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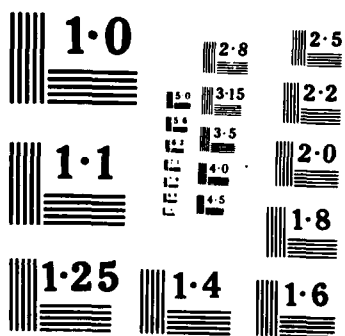
User's Manual for Purchase Request System
Part III - Tracking of the Purchase Request

H. McAVOY

Bedford Research Associates
4 DeAngelo Drive
Bedford, MA 01730

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This technical report has been reviewed and is approved for publication.

P Tsipouras

PAUL TSIPOURAS
Contract Manager

FOR THE COMMANDER

J. E. Holdner

LT COL J.E. Holdner, Director
Research Services Division

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20 ABSTRACT (Continue on reverse side if necessary and identify by block number)

This report is a User's Manual for using the Purchase Request System. The tracking of the Purchase Request until it is obligated as a contract is covered in this manual.

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User's Manual
for
Purchase Request System

Part III - Tracking of the Purchase Request

INTRODUCTION

This manual is intended to serve as a user's guide for people using the Purchase Request System in the tracking of the Purchase Request. Before tracking a Purchase Request, the Purchase Request Number must be an assigned number and it must be received with a related work unit number. Please refer to the following manual for the assigning and receiving of a Purchase Request number:

<div align="center">

User's Manual

for

Purchase Request System

</div>

Part I - Assignment and Receipt of Purchase Requests

A certain familiarity with the AFGL VAX 11/780 is assumed. Connecting and logging on to the AFGL VAX 11/780, using the electronic mail system, and changing the LOGIN password are not covered in this manual. If information on these topics is needed, please refer to the AFGL VAX User's Guide.

The Purchase Request System is designed to be accessed using a VT100 series terminal. All keypad diagrams are only of this type terminal. If you do not have access to a VT100 terminal, please contact the XO division director.

Again this manual covers the tracking of the Purchase Request. You can select among the seven options from the Tracking of the Purchase Request Menu. You can add steps to a Purchase Request path, change steps in a Purchase Request path, delete steps in a Purchase Request path, display a Purchase Request path, display the location of a Purchase Request in its tracking, list a range of Purchase Requests, or print out a particular Purchase Request path.

DEFINITIONS & RULES FOR DATA ENTRY

There are several important rules that apply to the system described in this manual. Please familarize yourself with them before beginning to use the system. In addition, a knowledge of the following terms will aid you in using this user's guide.

CHARACTER - Character is a generic term that includes all graphic symbols. Letters, numbers, punctuation marks, other special characters, and blank spaces are all considered characters.

FIELD - A field is a group of characters which comprise one piece of information or data. An example of a field is the WU number.

RECORD - A record is a group of related fields. For example, an individual work unit plan is a record which is comprised of a group of fields such as the WU number, manager's name, etc.

FILE - A file is a group of records. It can be compared to a file in a filing cabinet. For example, you may have a file titled "Contract Work Units" which contains all the individual CWU plans or "records."

DATA BASE - A data base is a collection of files. The data base is like a filing cabinet. It contains a number of files, such as the CWU file and the IHWU file.

HARD COPY - Hard copy refers to a paper copy of a document (as opposed to a screen display).

CURSOR - The cursor is the blinking rectangle which indicates where the next character typed will appear on the screen.

PROMPT - A prompt is a screen message which requires a response from the user.

ENTER - To enter data means to send it to the computer by pressing the "RETURN" or "ENTER" key. Therefore if the

instruction reads, "Enter the purchase request number.", you are to type the purchase request number and then press "RETURN."

DEFAULT - A default is the standard value that has been assigned to a field and is used when the user enters no value.

RULES FOR DATA ENTRY

1. Always press "RETURN" after typing in a field or response to a screen prompt. This will cause what has been typed to be "entered" or sent to the computer, and then displayed in high intensity on the screen.

2. To erase a character, or to back up the cursor, use the "DELETE" key. (See below, Special Keys)

3. To change a character(s), just type over it (them). The new character(s) will replace what was there.

4. Holding down a key will cause multiple entries. For example, if you want to enter one blank line, press the "ENTER" key and release it immediately. Holding the key down will cause more than one blank line to be entered.

5. Unless prompts specifically require a "Y" or "N" response as noted by "(Y or N)," screen prompts which require yes or no answers will default to "Yes." That is, if you just press "RETURN," a "Yes" will be entered automatically.

6. A date is entered as three separate fields: the day, the three letter abbreviation for the month, and the year.

   The day field must contain a number from 1 to 31. Any other entry will cause the message "Invalid day, please try again. (PRESS RETURN)" to display.

   The month field must contain the three letter abbreviation of a month. Any other entry will cause the message "Invalid

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month, please enter again. (PRESS RETURN)" to display. The
month must also be consistent with the day entered otherwise
the message, "Invalid date, please try again. (PRESS RETURN)"
will appear. An example of an invalid date is 31 Sep.

The year field must be one or two digits. Any other entry
will cause the message "Invalid year, please try again.
(PRESS RETURN)" to display.

7. The length of field entries is limited. The allowable length
   of the field to be entered will be highlighted on the screen.

8. The allowable length for some fields is quite long. In the
   Purchase Request Form, for example, there is an "Remarks"
   field which permits ten full screen lines for an explanation
   of the approach. Sometimes, however, you may not need so
   many lines. Whenever you wish to finish entering data for
   such a field, and move to the next field, you must press the
   "RETURN" key twice: once to "enter" your last line of text,
   and once to move the cursor to the next field.

9. If the information entered for a field is too long, an error
   message will be displayed on the bottom of the screen. That
   portion of the entry which did not exceed the allowable field
   length remains displayed on the screen, and you are then
   given an opportunity to edit the entry.

10. If the type of information entered in a particular field is
    not allowed, for example a letter is entered when a number is
    required, an error message will be displayed at the bottom of
    the screen. Press the "RETURN" key and the cursor will be
    repositioned. Then reenter the information.

11. Occasionally there may be an error which has to do with the
    system rather than the data entry. When this happens, an
    error message telling you to contact your supervisor will be
    displayed. Please do so immediately, as any delay will
    compound the problem.

SPECIAL KEYS

There are some special keys used in data entry. The four key sequences which are described below perform special functions when they are the first and only entry to a field. These keystrokes, along with a brief description of their functions, will be displayed at the bottom of each screen.

Please refer to the numbered diagram of the VT102 keyboard when reading the following section. If you are using a terminal which is not a VT102, please consult the AWUPS manager to determine the special keys for the type terminal you are using.

Number	Key Stroke	Description
1	RETURN	The "RETURN" key on the main key pad and
1A	ENTER	the "ENTER" key on the numeric key pad are interchangeable. When "RETURN" or "ENTER" is the first entry to a field, any existing data is left unchanged. If no data exists for the field, it is left blank, or in the case of numeric fields, set to zero. When one of these keys is entered for the first field of a record, (for example if RETURN is pressed at the work unit number on the first screen) control returns to the previous menu.

Number	Key Stroke	Description
2	Q RETURN	This key sequence is used to "quit" entering data for the current record. Whatever function is being performed is immediately stopped, and any information already entered or changed for the current record is disregarded. The cursor is then positioned at the first field of the first screen.
3	ESC RETURN	This key sequence causes the cursor to skip from its current position to the bottom of the screen. The fields which are skipped over remain unchanged. There are certain fields which require an entry before this key sequence can be performed. In these cases the screen will provide the necessary prompts.
4	BACK SPACE RETURN	This key sequence causes the cursor to back up to the beginning of the previous field on the current screen. (You cannot back up to a previous screen by using this key sequence at the first field of a screen.)

In addition to these four keys, there are two other special keys which are used for editing information being entered. Unlike the four key sequences just described, these keys may be entered anywhere in a field.
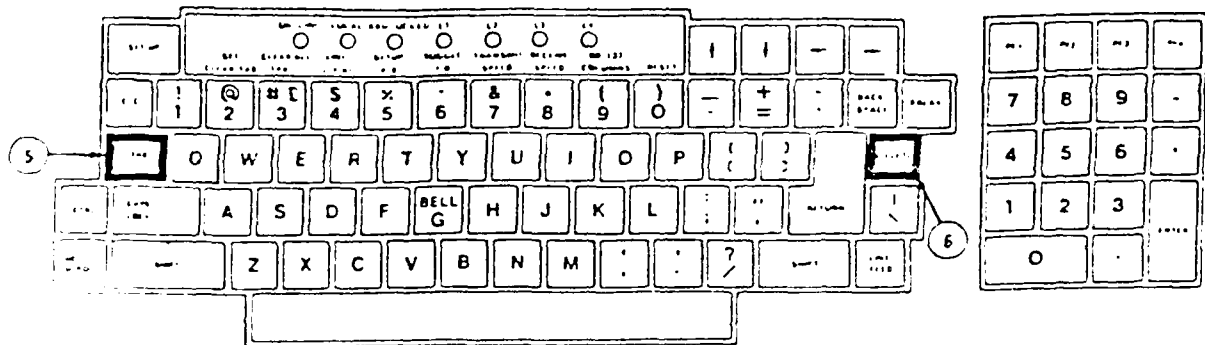
Number	Key	Description
5	TAB	Pressing this key causes the cursor to move to the position following the next blank space. This key is generally used to save the reentering of correct data in a field which has to be only partially edited.
6	Delete	Pressing this key causes the character to the left of the cursor to be erased, and the cursor to be repositioned.

OTHER ENTERING AND EDITING HINTS

Important: You are not using a word processor. If you make a mistake while typing, use the "DELETE" key to erase text. Then re-type the text. Never use the "BACK SPACE" key for editing (except in conjunction with "RETURN" as described above). Use of this key will cause formatting or other printing problems.

When you are entering text in a field which may be several screen lines in length, and you reach the end of the line, the text will not wrap around to the next screen line automatically (as it does with a word processor), nor will there be a bell or other audible signal. Therefore, you must watch the screen to make sure that you press "RETURN" before reaching the end of the line. Otherwise, the error message "Data too long" will appear, and you will have to reenter text.

When you are entering text in a field that permits a number of lines, it is a good idea to leave some extra space at the end of each line. This will make it very easy to edit later on. For example, if words need to be added, you will not need to change all the lines.

ACCESSING THE PURCHASE REQUEST SYSTEM

After you log in, the following Purchase Request System menu of options will be displayed on the screen.

```
                    Purchase Request System
                    ******** ******* ******

           1. Assignment of purchase request numbers

           2. Receipt of a purchase request

           3. Entering of a purchase request

           4. Tracking of a purchase request

           5. MAIL System

           6. Change LOGIN password

           7. Change hardcopy output device

           8. Maintenance of codes

           Enter selection :

Hard copy output will be produced on the Laser printer.
```

Please note the line indicating the printer which will produce your hard copies. This line shows the current printer device setting. The default is the laser printer. For instructions on how to change the printer, refer to the addendum at the end of this manual.

The Fiscal Year

After selecting an option from the Purchase Request System menu, you will be prompted, "For which fiscal year?". A field will be highlighted and it is here where you will enter the fiscal year. You must enter a two digit year. For example, if you are going to assign Purchase Request Numbers for the fiscal year 1985, then enter "85".

If you enter more than two digits (e.g. "1985"), the
message, "The data is too long. Please try again. (PRESS
RETURN)", will display and you will be given an apportunity to
enter the year again. If you (accidently) enter a non-numeric
character, the message, "Error reading response. Please enter an
integer. (PRESS RETURN)", will appear.

Once you enter the fiscal year successfully, you will be
brought to another menu for the subsystem you have selected. For
example, if you type "1" for the "Assignment of purchase request
numbers" option, after entering the fiscal year, you will get the
Purchase Request Menu for the assigning of the Purchase Request
Numbers.

```
        Purchase Request Menu
        ******** ******* ****

    1. Assign Purchase Request Number

    2. Change Purchase Request Number

    3. Delete Purchase Request Number

    4. Display PR number information

    5. Print Menu

Enter selection :
```

Here you will select an option for whatever task that you
want to do (e.g. type "1" to assign Purchase Request Numbers).
Each option is discussed further in the ASSIGNMENT OF THE
PURCHASE REQUEST NUMBER section of this manual.

If you select option 2, "Receipt of a purchase request", in the Purchase Request System menu, after entering the fiscal year, you will get the Receipt of Purchase Request Menu.

```
Receipt of Purchase Request Menu
******* ** ******** ******* ****

1. Add a receipt of a purchase request

2. Change receipt of a purchase request

3. Display range of received purchase requests

4. Display purchase requests for related WU numbers

Enter Selection:
```

Here you will also select the option for whatever task that you want to do (e.g. type "1" to add a receipt of a Purchase Request). Each option is discussed further in the RECEIPT OF A PURCHASE REQUEST section of this manual.

CHANGING OPERATIONS

Changing Operations Within The Same Fiscal Year

If you wish to change operations (e.g. you wish to stop displaying Purchase Request Numbers and begin changing Purchase Request Numbers) in the "Assignment of purchase request numbers" system for the same fiscal year, all you need to do is access the Purchase Request Menu and enter your selection. The Purchase Request Menu is accessed by pressing "RETURN" as the Purchase Request Number on the screen.

For example, If you are displaying Purchase Request Numbers and you wish to begin changing them, press "RETURN" as the first entry to the screen below.

```
 _____
/                                                \
|          Display of purchase request number     |
|                                                 |
|  Purchase Request Number: PY7121868             |
|                                                 |
|  Initiator                                      |
|                                                 |
|  Branch                                         |
|                                                 |
|  Date assigned                                  |
|                                                 |
|  Date received                                  |
|                                                 |
|  Contract number                                |
|                                                 |
|  Related WU number                              |
|                                                 |
|  PR Status                                      |
|                                                 |
|  Total amount of PR                             |
_____/
```

The Purchase Request Menu will appear.

```
 _____
/                                            \
|        Purchase Request Menu                |
|        ******** ******* ****                |
|                                            |
|    1. Assign Purchase Request Number        |
|                                            |
|    2. Change Purchase Request Number        |
|                                            |
|    3. Delete Purchase Request Number        |
|                                            |
|    4. Display PR number information          |
|                                            |
|    5. Print Menu                            |
|                                            |
|  Enter selection :                          |
_____/
```

Enter "2" to select the option to change a Purchase Request Number. The screen will appear with the heading, "Change of purchase request number".

Please note that when you are adding Purchase Request Numbers, the number is automatically put in by the system. So to get back to the Purchase Request Menu, just press "RETURN" as the entry to the initiator field. This will allow you into the Purchase Request Menu where you can select another option.

The changing of operations within the same fiscal year is done in the same way for the "Receipt of a purchase request" subsystem.

Changing Fiscal Years

If you wish to perform either the same or a different operation for a different fiscal year, you must access the main Purchase Request System menu. To access the Purchase Request System menu, you must first bring up the menu of the subsystem which you were working in (e.g. the Purchase Request Menu for the assignment of the Purchase Request Numbers). The previous section explains how to get back to the menu of the subsystem in which you are working; please refer to this if you do not remember how to get back to the menu.

Going by the Purchase Request Menu example, press "RETURN" to access the main Purchase Request System menu.

```
                    Purchase Request System
                    ******** ******* ******

              1. Assignment of purchase request numbers

              2. Receipt of a purchase request

              3. Entering of a purchase request

              4. Tracking of a purchase request

              5. MAIL System

              6. Change LOGIN password

              7. Change hardcopy output device

              8. Maintenance of codes

              Enter selection :

  Hard copy output will be produced on the Laser printer.
```

Here you can enter "2" to access the receipt of the Purchase Request subsystem or enter "1" to access the assignment of the Purchase Request Numbers subsystem. When prompted for the fiscal year, you can specify a different fiscal year. You will then be ready to continue working.

Finish Using The System (Logging Off)

Whenever you finish using the system, you must "log off" before turning off the power and leaving the machine. To do this, return to the main Purchase Request System menu and then press "RETURN". You will be automatically "logged off" the system.

TRACKING OF A PURCHASE REQUEST

Once the Purchase Request has been entered into the system as being assigned and received, the Purchase Request is tracked through the locations before it can be made into a contract. The tracking of the Purchase Request can proceed in conjunction with the entering of the Purchase Request form.

After logging in and selecting option 4 ("Tracking of a Purchase Request") at the Purchase Request System Menu, you will be prompted with, "For which fiscal year?" . Enter the two digit year for the Purchase Request. For example, if the Purchase Request is for the fiscal 1986, then enter "86".

If you enter more than two digits (e.g. "1986"), the message, "The data is too long. Please try again. (PRESS RETURN)", will display, and you will be given the opportunity to enter the year again. If you (accidently) enter a non-numeric character, the message, "Error reading response. Please enter an integer. (PRESS RETURN)", will appear.

Once the fiscal year is entered successfully, the following Purchase Request Tracking Menu will display on the screen.

```
┌─────────────────────────────────────────────────────────────┐
│        Main Menu of the Purchase Request Tracking System     │
│                                                              │
│                                                              │
│      1.   Add steps to a PR Path                             │
│      2.   Change steps in a Purchase Request Path            │
│      3.   Delete steps in a Purchase Request Path            │
│      4.   Display a Purchase Request Path                    │
│      5.   Display the location of a PR                       │
│      6.   List the Purchase Requests                         │
│      7.   Print out the Purchase Request                     │
│                                                              │
│      Which option do you want (enter 1-7)?                   │
│                                                              │
│      What is the PR number?                                  │
│                                                              │
└─────────────────────────────────────────────────────────────┘
```

There are seven options within the tracking of the Purchase
Request subsystem. They are: (1) adding steps to a Purchase
Request path, (2) changing steps in a Purchase Request path, (3)
deleting steps in a Purchase Request path, (4) displaying a
Purchase Request's path, (5) displaying the location of a
Purchase Request, (6) listing the Purchase Requests, and (7)
printing out the Purchase Request. Each option will be described
in full in the following sections of this manual. You can quit
out of the tracking of the Purchase Request subsystem by entering
"Q" as the option or just hitting the carriage return. At this
point you will be brought back to the Purchase Request System
Menu where you can select another Purchase Request subsystem or
log out if you wish.

You are given two prompts in the tracking of the Purchase Request menu. The first prompt is, "Enter the option (1-7)", where you will enter the number corresponding to the task that you want to perform in the tracking of the Purchase Request. Entering any other integer value would result in an error message.

The second prompt is, "Enter the Purchase Request Number", where you would enter the particular Purchase Request number to track on. Note that the Purchase Request number you enter must be one that was assigned and received within XOR. Otherwise, you would not be able to proceed with its tracking.

After entering a valid Purchase Request number to track, you will be asked, "Any changes?" . If "Y", you can enter a different option and/or a different Purchase Request number. Answering "N" to this prompt will result in the first screen of the select option being displayed.

ADD STEPS TO A PURCHASE REQUEST PATH

After selecting "1" in the Tracking of the Purchase Request Menu, there are initially two possibilities: (1) XOR has yet to review the Purchase Request in question or (2) the other locations can review the Purchase Request.

In either case, the following screen will be displayed.

```
Add steps to a PR Path                        FY <fy>   Screen 1 of 8
Purchase Request Number
                             Location of the PR
Status:                      Contract Information Codes
Contract Organization          Contract Manager        Phone

    Division

    Date Sent

    Review Complete

    Approval


Q-Quit  ESC-Skip rest of screen Back space-Back up <CR>-Leave as is
```

You will note that at the top of this first screen and on subsequent screens is the header information about the PR's related work unit. General information about the work unit includes its status, its contract information code (e.g. "sole source"), its contractor organization, its contract manager, and the phone number.

If condition (1) is the case, the screen indicating that the Purchase Request is in XOR is displayed. The header information also includes items such as the fiscal year, the location where the Purchase Request is currently being tracked in, and the status of the Purchase Request (i.e. "not started", "continuing", or "completed"). This header information is displayed for the latter condition as well. If condition (2) is the case, the same holds true except that the current location where the Purchase Request is being tracked in is indicated in the header information.

Whether the Purchase Request is in XOR or in any other location, there are four fields painted on the first screen. These fields are: (1) the "Division", (2) the "Date Sent" ("Date Received" in XOR REVIEW), (3) the "Review Complete", and (4) the "Approval" fields.

1) The "Division" field tells you where the Purchase Request is currently being tracked in. For example, if the Purchase Request is in XOR, this field will have the "XOR" literal.

2) The "Date Sent" field indicates the date in which the location doing the tracking has received the Purchase Request. If the Purchase Request is in XOR, the Date Received is retrieved from the receipt of the Purchase Request. Otherwise, you will enter the Date Sent.

3) The "Review Complete" field indicates the date in which the location doing the tracking of the Purchase Request has completed that Purchase Request. The default value is the current date. When the Date Received field has not as yet been entered, this field has the literal "unknown" displayed. The user enters this field after the Date Sent has been entered.

4)   The "Approval" field tells you whether the Purchase Request was accepted at the location tracking it or if it was rejected. After entering the Review Complete field, you will be asked, "Was the PR accepted? (Y,N, or Q)" . Enter "Q" to quit out of the screen back to the main menu. If you enter "Y", then the literal, "Accepted", is put into this field. If "N" is entered, the literal, "Rejected", is put here.

After these 4 fields have values entered, you will be asked, "Any changes?". If there are changes to be made, answer "Y" or hit "<RETURN>". The curser is brought back to the Review Complete field. You may change this field if you wish. No matter what you do to the Review Complete field, you will receive the prompt, "Do you want to leave the approval status the same?" . If so, the Approval field is left unchanged. If not, whatever value that was in the Approval field before will be changed to its opposite value. For example, "Accepted" would be changed to "Rejected".

If you decide to reject the Purchase Request in a specific location, you will be provided with a separate screen, "Screen 2 of 8", to enter the reasons for rejecting it.

```
Add steps to a PR Path                              FY <fy>   Screen 2 of 8
Purchase Request Number
                                    Location of the PR
Status:                         Contract Information Codes
Contract Organization               Contract Manager      Phone


                                Reason for Rejection
                                ********************


Q-Quit ESC-Skip rest of screen Back space-Back up <CR>-Leave as is
```

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You can enter up to 6 lines of reasons with each line consisting of 80 characters. It is important to note here that if a Purchase Request is rejected within a division, the PR remains in that tracking station until it is accepted there.

After all these changes have taken place for the location reviewing the Purchase Request, you are asked again, "Any changes?". When through making changes, answer "N". You are then asked, "Does the PR go to PKR ? (Y or N)" .If not, as in the case of transfer of funds for example, this Purchase Request is not tracked through the locations at AFGL. It is put on hold until the PR is ready to be obligated and made into a contract. If the Purchase Request is to go to PKR then the following list of locations that can track the Purchase Request is displayed on the following separate screen:

```
Add steps to a PR Path                          FY <fy>
Purchase Request Number                         Via: PKR
                      Location of the PR
Status:                      Contract Information Codes
Contract Organization               Contract Manager      Phone

                  1. SI
                  2. SUT
                  3. LMCA
                  4. STINFO
                  5. XO
                  6. Commander
                  7. MIPR Control


   What is the number of the location you want (1-7)?


Q-QUIT
```

You are prompted, "What is the number of the location you want (1 - 7)?" . As the list is updated after each location has tracked the Purchase Request, the numbers to choose from will be updated as well. Enter the number corresponding to the location where you want to track the Purchase Request. The location that you select does not have to be in sequential order as the list depicts. A screen for that location selected will be painted with the same four fields as described above. The screen will still say "Screen 1 of 8" for the other locations tracking the PR except for MIPR Control at which the screen will say "Screen 3 of 8". Enter these fields following their restrictions as explained above.

The same procedure will be followed for each location tracking the Purchase Request. The screen will have the header information indicating that the Purchase Request is currently being tracked within a specific location.

As a final note, you are allowed to skip the locations that have no relevance to the Purchase Request in question. In other words, not every location has to see the Purchase Request before sending it to MIPR Control.

When the Purchase Request is sent to MIPR Control to review the Purchase Request, the following screen is displayed.

```
Add steps to a PR Path                         FY <fy>    Screen 3 of 8
Purchase Request Number                                   Via: PKR
                          The PR is in MIPR Control
Status:                   Contract Information Codes
Contract Organization            Contract Manager    Phone


   Division        MIPR

   Date Sent



Q-Quit ESC-Skip rest of screen  Back space-Back up <CR>-Leave as is
```

Note that there are only two fields: (1) the "Division", and (2) the "Date Sent" fields.

(1) The "Division" field is automatically filled in by the "MIPR" literal indication that the Purchase Request is in MIPR Control.

(2) The "Date Sent" field is the date in which the Purchase Request is sent out from MIPR Control.

After entering the Date Sent field, you will be prompted, "Any changes?" . Answer "Y" to change the Date Sent; otherwise answer "N" to go to the next screen. The PR is then sent to PKR.

The following screen comes up when the PR is sent to PKR.

```
Add steps to a PR Path                      FY <fy>      Screen 4 of 8
Purchase Request Number                                  Via: PKR
                                  The PR is in PKR
Status:                           Contract Information Codes
Contract Organization                 Contract Manager    Phone


    Division              PKR

    Date Received

    Approval

    Date of acceptance


Q-Quit ESC-Skip rest of screen  Back space-Back up <CR>-Leave as is
```

When the Purchase Request is sent to PKR from MIPR Control, you will note that the fields are similar to those of the other locations which have so far tracked the Purchase Request. The only differences are that the Date Acceptance field replaces the Review Complete field and the Date Received field replaces the Date Sent field.

If the Purchase Request is sent to PKR and is approved by PKR, you are brought into Screen 5 of 8 which looks like this.

```
Add steps to a PR Path                      FY <fy>      Screen 5 of 8
Purchase Request Number                                  Via: PKR
                                  The PR is in PKR
Status:                           Contract Information Codes
Contract Organization                 Contract Manager    Phone


    Buyer
```

You are given the one field, "Buyer". Enter up to 20 characters for the Buyer and then you will be asked, "Does this PR go to Technical Evaluation (Y,N or Q)?" . Enter "N" to skip over Technical Evaluation, and "Y" to go to Technical Evaluation, "Screen 6 of 8". If skipping over Technical Evaluation, you will automatically be brought into the seventh screen.

If the Purchase Request is to go through Technical Evaluation, the following screen will be displayed.

```
Add steps to a PR Path                    PY <fy>      Screen 6 of 8
Purchase Request Number                                Via: PKR
                          The PR has completed PKR.
Status:                   Contract Information Codes
Contract Organization          Contract Manager      Phone

    Location            Technical Evaluation

    Date Sent

    Date Received

    Suspension Date

    First Extension Date

    Second Extension Date

    Date Returned
```

There are seven fields on this screen which are as follows: (1) the "Location", (2) the "Date Sent", (3) the "Date Received", (4) the "Suspension Date", (5) the "First Extension Date", (6) the "Second Extension Date", and (7) the "Date Returned".

(1) The "Location" field is automatically filled in with the literal, "Technical Evaluation", by the system.

(2) The "Date Sent" field is the date that the PR is sent to Technical Evaluation from PKR. The default value is the current date.

(3) The "Date Received" field is the date that the PR is received at Technical Evaluation. The default value is the current date.

(4) The "Suspension Date" marks the date that the PR is considered late. It is usually one week after the PR is received in Technical Evaluation. If this field is left blank, the two extension dates and the date returned are skipped and you are asked, "Any changes?". Therefore, you must enter the Suspension Date before you can enter the other dates. The Suspension Date can be after the current date.

(5) The "First Extension Date" is the first extension of the suspense date.

(6) The "Second Extension Date" is a later extension of the suspense date, i.e. later than the First Extension Date.

(7) The "Date Returned" is the date that the PR is returned to XOR from Technical Evaluation.

If you have any difficulty entering the date fields, please refer to the beginning of this manual for the section dealing with entering of date fields.

After entering all the fields in the Technical Evaluation screen, you will be asked, "Any changes?" . Answer "Y" to make any changes; otherwise, answer "N" to go the seventh screen.

The seventh screen deals with obligating the Purchase Request and making it a contract. The following screen is displayed.

```
Add steps to a PR Path                         FY <fy>     Screen 7 of 8
Purchase Request Number                                    Via: PKR
               The PR has been received from Tech Evaluation/PKR
Status:                        Contract Information Codes
Contract Organization               Contract Manager    Phone


    Date Obligated

    Contract Number

    Start Date

    End Date

    Total
```

You will note that there are five fields on the seventh screen: (1) the "Date Obligated" field, (2) the "Contract number", (3) the "Start date", (4) the "End date", and (5) the "Total" field. You will also note that each of these fields are filled with the "unknown" literal. Each field is explained as follows. You will be notified that the Purchase Request has either completed PKR in the case of a Purchase Request at AFGL by the notice, "This PR has completed PKR." in the header information or the notice, "The PR has been received from Tech Evaluation", if the PR has gone through Technical Evaluation.

Note that all the line items of a Purchase Request form that is being tracked must be funded before the Purchase Request can be made into a contract. There cannot be any remaining preinitiated line items in the Purchase Request or you wil get the error message, "The PR's items can not be found; the PR cannot be completed. (PRESS RETURN)". Each field is explained as follows:

(1) The "Date Obligated" is the date in which the Purchase Request is made into the contract. There will be money obligated for all the line items of the Purchase Request.

(2) The "Contract number" is the number given to the new contract. Enter up to 20 characters for the contract number. This field cannot be left blank. If it is, the other fields will be skipped and you will be asked, "Any changes?" . If "N" to this prompt, you will be brought back to the main menu.

(3) The "Start date" is the starting date of the newly created contract. This date field has no restrictions.

(4) The "End date" is the ending date of the contract. The only restriction is that it cannot be before the start date.

(5) The "Total" field is the total amount of money that the contract is let. This total must equal the total amount of money committed for all the line items of the Purchase Request. If this total is more than the total of the PR, then you will get the message, "No more than PR total can be obligated on this PR. (PRESS RETURN)" . If the total is less than the PR Total, adjust the Purchase Request line items.

In the above case, you will get a list of the funded line items with 3 fields: (1) **LINE ITEM**, (2) **DOCUMENT**, and (3) **RELATED WORK UNIT**. You will be asked, "Do you want to change one of these? (Y,N,D or Q)?" . Your options are the following:

-- Enter "Q" to be brought back to the main menu.

-- Enter "D" if you are done adjusting the line items. If the amount obligated is not equal the target amount, you will get the error message, **"The amount obligated does not equal the target amount. (PRESS RETURN)"**, and the line items are displayed again. Then you must re-adjust.

-- Enter "N" if the amount obligated is not equal to the target amount; you would get the same error message as above and the line items would be displayed again.

-- Enter "Y" to get (Screen 8 of 8) of the particular line item to adjust. All its fields are displayed.

```
Add steps to a PR Path                    FY <fy>        Screen 8 of 8
Purchase Request Number                                  Via: PKR
                          Location of the PR Tracking
Status:                        Contract Information Codes
Contract Organization             Contract Manager    Phone

Line Item                       Description
Delivery Date                   Other Information
Cost Center
EEIC
Money Amount
Type Work Unit:
Related Work Unit Number:
Category of Funds  Contracts                      BPAC
Fund Cite

Funding Document

Amount Obligated
```

In the eighth screen where you adjust the Purchase Request line item, there are two extra fields at the bottom: (1) the "Funding Document" where the funding document's number and its identification are displayed, and (2) the "Amount Obligated" which must be adjusted.

You will be asked, "Any changes?" . If "Y", you can only change the Amount Obligated field. If the total of the contract matches the total of the Purchase Request, then the Purchase Request is amended with the new fund levels. If there are no remarks in the Purchase, you will get the message, "There are no remarks for this Purchase Request. (PRESS RETURN)" . If there no approvers in the Purchase Request, you will get the message, "There are no approvers for this Purchase Request. (PRESS RETURN)" .

Finally you will get the message, "The PR has been amended with the new fund levels. (PRESS RETURN)" .

You must note here that if there are no Purchase Request line items, or not all the items are funded, you will get the error message, "The PRs items can not be found, the PR can not be completed. (PRESS RETURN)" . Hit <CR> and the main menu is brought back.

There are some points to remember when you obligate a Purchase Request. First of all, a contract can be let for the same or less than the total committed amount of a Purchase Request. However, a contract cannot be more than that committed amount.

Second, a Purchase Request cannot be let as a contract if there are remaining preinitiated line items for that Purchase Request.

Third, if the contract is let for less than the Purchase Request committed total of its funded line items, one or more of those line items must be adjusted so that the total obligated equals the total committed.

Lastly, a routine is called which displays all the funded line items. You would select one line item and (Screen 8 of 8) of the particular line item selected is displayed and the amount committed can be adjusted. You can adjust more than 1 line item. You will stay within this line item adjustment routine until the total committed of the Purchase Request is the same as the total obligated let by the contract.

In adding steps to the tracking of the Purchase Request, if the Purchase Request has been completed, you will get the message, "This PR has already been completed. (PRESS RETURN)" .

SUMMARY

To add steps to a Purchase Request path:

1. Enter "1" in the Tracking of the Purchase Request Menu followed by the Purchase Request Number.

2. Initially, you will be brought into the XOR REVIEW screen where you will enter the dates. If the PR is accepted in XOR, answer "Y" to the question, "Does this PR go to PKR?", if that is the case.

3. A list of locations that the PR can be tracked in is displayed. Select the location where the PR is to be sent to for review by entering the number corresponding to that location.

4. Each location from the list (except MIPR Control) will have the same generic screen as for the XOR REVIEW screen, i.e. "Screen 1 of 8". Enter the dates as for XOR and accept the PR or reject it. If rejecting the PR in a location, state the reason(s) for rejection in "Screen 2 of 8".

5. Step through MIPR Control, PKR, and optionally through the Technical Evaluation screens entering the required dates as they appear in your PR log book.

6. On the Obligation Screen, "Screen 7 of 8", enter the Date Obligated, the Contract Number, and the other dates with the total money that the Purchase Request is obligated for. Note the Purchase Request form must have all funded line items.

7. If the total committed amount does not match the total obligated amount, you can adjust one or more line items. Given a display of all the Purchase Request line items, enter the line item and change the obligated amount.

8. Continue changing the obligated amounts of the Purchase Request line items until the total committed and obligated match. At this point, the PR is amended and added to the database. The PR's tracking is completed at this point.

CHANGE STEPS IN A PURCHASE PATH

This option can be performed on a completed Purchase Request or for an incomplete Purchase Request. To get into the change mode for the tracking of a Purchase Request enter select "2" in the Purchase Request Tracking Menu. Then enter the Purchase Request number whose path you want to change. You will be asked, "Any changes?". Answer "N" to get a list of the PR paths. You will get a screen display similar to this:

```
Change steps in a Purchase Request Path              PY <fy>
Purchase Request Number                              Via: PKR
                  The location of the PR Tracking
Status:                        Contract Information Codes
Contract Organization              Contract Manager   Phone


                                   Review    Approval
Entry   Location      Date Sent    Complete  Status
*****   ********      *********     ********  ********

001     XOR REVIEW    dd mmm yy     dd mmm yy  dd mmm yy
002     SI            dd mmm yy     dd mmm yy  dd mmm yy


Entry   Location      Date Sent
*****   ********      *********

003     MIPR          dd mmm yy

** end of entrys **

Do you want to change one of these entrys?  (Y, N or Q)?
```

If there are any more locations that are to be displayed which cannot fit on one screen, you will get the notice, "** continued **". You are then asked, "Do you want to change one of these entries? (Y, N or Q)". If "N" and there are more, the rest of the PR's path is displayed on another screen.

If there are no more entries, you will get the notice, "** end of entries **". You are asked again, "Do you want to change one of these entries? (Y, N or Q)". If "N", all the entries are displayed again. If "Y", then you are prompted, "enter number (1 - total number of entries)?" .

Select the number corresponding to the entry within the PR location that you want to change. (Example: if MIPR is entry 3 in the PR's path, enter "3" to get the MIPR entry screen up and change the Date Sent field.

Make the changes to the date fields of the selected entry. The approval status of the PR, e.g. "Accepted" or "Rejected" can be changed only if the selected entry is the current entry of the PR's tracking path.

You are then asked, "Do you want to change another step for this PR?" . Answer "Y" to change another location. Otherwise answer "N" and the message, "PR tracking information is being updated. Please wait.", will flash and the information will be changed for that Purchase Request.

SUMMARY

To change steps in a Purchase Request Path:

1. Enter "2" in the Tracking of the Purchase Request Menu followed by the Purchase Request Number.
2. Select the step from the display of the PR Path corresponding to the location that you want changed.
3. The information in that location can be changed. However, the approval status can not be changed unless the location for that step is the same as the present location of the PR.
4. If the last step of the PR is chosen, new data for that step can be added.

DELETE STEPS IN A PURCHASE REQUEST PATH

To delete one or several steps in the tracking of a Purchase Request, you will enter the select "3" in the Purchase Request Tracking Menu. Then you will be prompted, "Enter the Purchase Request Number", at which you would enter the PR number whose steps in the tracking is to be deleted. Answer "N" to the "Any changes?" prompt to go on within this option of the tracking system.

You are given a display of all the steps (or locations) where the Purchase Request has been track. The screen display looks very much like that for the change option of the PR tracking system. Only the header information would be different such as indicating that you are now in the delete mode.

You will be first asked, "Is one of these the last one you want to keep? (Y, N or Q)". Answering "Q" allows you to quit out of this option and to go back to the PR Tracking Menu. If you answer "N" and there are more steps or PR locations to display, these entries will be displayed.

If you answer "Y" to the above question, you will be prompted, "enter number (1 - #steps in PR tracking)". If you enter "4" for example, all the steps greater than or equal to 4 are marked for deletion. If you answer "1", then you will delete the entire tracking of the Purchase Request. You would get the message, "This will delete the whole PR, is this what you want? (Y, N or Q)". If "Y" to this question, you are shown the steps that will remain after the others are deleted in the Purchase Request tracking.

Then you are asked, "Are you sure this is what you want? (Y or N)". If you answer "N", you will get the message, "No data will be deleted.", and you are brought back to the main menu. If you answer "Y", you will get the message, "Deleting information, please wait.". The steps are deleted and you are brought back to the main menu of the tracking subsystem.

If you enter any other number besides "1", you will get the message, "This will delete all information from (number); Is this what you want? (Y, N or Q)". The rest proceeds as explained above.

SUMMARY

To delete steps from a Purchase Request Path:

1. Enter "3" in the Tracking of the Purchase Request Menu followed by the Purchase Request number.
2. Select the step from the display of the PR Path which will delete that step and steps after it.
3. You will be given a display of what the PR will look like after the steps have been deleted.
4. Answer "Y" to the question, "Are you sure this is what you want? (Y or N)", if you want those steps deleted.
5. After the steps are deleted, you are brought back to the main menu.

DISPLAY A PURCHASE REQUEST PATH

To display a Purchase Request path, you would enter "4" at the prompt, "Enter option (1-7)". Next you would enter the Purchase Request number whose path you want displayed. Answer "N" to the "Any changes ?" prompt if you are dealing with the Purchase Request that you want to display and continue on.

A screen display similar to the display in the change mode is displayed showing all the steps or locations in the Purchase Request's path. You will be asked, "Do you want to see one of these? (Y, N or Q)". If "N" or "Q", you will be brought back to the main menu of the PR tracking system. (For "N", if there are more entries, the rest of those entries are displayed.)

If you respond with a "Y", the prompt, "Enter number (1 - #entries)?" appears. Enter the number of the corresponding entry which you want to see in detail. After viewing the display, you are brought back to all the entries of the PR path and asked, "Do you want to see one of these ? (Y, N or Q)" at which you can quit out if you are through viewing the path entries of the Purchase Request.

It is worth noting that if the Purchase Request has been obligated and made into a contract, you can in addition to displaying the obligation screen (Screen 7 of 8), you can view all the funded line items of that PR and select one of those obligated line items and view it on the eighth screen.

SUMMARY

To display a Purchase Request Path:

1. Enter "4" in the Tracking of the Purchase Request Menu followed by the Purchase Request number.
2. A display of all the steps which the tracking of the Purchase Request has currently undergone will show on your screen.
3. Answer "Y" to the question, "Do you want to see one of these? (Y, N or Q)" followed by the number to the location that you want to view.
4. After viewing one location, you will be brought to the general display where you can select another location to view.
5. If viewing the obligation screen, you can see a list of the line items and a detailed display of one particular line item if you wish.

DISPLAY THE LOCATION OF A PURCHASE REQUEST

To display a Purchase Request's location in its tracking enter "5" in the Purchase Request Tracking Menu. Then you would enter the Purchase Request number at the "Enter Purchase Request number" prompt. If you have the right Purchase Request and option, answer "N" to the "Any changes?" prompt.

You are shown the last location in the Purchase Request's tracking path. If the Purchase Request is obligated and completed, you will be prompted, "(PRESS RETURN)". The question, "Do you want to see the PRs items?", comes up on the screen. Respond "Y" to get a list of all the funded line items. Then you will be asked, "Do you want to see one of these? (Y,N,D, or Q)?". If "Y", the particular line item selected is displayed. followed by "(PRESS RETURN)". This returns you to the list of the funded line items. Hit "N", "D", or "Q" to get back to the main menu of the Purchase Request Tracking system.

SUMMARY

To display the location of a Purchase Request:

1. Enter "5" in the Tracking of the Purchase Request Menu followed by the Purchase Request number.
2. You are shown the last location in the Purchase Request's path.
3. If the Purchase Request is obligated, you can view all the PR's funded line items or one particular line item.

LIST THE PURCHASE REQUESTS

To list a range of Purchase Requests which are undergoing tracking at some stage within a fiscal year, you would enter option "6" at the Purchase Request Tracking menu. Entering a specific PR number is not applicable in this option so the literal "N/A" fills this location.

When you answer "N" to the "Any changes?" prompt, the following screen is displayed.

```
List the Purchase Requests                                    FY <fy>


        What is the range of the Purchase Requests you want to see?

Start            (Enter <CR> to get all the PRs.)

End              (Enter <CR> to get the rest of the PRs.)
```

If you hit "<RETURN>" at the "Start" prompt, there is no need to enter the ending Purchase Request; all the Purchase Requests will be displayed.

You are asked, "Any changes?". If "N", then you are asked, "Do you only want the late PRs". If "Y", only the PRs whose tracking has not commenced are displayed; otherwise all the other PRs are displayed as well.

The following display fields are shown on a fresh screen followed by the selected Purchase Requests:

```
                       Listing the Purchase Requests in FY <fy>


                                                               Related
                                                                 WU
        Number    Location          Date Due      Status      *********
        ******    ********           ********    ************

        xxxx      ** not started **              not started   ** Unknown **
        yyyy      Obligation                     done
```

It is worth noting that the Status field is filled in with either the "done", "** late **", or "not started" literal value.

You will then be prompted, "(PRESS RETURN)" to return to the main menu in the Purchase Request Tracking system.

SUMMARY

To list the Purchase Requests being tracked:

1. Enter "6" in the Tracking of the Purchase Request Menu.
2. Enter the starting and ending PR number of the range which you want to view. Hit "<RETURN>" to the starting PR number field if you want to view all the Purchase Requests for the fiscal year.
3. Answer "N" to the question, "Do you only want the late PRs", if you want to view the status of all the Purchase Requests.
4. You will be given a display of the specified range of the PRs and their status in their trackings.

PRINT OUT THE PURCHASE REQUEST

To print out the tracking information for a particular Purchase Request, you would enter option "7" in the Purchase Request Tracking Menu followed by the Purchase Request number. If you have the right PR to print out, answer "N" to the "Any changes?" prompt. You will be given the following display while the listing is being produced and being sent to the laser printer.

```
Produce a hard copy of a PR                        FY <fy>
Purchase Request Number                            Via: PKR

Status:              Contract Information Codes
Contract Organization        Contractor Manager          Phone
```

Once the hardcopy of the Purchase Request's tracking information is produced, you will be brought back to the main menu where you can produce another hardcopy, enter another option, or simply leave the Purchase Request Tracking subsystem by hitting "<RETURN>".

SUMMARY

To print a hardcopy of a Purchase Requests tracking:

1. Enter "7" in the Tracking of the Purchase Request Menu followed by the Purchase Request number.
2. Answer "N" to the "Any changes?" prompt if you have the correct PR number.
3. A hardcopy will be printed on the specified output device and you will be brought back to the PR tracking menu.

ADDENDUM
HARD COPY OUTPUT DEVICE (PRINTER)

Hard copies can be produced on a variety of printers. The printer select will appear when you access the main Purchase Request System menu. This information will appear at the bottom of the Purchase Request System menu.

When you log into the system, the printer selection will be set to the default printer, which is the laser printer. You also have the capability to receive you output on the printer attached to you terminal or the central printer. It is possible for a programmer to make a fourth option available if the need arises.

To change the printer selection, access the main Purchase Request System menu.

```
            Purchase Request System
            ******** ******* ******

            1. Assignment of purchase request numbers

            2. Receipt of a purchase request

            3. Entering of a purchase request

            4. Tracking of a purchase request

            5. MAIL System

            6. Change LOGIN password

            7. Change hardcopy output device

            8. Maintenance of codes

            Enter selection :

   Hard copy output will be produced on the Laser printer.
```

Enter "7" (for Hardcopy Output Device). The following menu
will display:

```
        PRINT DEVICE MENU
        ***** ****** ****

     1. Laser printer

     2. Attached printer

     3. Central printer

     4. Other

     5. No output


        Select printer
```

Simply enter the number which corresponds to the desired
printer. For example, if you wish to produce output on your
attached printer, enter "2". In this case, a message will display
on your screen telling you to make sure that your attached
printer is on. At this point hit "RETURN" (not necessary for the
other selections) and the Purchase Request System Menu will
reappear, with the hardcopy output message changed to reflect
your choice.

Please note that option 5 in the Print Device Menu will
allow no output to be produced at all.

MAINTENANCE OF CODES

Included in the Purchase Request System Menu is the option of maintaining the various codes which the entire Purchase Request system depends on. This option which is option "8" on the main menu is primarily for the Database Administrator's use.

When this option is invoked, the Maintenance of Codes submenu is displayed:

```
                    Maintenance of codes
                    ********************

            1. Category of funds

            2. Type document

            3. Type source

            4. Name of sources

            5. Cost center codes

            6. EEIC codes

            7. PR codes

       Enter selection:
```

These various codes must be maintained so that the Purchase Request system can interact with the Funding system. The Funding system allocates the monies according to the various categories of funds, type documents, sources of funds, cost center codes, and EEIC codes. The PR codes are relevant to the tracking of the Purchase Request, e.g. PKR if the Purchase Request is to go through Procurement before it is obligated.

Enter the selection corresponding to which codes you want to access. For example, if you want to access the Category of funds, enter "1" at the Maintenance of codes menu. You will be given another menu for the selection:

```
Category of funds
*******************

1. Add a category

2. Change a category

3. Display categories

Enter selection:
```

You can add new categories of funds, change these categories, or display them. The numeric code is determined by the system automatically. You would enter the name of the category of funds and its abbreviated form.

The other codes in the maintenance of codes menu have the same setup as the category of funds with the exceptions of the cost center codes and the EEICs. These two types of codes have the added option of deletion since they are more apt to change from one fiscal year to the next.

Again, the maintaining of all these codes are really geared for the Database Administrator. However, if you want to know what codes are in the database, you can access the appropriate codes menu and enter the display option to display all the codes. If you do not find the code that is needed by the Purchase Request, the Database Administrator would have to be notified and that code added to the database. Otherwise, you cannot proceed with the entering of the Purchase Request.

END

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