3in1 Tool

Reviewer Guide

New User Training

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Joint Contingency Contracting System

Defense Logistics Agency

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Table of Contents

Module 1: 3in1 Tool Overview 1

Lesson 1: What is the 3in1 Tool? 1

Objectives 1
What Is the 3in1 Tool? 1
Benefits of Using the 3in1 Tool 1
3in1 Tool Components 2
Process 3
Key Features of the 3in1 Tool 4
Data Organization by Areas of Responsibility 6
Using This Manual 7
Lesson Summary 8

Module 2: Application Setup 9

Lesson 1: Registering New Users 9

Objectives 9
Registering a New User 9
Finishing the Registration Process and Uploading Supporting Documents 18
Web-Based User Registration 19
Role-Based Access to 3in1 Workstation Features 21
Lesson Summary 23

Module 3: Application Familiarization 25

Lesson 1: Navigating the 3in1 Workstation Application 25

Objectives 25
Logging in to the 3in1 Tool Workstation 25
Logging in using a CAC 27
3in1 Tool Workstation Main Menu 30
Workstation Software Updates 31
Forget Your Login Password? 31
Changing Your Login Password 31
Lesson Summary 32

Lesson 2: Going Offline with the 3in1 Workstation 33

Objectives 33
Working Online or Offline 33
Tips for Working Offline 37
Offline Conflict Resolution 38
Lesson Summary 39

Lesson 3: Managing User Account Information 41

Objectives 41
Accessing User Account Information 41
Viewing Role Assignments 47
Lesson Summary 48

Lesson 4: Viewing AOR Information and Policies 49

Objectives 49
Reviewing the AOR Organization 49

Reviewing Procurement Policies 50
Viewing the Clearance Configuration 53
Lesson Summary 53
Lesson 5: Viewing Attached Documents 55
Objectives 55
View Documents Attached to Purchase Requests 55
View Documents Attached to Users 56
Lesson Summary 58
Lesson 6: Importing Voucher Numbers from DDS 59
Objectives 59
Importing Voucher Numbers from DDS 59
Orders Moved to EDA for Permanent Storage 60
Lesson Summary 60
Module 4: The Ordering Process 61
Lesson 1: Understanding the Ordering Process 61
Objectives 61
About Purchasing Using the 3in1 Device 61
Before Starting an Order 64
Making a Purchase Using the Device 65
Funding Changes Made on the Workstation 66
Procurement Controls 67
About PIINs and Ordering 67
Manually Adding Purchase Orders in the Workstation 68
Lesson Summary 68
Module 5: Clearing Purchase Orders 69
Lesson 1: Clearing Orders from the Workstation 69
Objectives 69
Clearing Purchase Orders 69
Reviewing and Responding to Comments 70
Viewing Attached Files 71
Monitoring Data Integrity in Purchase Orders 71
Viewing the SF44 and Cash Advance and Discount 72
Viewing Scanned Purchase Request 73
Completing Review of Purchase Orders 73
Locating the Next Reviewer 74
Web-Based Clearance 74
Lesson Summary 75
Lesson 2: Looking Up Purchase Orders 77
Objectives 77
Looking Up Purchase Orders 77
Viewing Purchase Items 79
Viewing FOO Responses and Clearance Status 80
Viewing Signatures and Messages 80
Lesson Summary 81

Module 6: Reporting from the Workstation 83

Lesson 1: Generating Reports 83

Objectives 83
Report Overview 83
Web-Based Reporting 84
Accounting Log Report 85
Purchase Log 86
Property Purchase Log 87
SF44 Report 88
Clearance Information Report 90
Active FOO Report 92
RCC Activity Report 93
Deprovisioned/Terminated FOO Report 95
FOO Provisioning Report 96
Procurement Controls Report 98
Finance Office Funds Report 99
Vendor List 101
Purchase Request and Order Search Report 102
Lesson Summary 104

Appendix A: End-to-End Process Diagrams 105

Appendix B: Acronym List 111

Module 1: 3in1 Tool Overview

Lesson 1: What is the 3in1 Tool?

Objectives

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

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

What Is the 3in1 Tool?

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

Benefits of Using the 3in1 Tool

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

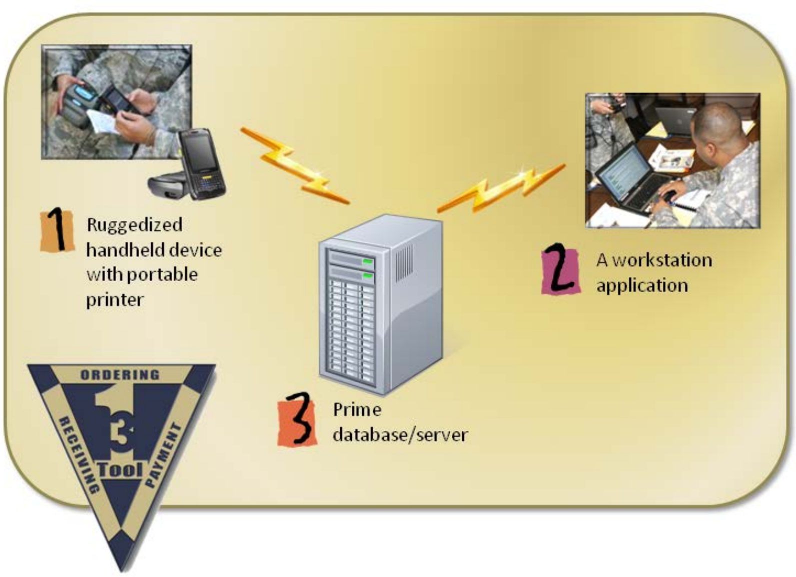
- Reduces errors and increases accountability with electronic record-keeping and reconciliation between FOO and Contracting Officer (KO), and PA and Disbursing Agent (DA)
- Provides centralized, electronic analysis of obligations, expenditures, available cash, and purchase activities
- Provides audit trail of all transactions in a designated 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).

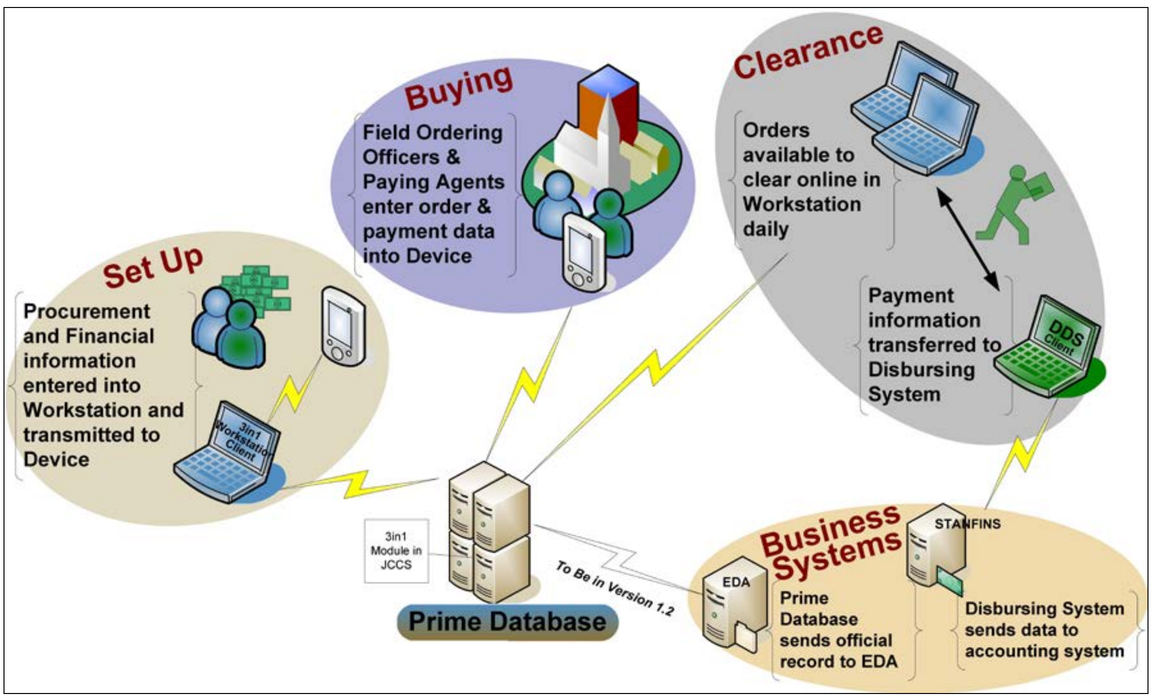


3in1 Tool Main Components

Process

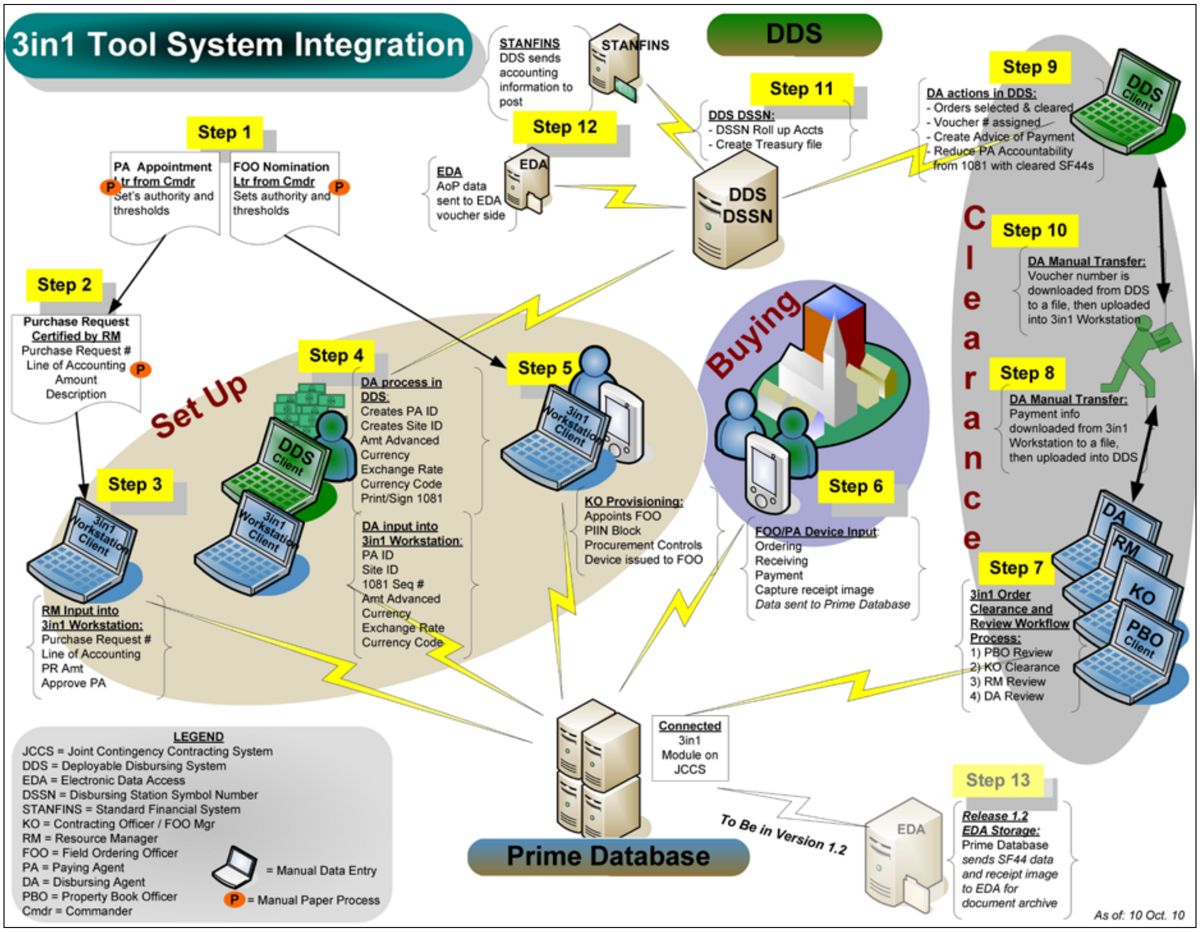
How is the 3in1 Tool used to process device, procurement and financial management information?

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, displaying the step by step process of the 3in1 system automating the SF44 process. Each step shows the actions of each key player in the 3in1 system.



3in1 Tool System Integration

Key Features of the 3in1 Tool

Online/Offline Operations

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

Authentication/Security

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

Financial Operations

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

Procurement Controls

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

Receipt and Record of Payment

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

Online Review/Clearance

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

Data Backup and Restoration

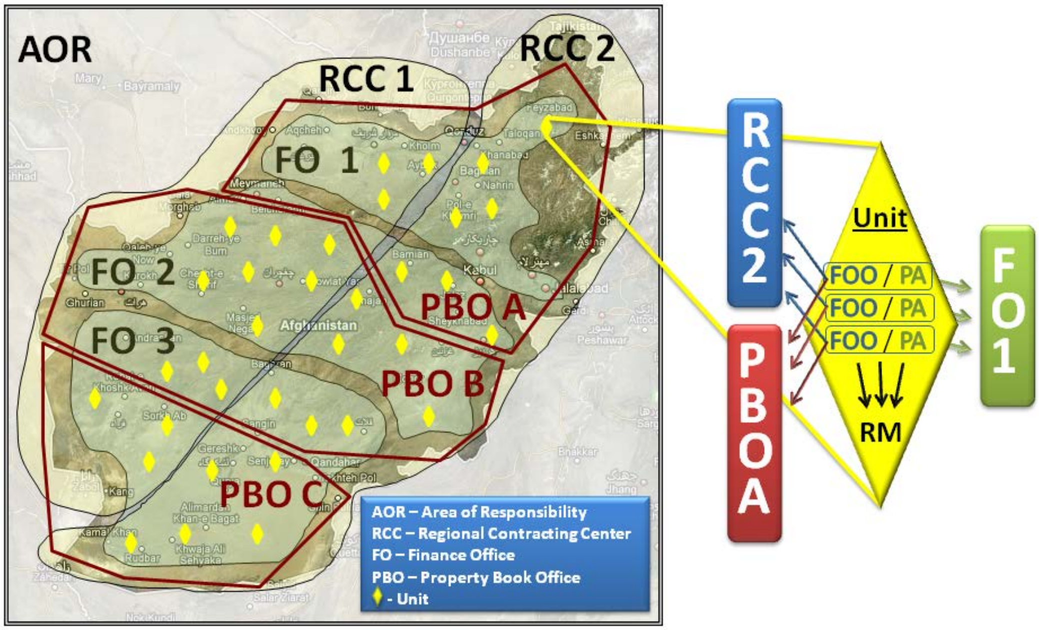
If a device is damaged, any data not uploaded to the prime database can be retrieved by the system administrator from the MicroSD card using another device. If a device is stolen, it can be deactivated from the system by the system administrator from the workstation. Should a device fail in the field, FOOs can execute manual SF44s with special PIINs issued during set up and then input the SF44 data, and upload the scanned SF44 into the workstation for automated review/clearance and payment and storage processing. Data processed on the device while offline should be transferred to the prime database or Workstation as soon as possible, for data backup and clearing.

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

Data Organization by Areas of Responsibility

The 3in1 Tool system supports contingency operations around the world for all services. Data is organized within the system by AOR. Within an AOR, there may be multiple Regional Contracting Centers, Finance Offices (FO) and Property Book Offices (PBO), 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 used within an AOR. The minimum required to operate the 3in1 system is an RCC, if only purchase orders will be executed with the 3in1 device. If PA will be used to issue payments, a FO must also be used. If a RM is not deployed with the contingency operation, the contracting officer can enter the purchase request information into the system during provisioning.



AOR Organization

Using This Manual

This training focuses on the features of the 3in1 Tool as it used by personnel who review and approve purchase orders made by FOOs.

This book contains the following parts and modules:

- Module 1: 3in1 Tool Overview
- Module 2: Application Setup
- Module 3: Application Familiarization
- Module 4: The Ordering Process
- Module 5: Clearing Purchase Orders
- Module 6: Reporting from the Workstation

Appendices

- Appendix A: End-to-End Process Diagrams
- Appendix B: Acronym List

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

Module 2: Application Setup

Lesson 1: Registering New Users

Objectives

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

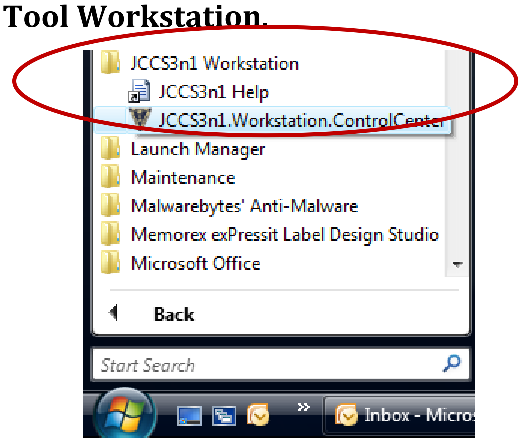
- ❑ Register new users in the 3in1 Tool Workstation
- ❑ Identify various roles used in the Workstation
- ❑ Identify the features that can be accessed by each role
- ❑ Request a role assignment for a new user
- ❑ Upload supporting documents for a new user

Registering a New User

Each 3in1 user must be registered with a user ID and password. Typically a designated person, such as a system administrator or Contracting Officer, creates the user IDs and passwords. The feature for registering a new user may be accessed on the *3in1 Workstation Logon* window or from the JCCS web site.

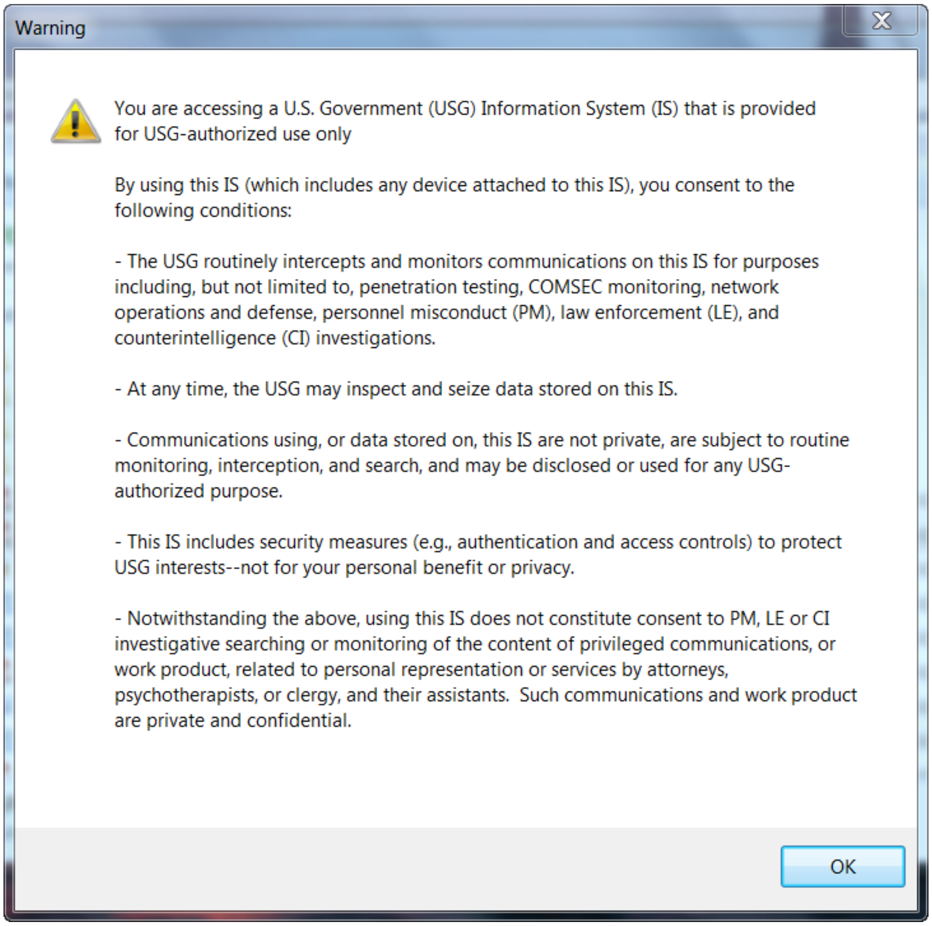
Follow these steps to register as a new user from the 3in1 Workstation Logon window:

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



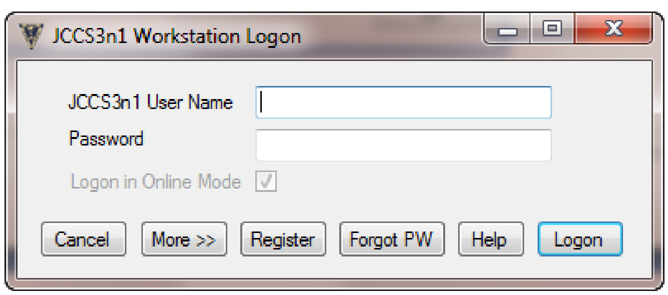
Start, All Programs, 3in1 Tool Workstation

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

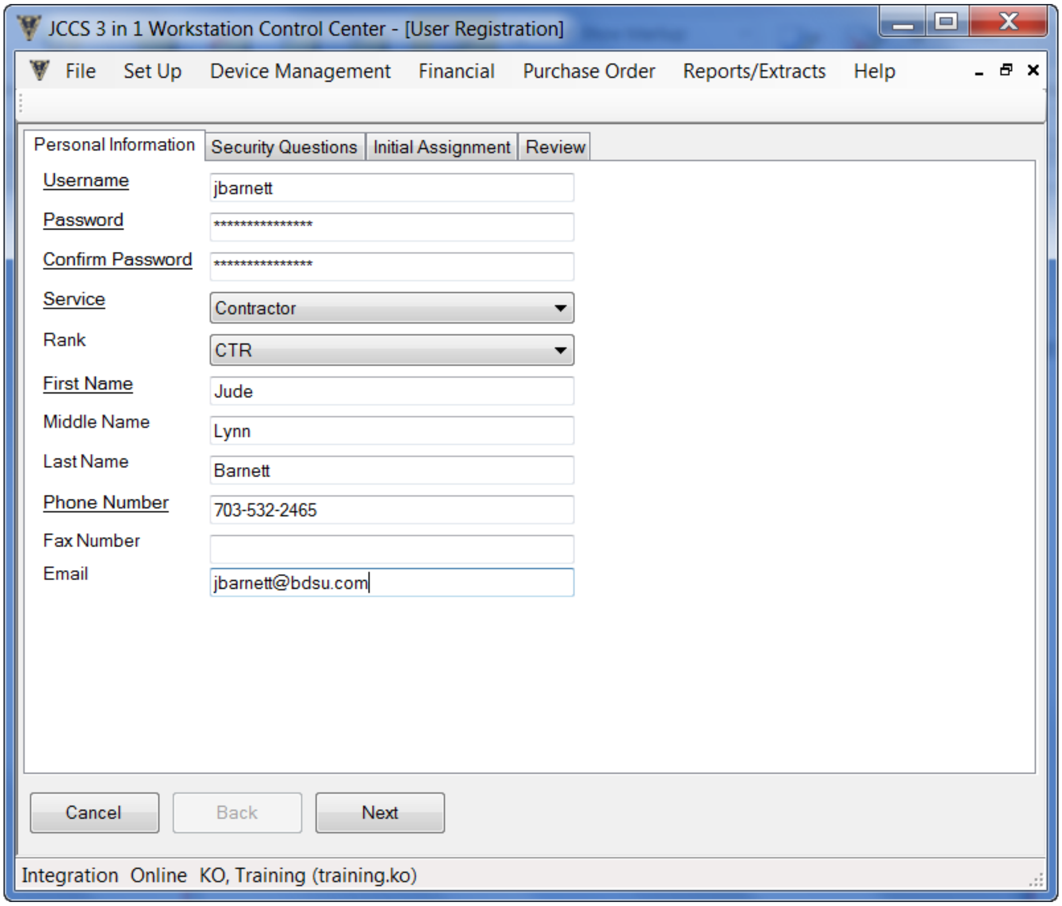
– The *User Registration* window opens.

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

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

Personal Information

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



User Registration Personal Information Tab

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

Password Rules

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

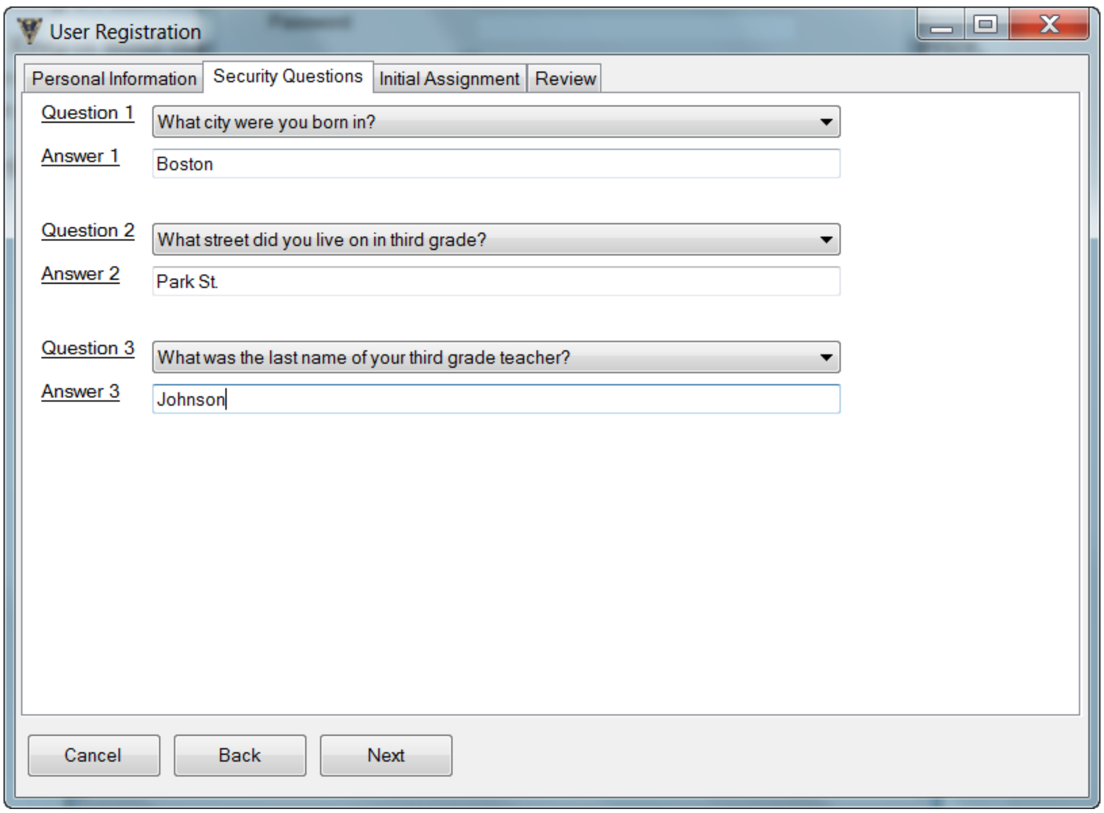
- Passwords must contain a minimum of 15 characters:
  - Include at least one uppercase alphabetic character
  - Include at least one lowercase alphabetic character
  - Include at least one non-alphanumeric (special) character
- When resetting passwords:

- The new password must be different from the previous 10 passwords used
- A user can change a password only once in a 24-hour period
- Users are forced to change their passwords after 60 days

- Additional password rules:
  - Only the affected user and administrator can change user's password.
  - An administrator can change passwords at any time

Later, if there is a need to reset the password, please refer to *Module 3: Application Familiarization*, *Lesson 1: Navigating the 3in1 Workstation Application.*

Security Questions



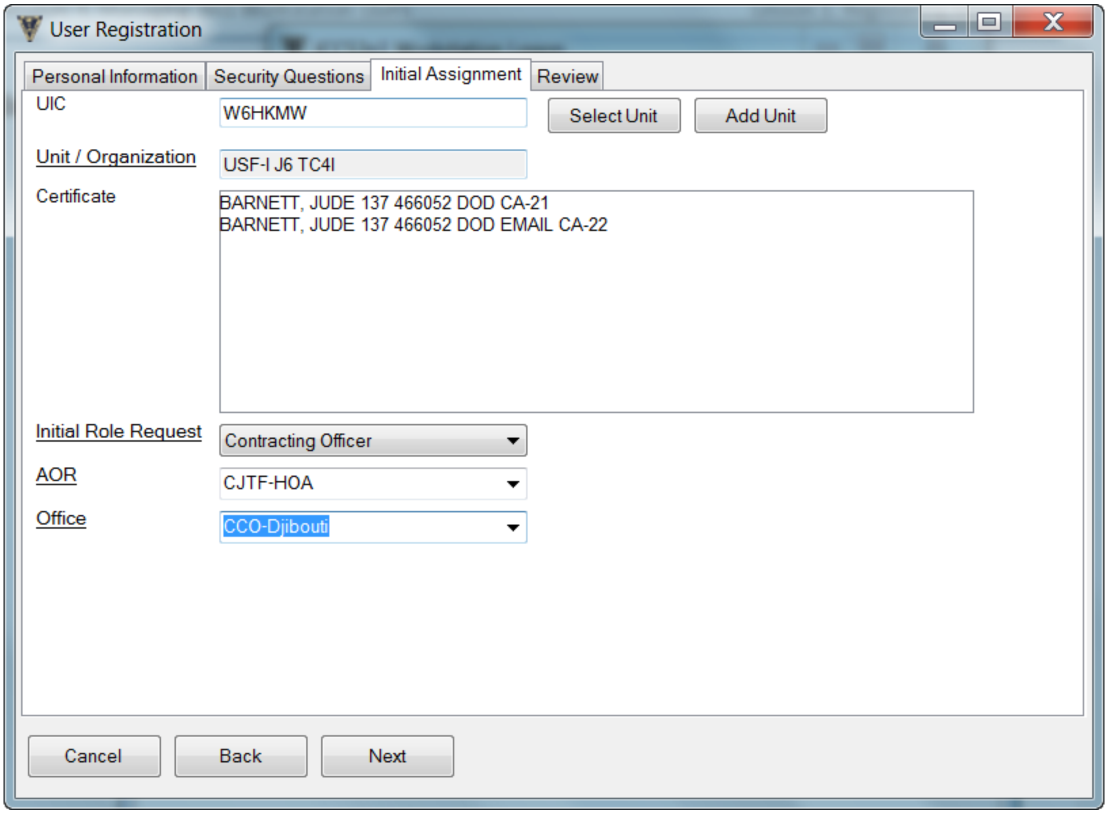
User Registration – Security Questions Tab

1. Select three different security questions from the drop-down lists, and then type your responses.
2. Click **Next**.

The Initial Assignment tab is displayed.

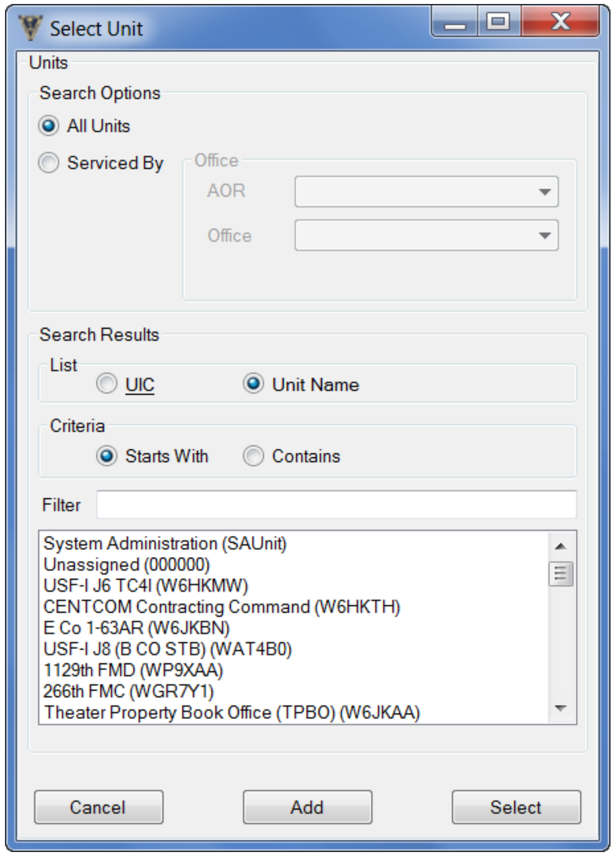
Initial Assignment

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



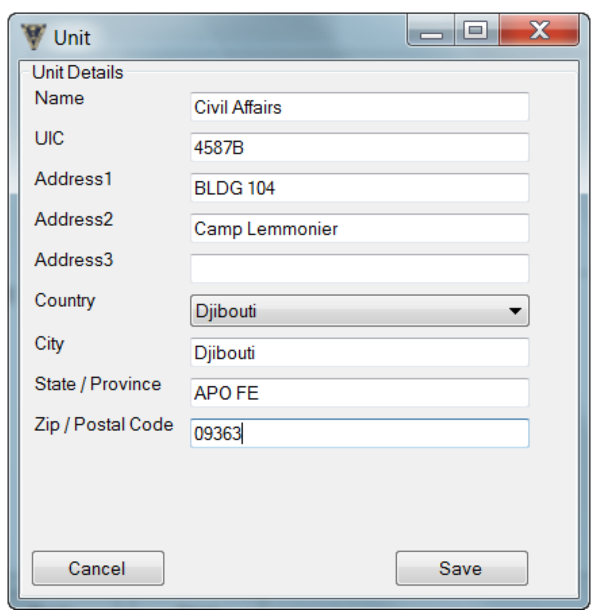
User Registration – Initial Assignment Tab

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



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

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

Each 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 A, *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.

Roles used in the 3in1 Workstation

The roles available in the 3in1 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 Workstation.
- Records changes to the PR amount in the Workstation for transmission to the 3in1 device.
- Reviews orders and payments in 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 Workstation to ensure that pilferable and accountable items that have been purchased are entered into the unit's property book.

Finance Officer (Disbursing Agent): The Disbursing Agent (DA) is responsible for maintaining obligations and cash advances in the prime database. The DA uses the 3in1 Workstation to enter cash advances to PAs for payments on orders. The DA reviews payments in the 3in1 prime database, transfers approved 3in1 payment data to the Deployable Disbursing System (DDS) and captures the voucher number assigned to the order by DDS and enters the voucher number on the order in the 3in1 prime database.

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

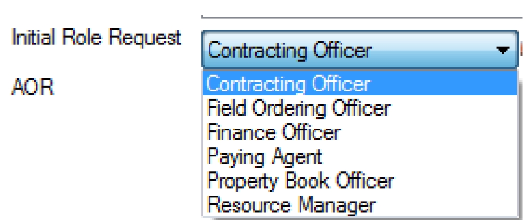
AOR Administrator: A role created for the 3in1 Workstation specifically to add or edit Areas of Responsibility (AORs) and various types of offices within each AOR. No other role can add or edit an AOR.

System Administrator: A "super user" who can access all 3in1 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.

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.

Initial Role Request

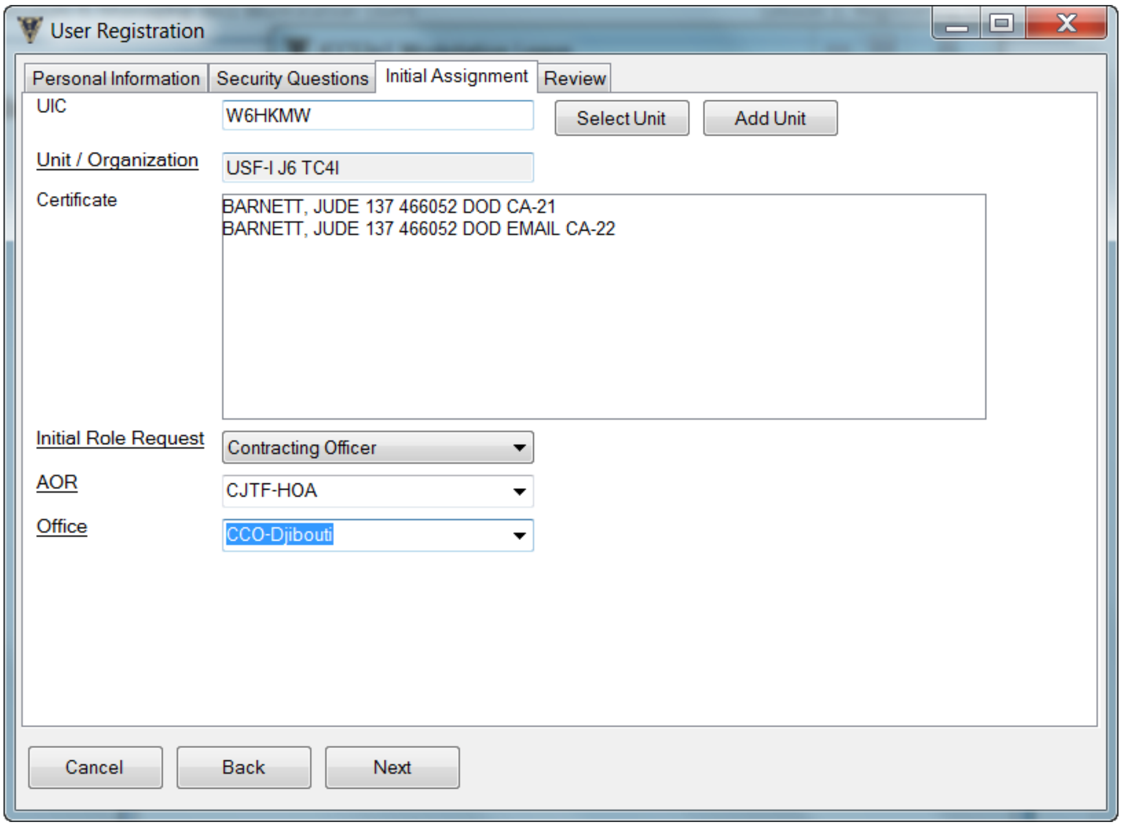
To make an initial role request for a new user:



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.

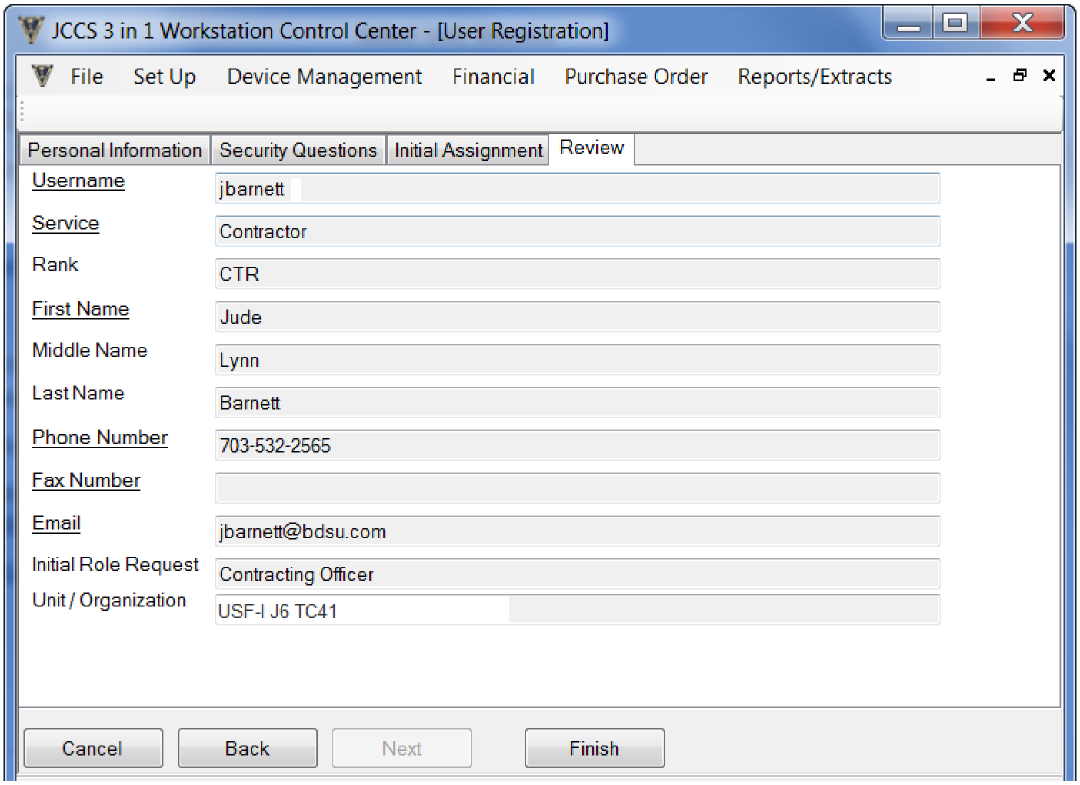
3. In the **Certificate** field, select the appropriate certificate for digitally signing documents and forms using the 3in1 Tool Workstation. For training purposes on non-CAC systems the **Certificate** field is optional.



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.

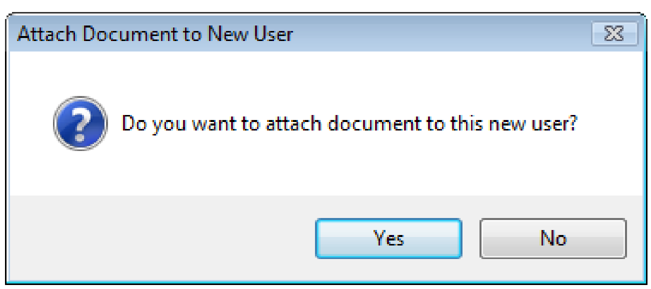
4. Click **Next**.
   – The *Registration Review* window is displayed.

Finishing the Registration Process and Uploading Supporting Documents

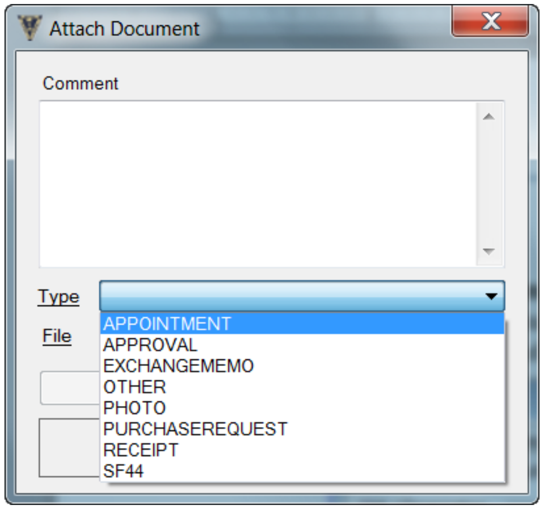


User Registration Review Tab

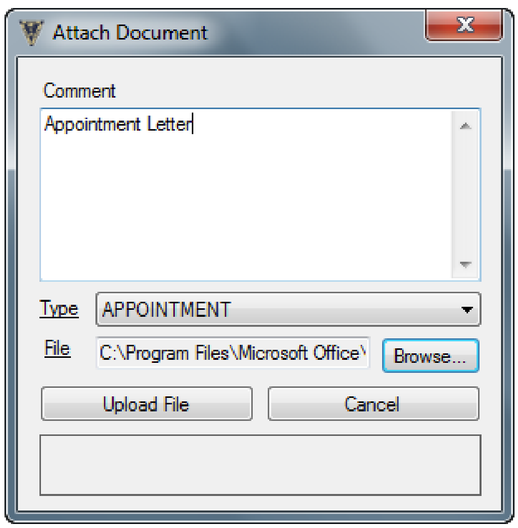
1. Review the information on the Review tab.
2. If you need to change anything, click the **Back** button and make edits. Otherwise, click the **Finish** button to complete the registration.
3. The following dialog box asks if you want to attach a document. Click **Yes** to upload a 577 form, appointment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



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.



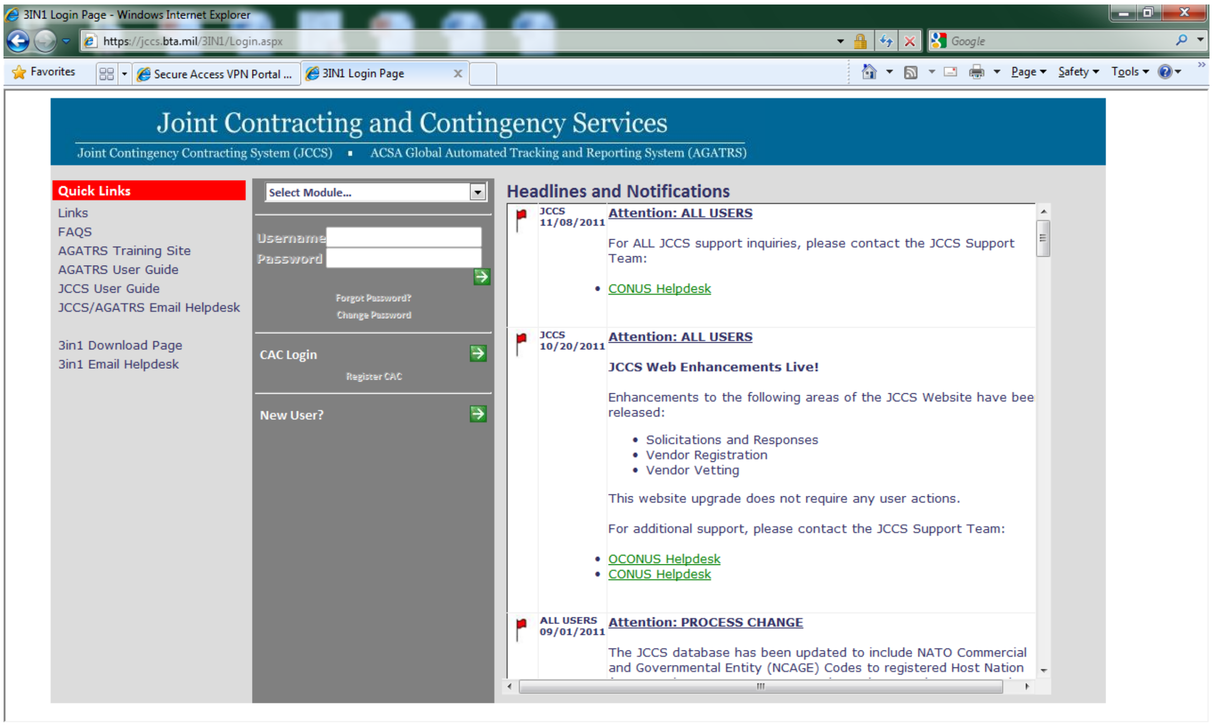
You have now completed the registration and may log in to the 3in1 Tool Workstation. See *Module 3: Application Familiarization, Lesson 2: Navigating the 3in1 Workstation Application* for details on how to log in to the Workstation.

Web-Based User Registration

As an alternative, new users can register using the JCCS web site. They can generate web-based 3in1 reports and also clear purchase orders. See *Module 5: Clearing Purchase Orders, Lesson 1: Clearing Orders from the Workstation, Module 6: Reporting from the Workstation, Lesson 1: Generating Reports*.

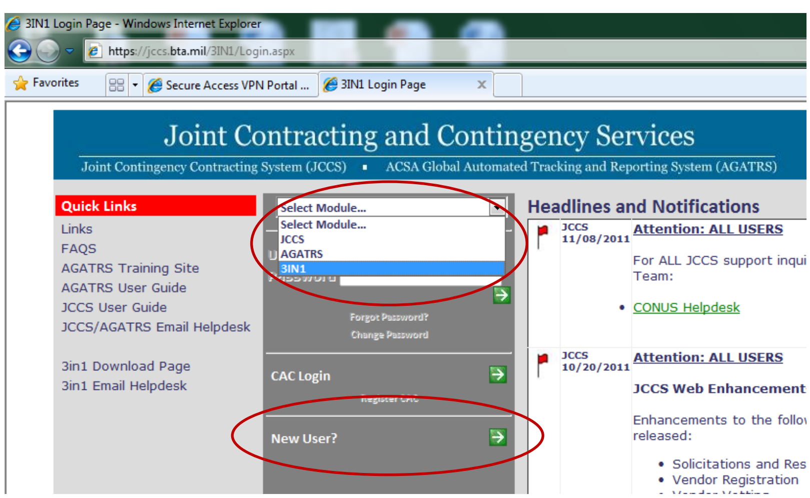
To register a new 3in1 Workstation user on the JCCS web site:

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.

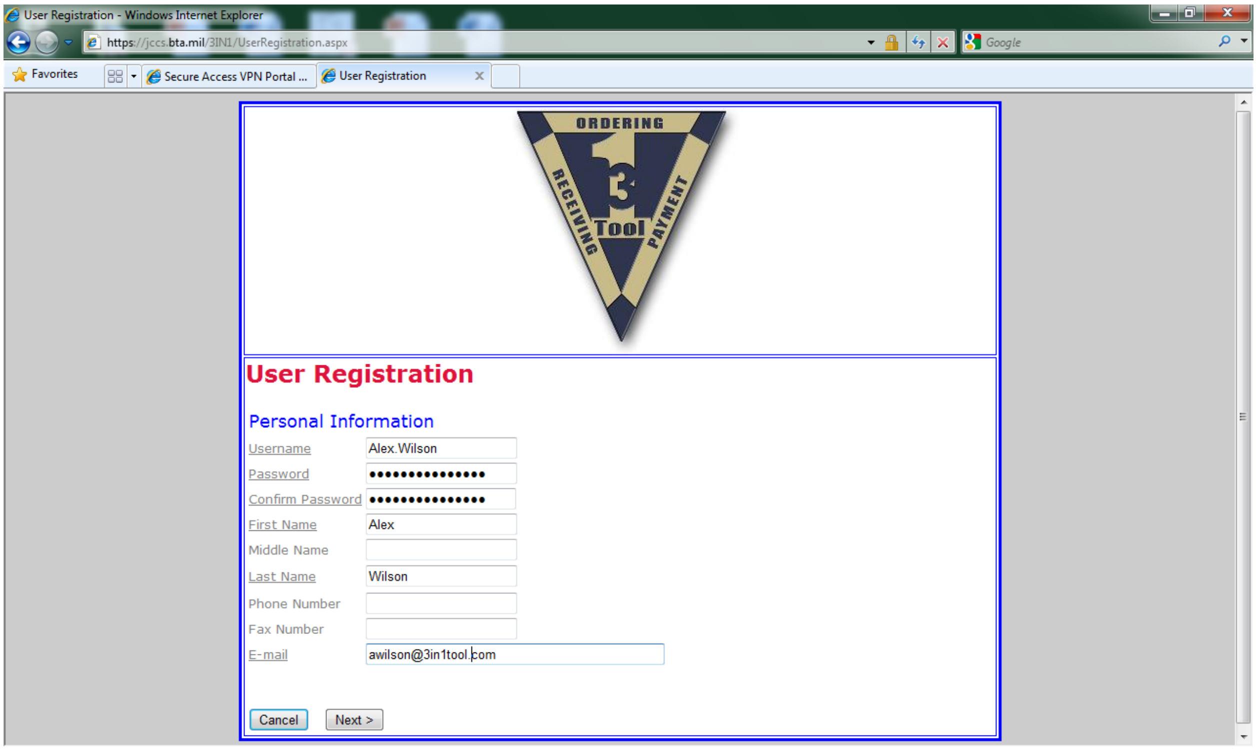


JCCS Web Page on CAC-Enabled Systems

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.

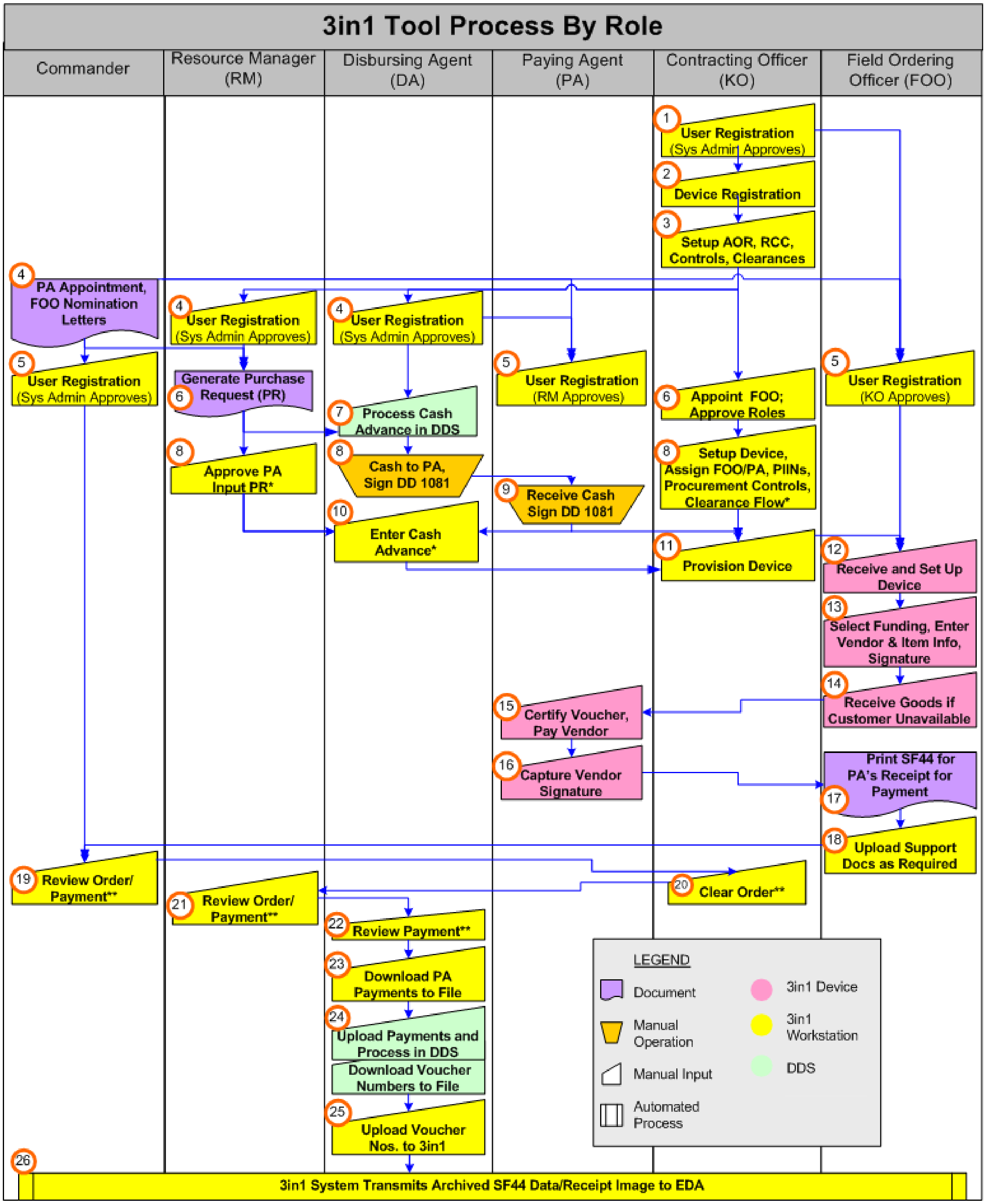


Web-based User Registration – Personal Information Screen

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

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Module 3: Application Familiarization

Lesson 1: Navigating the 3in1 Workstation Application

Objectives

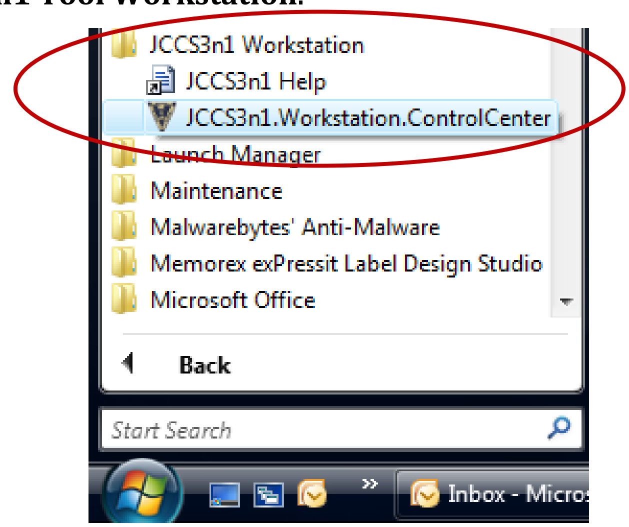
After completing this lesson, the participant will be able to:

- ❑ 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
- ❑ Retrieve/reset a forgotten password
- ❑ Change a user password on the 3in1 Workstation
- ❑ Contact the system administrator to obtain a temporary password if the user is locked out of the Workstation

Logging in to the 3in1 Tool Workstation

To log in to the 3in1 Tool Workstation:

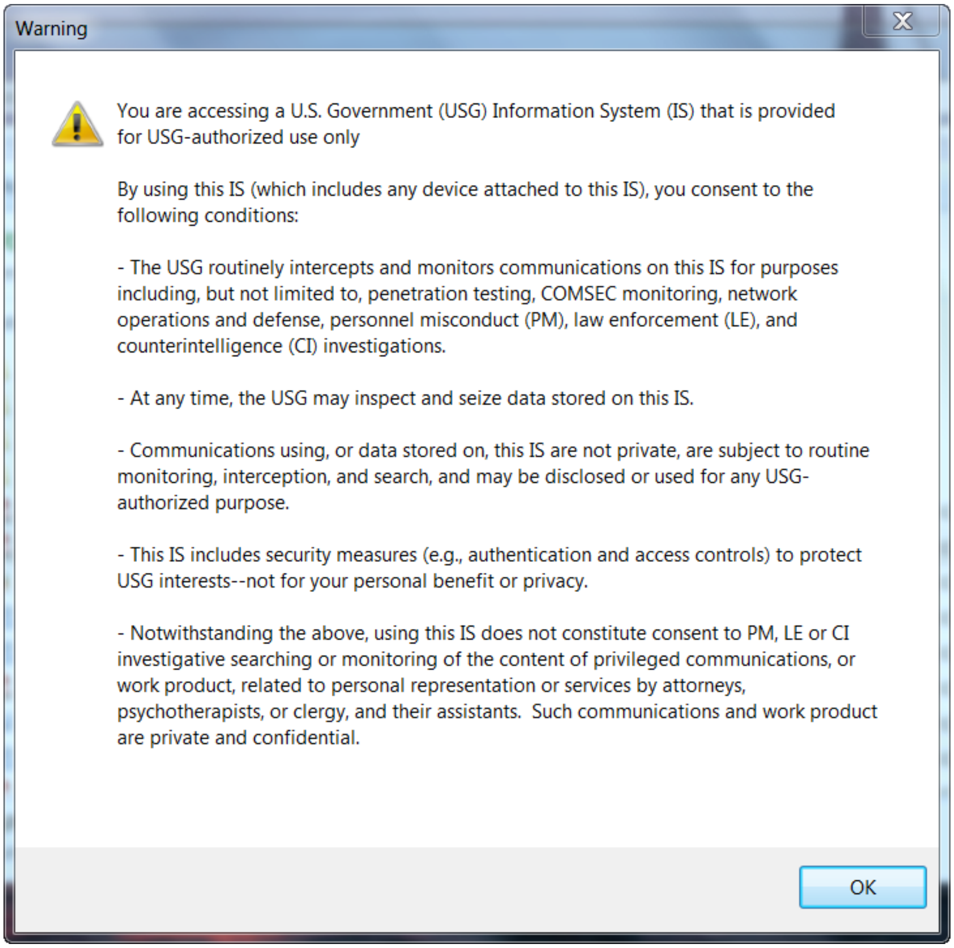
1. In the Windows tool bar, select **Start**, **All Programs**, **3in1 Tool Workstation**. Double-click **3in1 Tool Workstation**.



Start, All Programs, 3in1 Tool Workstation

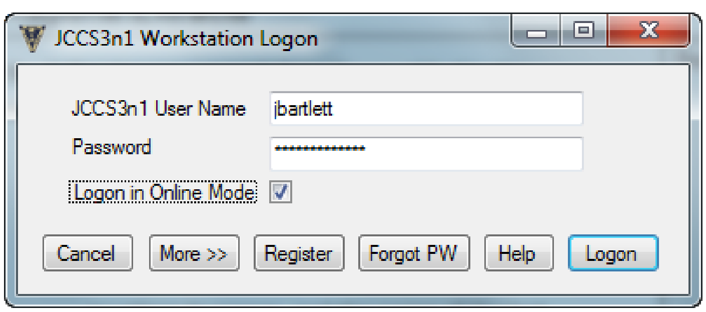
   - Alternatively, double-click the **3in1 Tool Workstation** shortcut icon on your desktop, if it has been set up.

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 *Lesson 1: Registering New Users*.)
4. Click the **Logon** button.



3in1 Tool Workstation Logon Window

The 3in1 Tool Workstation main menu is displayed in a new window.

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.

Users who become locked out of the 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.

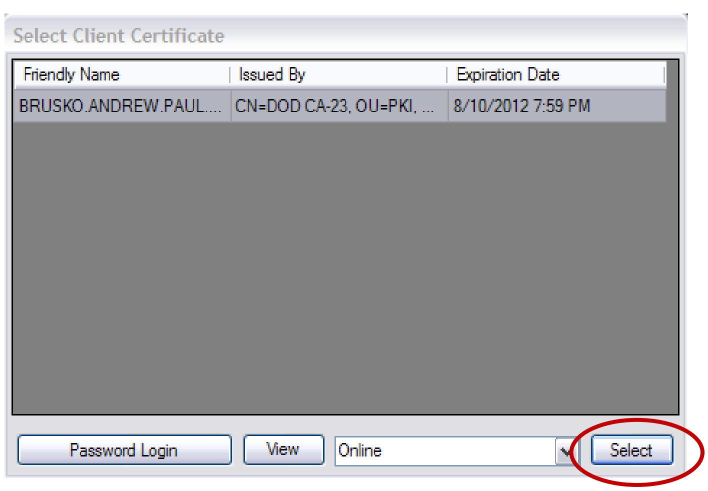
Logging in using a CAC

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

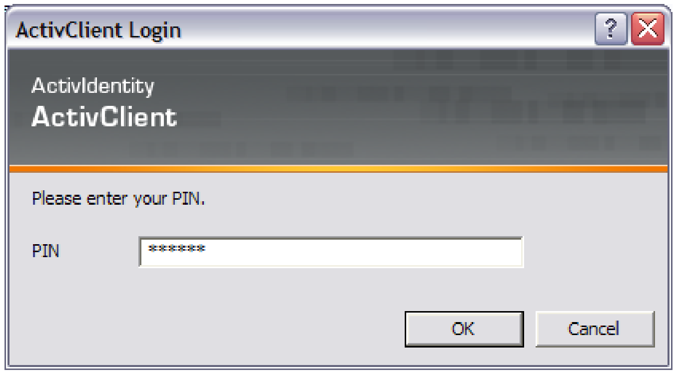
To log in to the 3in1 Workstation using a CAC:

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

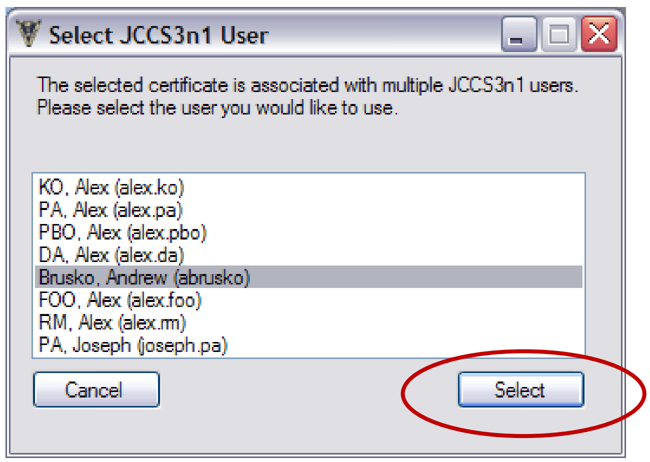
   After opening the 3in1 Workstation application, and passing the initial warning screen, CAC users will see the *Select Client Certificate* screen.
3. Choose a certificate from the *Select Client Certificate* screen. Click the **Select** button.



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



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

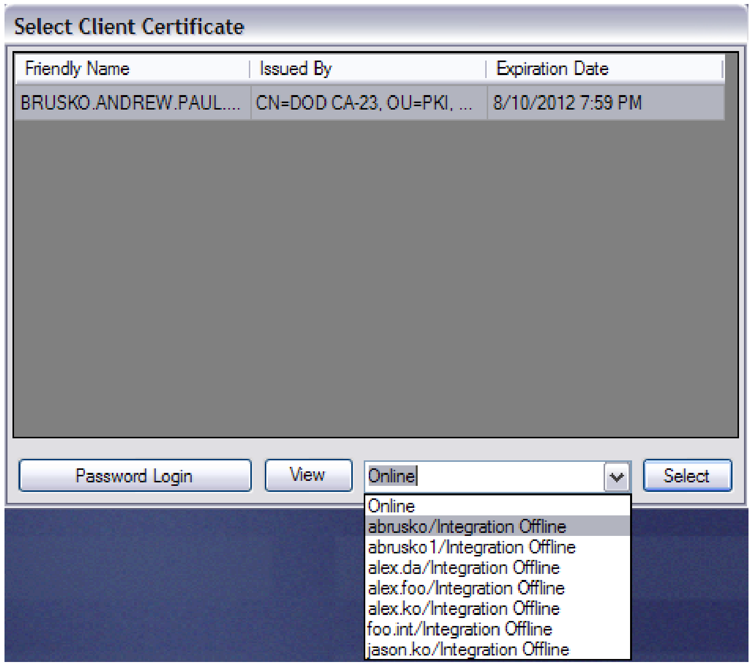


6. You are logged into the 3in1 Workstation under the selected user.

CAC Login Options

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

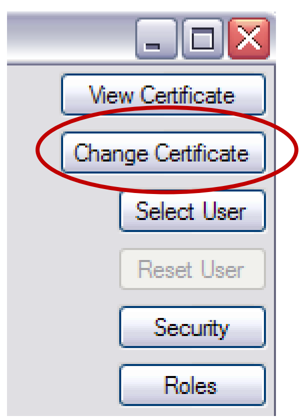
By default, the 3in1 system defaults the login to "Online" on the *Select Client Certificate* screen. To log in to an offline replica with your CAC, select an offline replica from the dropdown menu, as shown below.



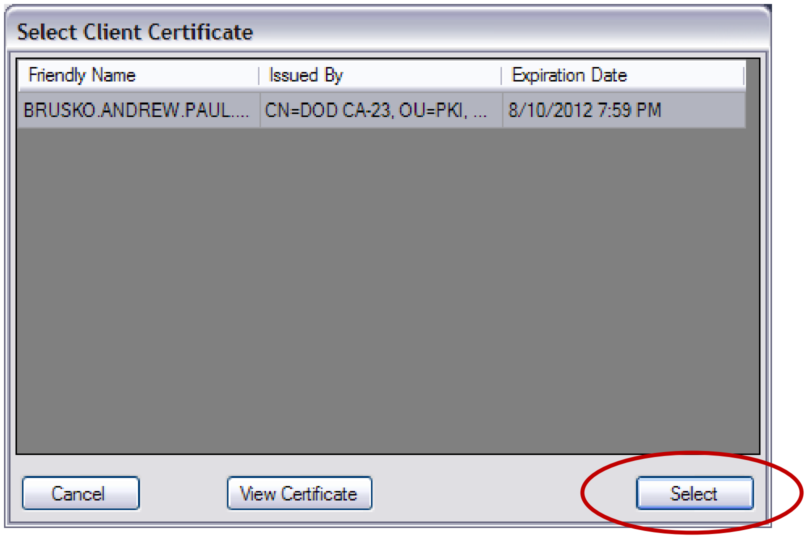
CAC Workstation Registration

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.

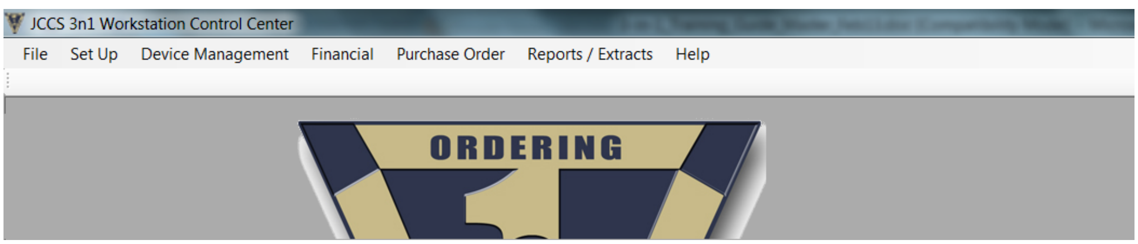


5. Select the client certificate, then click the **Select** button. Enter your CAC PIN if prompted.



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

Access to some menu commands is restricted by role. As a reviewer, you cannot access any commands on the **Device Management** menu.

File: Change or verify online/offline connectivity mode; view documents attached to PRs or users; manage your own user profile and view others; view unit profiles; and exit the 3in1Tool Workstation application.

Set Up: View details related to assigned Area of Responsibility (AOR) and associated offices; view roles assigned to other users; and view AOR/RCC procurement control policies and default clearance flow.

Financial: Import voucher numbers from DDS.

Purchase Orders: Look up and clear POs.

Reports: Select from a list of standard reports and produce them in different formats.

Workstation 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.

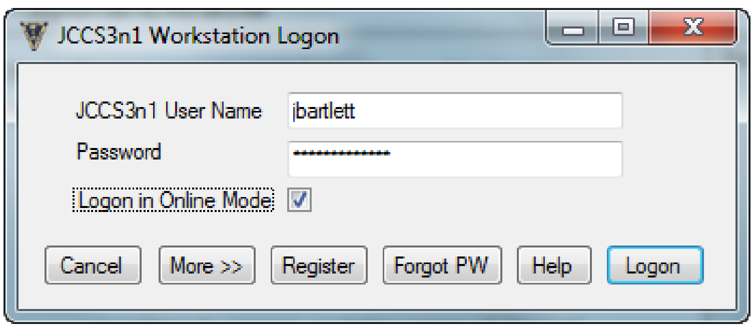
Forget Your Login Password?

If you forget your login password, click the **Forgot Password** button (on the Logon window). You will be asked the three security questions which were answered during the user registration process. If you provide correct answers to all three questions, you can retrieve/reset the password yourself. If you cannot correctly answer the three questions, the system administrator/help desk can reset the password.

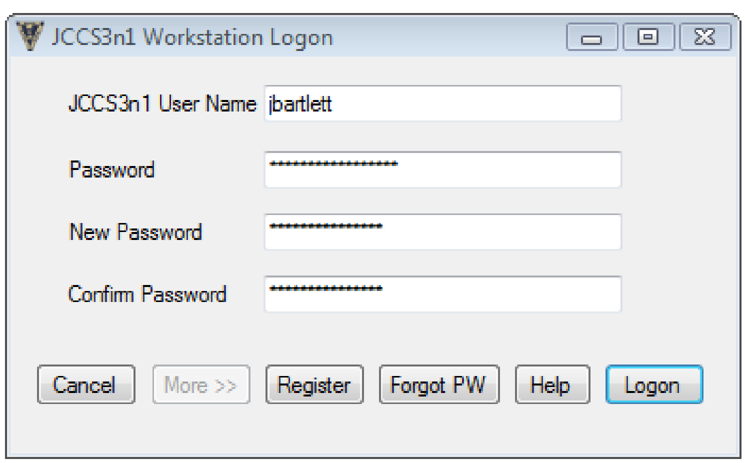
Changing Your Login Password

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

1. Start the 3in1 Workstation.
2. In the *Logon* window, type your user name and current password.



3. Click the **More** button to display the ***New Password*** fields.
4. Type the new password twice.



3in1 Workstation Logon Screen with New Password Fields

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

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

Lesson Summary

In this lesson, you learned 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

❑ Retrieve/reset a forgotten password

❑ Change a user password on the 3in1 Workstation

❑ Contact the system administrator to obtain a temporary password if the user is locked out of the Workstation

Lesson 2: Going Offline with the 3in1 Workstation

Objectives

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

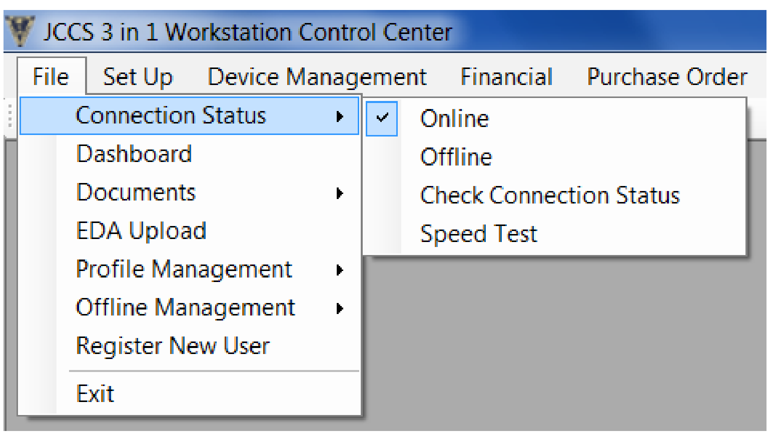
- ❑ Describe the differences between working online and offline using the 3in1 Tool Workstation
- ❑ Change from working online to working offline for the first time
- ❑ Subsequently switch between working in online and offline modes

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.

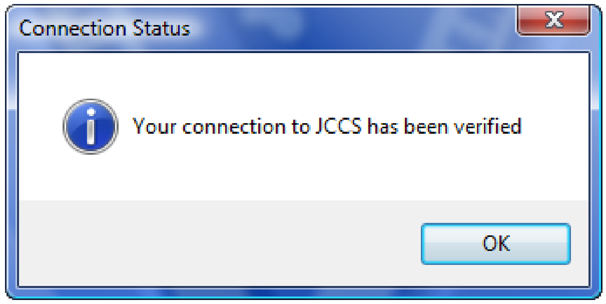
To check your current connection status, select **File**, **Connection Status**. The checkmark indicates whether you are working online or offline.



File Menu

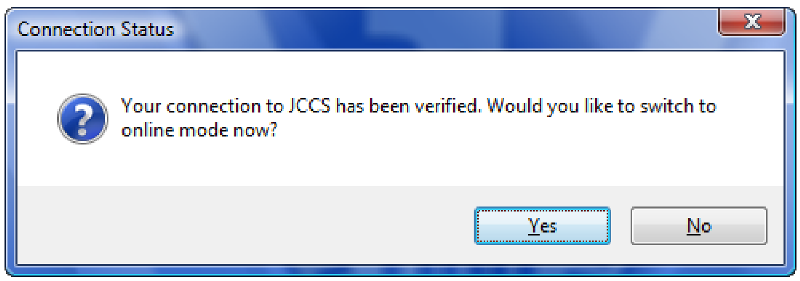
Checking Your Connection to the 3in1 Workstation

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.



This message indicates you are connected online to JCCS

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



Connection Status Dialog Box

Checking Your Synchronization Settings

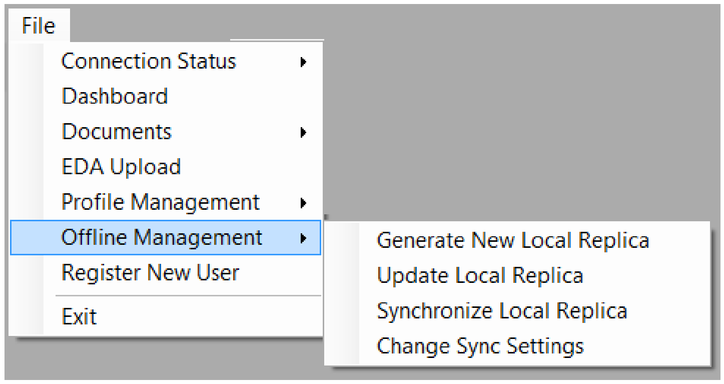
To ensure data is synchronized between your computer and the 3in1 prime database, check your personal data synchronization settings before working offline. Select **File**, **Profile Management**, **User Profile.** See *Module 3: Application Familiarization, Lesson 3: Managing User Account Information*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

Working Offline for the First Time

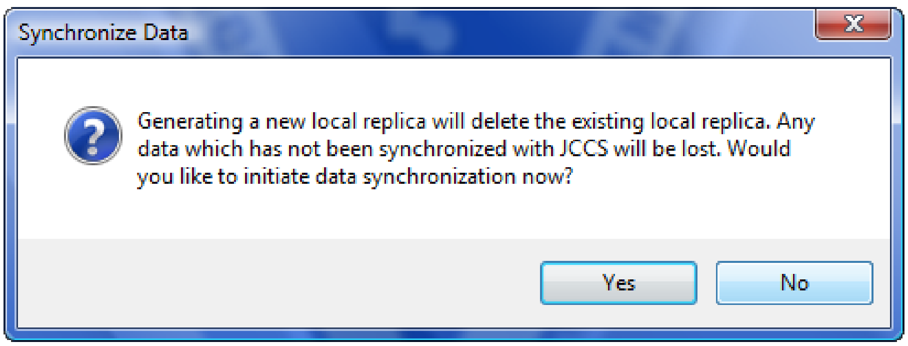
Switching from online to offline mode requires creating a copy of relevant data from the 3in1 prime database on your computer, called a ***local replica***. The process is slightly different the first time that you switch from online to offline mode.

Follow these steps the first time that you change from working online to working offline.

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

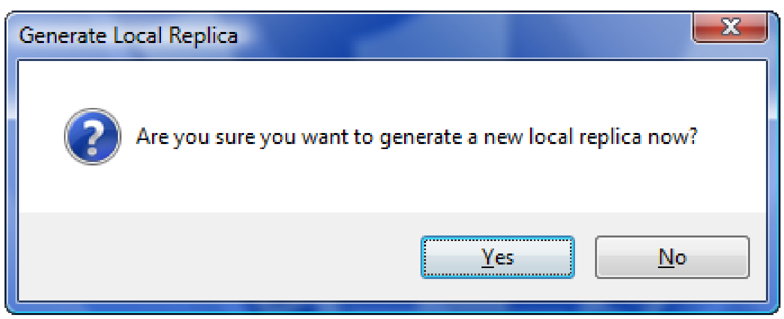


2. In the following dialog box, select **No** because there is no existing replica to synchronize, since this is the first time you are going to work offline.



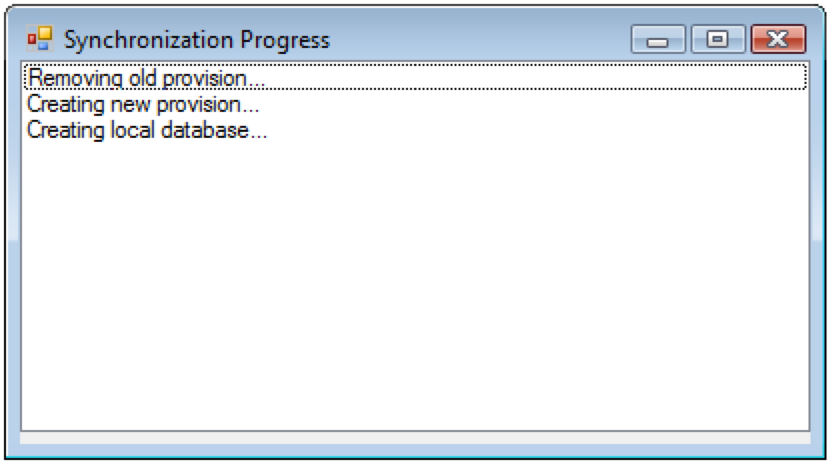
Synchronize Data Dialog Box

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



Generate Local Replica Dialog Box

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



Synchronization Progress Window

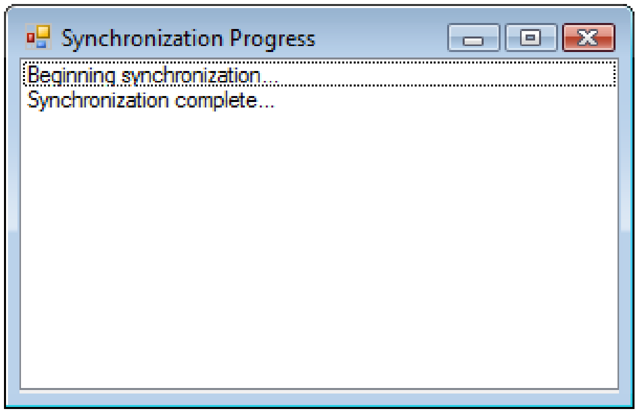
4. Select **File**, **Connection Status**, **Offline**.

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.

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



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

Going Back Offline

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

Follow these steps to switch from online to offline mode:

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

You may start working offline.

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

Tips for Working Offline

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

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Lesson 3: Managing User Account Information

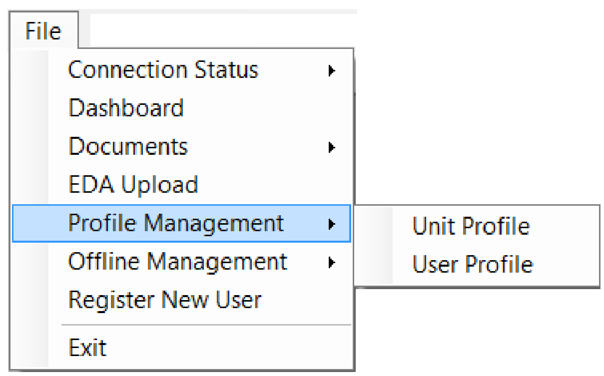
Objectives

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

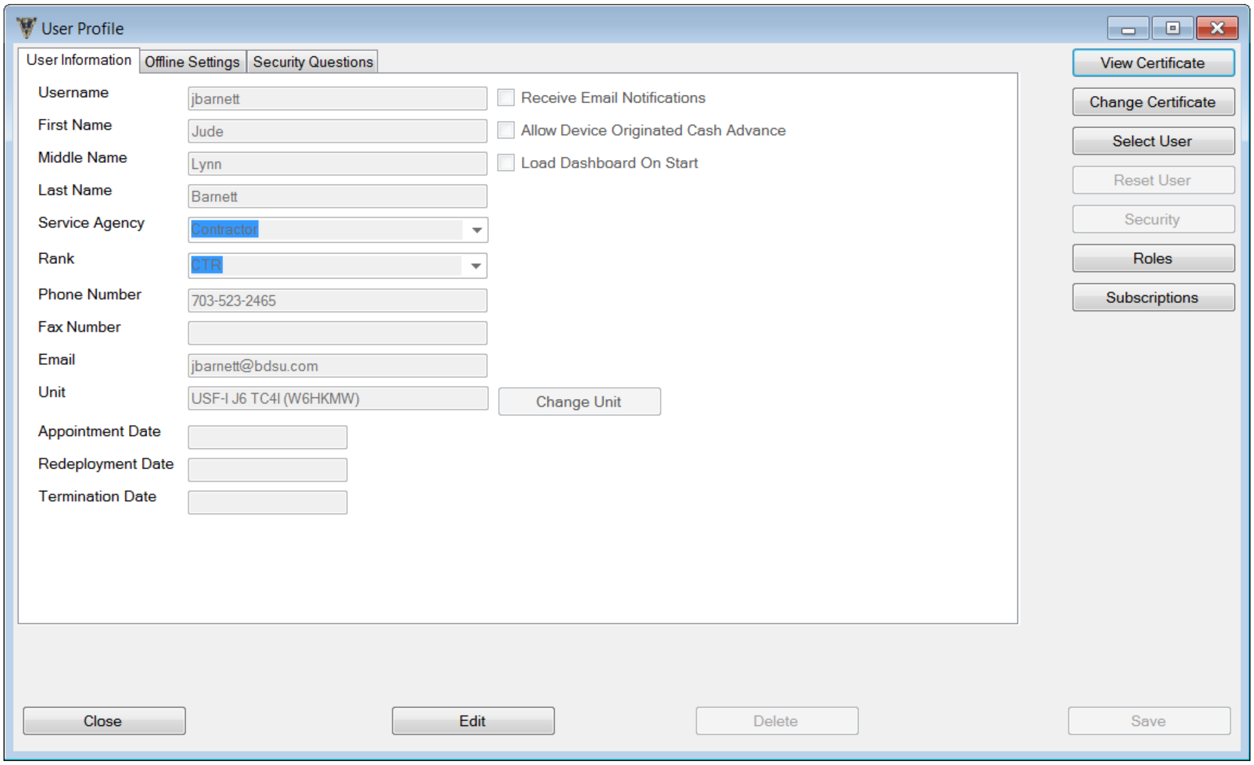
- ❑ Edit user information on the User Profile screen
- ❑ Change a unit assignment
- ❑ View a user's certificate
- ❑ Choose to receive email notifications within the 3in1 system
- ❑ View user role assignments using the Manage Users feature

Accessing User Account Information

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



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



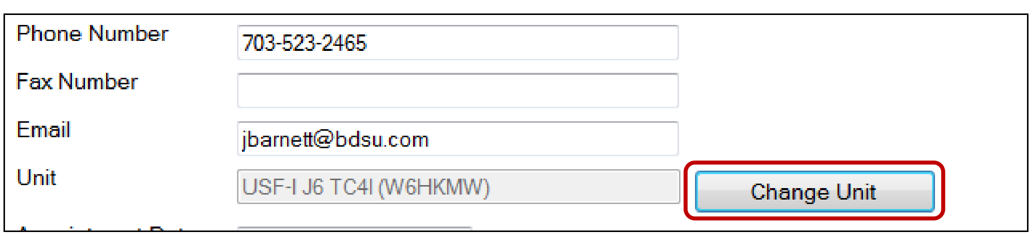
User Profile Window

You may edit the following fields: **First**, **Middle**, and **Last Names**; **Phone** and **Fax Numbers**; and **Email address**.

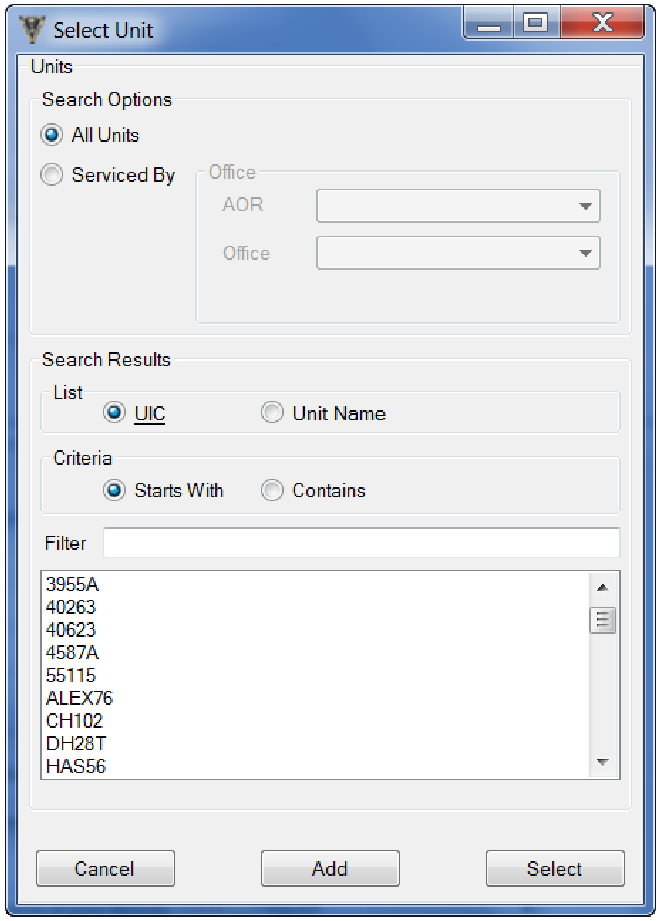
You may also mark the **Receive Email Notifications** checkbox to receive emails generated by the 3in1 system during the clearance process. When one reviewer finishes and approves a PO, it is sent to the next reviewer's queue, based on the clearance configuration that has been established using the Provision Device feature. Typically, a notification email is sent to the next reviewer. A valid email address must be provided on the *User Profile* window, and the **Receive Email Notifications** check box must be marked. If it is unmarked, the user will not receive 3in1 system-generated emails.

You may also edit the **Appointment**, **Redeployment** and **Termination** Dates. The suggested date format is mm/dd/yyyy.

If you need to change your 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 that you may select are:

- **View Certificate** – Displays the user's digital signing certificate, if one exists.
- **Change Certificate** – Opens the *Select Client Certificate* window so you can select a different signing certificate for the user
- **Reset User** – Restores previously saved settings
- **Roles** – Opens the *Manage User Roles* window so you can view and/or edit roles assigned to a user
- **Security** – Available to system administrators only

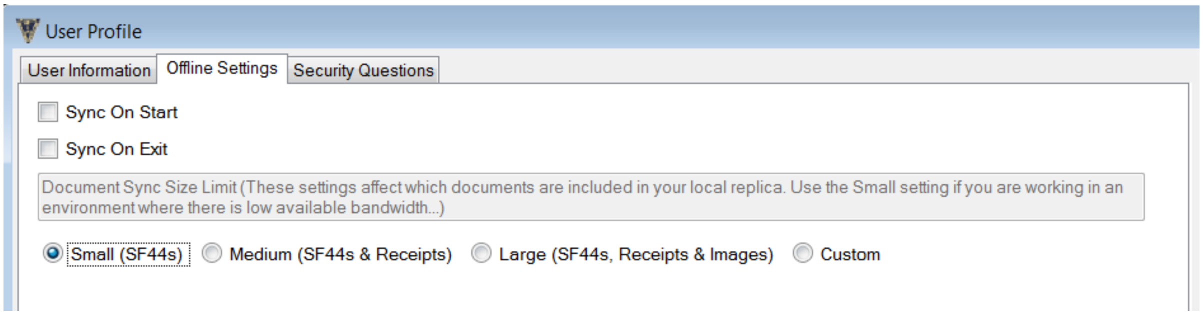
Finally, on the *Security Questions* tab, you may change the three security questions that are used to confirm your identity in the event you forget your Workstation logon password.

Load Dashboard on Start

Leave this checkbox unmarked. It does not apply to users who have the Reviewer role.

Synchronizing Options

The Sync 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 switch between working offline and 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.

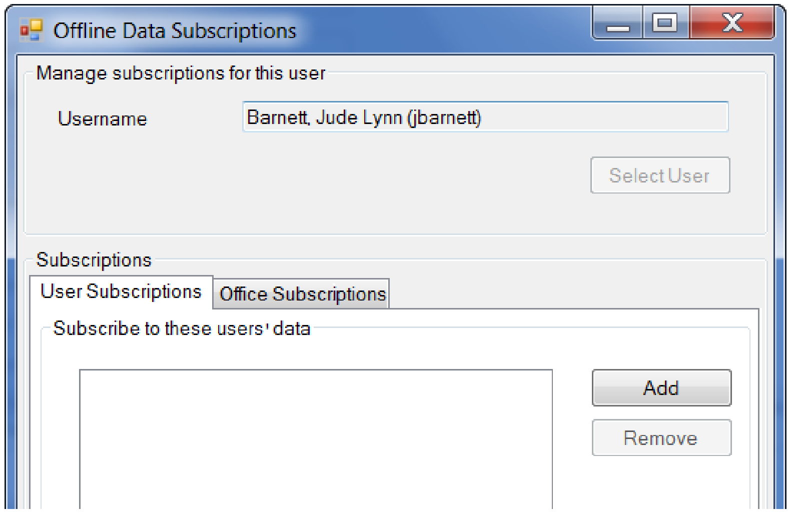
- **Small** - Includes only SF44s in local replica
- **Medium** - Includes SF44s and receipts in local replica
- **Large** - Includes SF44s, receipts, and images in local replica
- **Custom** - Includes documents equal to or smaller than the entered document size limit (in kilobytes) in local replica

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.

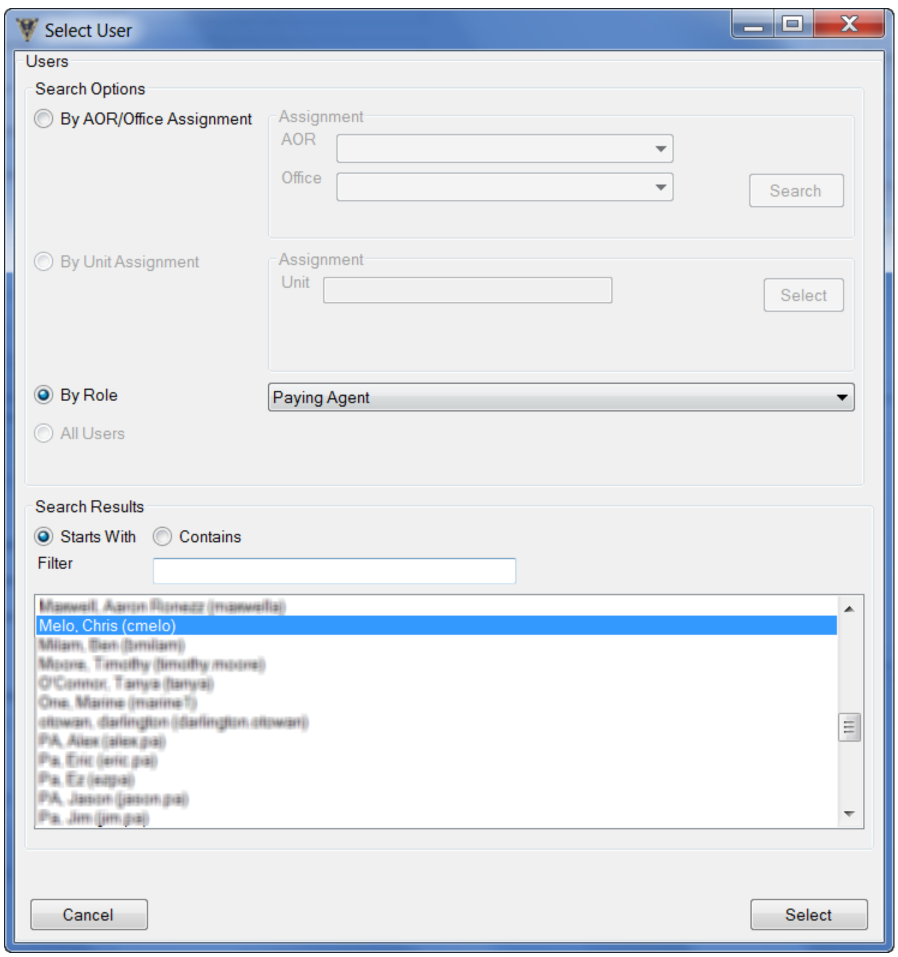
To add user and/or office subscriptions:

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



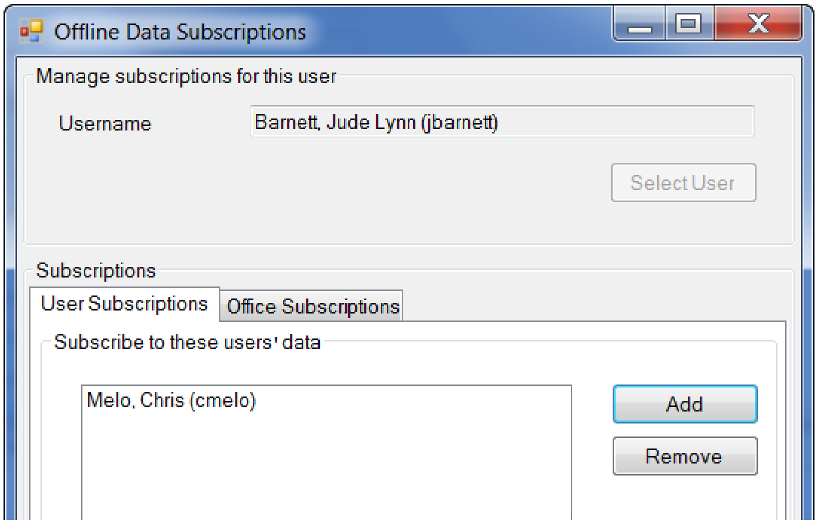
Offline Data Subscriptions Window

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



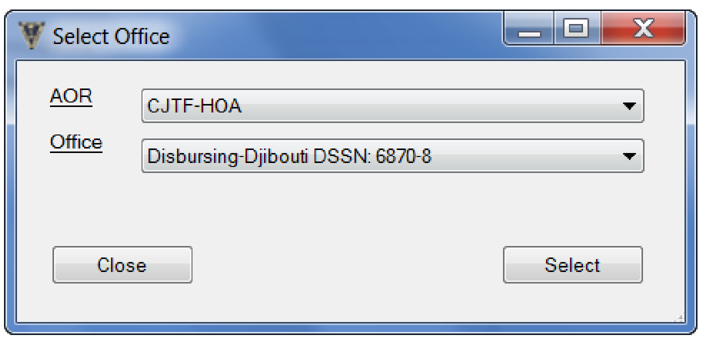
Select a user and click the Select button

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



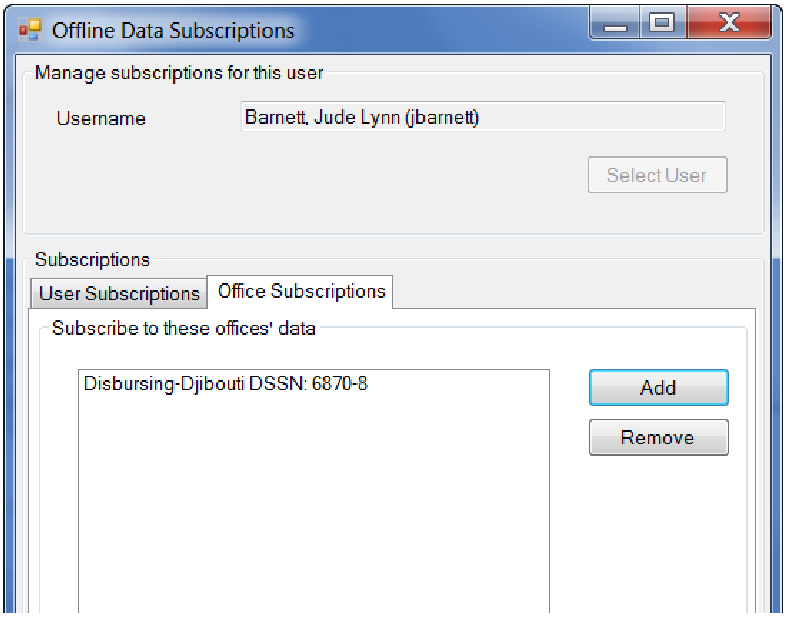
Selected users' data will be downloaded when you go offline to work

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.

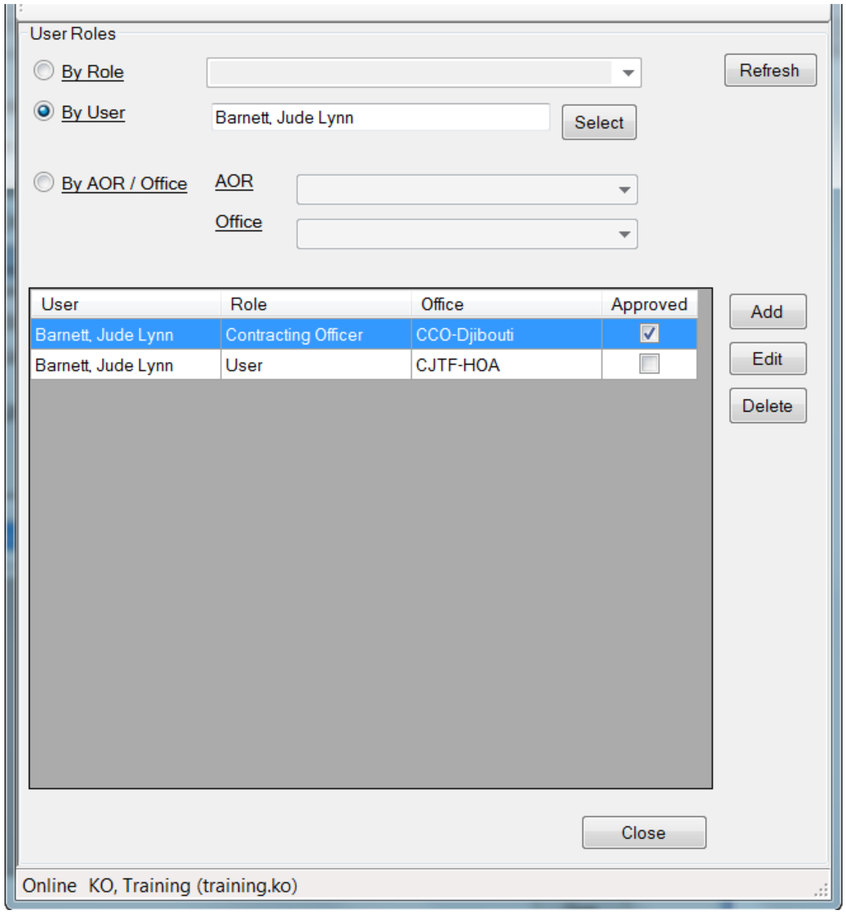


Office Subscriptions Tab

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

Viewing Role Assignments

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



Manage User Roles Window

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

Lesson Summary

In this lesson, you learned to:

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

Lesson 4: Viewing AOR Information and Policies

Objectives

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

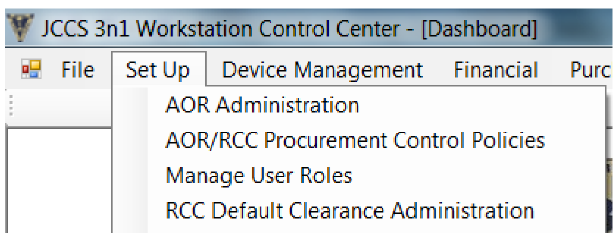
- ❑ Review the details of an assigned AOR
- ❑ Review the name and location of offices within an AOR
- ❑ Review procurement policies associated with the AOR
- ❑ Review the clearance configuration

Reviewing the AOR Organization

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

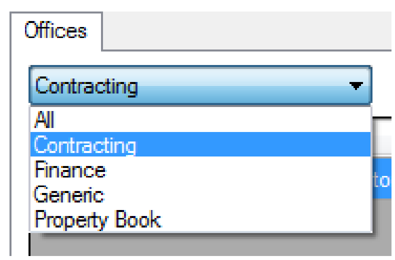
To view the details of an AOR:

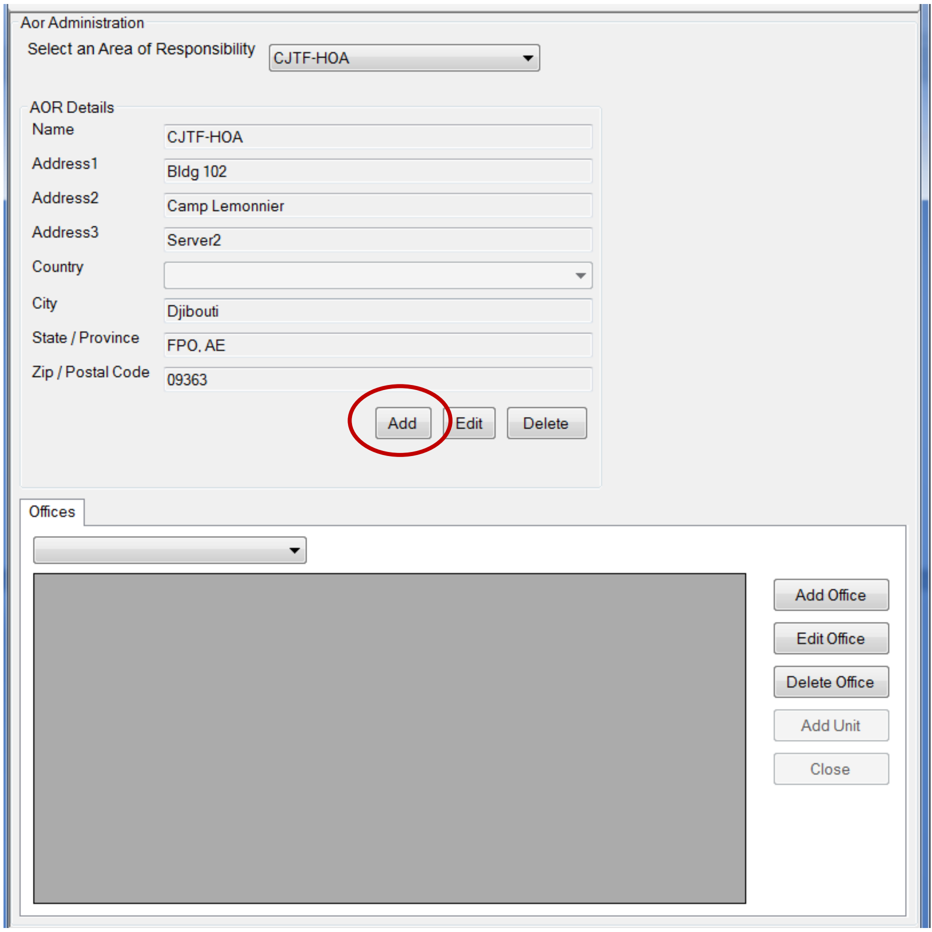
1. Select **Set Up, AOR Administration** from the 3in1 main menu.



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

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





AOR Administration Window

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

Reviewing Procurement Policies

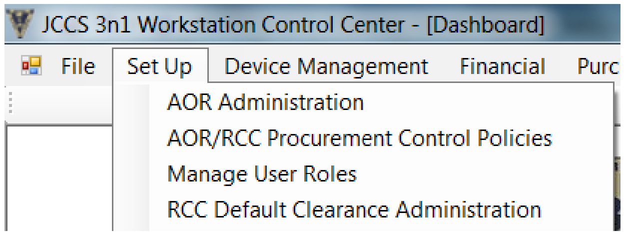
Procurement controls can be established on the Workstation by KOs and transmitted to the device to display a warning message when an unauthorized item, or one that requires special approval, is being purchased; or to prevent a purchase that exceeds the authorized limit. Procurement controls are not required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

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

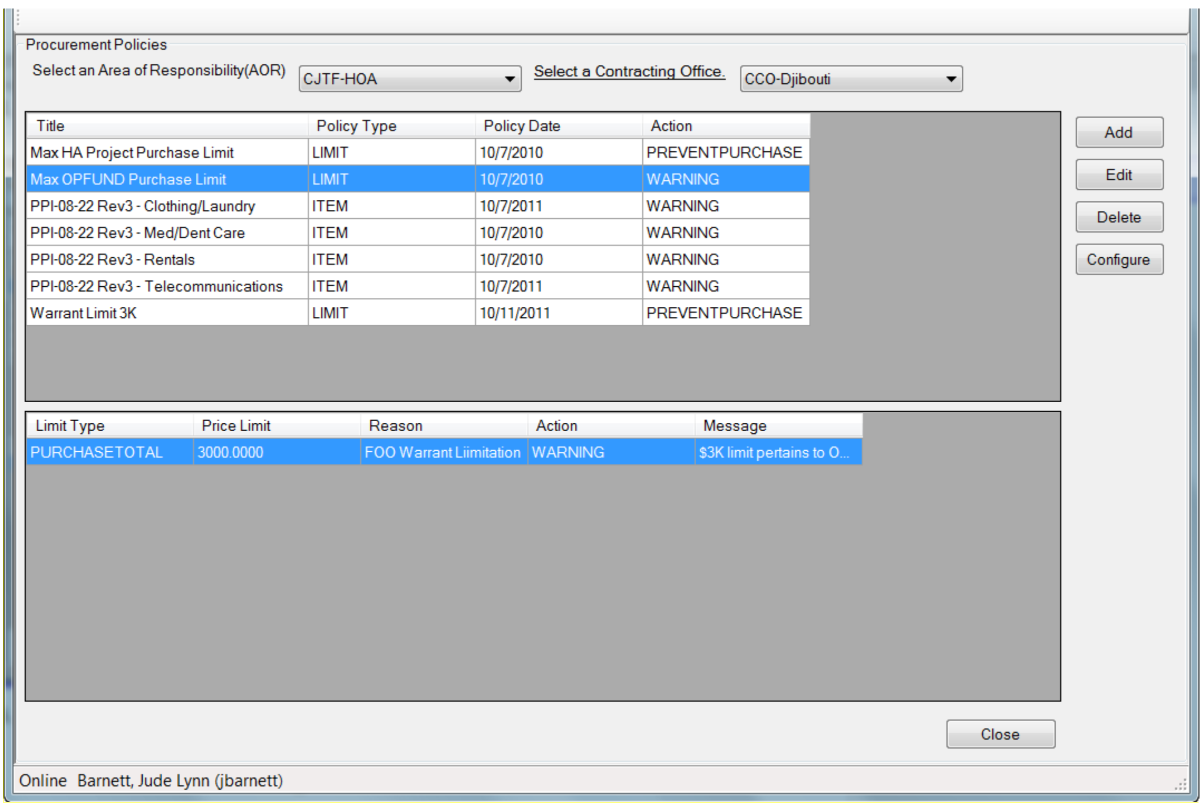
Procurement controls are established at the AOR or RCC level. Defined procurement controls can then be selected when provisioning devices (AOR level policies automatically flow down to each RCC assigned to that AOR). All procurement controls are available for assignment to each FOO as applicable during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

To view a procurement policy assigned to an AOR:

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



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



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

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

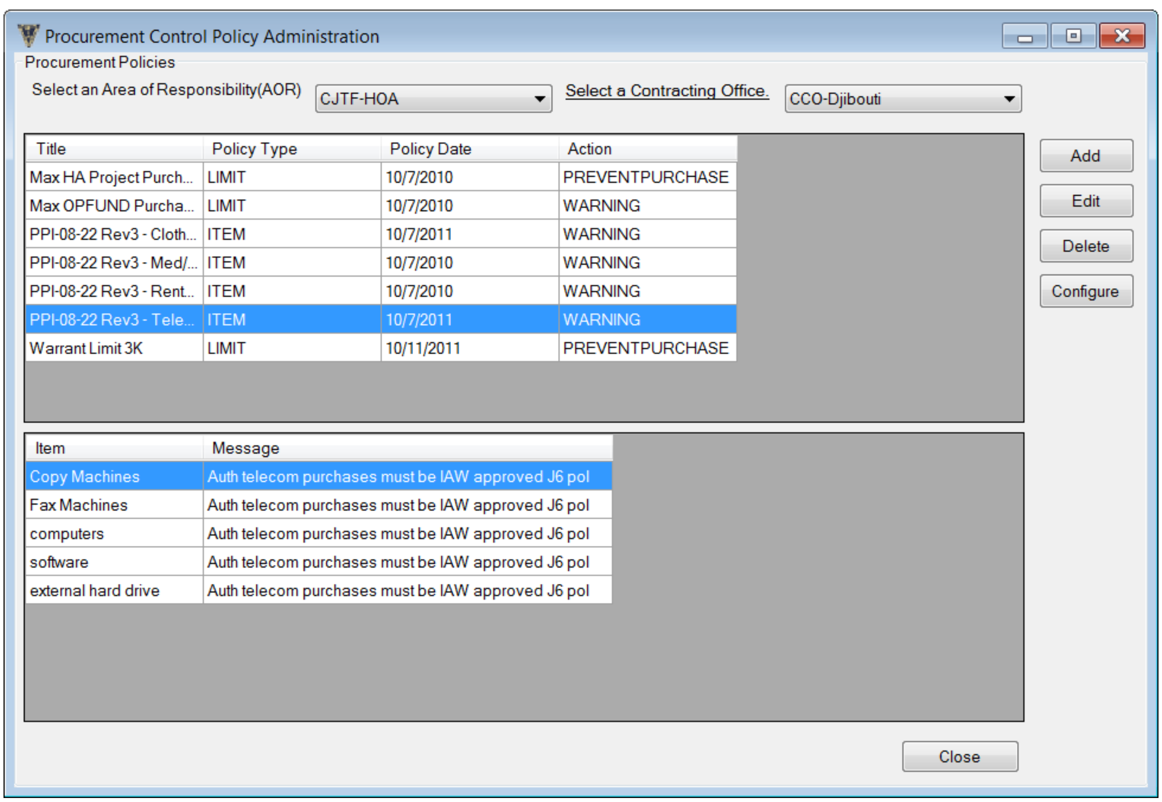
Item Limit and Price Limit Policies

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

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

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

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



Procurement Control Policy Administration Window – Item Policy Selected

Viewing the Clearance Configuration

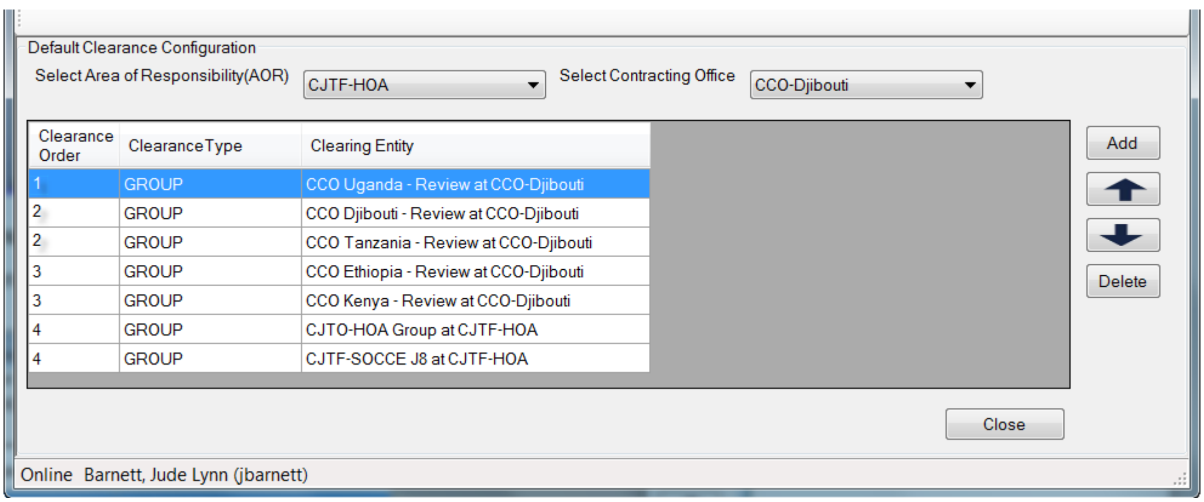
Local policy usually dictates who must review/clear a FOO/PA's orders/vouchers in order to close out the process. The Contracting Officer must determine the best way to configure the 3in1 system in accordance with the established policies. The clearance flow can be created with individuals, offices,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

To view the clearance configuration for your AOR:

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

The clearance configuration is displayed.

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



Default Clearance Configuration Window

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

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

Lesson Summary

In this lesson, you learned to:

- ❑ Review the details of an assigned AOR

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

Lesson 5: Viewing Attached Documents

Objectives

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

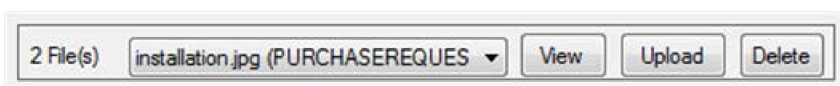
- ❑ Use the Document Handling feature to view documents attached to purchase requests or users

View Documents Attached to Purchase Requests

The scanned copy of the actual purchase request can be attached to purchase request files on the Workstation using the **Document Handling** feature.

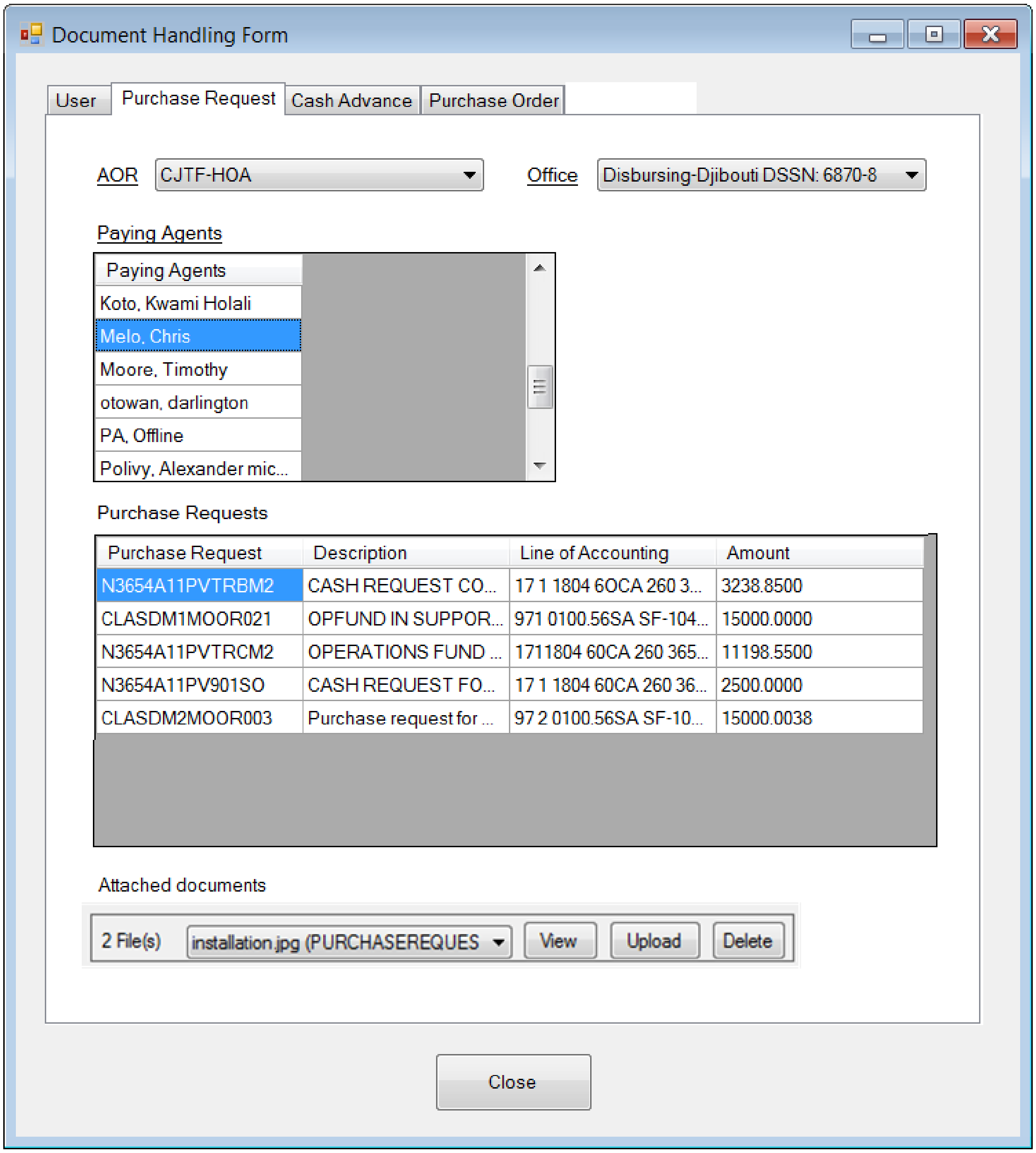
To view files attached to a purchase request, such as a copy of the purchase request document:

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.
4. Select a purchase request in the Purchase Requests table.
   – Files attached to the selected purchase request are listed the bottom of the window.



   – If more than one file is attached, select one using the drop-down list.
5. Click the **View** button to open the file.

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.

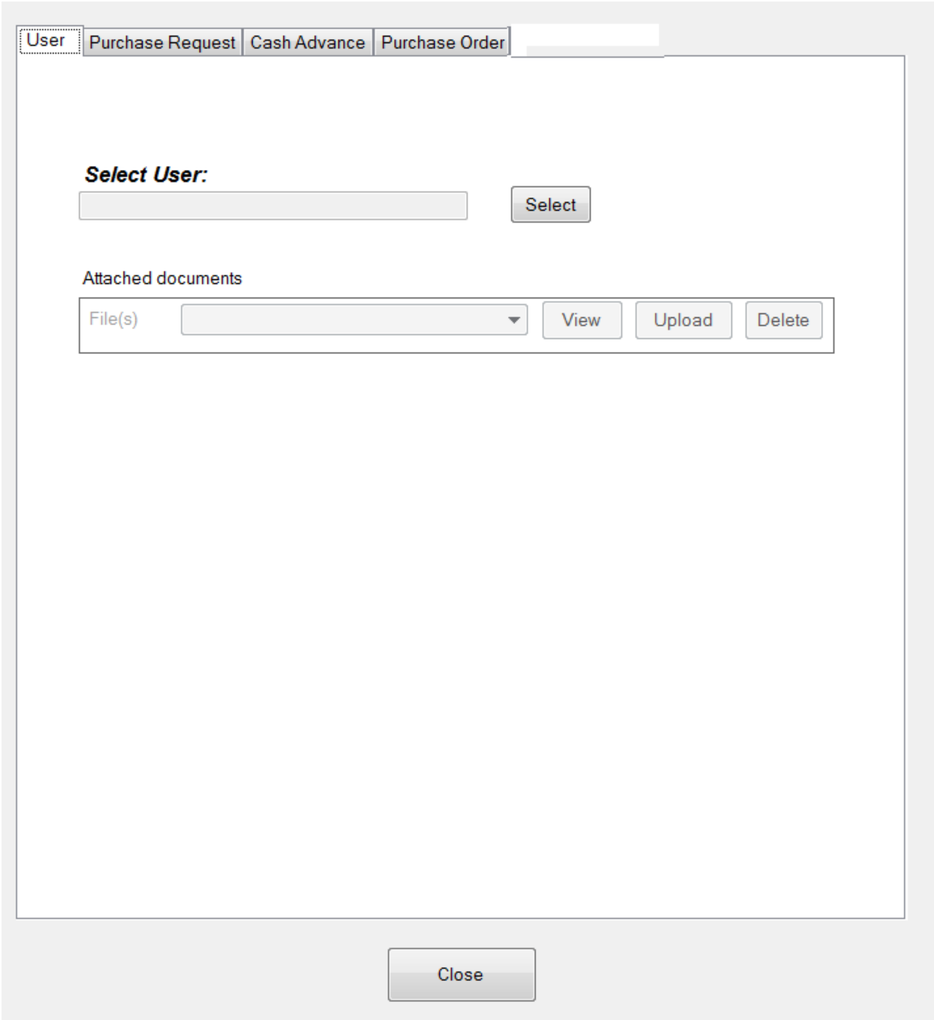


Document Handling Window, Purchase Request Tab

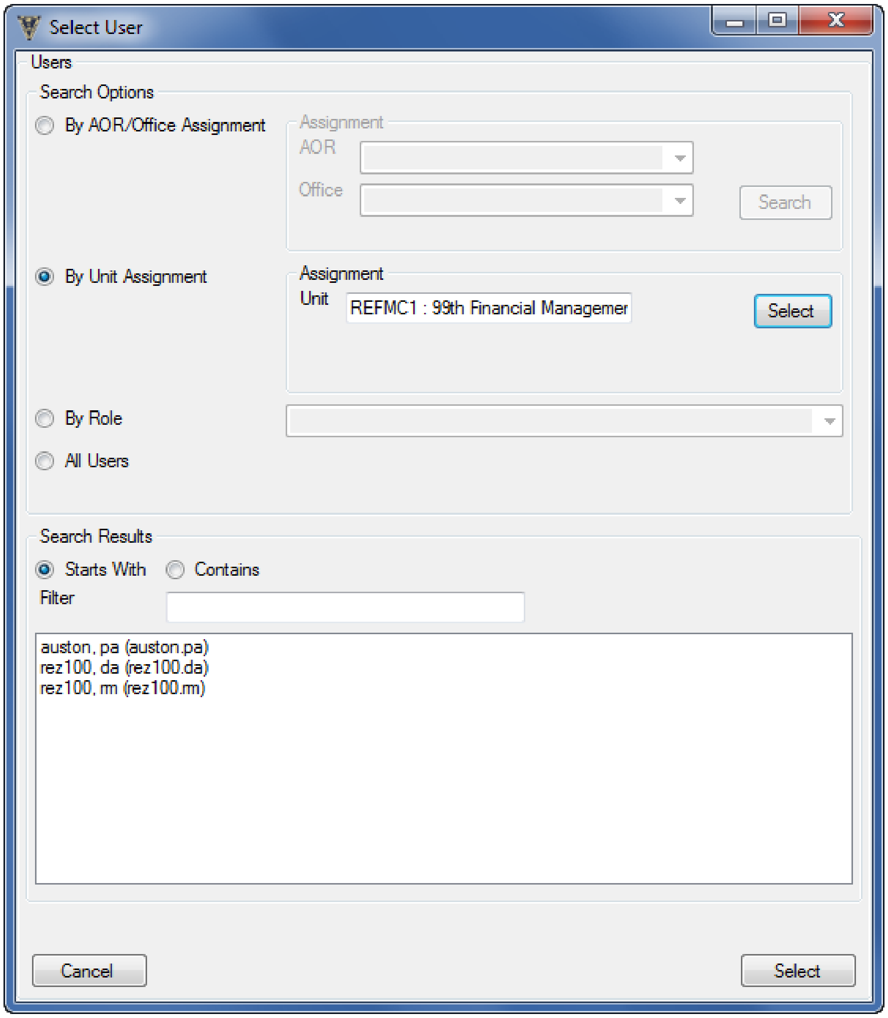
View Documents Attached to Users

Documents such as appointment letters that are attached to a user profile can be viewed using the Document Handling feature.

1. From the main menu, select **File**, **Documents, Document Handling**.
2. In the *Document Handling Form* window, click the **User** tab.

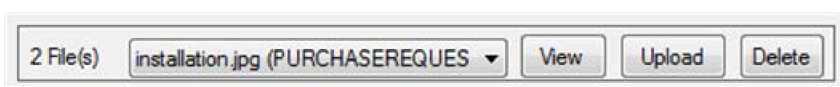


3. Click inside the **Select User** field, and then click the **Select** button.
   - The *Select User* window opens.
4. Use the filters in the *Select User* window to search for users. For example, search by role to locate FOOs.
5. Select a user name from the results list, then click the **Select** button at the bottom of the window.



Select User Window

– Files attached to the selected user are listed in the **User** tab.



– If more than one file is attached, select one using the drop-down list.

6. Click the **View** button to open the file.

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.

Lesson Summary

In this lesson, you learned to:

- ❑ Use the Document Handling feature to view documents attached to purchase requests or users

Lesson 6: Importing Voucher Numbers from DDS

Objectives

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

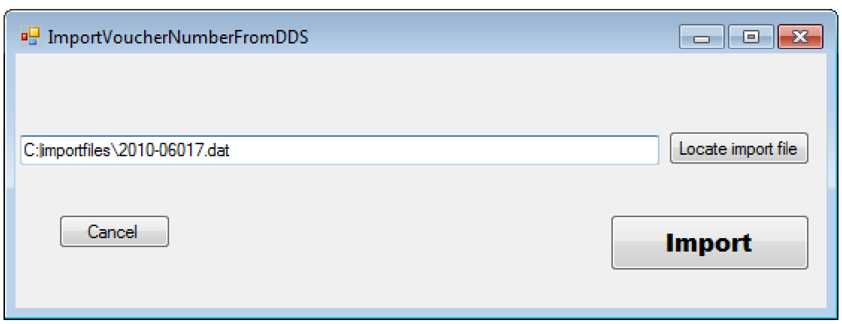
- ❑ Import voucher numbers from DDS for purchase orders

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. If your finance office uses DDS, the voucher numbers can be imported. If your finance office does not use DDS, a finance officer will need to look up individual purchase orders and manually enter the voucher number for each one, using the **Purchase Order**, **Lookup Purchase Order** feature. As a reviewer, you cannot edit individual purchase orders.

Importing Voucher Numbers from DDS

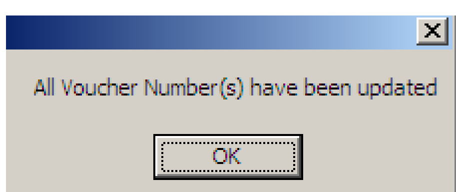
Follow these steps to import the DDS download file and update purchase orders with the voucher numbers issued in DDS:

1. From the 3in1 Tool Workstation main menu, select **Financial**, **DDS**, **Import/Update Vouchers**.
2. In the *Import* dialog box, click the **Locate Import File** button to locate and select the DDS download file.



Import Dialog Box

3. Click the **Import** button.
   – Imported voucher numbers are automatically assigned to the corresponding purchase orders.
4. The following dialog is displayed when the import process finishes. Click OK.



Voucher Update Confirmation Dialog Box

Orders Moved to EDA for Permanent Storage

After voucher numbers have been issued, the 3in1 prime database will transmit payment information to other financial systems and send order/voucher and receipt images for official document storage to Electronic Data Access (EDA). This eliminates the need for FOOs and PAs to retain paper copies of the SF44s.

Lesson Summary

In this lesson, you learned to:

- ❑ Import voucher numbers for purchase orders
- ❑ Manually add voucher numbers to purchase orders in the Workstation

Module 4: The Ordering Process

Lesson 1: Understanding the Ordering Process

Objectives

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

- ❑ Understand the basic process used by FOOs to make purchases using the 3in1 device
- ❑ Understand that procurement controls can trigger warnings or prevent some purchases
- ❑ Understand the composition of a PIIN number, and know when a PIIN is assigned and that a PIIN cannot be un-assigned.
- ❑ Understand that funding changes made on the workstation affect the funding availability on the device
- ❑ Name the parties that must sign the PIIN Log to verify the order transaction
- ❑ Understand that a FOO can create orders on the device or on the Workstation, if the device becomes inoperable in the field

About Purchasing Using the 3in1 Device

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

As a reviewer, it is helpful to understand the general process of setting up the 3in1 handheld devices for use by FOO/PA teams. The KO registers and approves the 3in1 handheld devices, then assigns each device to one or more FOO/PA teams.

The first time that a FOO uses the device, he or she logs in and downloads and installs user data, assigned purchase requests, cash advances, procurement controls, PIIN blocks, and all other necessary data. This is referred to as *provisioning data* in the 3in1 Tool. The download also includes the FOO user name and password, which allows the FOO to log in to the device 3in1 application.

As purchases are made on the device, they are uploaded to the Workstation. It is important to understand the device and Workstation exchange information regularly, provided a network connection exists. Changes recorded on the Workstation, such as cash advances or cancelling purchase requests, are downloaded to the device and affect FOOs' purchasing decisions.

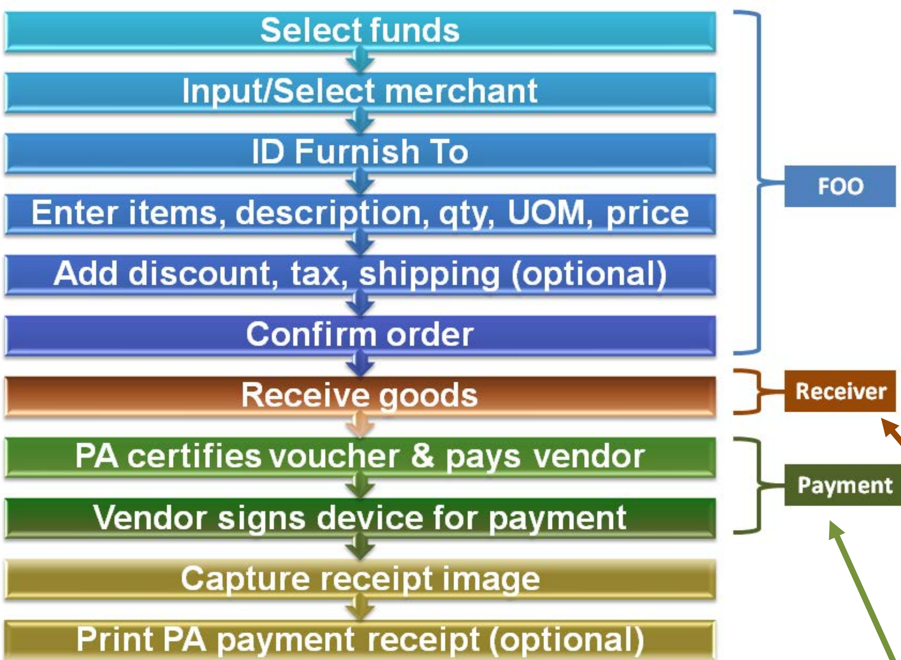
It is important for FOOs to understand that completing a purchase on the device creates a contract between the government and the merchant. The FOO is acting as an authorized agent of the government in creating the contract.

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.

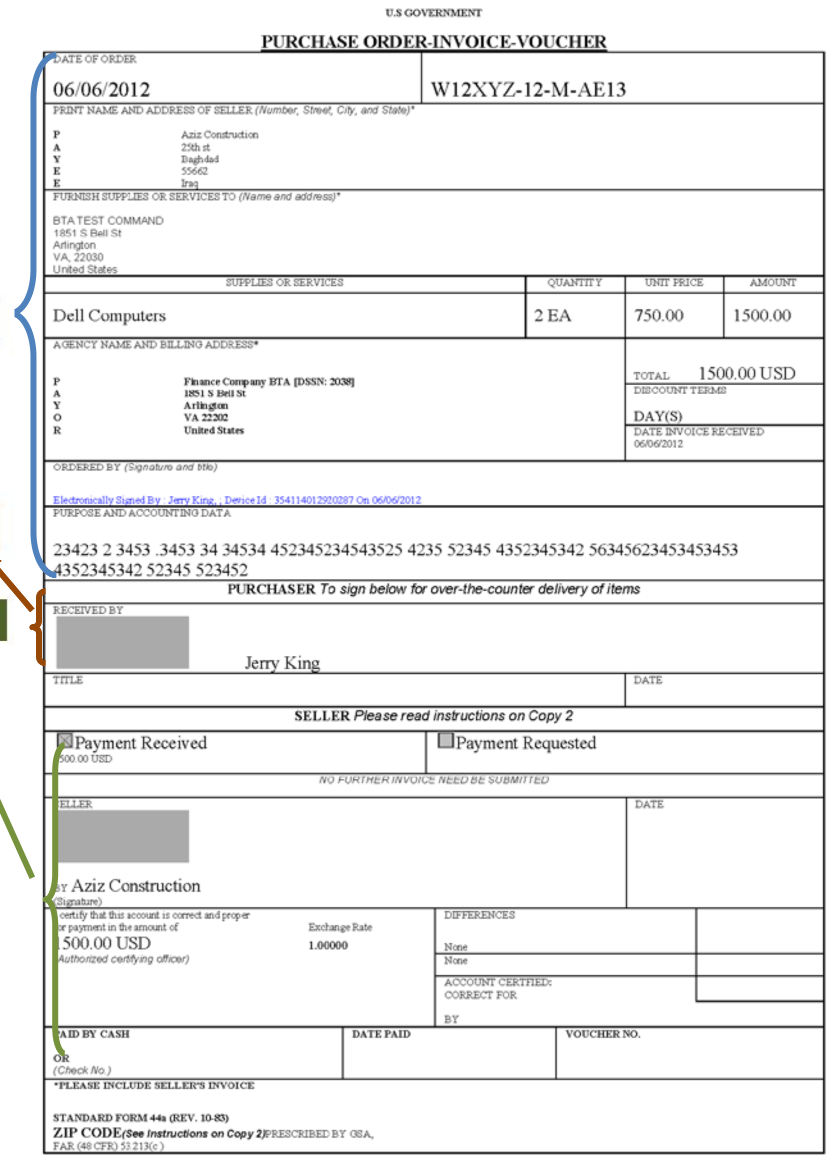
However, the 3in1 application does provide tools to manage orders, such as cancelling or returning orders and correcting mistakes in an order. It is also important to understand that when a purchase is finalized, it is assigned a PIIN. Once a PIIN is assigned, it cannot be unassigned and the order cannot 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
500.00 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
OR
(Check No.)
DATE PAID
VOUCHER NO.

***PLEASE INCLUDE SELLER'S INVOICE**

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

Before Starting an Order

FOOs can view procurement controls before starting orders. The FOO will know that certain items cannot be purchased, or require special authorization. View Procurement Controls is a feature available on the device Tools tab.

The prerequisite to starting an order is to ensure an active purchase request or cash advance exists for the purchase requisition that the FOO plans to use.

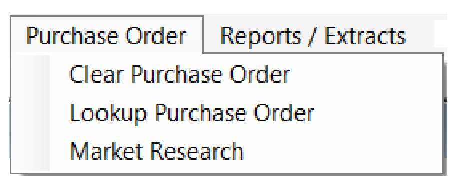
The device has the capability to store a directory of merchants. FOOs making regular purchases from a known set of vendors are encouraged to enter vendor information all at once when using the 3in1 Tool for the first time. Creating a merchant list saves time at the vendor's location and reduces exposure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

Another useful feature is Shopping Lists, which can be created and stored on the device or Workstation. They are helpful for remembering items, and also save time in the market by automatically populating the order.

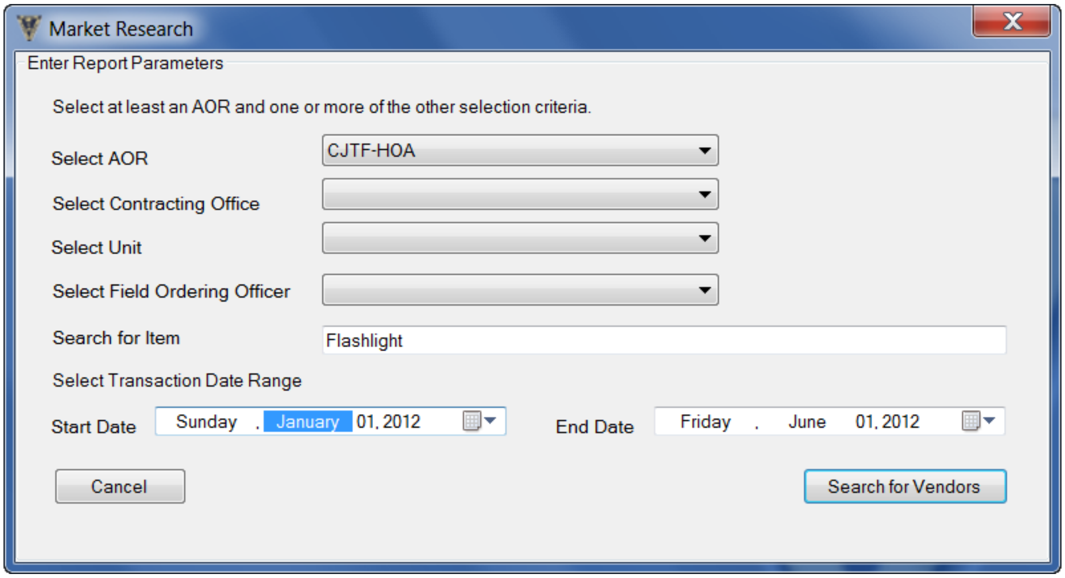
Market Research Tool

The **Market Research** tool, which can be accessed through the **Purchase Order** menu on the Workstation or the **Tools** tab on the device, is useful for price comparisons. Enter the name of the item you want to purchase and search for vendors who supply the item, and also view their prices. These are vendors from whom previous purchases were made by the AOR.

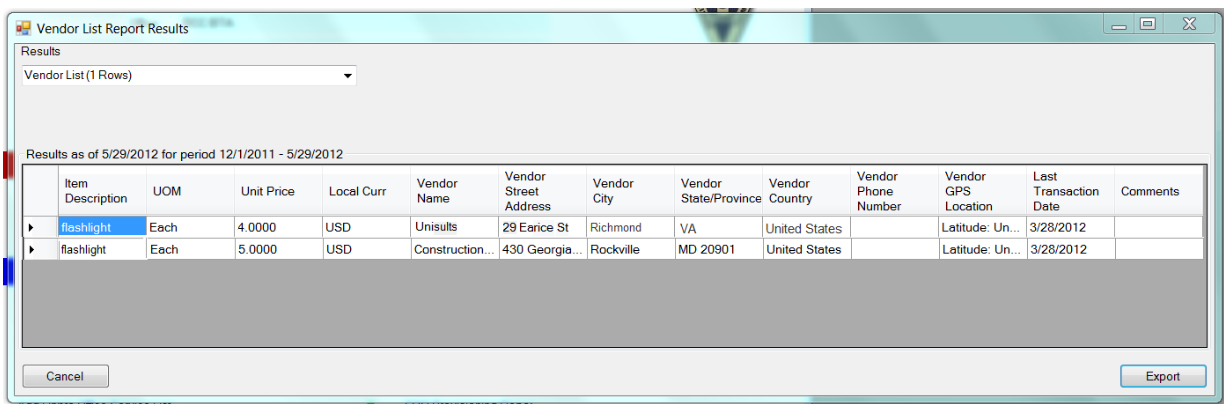
To use the Market Research feature on the Workstation:



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.



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



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.

Making a Purchase Using the Device

The basic process used by FOOs to make purchases on the handheld device:

1. Start an order on the device.
2. On the **Funding** tab, select a cash advance that has a remaining amount greater than zero.
   – 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.
3. Specify the unit that will be furnished with the ordered supplies.
4. Specify the merchant from whom goods will be purchased.

5. Add line items to the order. Each line item includes a quantity, a description, a unit of measure, and a price. This is similar to the line items in an invoice or a receipt.
   - Items can be flagged for Property Book accounting. (Property Book items are listed in reports produced on the Workstation.)
   - Scanning item bar codes using the handheld device is optional.
6. 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 an optional fixed discount field. (Not all orders will have tax, shipping, and/or discounts.)
7. The FOO digitally signs to confirm the order. At this point, a unique PIIN/Order number is assigned to the order. The PIIN/Order number is assigned and cannot be un-assigned. The FOO has obligated the government to the merchant according to the items entered in the order.

   Note: Once an order has been executed on the device, it cannot be changed.
8. After confirming the order, the device should be connected to a network as soon as is practical. Until the order is sent to the prime database, there is no backup of the order, and the order would be lost if the device is lost or destroyed.
9. After an order is successfully placed, each party verifies the transaction by providing a signature on the device screen. The parties include:
   - Receiver: The person receiving the goods on behalf of the government
   - Paying Agent: The person who certifies the voucher for the government
   - Vendor: The person from whom the goods are being purchased
10. The FOO can print an SF44 from the device using the small field printer that is part of the 3in1 system. 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. The printed SF44 can also be provided to a vendor if an ordered item will be received and paid for on a later date.
11. The FOO can take images of the receipt using the device built-in camera. Receipt images taken by the device camera are uploaded to the prime database with the order.

Funding Changes Made on the Workstation

FOOs should be aware that an RM can close or cancel a purchase requests on the Workstation. When the close or cancel action is received and acknowledged by the device, the closed or cancelled PR is removed from the device.

Also, if funds are decommitted from a purchase request, the Decommit Funds feature is used on the Workstation to decrease the amount loaded on both the Workstation and the device. The FOO will see a change in the available amount of funding for the decommitted PR.

Purchase requests are automatically decommitted if the handheld device verifies that the PR balance is sufficient to support the decommit. This eliminates the extra steps of having the Workstation user use the **Decommit** button on the *Purchase Request Administration* window after the device verifies there are sufficient funds to de-commit.

There is an option on the Workstation to automatically close out a PR after a successful decommitment of funds. This saves users an extra step of using the **Close PR** button.

Procurement Controls

When attempting to make some purchases, warnings may be issued or a purchase may be prevented due to procurement controls.

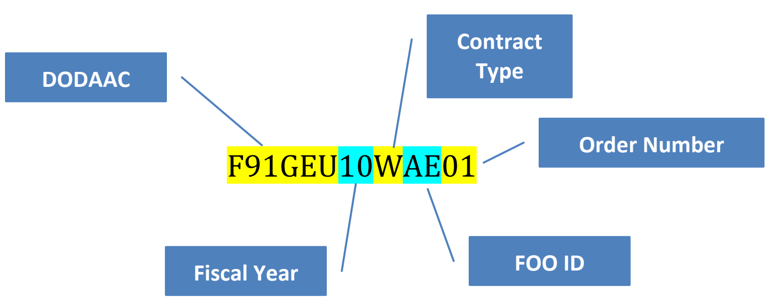
Procurement controls are downloaded from the prime database during provisioning.

Item-based controls will issue a warning, while price-based controls will either issue a warning or prevent purchase. For example, if an attempt is made to purchase beer, a warning may be issued, depending on procurement controls received during provisioning.

If an order exceeds the authorized limit, a warning may be issued or purchase prevented. The 3in1 Tool is designed to prevent a purchase if the price and quantity of an item exceed the remaining cash available. Note this is not a procurement control policy received during provisioning.

About PIINs and Ordering

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



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. The manual orders are then entered in the Workstation for electronic processing.

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

Once a PIIN number is issued, the order cannot be changed. However, the order can be cancelled. If the FOO completed the process by collecting all relevant signatures and confirmations, then realized a mistake has been made, the FOO may return the order using a command on the device. However, the PIIN number is still considered used.

PIIN numbers are unique and cannot be recycled if an order is returned.

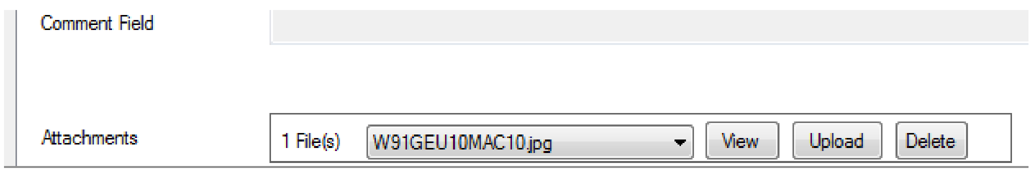
Manually Adding Purchase Orders in the Workstation

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

The FOO uses the **Purchase Order**, **Add Purchase Order** command to add a purchase order with purchase items in the Workstation.

Uploading Supporting Documents

While creating a manual PO, the FOO can upload a scanned version of the original, paper SF44 to support the data entered for electronic processing. At the bottom of the *Purchase Order* window, the Attachments area provides an **Upload** button to locate and upload the scanned SF44 file.



Attachments area of Purchase Order Window

Completing Purchases on the Workstation

After creating the purchase order on the Workstation, the FOO may return to edit some fields, such as entering payment information and voucher numbers. The **Look Up Purchase Order** command is used to locate and edit the purchase order.

Lesson Summary

In this lesson, you learned to:

- ❑ Understand the basic process used by FOOs to make purchases using the 3in1 device
- ❑ Understand that procurement controls can trigger warnings or prevent some purchases
- ❑ Understand the composition of a PIIN number, and know when a PIIN is assigned and that a PIIN cannot be un-assigned.
- ❑ Understand that funding changes made on the workstation affect the funding availability on the device
- ❑ Name the parties that must sign the PIIN Log to verify the order transaction
- ❑ Understand that a FOO can create orders on the device or on the Workstation, if the device becomes inoperable in the field

Module 5: Clearing Purchase Orders

Lesson 1: Clearing Orders from the Workstation

Objectives

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

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

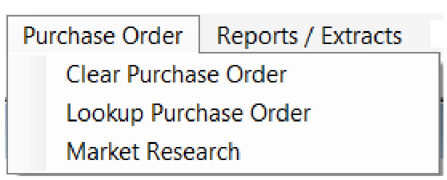
Clearing Purchase Orders

Clearance is the process of reviewing or approving purchase orders by multiple people, usually based on their roles in the procurement process. When the devices are connected to the Internet, SF44 information is transmitted to the prime database and is immediately available for review and clearance on the Workstation. 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 is established by the KO during the provisioning process. Orders will move through the clearance process in the order the reviewers were assigned. Reviewers will receive an email from the 3in1 system when orders move to their queue for review/clearance. This notification can be turned off from the User's Profile screen.

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

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

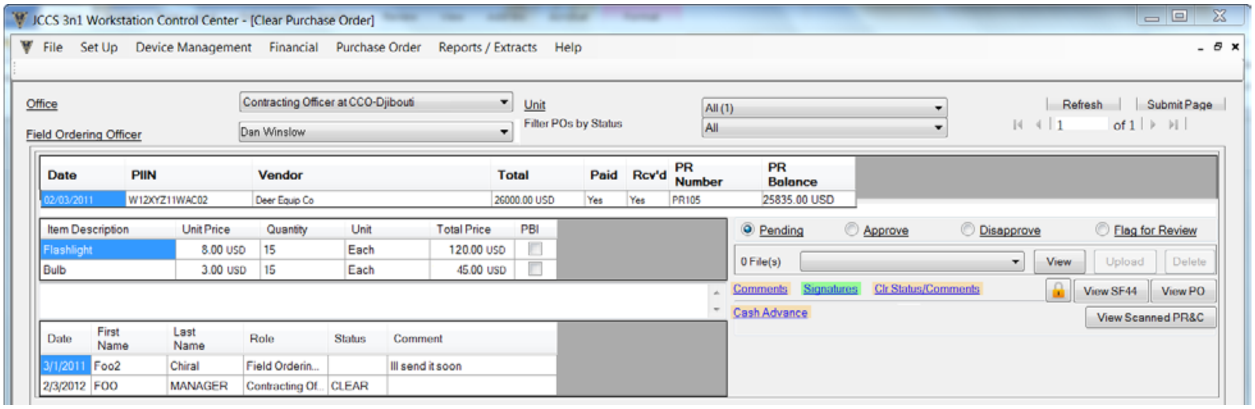


Clear Purchase Order Menu Command

   – The *Clear Purchase Order* window opens.

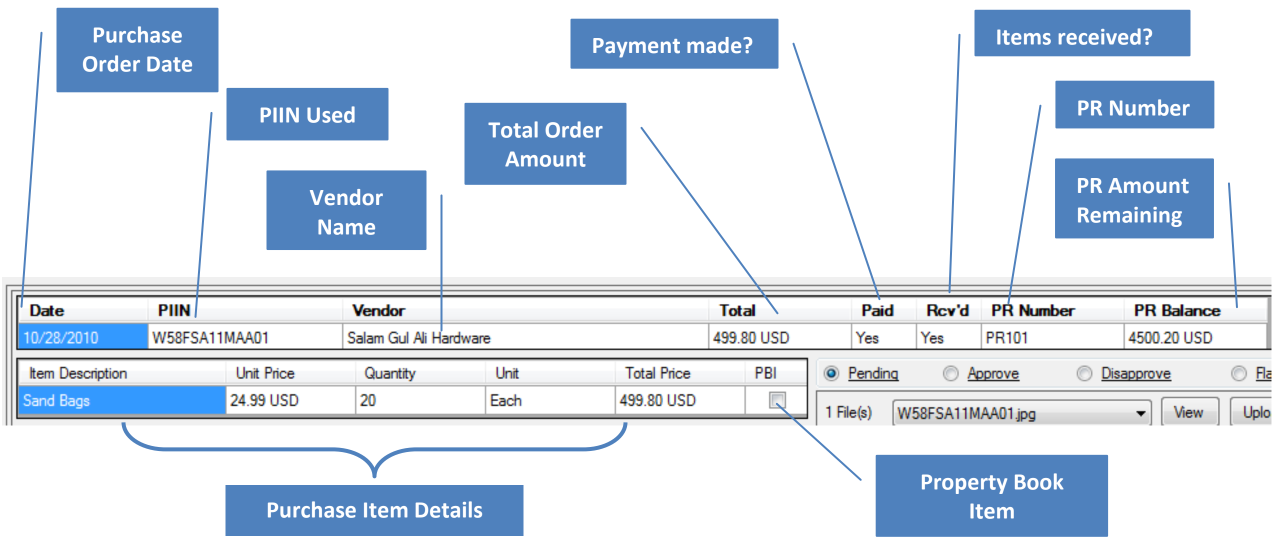
2. Select a **Unit** and **Office** from the drop-down list. (To select all units, select the **All** option. This enables viewing orders associated with FOOs in all units.)
3. Select the **FOO** whose purchase orders you would like to review.
4. If there are many order, use the **Filter** field to filter them by status: **Pending**, **Disapproved** or **Approved.**

The list of purchase orders updates to match the criteria you specified.



Clear Purchase Order Window

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



Reviewing and Responding to Comments

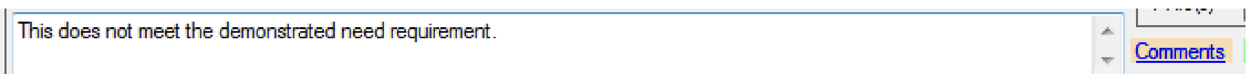
Comments regarding purchase orders may be exchanged between a FOO, using the handheld device, and a reviewer who types in the **Comments** section on the Clearance screen.

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

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

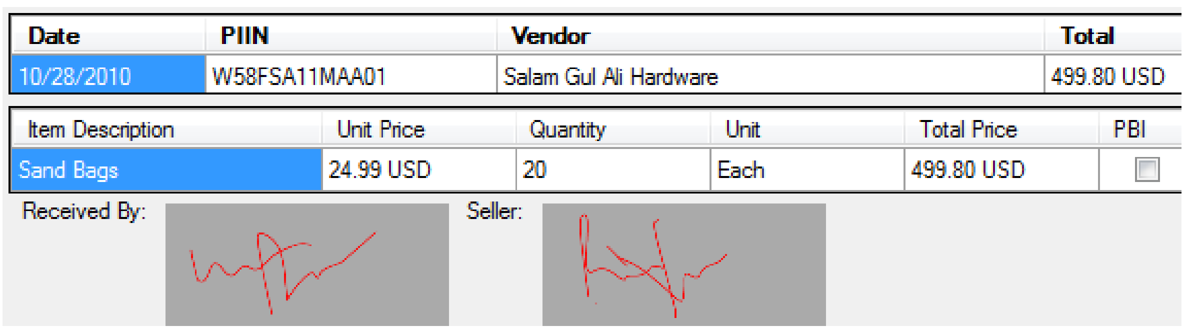
Clr Status/Comments Table

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



Reviewer Comments

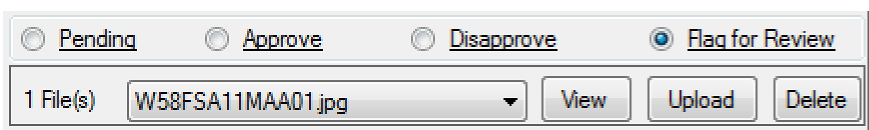
In addition to the item details, you can view or hide reviewer comments and signatures by clicking the **Signatures** links.



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.

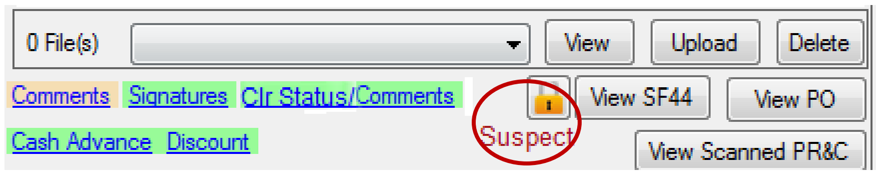
(2) Paid Phase: When the PA agent enters the password on the device and agrees to pay the amount stated on the SF44.

(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.

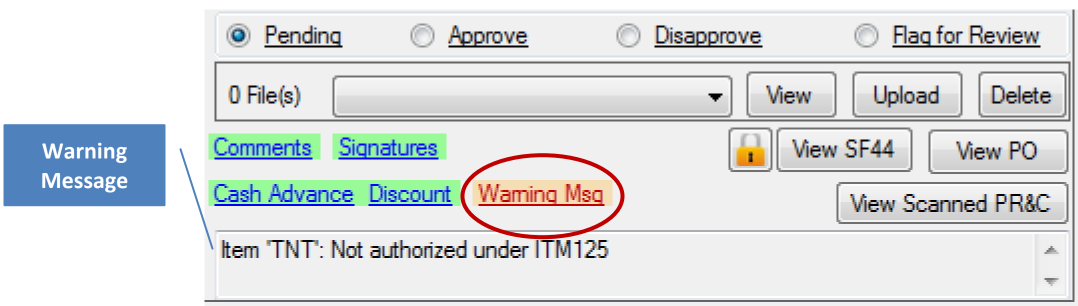
If the purchase order has not been altered, a confirmation message ("OK") is displayed beside the Lock icon. However, if the purchase order has been altered in some way, a "Suspect" message is displayed.



Verify Data Integrity

If the order is flagged as Suspect, click the **View PO** button to review the entire purchase order in the *Purchase Order* window.

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



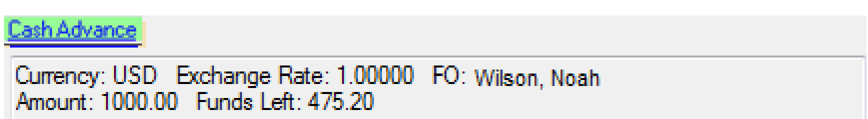
Warning Message Indicates Procurement Control Policy May Have Been Violated

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

Viewing the SF44 and Cash Advance and Discount

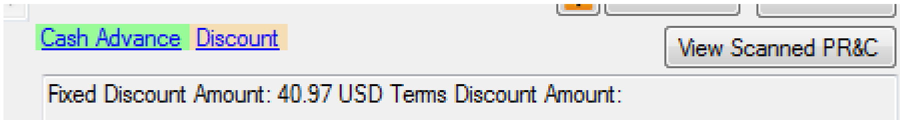
Two other features on the Clearance screen are viewing the SF44 associated with the purchase order, and viewing the cash advances associated with the purchase request.

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.



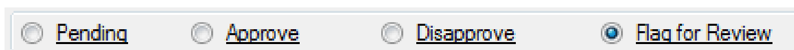
Viewing Discount Amounts

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.

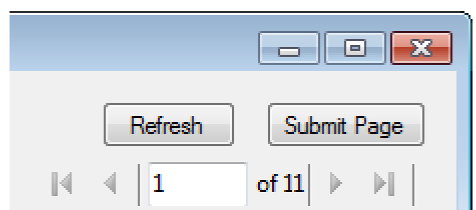
Completing Review of Purchase Orders

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.

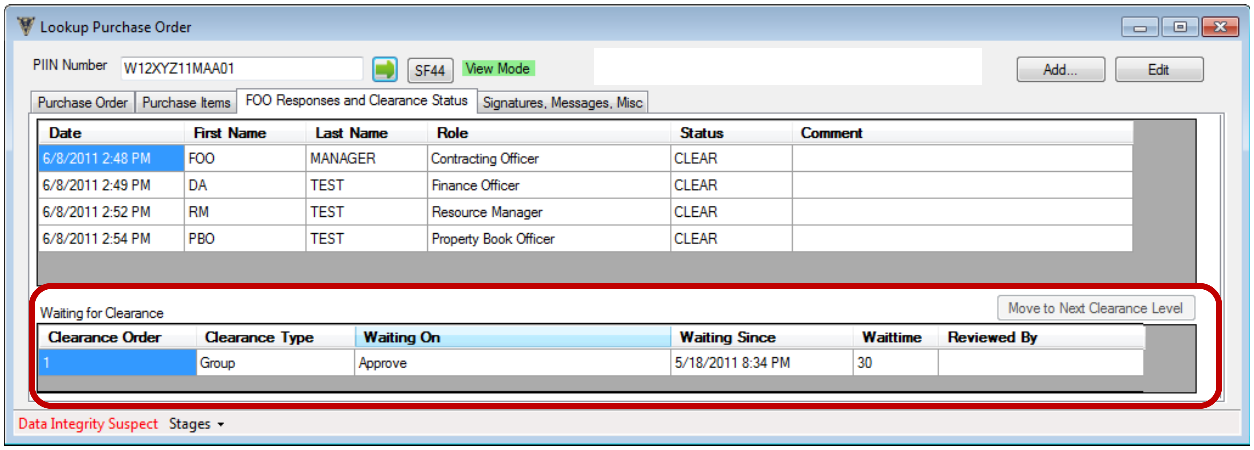
A maximum of 10 orders can be displayed on one page. If more than one page of orders exists, click the right double-arrow to advance to the next page.

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.

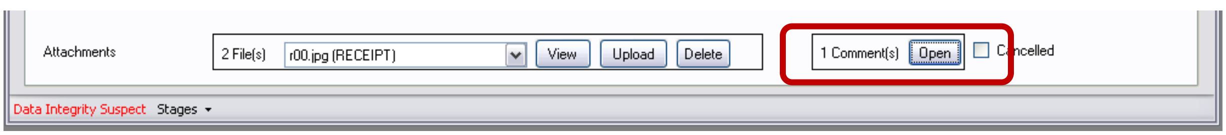
Locating the Next Reviewer

In the *Lookup Purchase Order* window (accessed by selecting **Purchase Order**, **Lookup Purchase Order** from the main menu), on the **FOO Responses Clearance Status** tab, the Waiting for Clearance section identifies the next reviewer.



Lookup Purchase Order Window – Waiting for Clearance Section

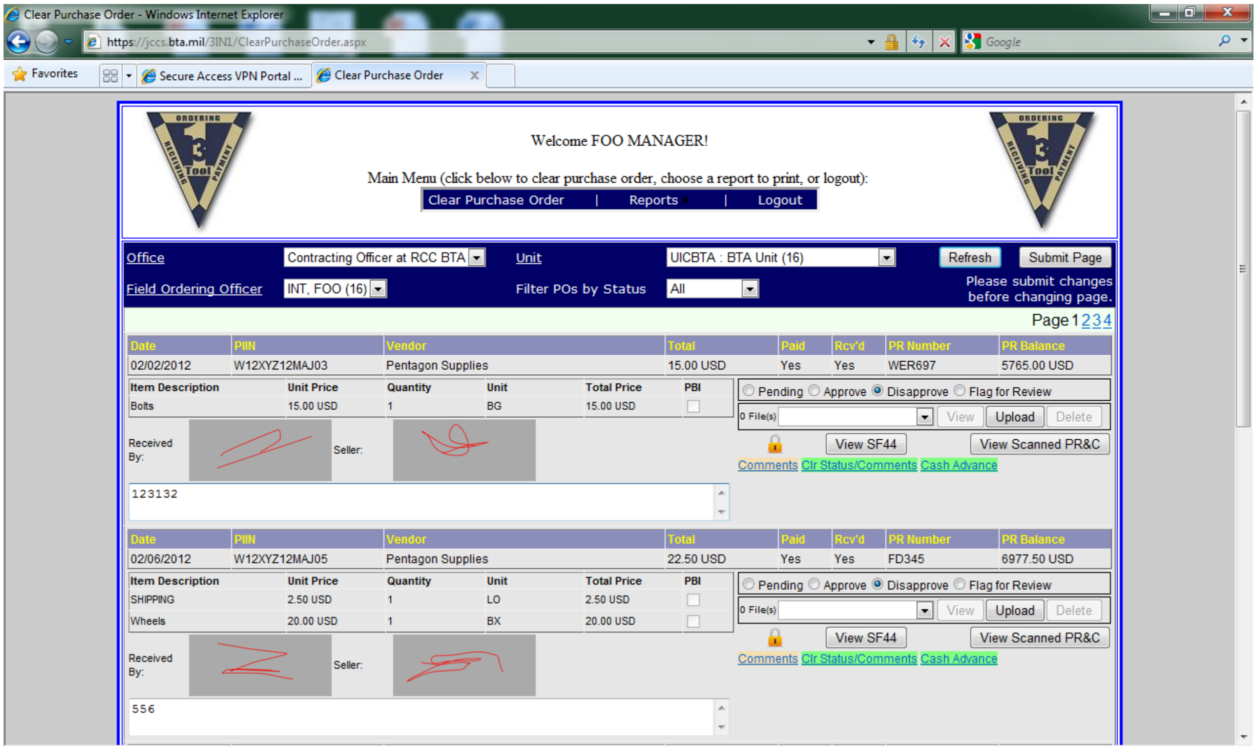
There may be situations where it is necessary for the System Administrator to manually advance a PO to the next clearance level. When a PO is moved to the next clearance level, a comment is added automatically to the purchase order, stating that the Sys Admin manually moved the PO from one clearance 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

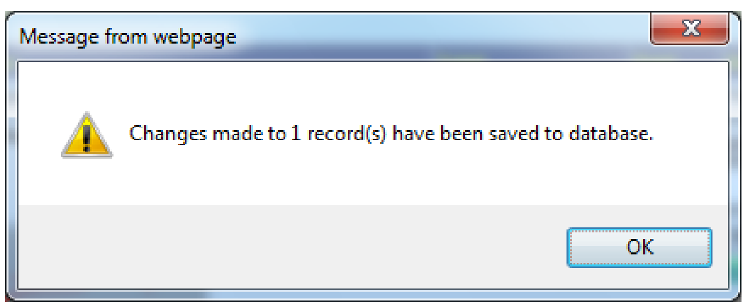
Web-Based Clearance

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



Clear Purchase Orders Screen

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



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

Lesson Summary

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

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Lesson 2: Looking Up Purchase Orders

Objectives

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

- ❑ Look up a purchase order on the Workstation
- ❑ View FOO and Clearance comments and signatures associated with a purchase order

Looking Up Purchase Orders

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

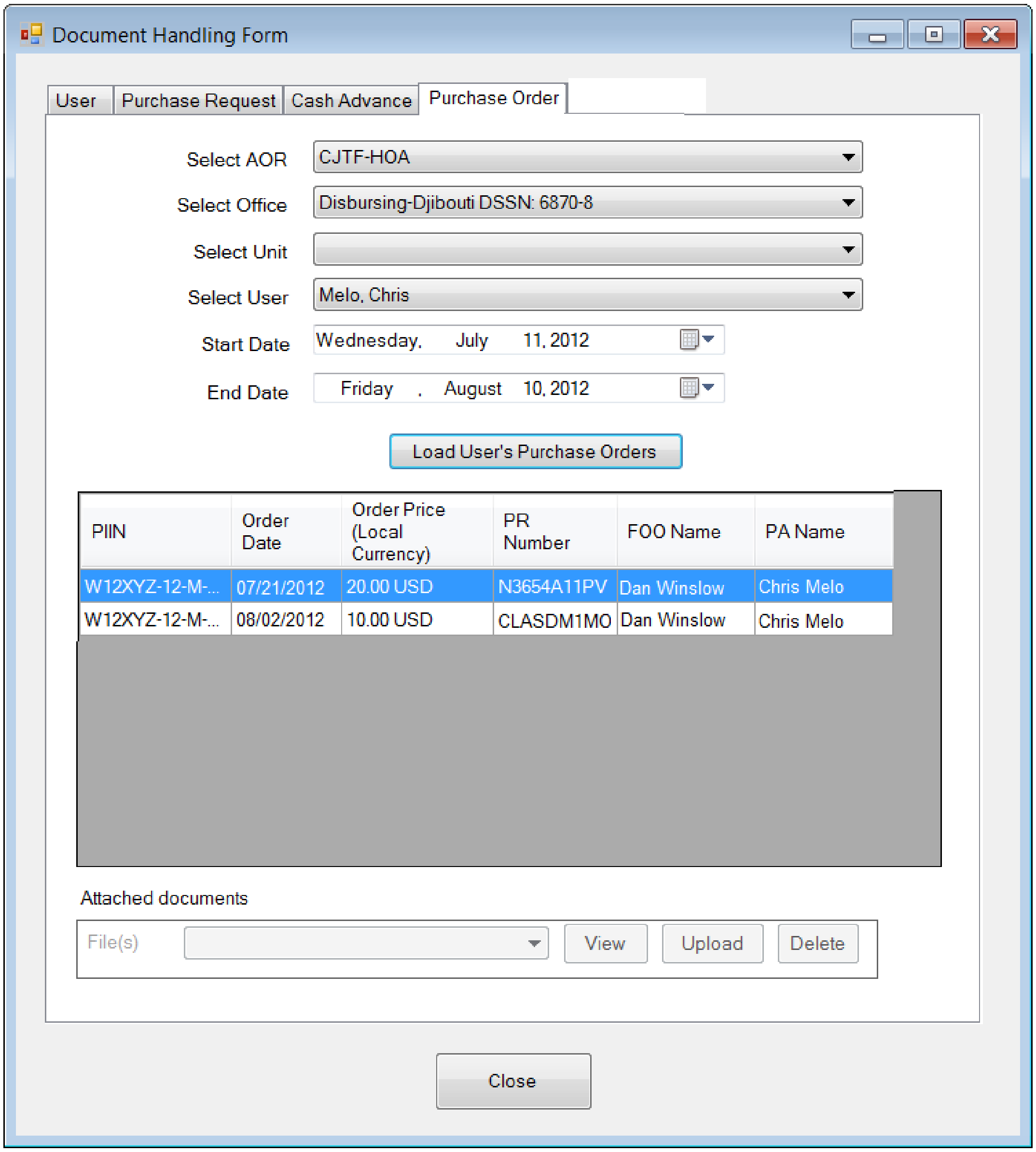
Looking Up POs by User

To view purchase orders by user assignment:

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

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

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

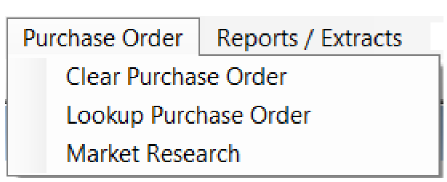


Purchase orders associated with the selected user are listed in the table

Looking Up POs by PIIN

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

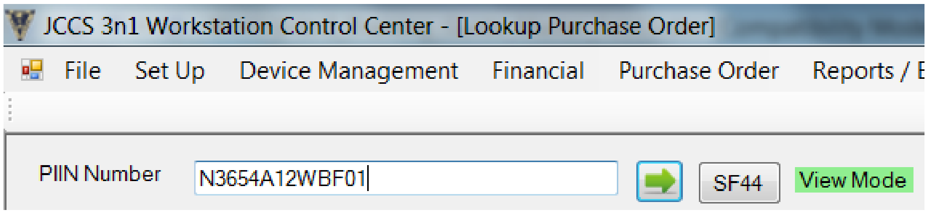
1. From the Workstation main menu, select **Purchase Order**, **Lookup Purchase Order**.



Lookup Purchase Order Menu Command

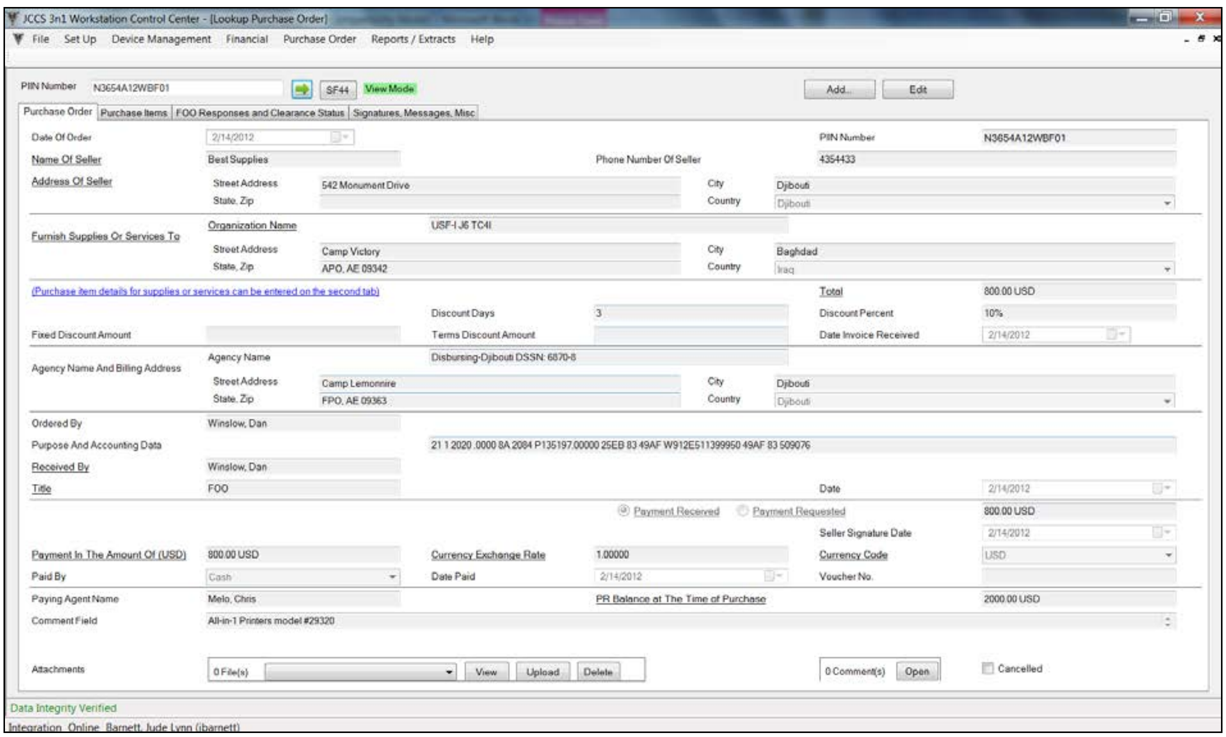
– The *Lookup Purchase Order* window opens.

2. Look up a purchase order by specifying a PIIN in the **PIIN Number** field at the top of the screen.



Specify the PIIN associated with the purchase order you are looking for

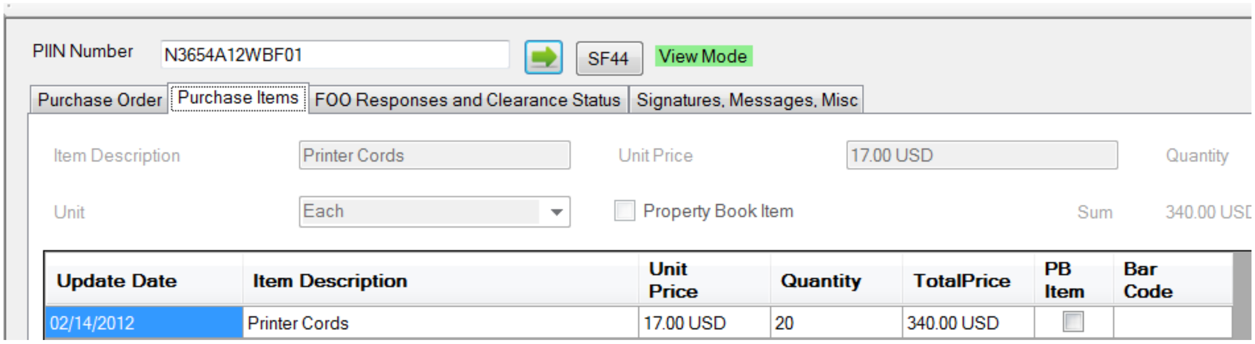
3. Click the **Lookup** button . The screen updates with the purchase order information.



Purchase Order Window

Viewing Purchase Items

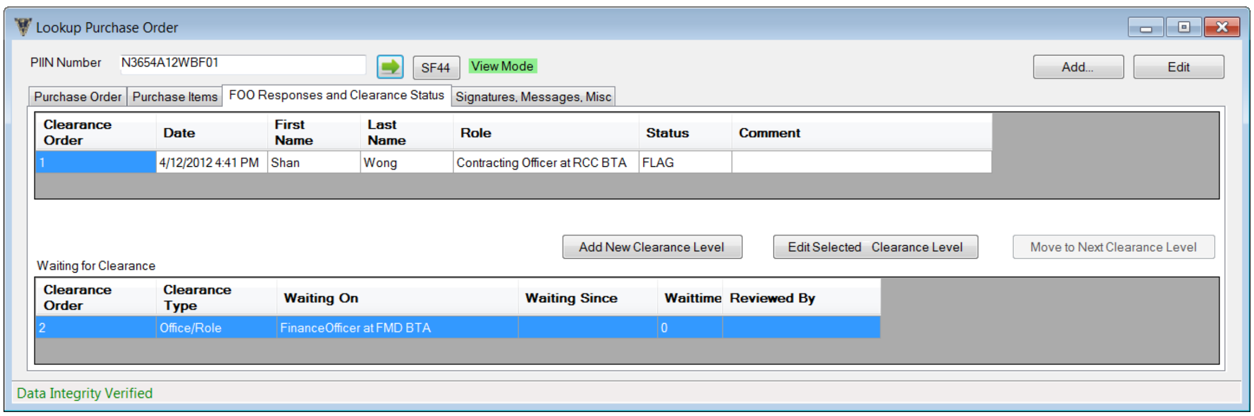
To view items purchased using the PO, click the **Purchase Items** tab on the *Purchase Order* window.



Purchase Items Tab

Viewing FOO Responses and Clearance Status

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



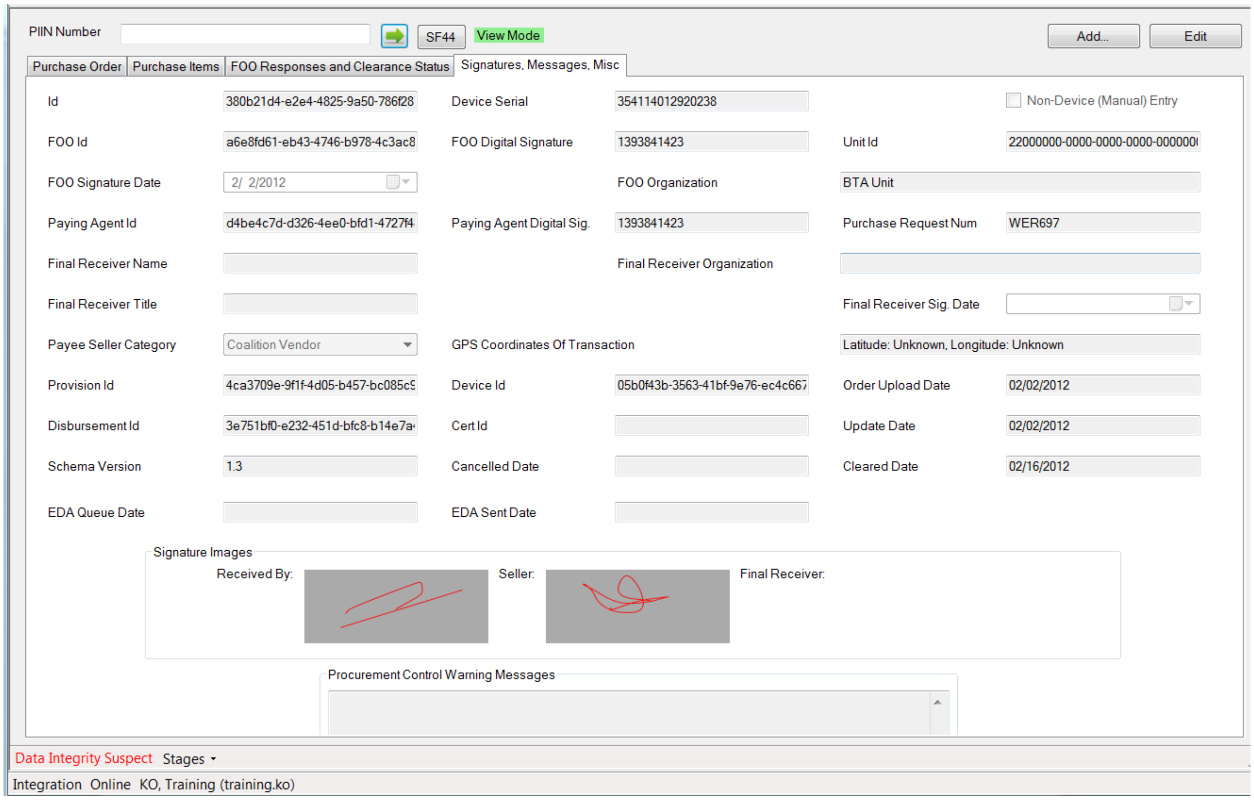
FOO Responses and Clearance Status Tab

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.

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.



Purchase Order Signatures, Messages, Misc Tab

Lesson Summary

In this lesson, you learned to:

- ❑ Look up a purchase order on the Workstation
- ❑ View FOO and Clearance comments and signatures associated with a purchase order

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Module 6: Reporting from the Workstation

Lesson 1: Generating Reports

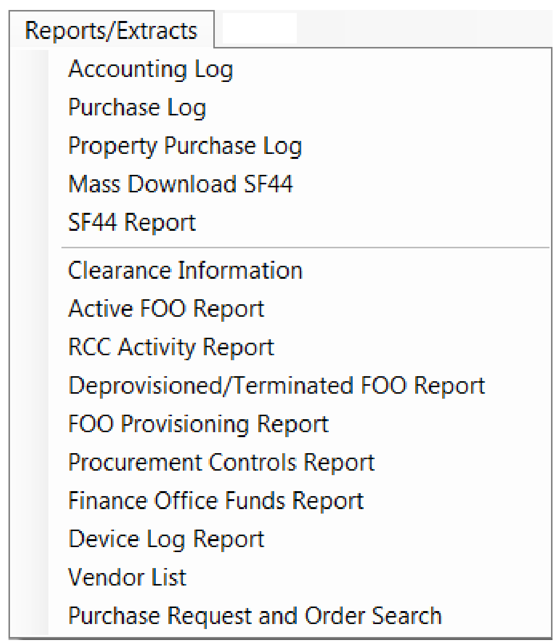
Objectives

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

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

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, so they can be viewed and/or printed. Also save the report as a separate file in Word or Excel, for future reference.

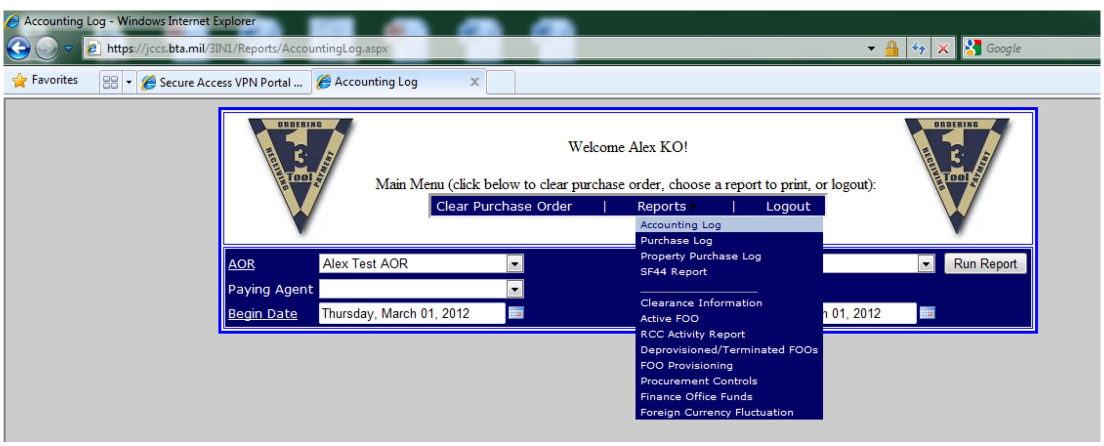


- **Accounting Log**: Enables an analysis of purchase requests and cash advances associated to each order/voucher placed during a period, for a selected paying agent.
- **Purchase Log**: Report showing orders placed by a FOO, unit, RCC, or AOR during a specified period. This report is similar to a PIIN Log.
- **Property Purchase Log**: Identifies accountable items purchased, quantities and prices, for a specific AOR office, unit, and FOO, within a defined time period.
- **Mass Download SF44s**: Provides the capability to download and save a batch of SF44s and receipts executed by a FOO/PA, based on a date range or purchase request.
- **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.
- **FOOs 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.

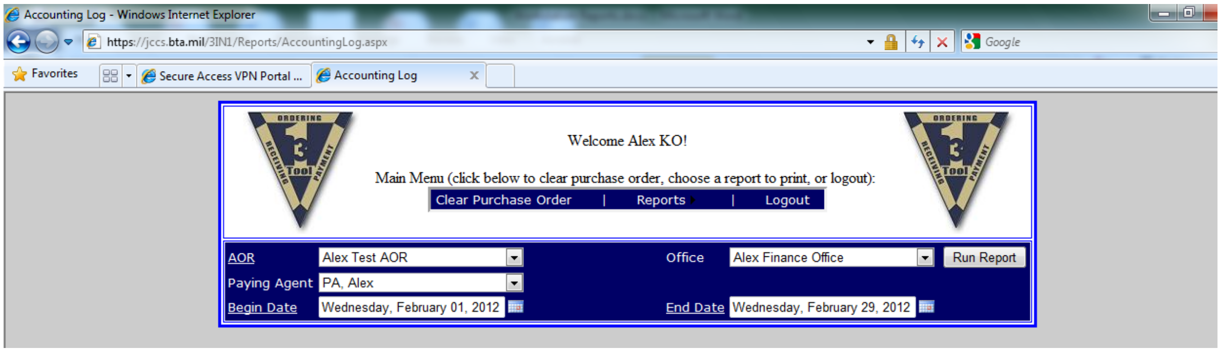
Web-Based Reporting

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.

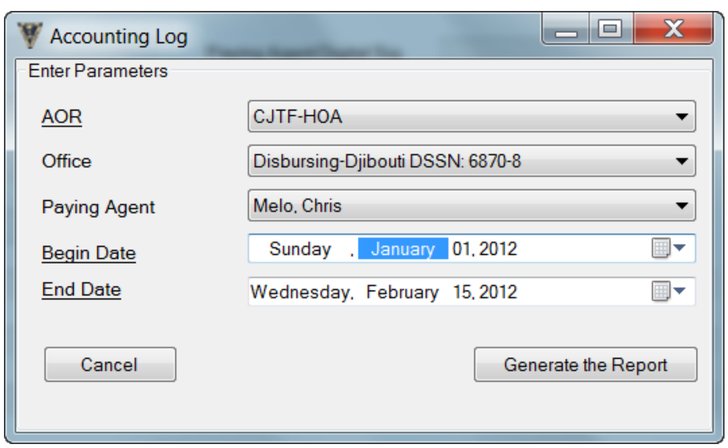


Accounting Log Report Parameters

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 Setup Window

5. The report is displayed in MS Excel. You may print the report from Excel.
6. Save the report as an Excel file before exiting.

The Accounting Log 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

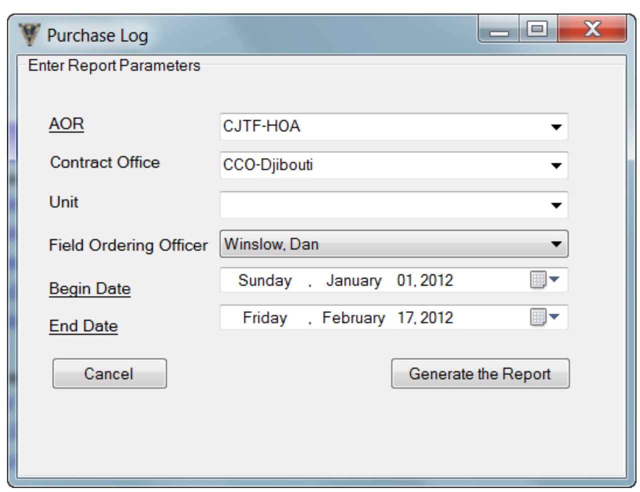
Notes:

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, RCC, or AOR. To facilitate analysis, details about purchase requests assigned to the FOO/PA are also listed in the report.

1. Select **Reports/Extracts**, **Purchase Log** from the main menu.
   – The *Purchase Log* window opens.
2. Select the **AOR**, **Contract Office**, and/or **Unit** from the drop-down lists. (Note: To view all SF44s for an RCC, leave the Unit and FOO blank.)

3. Select the **Field Ordering Officer**.
4. Specify the **Begin** and **End Dates** to include in the report. Click the calendar  icon to select dates.
5. Click the **Generate the Report** button.
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

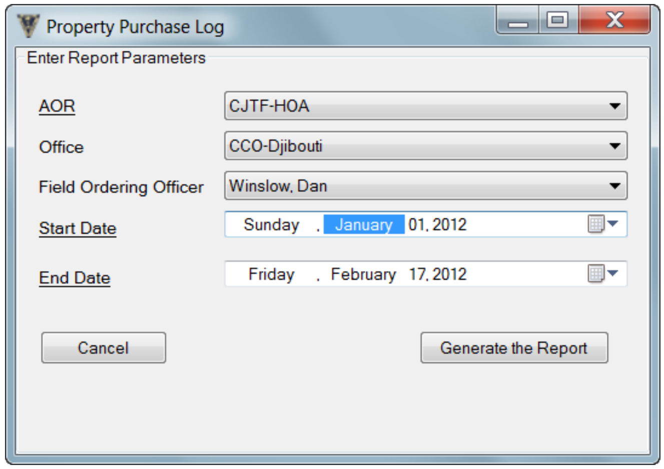
LC = Level Cleared. Displays the sequence number the order is currently awaiting clearance/review, based on the clearing workflow

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.



Property Purchase Log Window

2. Select the **AOR**, **Office**, and **FOO** from the drop-down lists. Also specify a start and end date for the report content. Click the calendar icon to select a date.
3. Click the **Generate the Report** button.
4. The report is displayed in MS Excel. You may print the report from Excel.
5. Save the report as an Excel file before exiting.

Property Purchase Log

FOO: Winslow, Dan **Period:** 12/01/2011 - 02/17/2012

Report As Of: 2/17/2012

Order Date	PR number	PIIN	Vendor	Item Description	Qty	UOM	Unit Price	Extended Price	Currency	Receiver/ Delivered To	Unit Delivered	UPC
12/16/11	WER346	W12XYZ12MAJ01	Pentagon Supplies	Desk	1		751.00	751.00	USD	FOO INT	BTA Unit	

Property Purchase Log Report

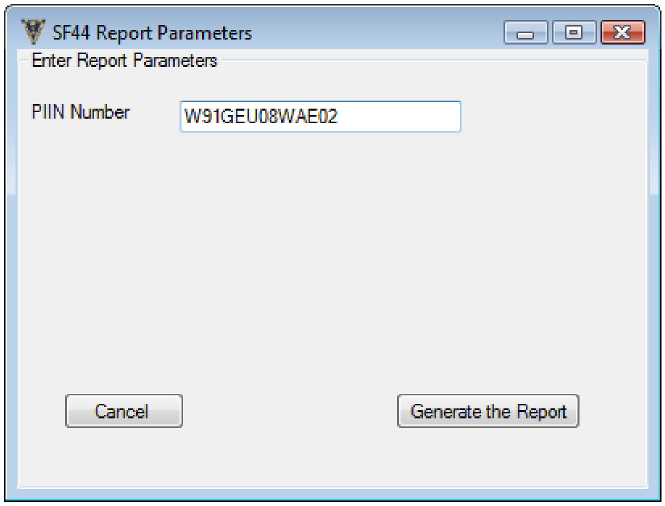
The report identifies purchased items by PR number, PIIN, and order date. Vendor names are listed. Quantities purchased along with the unit price/extended price are also listed. The next two columns identify the receiving individual and Unit. UPC codes (optional) scanned using the 3in1 handheld device 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** from the main menu.

   The *SF44 Report Parameters* window opens.



SF44 Report Parameters Window

2. Type the PIIN associated with the order, then click the **Generate the Report** button.
3. The SF44 report as a PDF file.
4. Select **File**, **Save As** to save the report before exiting.

U.S GOVERNMENT

PURCHASE ORDER-INVOICE-VOUCHER

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

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

P A Y E E

Aziz Construction
25th st
Baghdad
55662
Iraq

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

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

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

AGENCY NAME AND BILLING ADDRESS*

P A Y O R

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

TOTAL 1500.00 USD

DISCOUNT TERMS

DAY(S)

DATE INVOICE RECEIVED
06/06/2012

ORDERED BY *(Signature and title)*

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

PURPOSE AND ACCOUNTING DATA

23423 2 3453 .3453 34 34534 452345234543525 4235 52345 4352345342 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 OR *(Check No.)*	**DATE PAID**	**VOUCHER NO.**

***PLEASE INCLUDE SELLER'S INVOICE**

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

SF44 Report

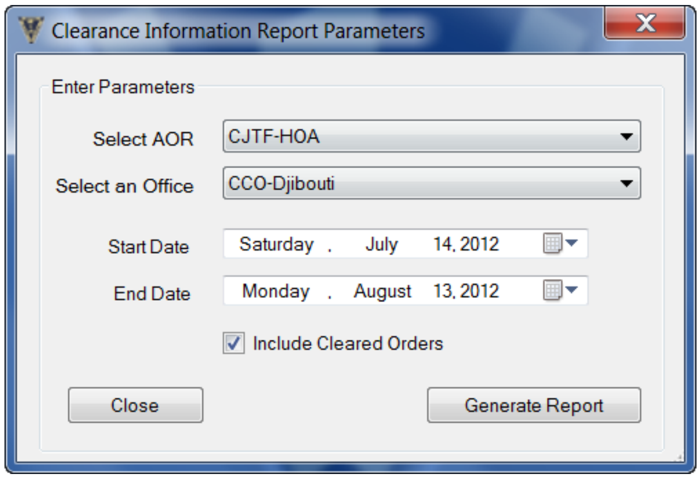
Clearance Information Report

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.

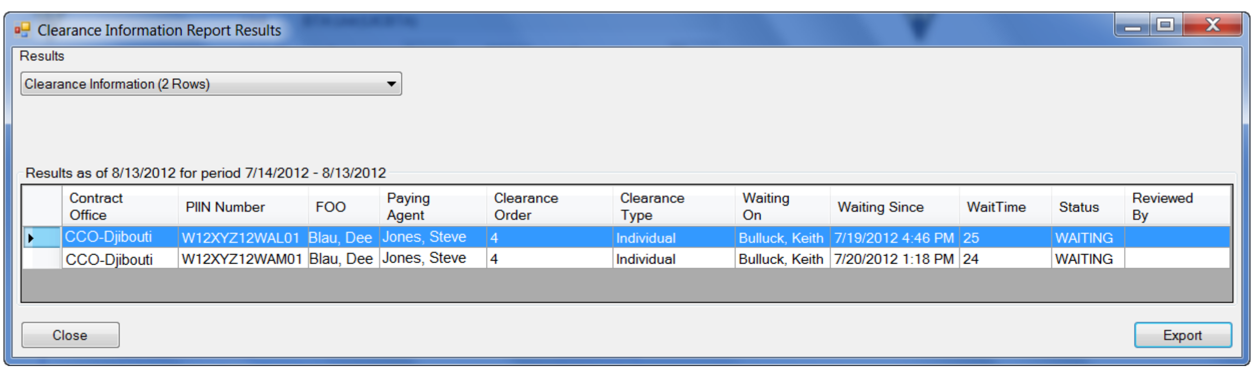
- The *Clearance Information Report Parameters* dialog box is displayed.

2. Select an AOR and Office from the drop-down lists.
3. To include cleared orders in the report, mark the **Include Cleared Orders** checkbox. To report on uncleared orders only, leave the checkbox unmarked.
4. Specify a date range for the report.
5. Click the **Generate Report** button.



Clearance Information Report Parameters Dialog Box

The report is displayed in a separate window. Manually expand the window to view additional data columns. Re-sort the data by clicking a column heading, such as PIIN Number or current status. Each order is displayed by PIIN number and associated FOO/Paying Agent team. Review the current status, the wait time, the office/role or individual who needs to take the next action, and who last cleared each order.

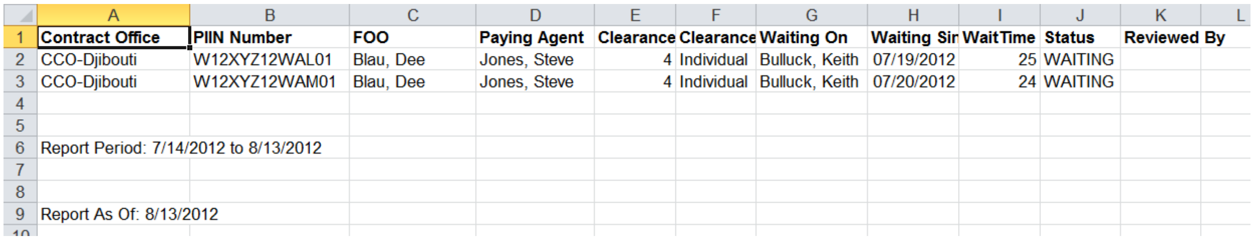


Clearance Information Report Results

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

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

– The report is displayed in Excel.



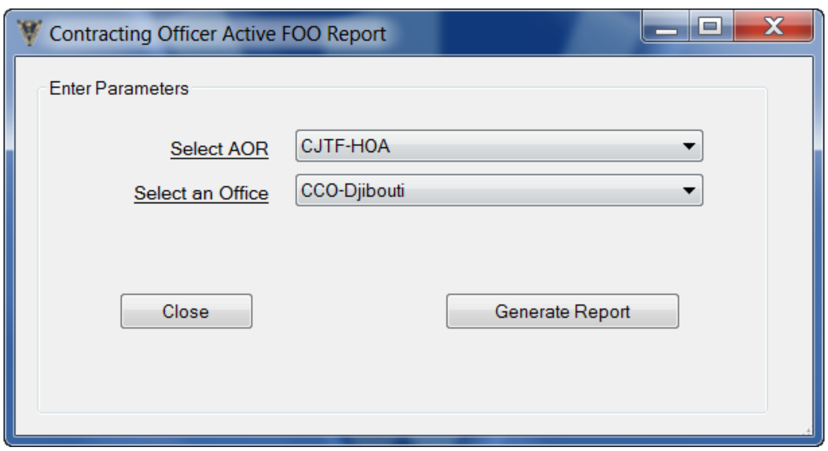
Contract Office	PIIN Number	FOO	Paying Agent	Clearance	Clearance	Waiting On	Waiting Sir	WaitTime	Status	Reviewed By
CCO-Djibouti	W12XYZ12WAL01	Blau, Dee	Jones, Steve	4	Individual	Bulluck, Keith	07/19/2012	25	WAITING	
CCO-Djibouti	W12XYZ12WAM01	Blau, Dee	Jones, Steve	4	Individual	Bulluck, Keith	07/20/2012	24	WAITING	
Report Period: 7/14/2012 to 8/13/2012										
Report As Of: 8/13/2012										

Clearance Information Report in Excel

Active FOO Report

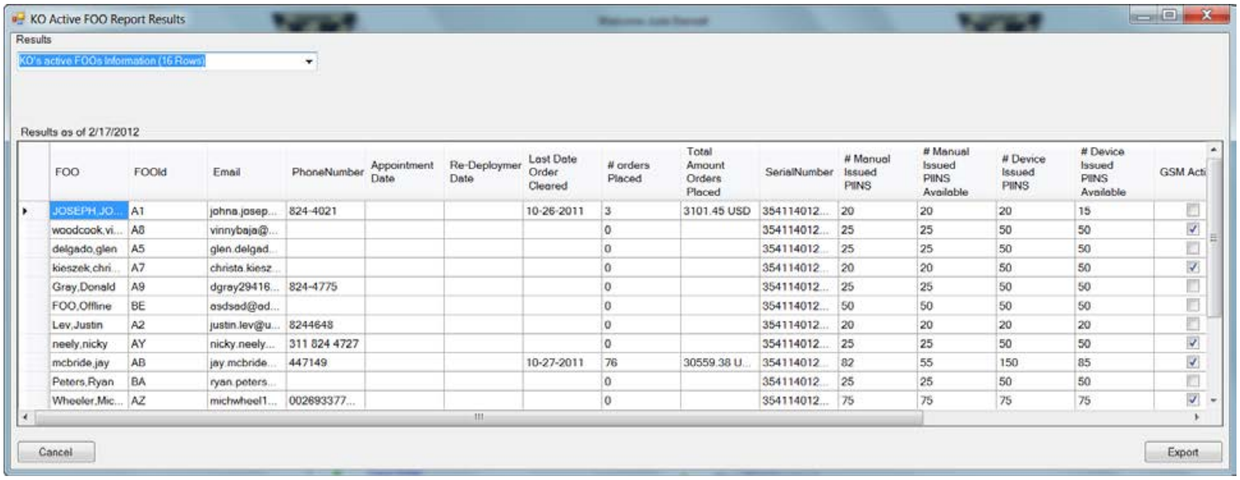
The Active FOO report prints a list of active FOOs at a specified AOR contract office. A FOO is considered active if they are currently assigned to a device. The FOO contact information, appointment date, associated PA, and latest order information, including PIINs and device ID numbers, are listed in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

1. Select **Reports/Extracts**, **Active FOO** from the main menu.
   - The *Active FOO Report* window is displayed.
2. Select an AOR and Office.



Contracting Officer Active FOO Report Window

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



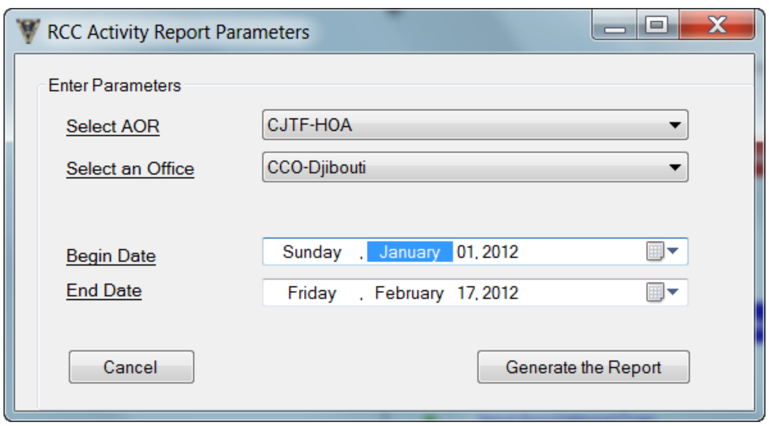
KO Active FOO Report Results

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 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.

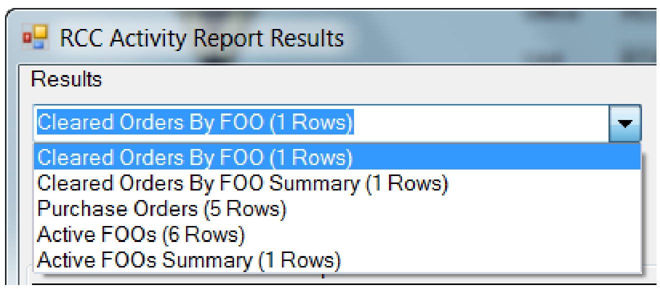


RCC Activity Report Parameters Window

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

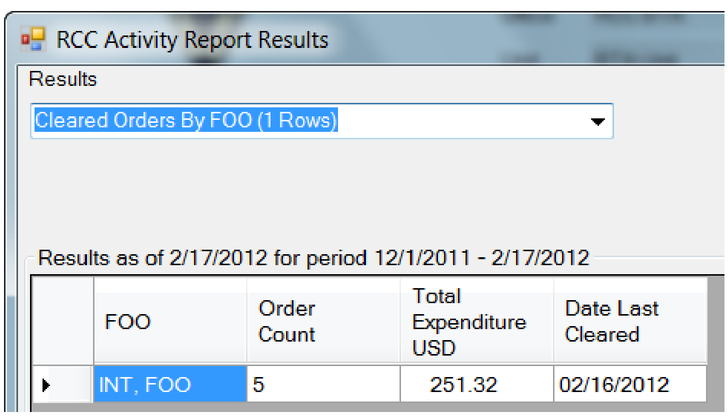
of the last cleared order. Note: these only show orders that have completed the clearance cycle.

– **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.



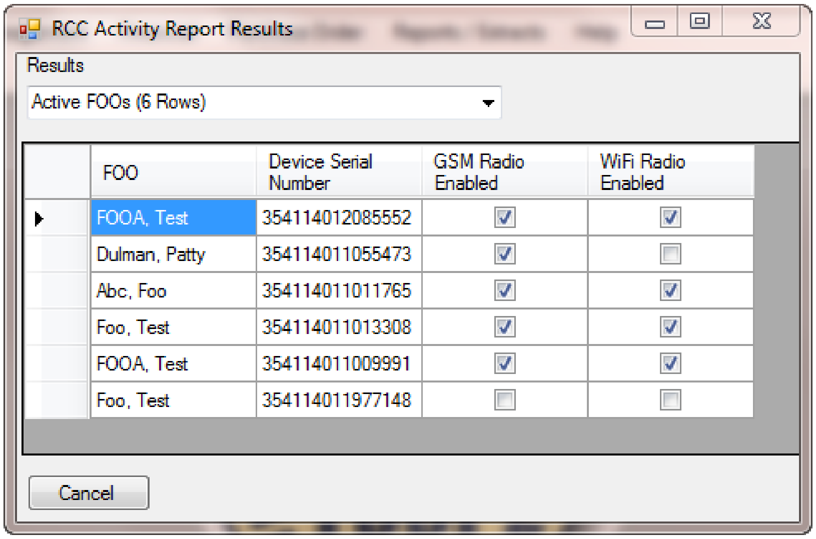
RCC Activity Report Options

– The selected report is displayed.



RCC Activity Report Results

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:**

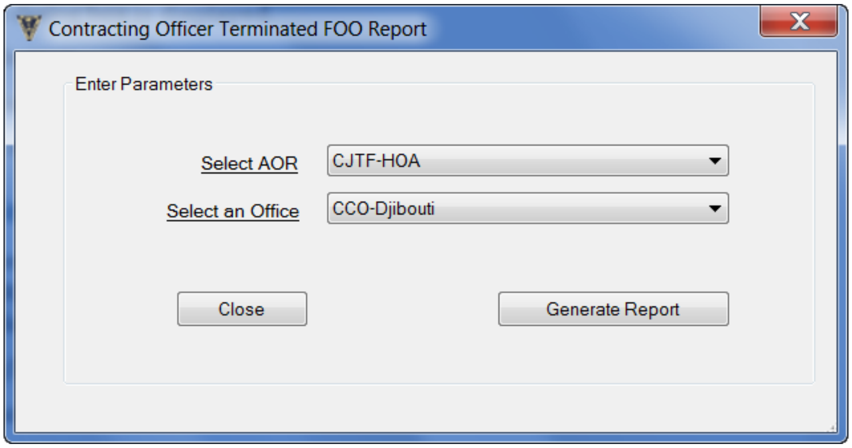
1. Click the **Export** button.
   – The *Save As* dialog box is displayed.
2. Click the **Save** button.
   – The report is displayed in Excel.

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

Deprovisioned/Terminated FOO Report

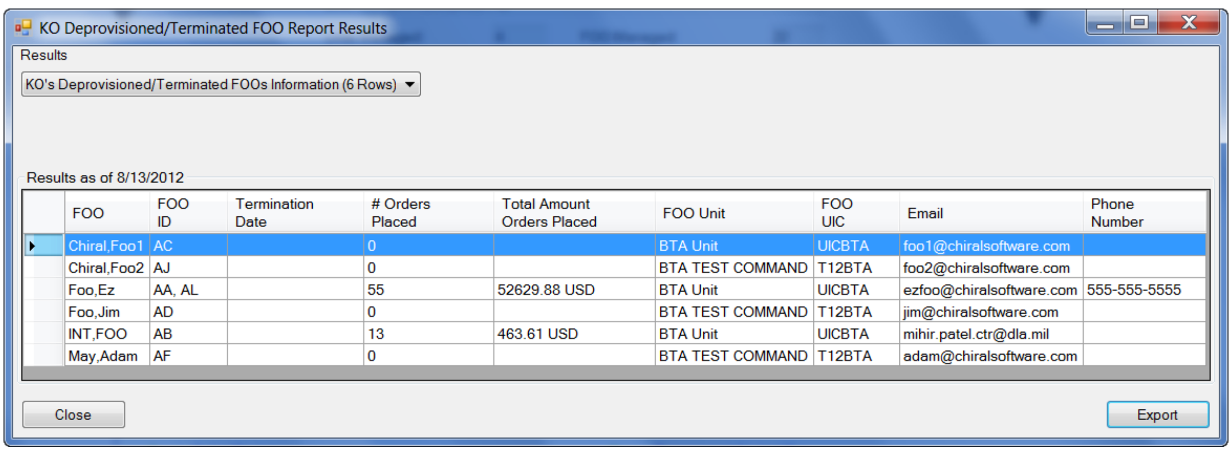
The Deprovisioned/Terminated FOO report prints a list of inactive FOOs at a specified AOR contract office. The FOO contact information, termination date, order information, and associated PA list are displayed in spreadsheet format.

1. Select **Reports/Extracts**, **Deprovisioned/Terminated FOOs** from the main menu.
   – The *Terminated FOO Report* dialog box is displayed.



Contracting Officer Terminated FOO Report Dialog Box

2. Select an **AOR** and **Office**.
3. Click the **Generate Report** button.
   – The report is displayed in a new window. Use the horizontal scroll bar to view additional columns.



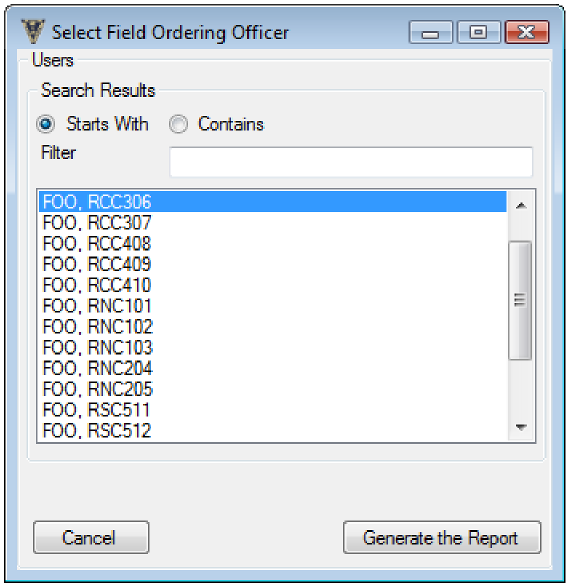
KO Deprovisioned/Terminated FOO Report Results

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

FOOs 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**, **FOOs Provisioning** from the main menu.
   – The *Select Field Ordering Officer* window opens.

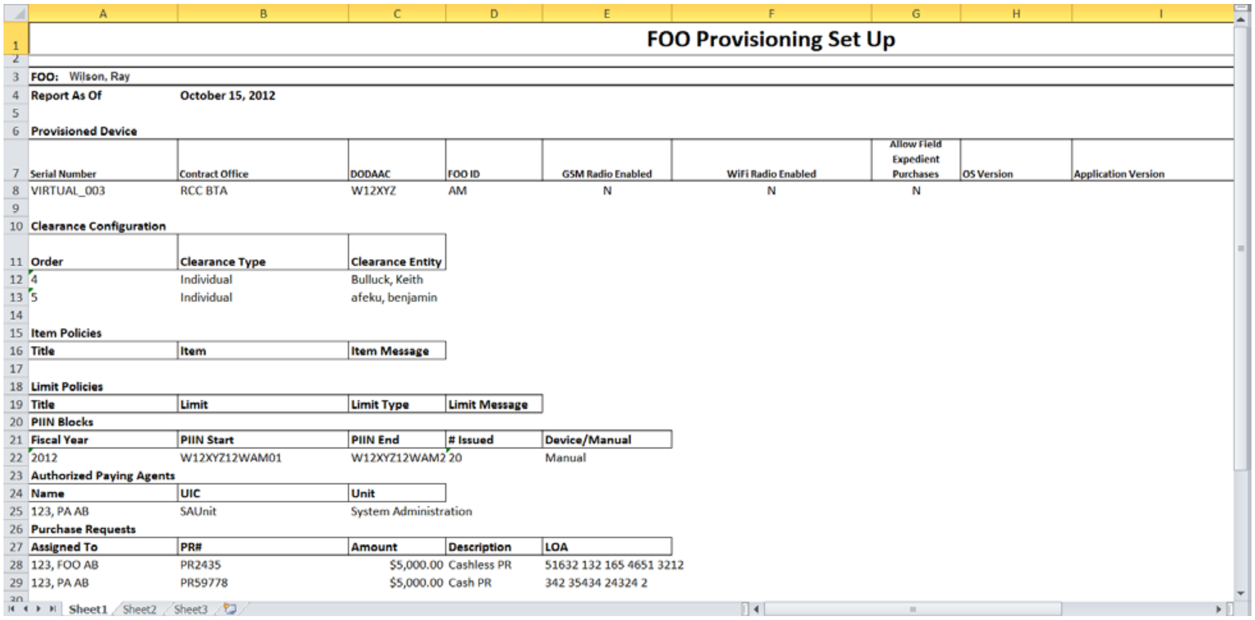


Select Field Ordering Officer Window

2. Select a FOO name and click the **Generate the Report** button.
   – If the list is long, filter it by typing a character string in the FOO name and selecting the Starts With or Contains radio button.
3. The report is displayed in MS Excel. You may print the report from Excel.
4. Save the report as an Excel file before exiting.

The report lists the FOO name, followed by:

- 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

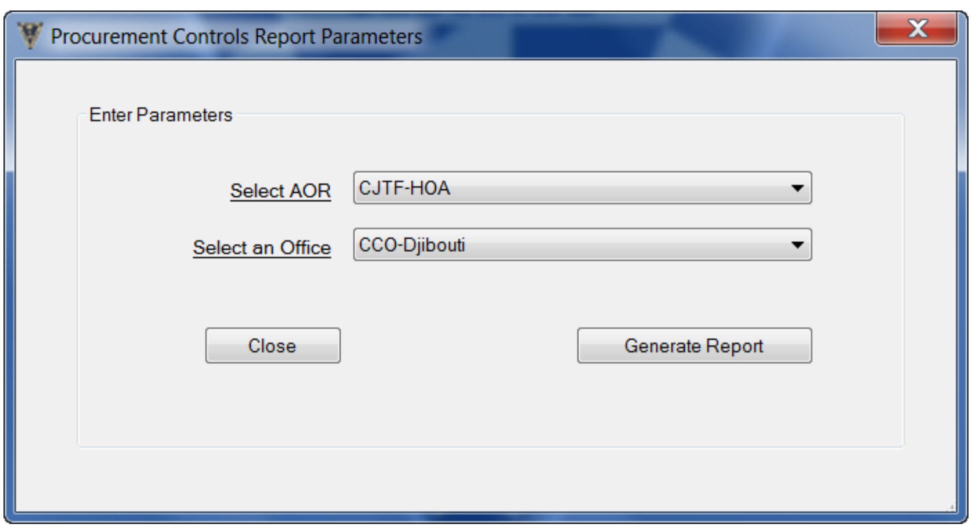


FOO Provisioning Report

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* dialog box opens.



Procurement Controls Report Parameters Dialog Box

2. Select the **AOR** and **Office**, then click the **Generate the Report** button.
3. The report is displayed in MS Excel. You may print the report from Excel.
4. Save the report as an Excel file before exiting.

The report lists the item and limit procurement policies applied to the selected Contracting Office. These policies were applied using the **Setup**, **AOR**, **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:

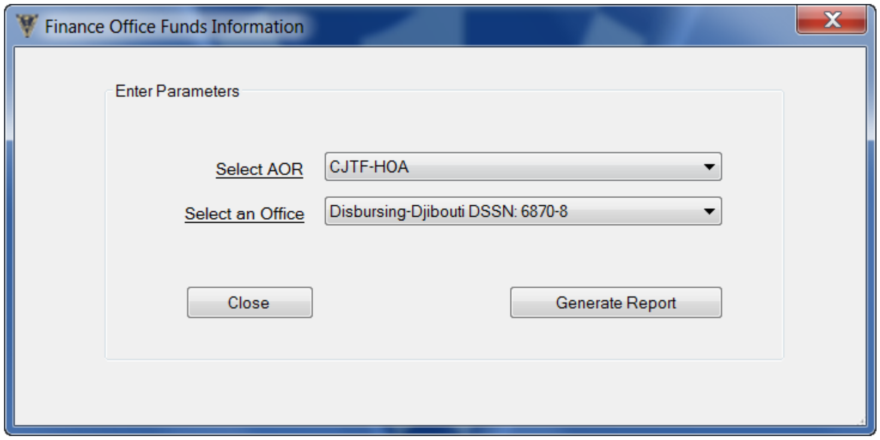
Policy Title	Policy Message	Limit	Limit Type	Limit Message
Max HA Project Purchase Limit	Max HA Project Limit- $10K	$10,000.00	PURCHASETOTAL	HA Project Funds only valid up to $10,000
		$40.00	LINEITEM	HA Project Funds Only valid up to $40 per item
Max OPFUND Purchase Limit	Not auth over $3000 (Tm support/life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

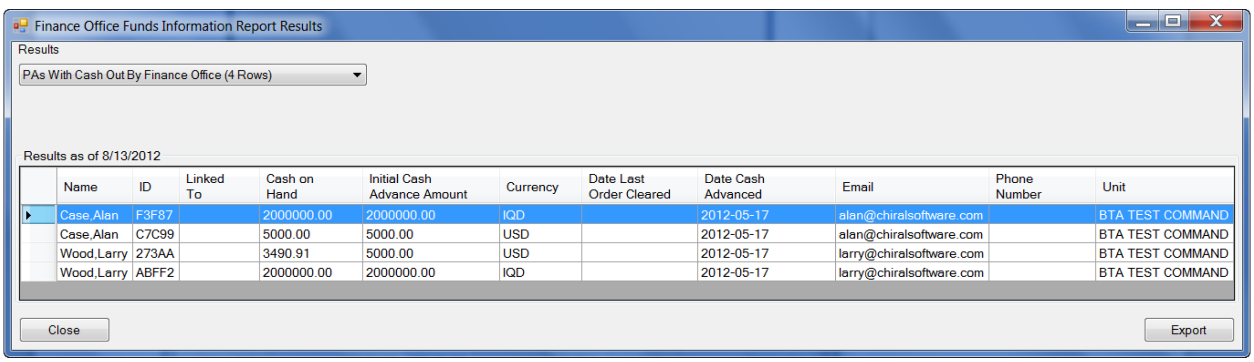
1. Select **Reports/Extracts, Finance Office Funds** from the main menu.
   – The *Finance Office Funds Information* window is displayed.
2. Select the **AOR** and **Office** from the drop-down lists.



Finance Office Funds Information Dialog Box

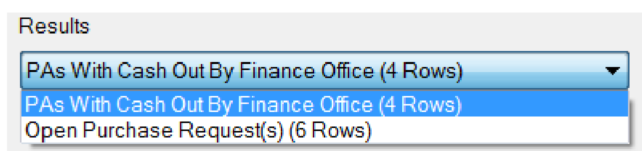
3. Click the **Generate Report** button.

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.

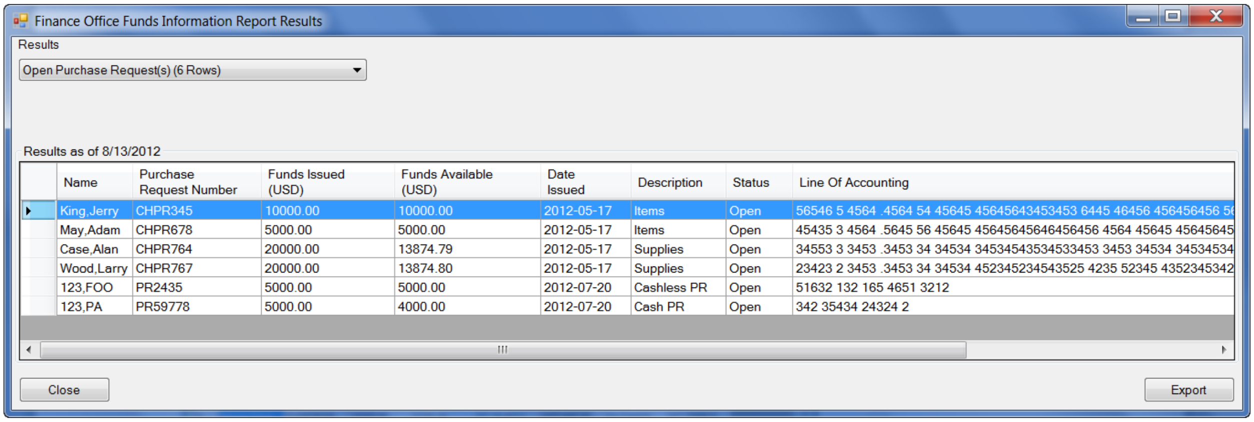


Finance Office Funds Report Results – PAs with Funds Out by Finance Office

There are two views for the report. Select **PAs with Funds Out by Finance Office** to view the PA names, email addresses, phone numbers and assigned units, amounts of unobligated cash, dates of cash advancement, total amounts advanced, and dates of the last orders cleared.



Select **Open Purchase Requests** to view a list of PAs, their open PR numbers, amount of funds issued and available, issue dates, descriptions, status and line of accounting numbers.



Finance Office Funds Report Results –Open Purchase Requests

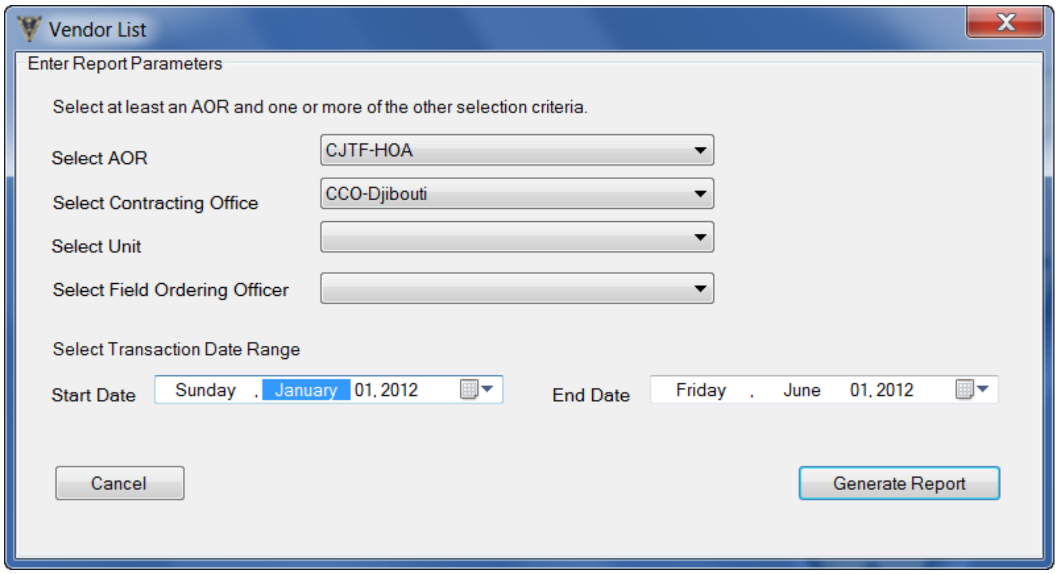
You can export the file to MS Excel for further data analysis or printing. To export the data to Excel:

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

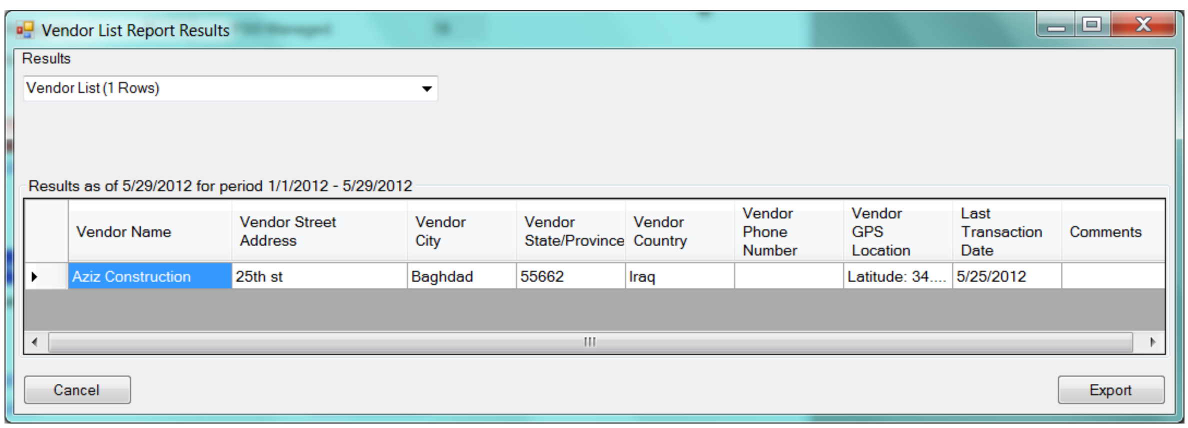
The Vendor List report identifies vendors with whom an AOR has conducted business during a specific time period. The report provides vendor contact information, last transaction date and comments.

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.

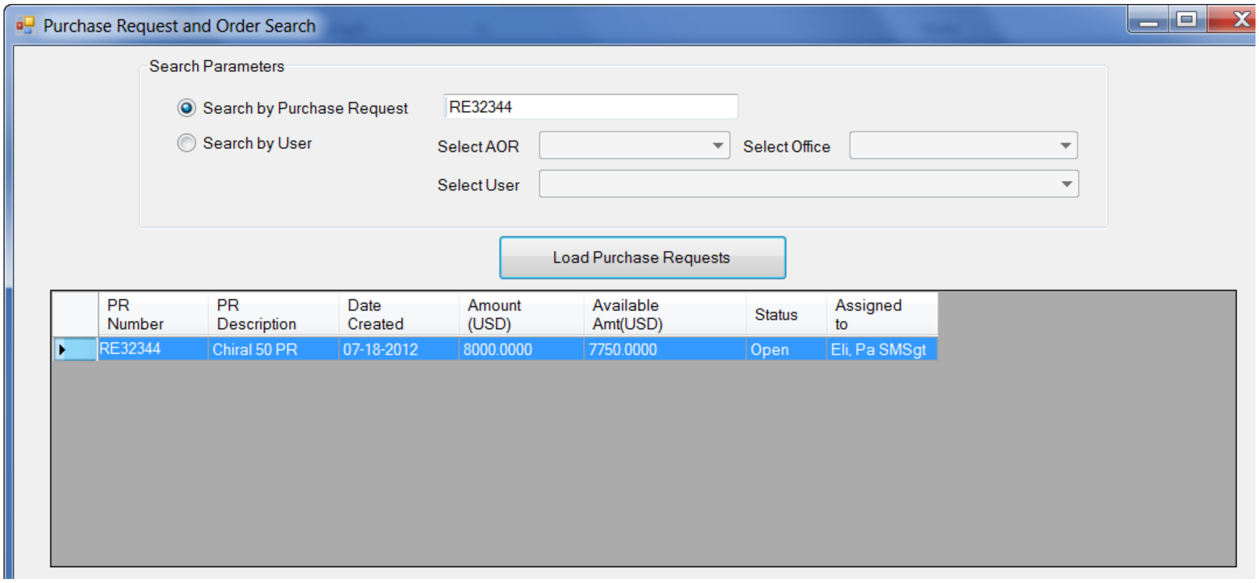
Purchase Request and Order Search Report

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

To search by PR number:

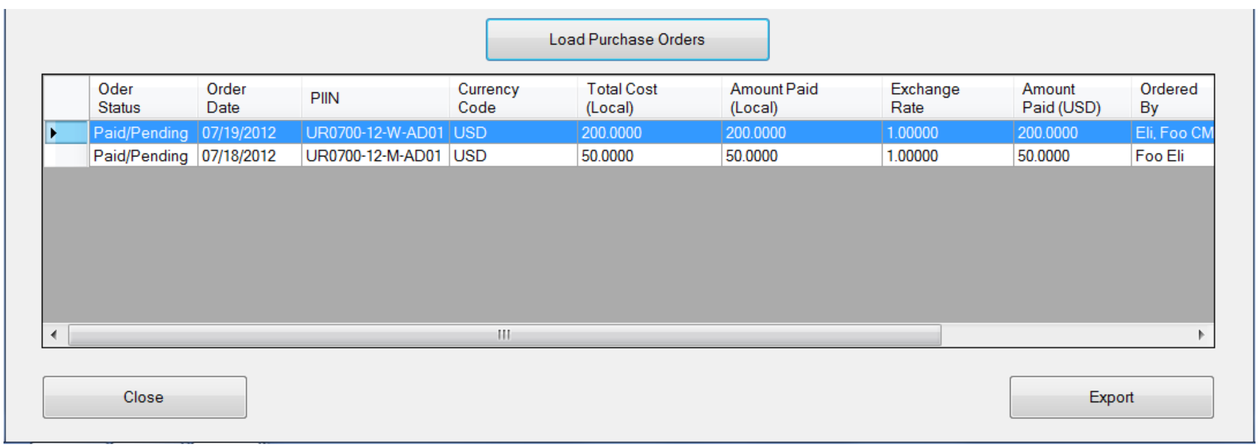
1. Select **Report/Extracts**, **Purchase Request and Purchase Order Search**. The *Purchase Request and Purchase Order Search* dialog box opens.
2. Select the **Search by Purchase Request** radio button and enter the PR number.

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



PR located by PR number

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

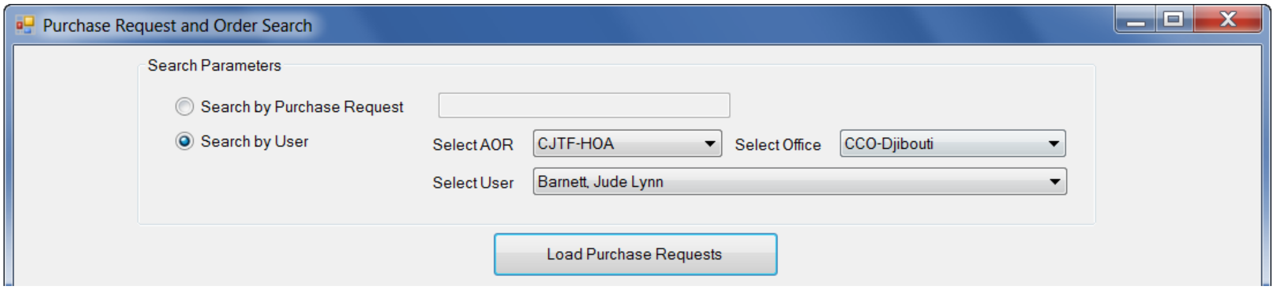


Load Purchase Orders Associated with the selected Purchase Request

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

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 Request and Order Search Window

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

Appendix A: End-to-End Process Diagrams

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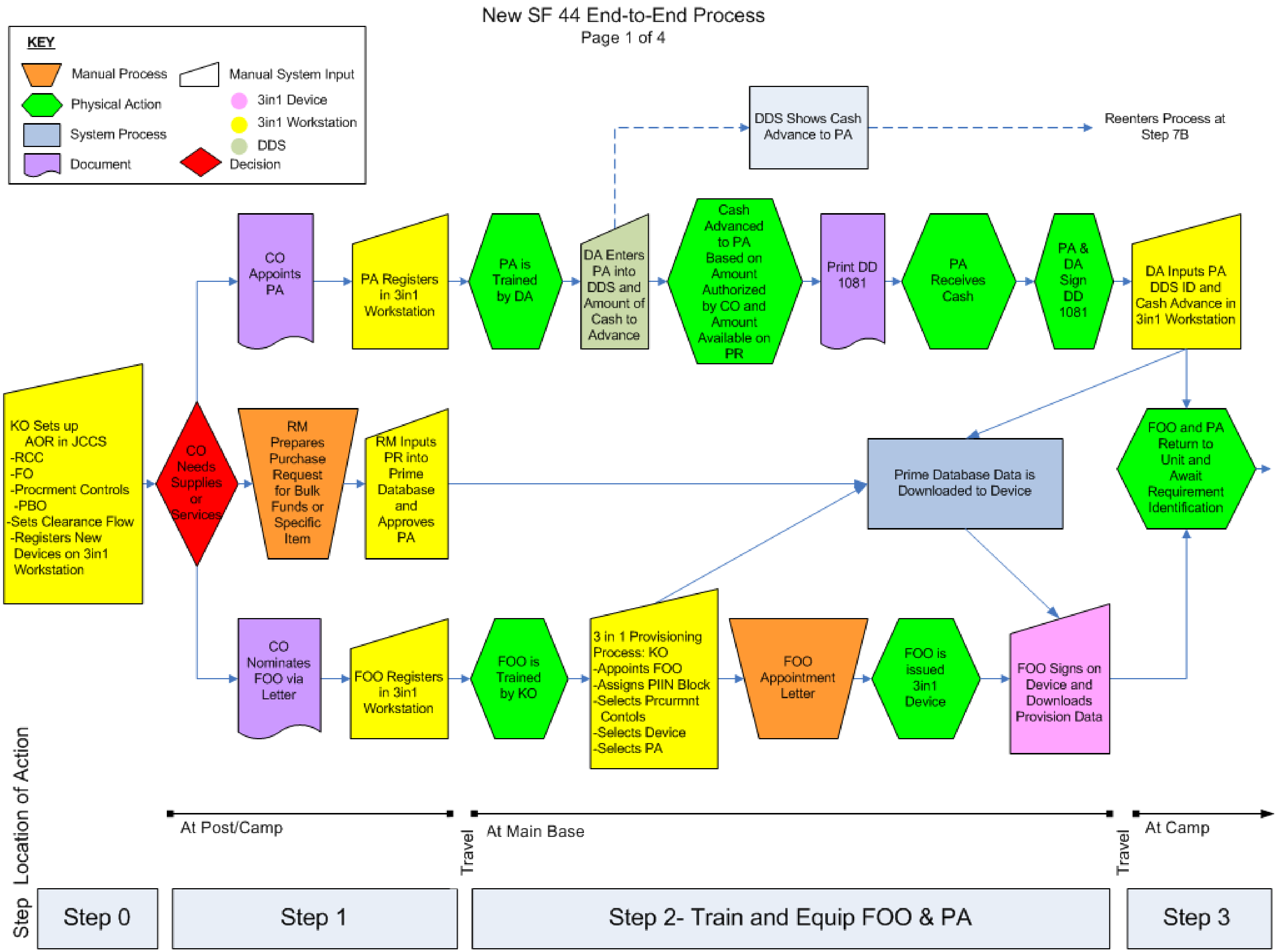
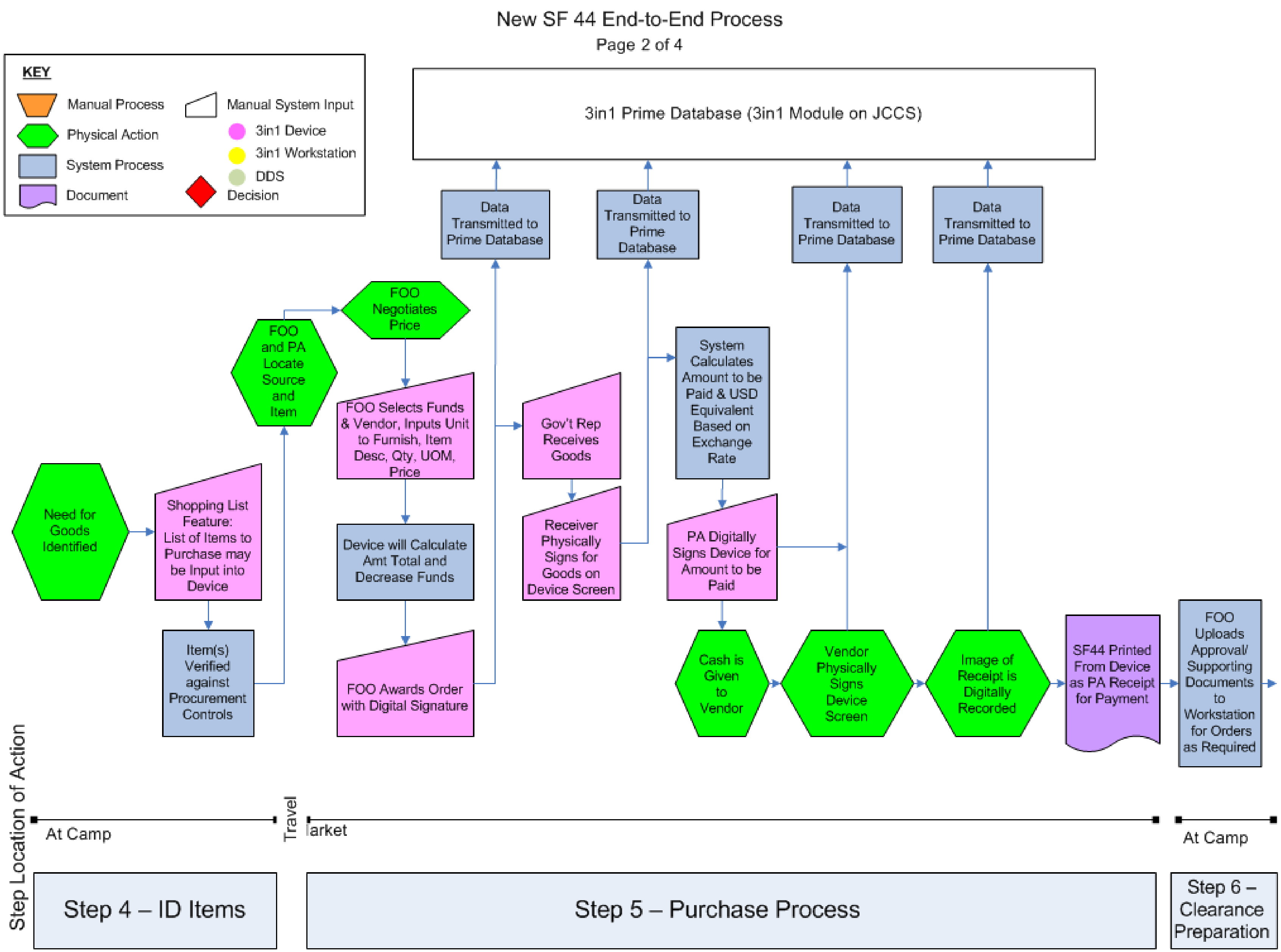
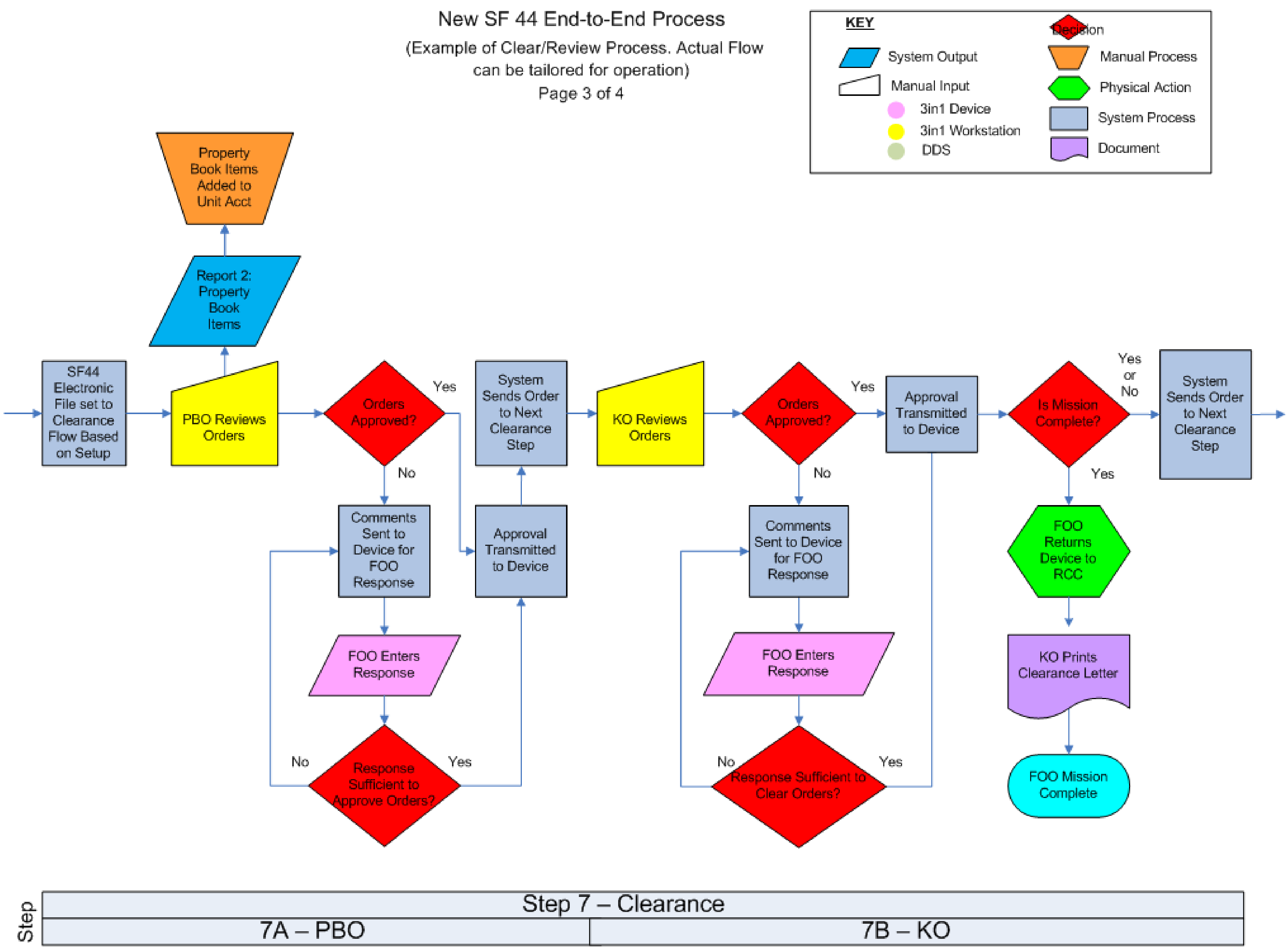
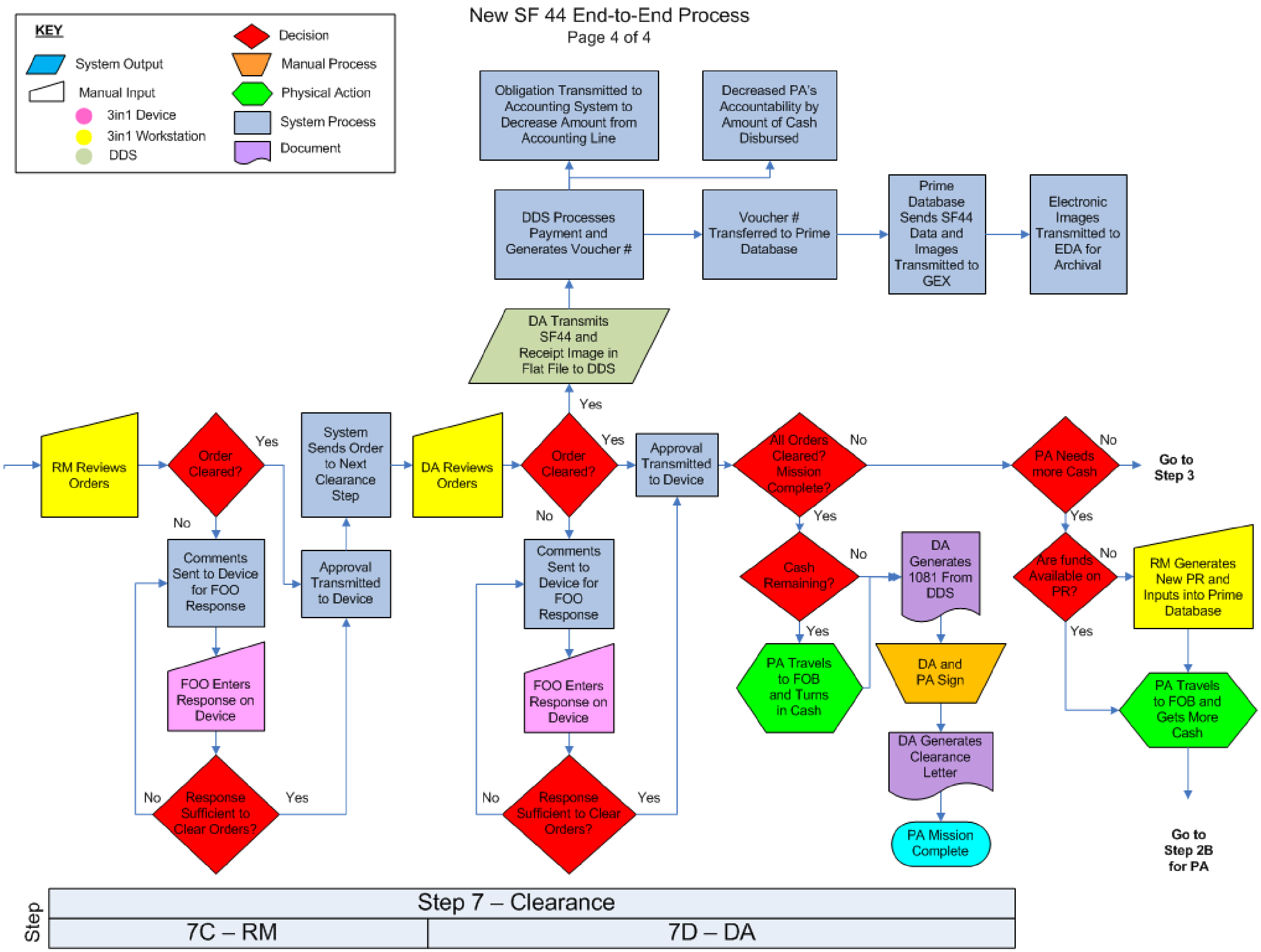

New SF 44 End-to-End Process
Page 1 of 4
KEY
Manual Process
Physical Action
System Process
Document
Manual System Input
3in1 Device
3in1 Workstation
DDS
Decision
DDS Shows Cash Advance to PA
Reenters Process at Step 7B
KO Sets up AOR in JCCS -RCC -FO -Procment Controls -PBO -Sets Clearance Flow -Registers New Devices on 3in1 Workstation
CO Needs Supplies or Services
CO Appoints PA
PA Registers in 3in1 Workstation
PA is Trained by DA
DA Enters PA into DDS and Amount of Cash to Advance
Cash Advanced to PA Based on Amount Authorized by CO and Amount Available on PR
Print DD 1081
PA Receives Cash
PA & DA Sign DD 1081
DA Inputs PA DDS ID and Cash Advance in 3in1 Workstation
RM Prepares Purchase Request for Bulk Funds or Specific Item
RM Inputs PR into Prime Database and Approves PA
Prime Database Data is Downloaded to Device
FOO and PA Return to Unit and Await Requirement Identification
CO Nominates FOO via Letter
FOO Registers in 3in1 Workstation
FOO is Trained by KO
3 in 1 Provisioning Process: KO -Appoints FOO -Assigns PIIN Block -Selects Prcurmnt Contols -Selects Device -Selects PA
FOO Appointment Letter
FOO is issued 3in1 Device
FOO Signs on Device and Downloads Provision Data
Location of Action
At Post/Camp
Travel
At Main Base
Travel
At Camp
Step
Step 0
Step 1
Step 2- Train and Equip FOO & PA
Step 3


New SF 44 End-to-End Process
Page 2 of 4
KEY
Manual Process
Physical Action
System Process
Document
Manual System Input
3in1 Device
3in1 Workstation
DDS
Decision
3in1 Prime Database (3in1 Module on JCCS)
Data Transmitted to Prime Database
Data Transmitted to Prime Database
Data Transmitted to Prime Database
Data Transmitted to Prime Database
FOO Negotiates Price
FOO and PA Locate Source and Item
FOO Selects Funds & Vendor, Inputs Unit to Furnish, Item Desc, Qty, UOM, Price
Gov't Rep Receives Goods
System Calculates Amount to be Paid & USD Equivalent Based on Exchange Rate
Need for Goods Identified
Shopping List Feature: List of Items to Purchase may be Input into Device
Device will Calculate Amt Total and Decrease Funds
Receiver Physically Signs for Goods on Device Screen
PA Digitally Signs Device for Amount to be Paid
Item(s) Verified against Procurement Controls
FOO Awards Order with Digital Signature
Cash is Given to Vendor
Vendor Physically Signs Device Screen
Image of Receipt is Digitally Recorded
SF44 Printed From Device as PA Receipt for Payment
FOO Uploads Approval/ Supporting Documents to Workstation for Orders as Required
Step Location of Action
At Camp
Travel
larket
At Camp
Step 4 – ID Items
Step 5 – Purchase Process
Step 6 – Clearance Preparation


New SF 44 End-to-End Process
(Example of Clear/Review Process. Actual Flow can be tailored for operation)
Page 3 of 4
KEY
Decision
System Output
Manual Process
Manual Input
Physical Action
3in1 Device
System Process
3in1 Workstation
DDS
Document
Property Book Items Added to Unit Acct
Report 2: Property Book Items
SF44 Electronic File set to Clearance Flow Based on Setup
PBO Reviews Orders
Orders Approved?
Yes
No
System Sends Order to Next Clearance Step
Comments Sent to Device for FOO Response
Approval Transmitted to Device
FOO Enters Response
Response Sufficient to Approve Orders?
No
Yes
KO Reviews Orders
Orders Approved?
Yes
No
Approval Transmitted to Device
Comments Sent to Device for FOO Response
FOO Enters Response
Response Sufficient to Clear Orders?
No
Yes
Is Mission Complete?
Yes or No
Yes
System Sends Order to Next Clearance Step
FOO Returns Device to RCC
KO Prints Clearance Letter
FOO Mission Complete
Step
Step 7 – Clearance
7A – PBO
7B – KO


New SF 44 End-to-End Process
Page 4 of 4
KEY
Decision
System Output
Manual Process
Manual Input
Physical Action
3in1 Device
System Process
3in1 Workstation
Document
DDS
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?
System Sends Order to Next Clearance Step
DA Reviews Orders
Order Cleared?
Approval Transmitted to Device
All Orders Cleared? Mission Complete?
PA Needs more Cash
Go to Step 3
Comments Sent to Device for FOO Response
Approval Transmitted to Device
Comments Sent to Device for FOO Response
Cash Remaining?
DA Generates 1081 From DDS
Are funds Available on PR?
RM Generates New PR and Inputs into Prime Database
PA Travels to FOB and Turns in Cash
DA and PA Sign
PA Travels to FOB and Gets More Cash
FOO Enters Response on Device
FOO Enters Response on Device
DA Generates Clearance Letter
Response Sufficient to Clear Orders?
Response Sufficient to Clear Orders?
PA Mission Complete
Go to Step 2B for PA
Yes
No
Step
Step 7 – Clearance
7C – RM
7D – DA

Appendix B: 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
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