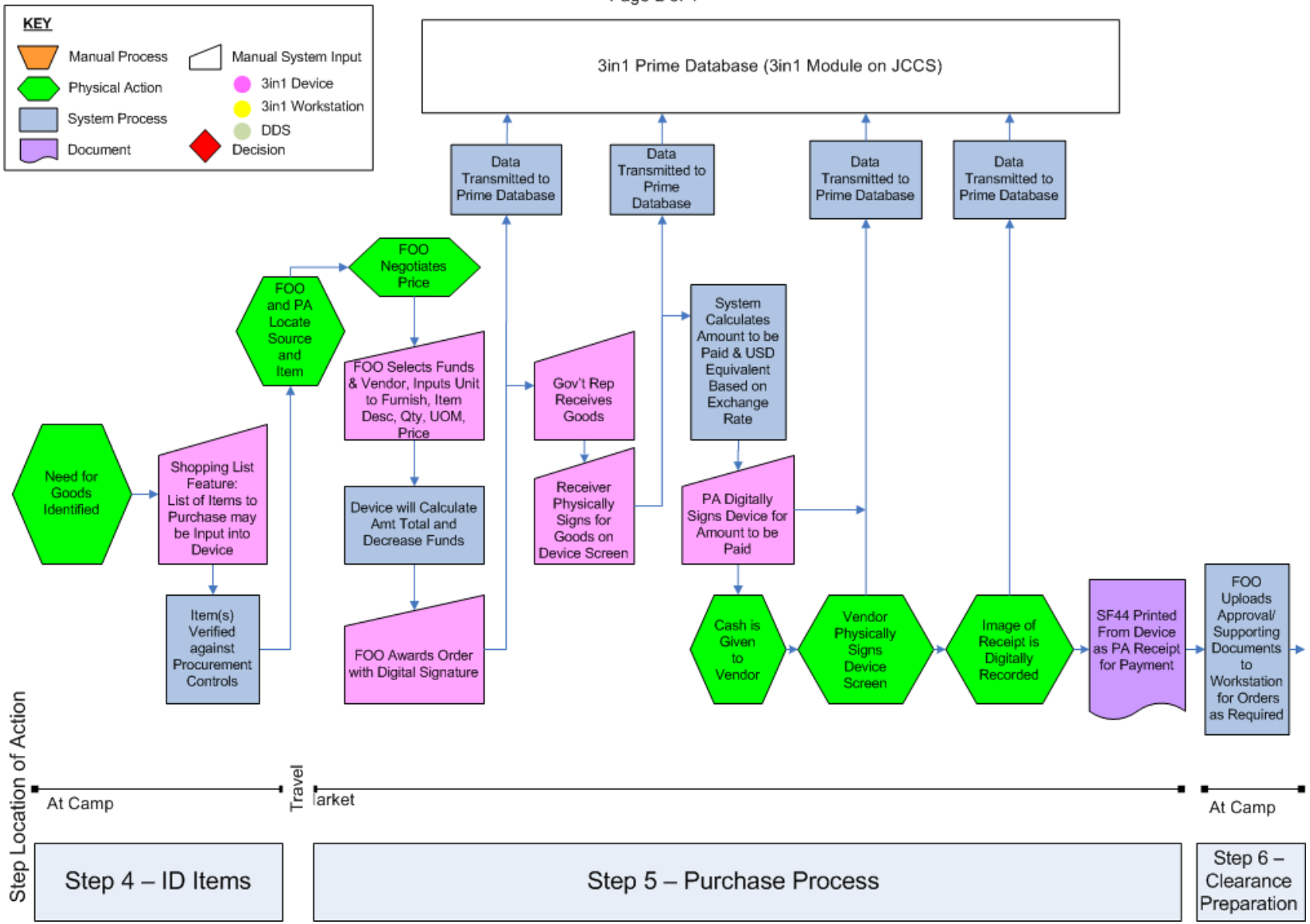
Appendix C: End-to-End Process Diagrams

New SF 44 End-to-End Process

Page 1 of 4

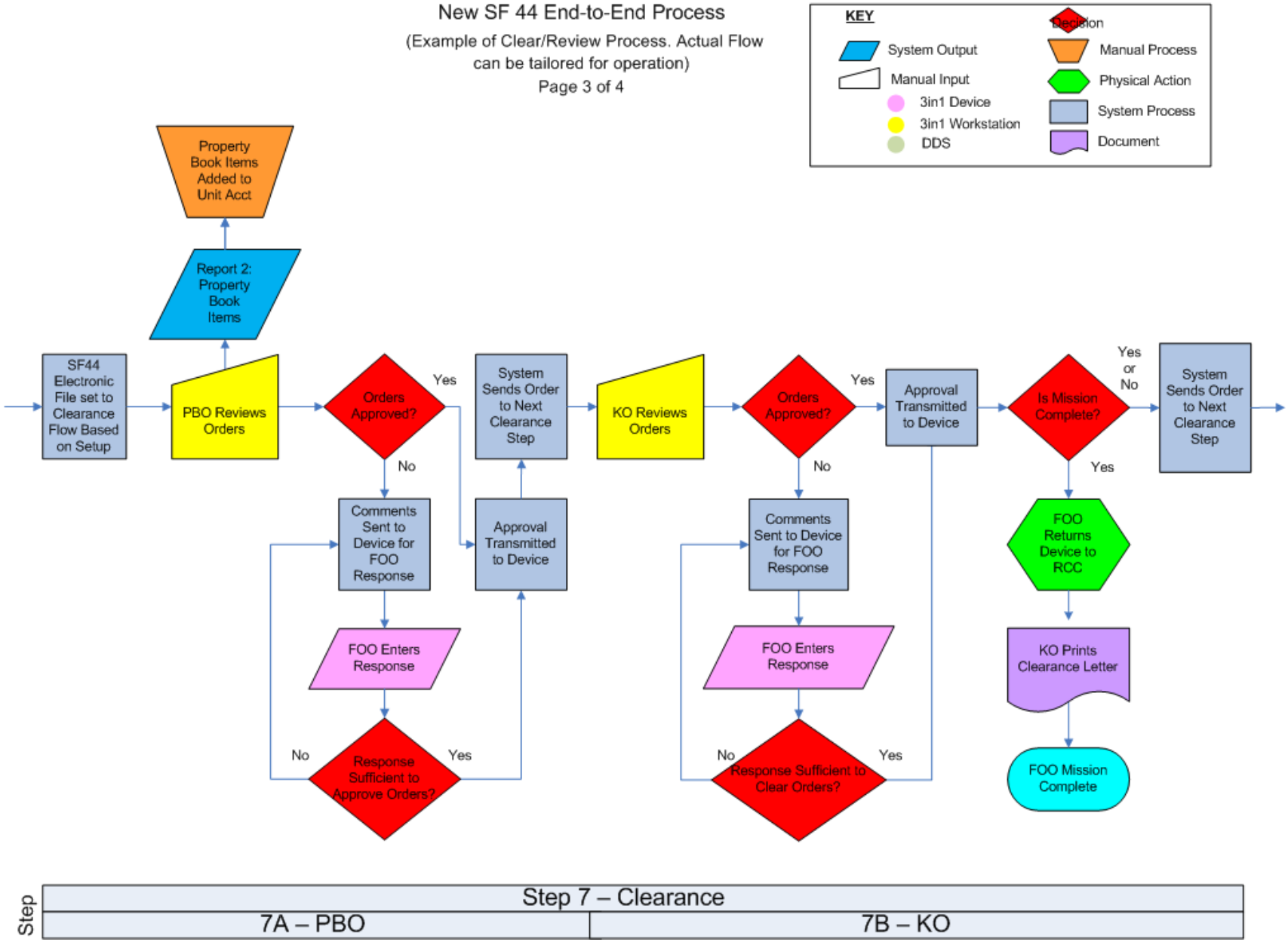


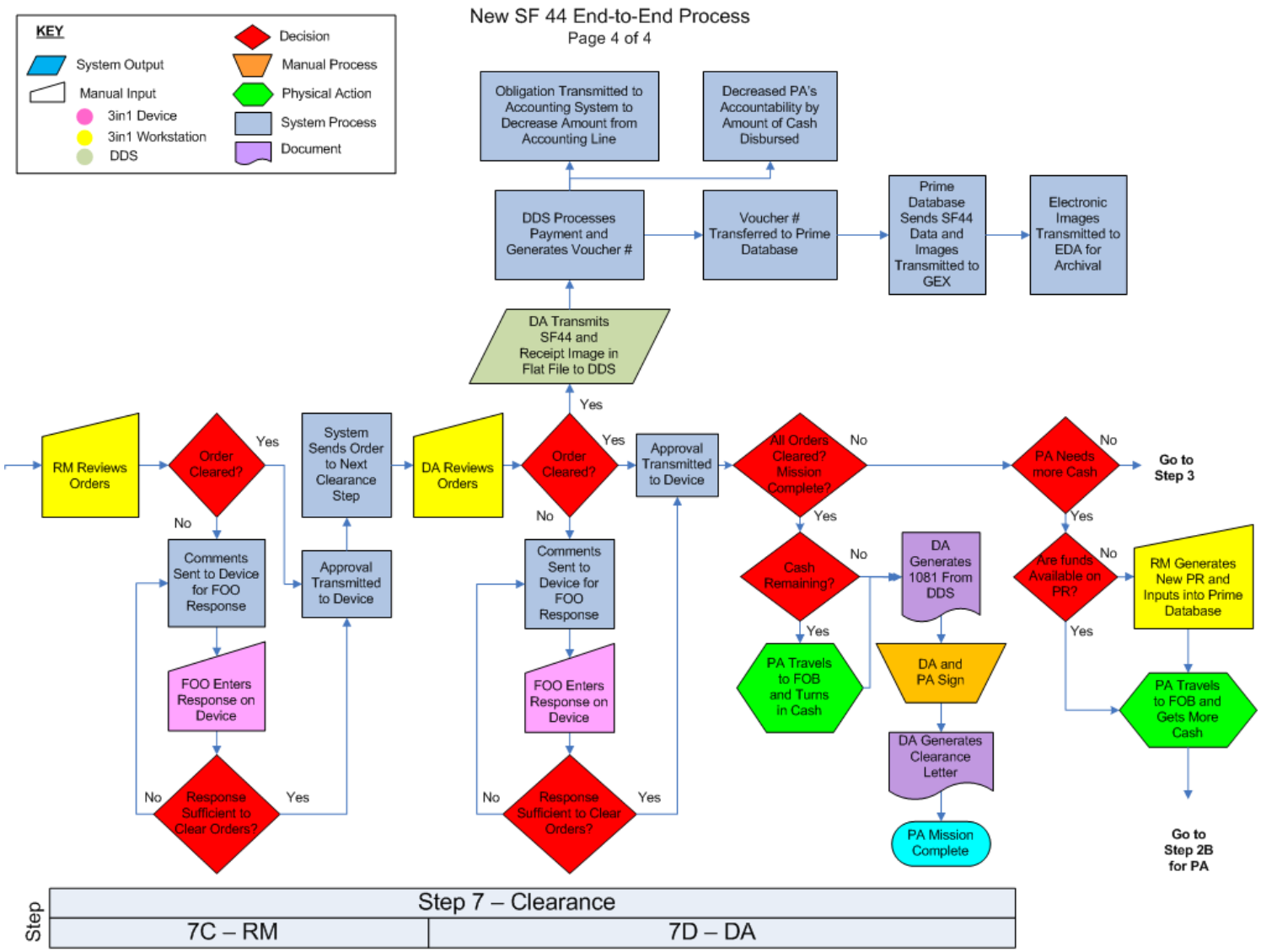
New SF 44 End-to-End Process



New SF 44 End-to-End Process

(Example of Clear/Review Process. Actual Flow can be tailored for operation)




New SF 44 End-to-End Process
Page 4 of 4
KEY
System Output
Manual Input
3in1 Device
3in1 Workstation
DDS
Decision
Manual Process
Physical Action
System Process
Document
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
Comments Sent to Device for FOO Response
Approval Transmitted to Device
FOO Enters Response on Device
Response Sufficient to Clear Orders?
DA Reviews Orders
Order Cleared?
Approval Transmitted to Device
All Orders Cleared? Mission Complete?
Cash Remaining?
PA Travels to FOB and Turns in Cash
DA Generates 1081 From DDS
DA and PA Sign
DA Generates Clearance Letter
PA Mission Complete
PA Needs more Cash
Go to Step 3
Are funds Available on PR?
RM Generates New PR and Inputs into Prime Database
PA Travels to FOB and Gets More Cash
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
DA	Disbursing Agent
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
GEX	Global Exchange Service
GCPC	Government Commercial Purchase Card
HTTPS	Hypertext Transfer Protocol Secure
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.

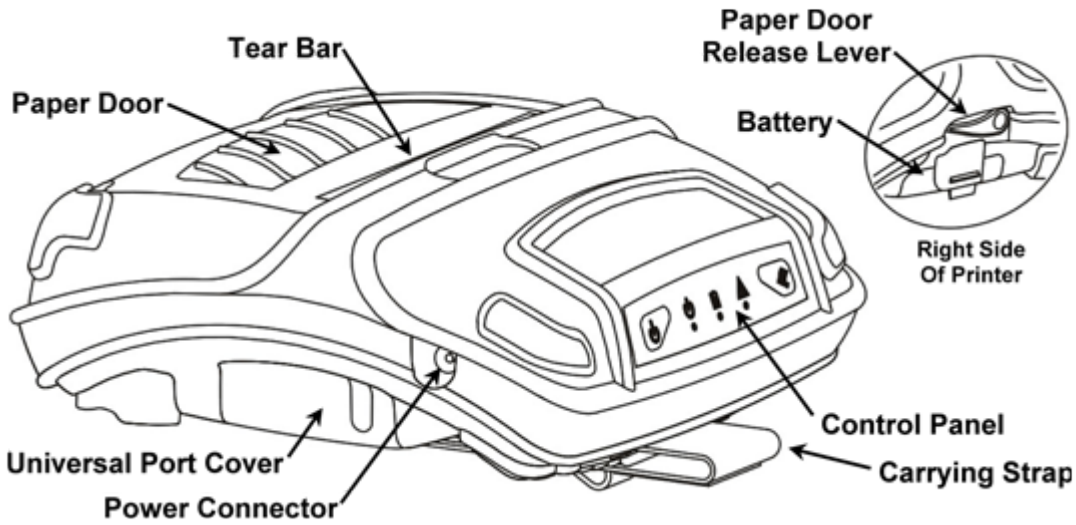
Getting Started

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.

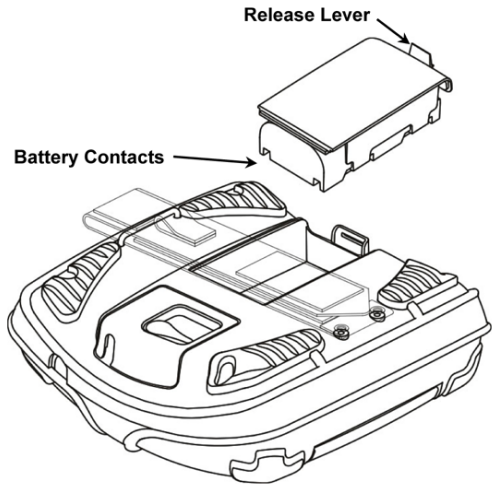
Printer Features

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, and 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.

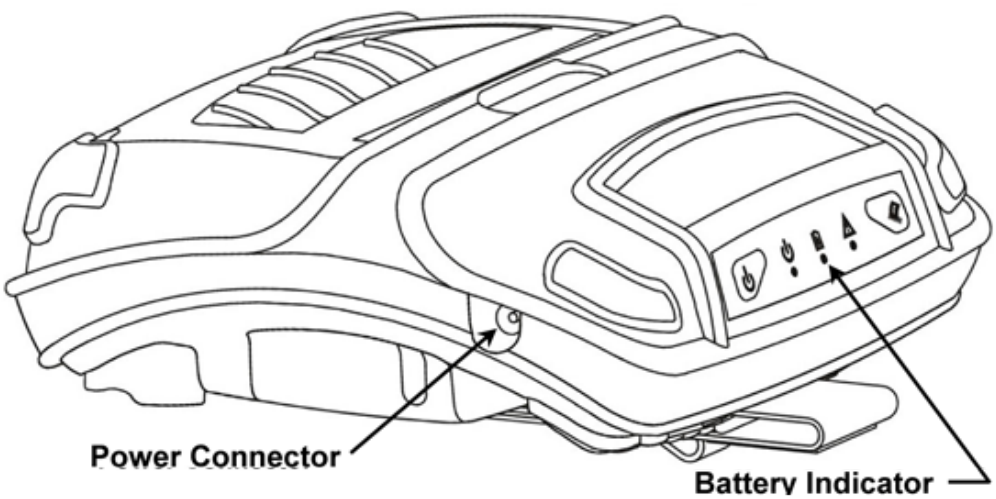
The printer's Battery Indicator flashes whenever the battery needs recharging.

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.

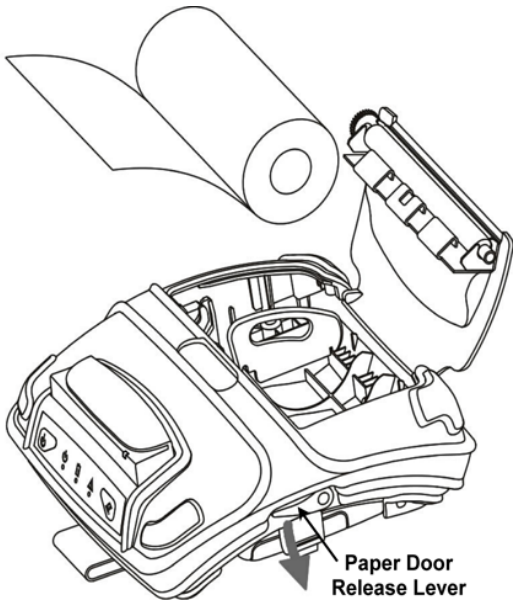
Power Connector & Battery Indicator



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.

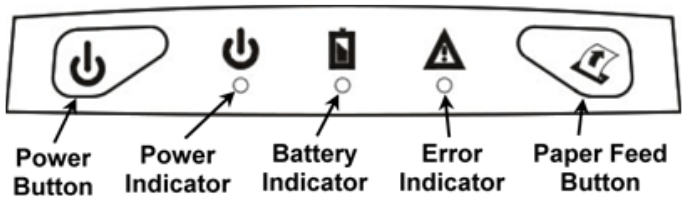
Installing Media	
	– To install media, you must release the paper door by moving the Paper Door Release Lever in the direction shown in and then lift the paper door to expose the paper compartment. – Unroll a small portion of the paper as shown, place the roll into the printer, and close the Paper Door.

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.

Turning the Printer On and Off	
 **Printer Control Panel**	• 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.

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.

Control Panel Buttons & Indicators			
Symbol	**Function**	**Status**	
	Power Button	Used to turn the printer on or off.	
	Paper Feed Button	Advances paper a preset distance or to the next black mark. Also used to clear paper error conditions.	
	Power Indicator		Printer is Off.
			Printer is On.
			Printer is in Standby. (Will wake on receipt of data.)
			Printer is receiving data and/or printing, or is in the Control Panel Setup mode.

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.