Section 2: ORDERS

READ: Under “Forms & Reports" are the following menu items: Orders, Distribution, Compendiums, Reports, History, and Misc. Under each of these menu items will be screens to perform various functions. Some functions will be the same as reviewed in the previous section, providing the choice of how to access it.

Order Processing Screen

DO: At the “Forms & Reports Menu,” place the cursor on “Orders” and single click. Highlight “Orders” in the drop-down menu and single click to display the screen. To request Initial Distribution (ID) or a One-time requisition quantity:

a. Enter the “Technical Order Distribution Office” account number. (**NOT** the JCALS TODO number)

b. Hit TAB. The TODO address information will be displayed. Check the accuracy.

c. Enter a “Requisition Number” which must be a <u>five</u> digits number. This is an internal tracking number the TODO designates. OR, you can enter a number and then "TAB". The system will automatically input zeroes to make the five digits.

d. Hit “Tab.” If you wish to enter a date prior to today’s date, delete the day, month, etc., and enter. Or, if you wish to accept today’s date, which is default, TAB once again.

<u>Note</u>: If you have previously used the same Requisition # and Requisition Date, you will be unable to proceed. You will get the error message “CST – Duplicate request in process w/same Request Number/Date. ”Click "OK " and Change Requisition Number or Requisition Date.

Alternate Address

e. Beneath the "Initiator" block is a check box marked "Alternate Address." This can be used to enter an address other than that of the TODO. For instance, if your unit is deployed for several weeks and you need software shipped directly to your location, an address can be entered when this is marked. Putting a check here brings up the "Alternate Mailing Address Details."

Once you have entered all the required information, click on "Order Details." <u>If you try to "Save" you will get a message saying you can't save without CPIN details</u>. You must first enter your CPINs in the Order Screen.

f. Now click the "Order Details" button to begin CPIN input.

Shopping Cart

g. If you are a TODO, and selected one or more CPINs using a check box in the "CPIN Listing" of the ACPINS Weapon Systems Pages, and then clicked the "Add to Cart" button, you will be taken to the Shopping Cart Status Screen. There you will be given the options to "Remove" selected CPINs, or "Order." Clicking the "Order" button will take you to the "Order Processing screen. You will enter your TODO code, a Requisition Number and a Requisition Date.

h. Once you have completed the required information in the yellow fields, click the "Add from Cart" button, which is located just above the "Order Details" title.

i. The CPIN, Revision, Managing Center (MCTR) and Security Classification will appear in the fields. Enter a Quantity in the ID and/or One Time fields.

Error Messages

j. One of the advantages of the Web-enabled ACPINS over the previous systems is its ability to deliver immediate error messages on the screen. Previously, TODOs had to rely on receiving the "215 Error Notice" through the mail. Sometimes a TODO would wait days or weeks expecting software, only to receive the error notice telling them they had requested an incorrect number or the CPIN had been cancelled. The system today allows you to research and correct CPINs before submitting the request.

Using “List”

k. If you are uncertain of the CPIN, or receive an error message, the “List” button is helpful. Position your cursor on a blank line in the “CPIN” field. Now, enter any part of the CPIN, such as the Identifier and Major function Code (86C), followed by the wild card for ACPINS, a percent sign (%).

l. Not only does the List box contain the CPIN, Rev # and Scty (Security Classification), also listed are the “Software Date” and MCTR (Managing Center) for the CPIN. If the CPIN has been dated, or is “operational”, there will be a date given. If there is no date, then the software is “Pending” (not being distributed yet). The MCTR code is the two letter code that designates the software manager, such as “WR” for the Warner Robins Software Control Center. You may want to make notes on the MCTR codes and which CPINs are pending for use during input of the Order. If you do not receive your software in a reasonable time, you will use the MCTR code to determine who to contact for follow-up.

m. If you receive a lengthy list, it can be shortened by using the “Find” feature. For training purposes, enter part of a CPIN, such as “86C% and then click once on the “List” button. Enter “86C-CPIN/4/%” in the query line in the box and click the “Find” button. The List functions the same in all of the ACPINS screens in which it is available.

The CPIN should populate the “CPIN” field. Hit “Tab” and the “Rev” and “Scty” Classification fields should populate automatically. The latest Revision Number will fill in and the Scty Classification is that of the CPIN, not the TODO. <u>ACPINS will always validate the Security Classification of the TODO against the CPIN. If the two do not match, you will receive an error notice.</u>

Establishing Initial Distribution (ID)

n. Once a CPIN is listed in the “CPIN” field of the Orders Details Screen, if the Revision #, MCTR and Security Classification are not already visible, click “Tab” so the “Rev, MCTR and Scty” fields will populate. Then, put your cursor in the “ID” field and enter a quantity. *If you had previously established ID for this CPIN, the quantity should automatically appear in the Qty Field*

If the TODO has previously established ID for this CPIN, the quantity must be increased, decreased or cancelled before the system will let you go further.

o. The error notice "No change to existing ID qty; either increase, decrease or cancel" will appear. If you do not want to change the quantity or cancel, then use the "Delete" button above to clear the CPIN.

q. Under "Priority", default is "Routine." To change it, select a new priority from the drop down list. If you have an emergency request, you may submit your order through ACPINS electronically, but to insure immediate attention, you may wish to FAX a copy of your Order or paper AFTO 157 to the Managing Center, e-mail, or call them.) Otherwise, to accept the default "Routine," hit Enter or TAB.

r. Generally, the software's managing center will distribute the software in the same media type it was received. For example, if the equipment specialist delivered it on a CD, then it would be distributed on CD. If the CPIN is available in more than one medium, when you click "List," the drop-down list will appear. However, if there is only one medium, when you click "List," the field will populate. "Media Type" field is not mandatory and may be skipped. If the field is blank, the Center will distribute the software as it was delivered to them.

Note: At this time, the user is not permitted to type in a media type; it must be picked off the list or filled in by the system when you click the "List" button above.

One Time Requisition Qty

s. <u>A One-Time Requisition Qty is available only for dated, or "Operational" CPINs</u>. If not dated, only ID may be established. To order a one-time requisition quantity for the same CPIN, put your cursor in the "One Time" field and enter a quantity.

Note: It is possible to establish ID for a "Pending" CPIN revision and also request a One-Time Qty for the previous Revision. (For example, Rev 004 is Pending and you need to request a copy of the previous Rev 003, which has been dated and distributed.)

t. When you try to Order a One Time Qty for a "Pending" CPIN Revision or Baseline, as soon as you tab, or arrow down, you will get a message telling you ”This CPIN is not dated. Only previous dated CPINs can be requisitioned.” Click "OK" and then click on the "Delete" button at the top of the page to clear the CPIN, or leave the input in the ID field.

Non-Approved Orders

READ: When all requirements are listed, the <u>user has two options</u>: 1) **Save** the work so it can be completed later or 2) “**Submit & Exit”** to forward the order for approvals.

DO: Select “Orders”

a. Select “Non-Approved Orders” If logged in as a TODO, the screen should automatically populate to show all Orders for your TODO Code.

b. There are several ways to find your order. If you have entered numerous orders, you can enter the Requisition Number and hit Query.

c. Once you have found the number, place the cursor in the Order # data field on that line and double-click. Displayed will be the top portion of your Orders Processing Screen.

d. Another way to query is by "Req Date."

e. View the order previously saved. Click on “Query” button above. This will clear the screen. Then, enter the Requisition Date for today and click “Query” again. This will bring up all Orders entered with this same requisition date. You can enter additional information to this order only if you selected “Save” rather than ”Submit and Exit.”

READ: Once all CPINs have been entered, the order is ready for the approval process. This time, select “Submit and Exit” in the upper right hand corner. you should see is the "Information saved to Database" message on your screen.

(Note: If you have provided ACPINS with <u>accurate</u> e-mail addresses, you should receive an e-mail notification telling you the system has accepted your order for processing. This is one of the reasons it is important to notify ACPINS Program Office of any e-mail changes.**)**

DO: Once an Order has been submitted for the approval process, to view the Order Status, Select “Orders” from the Forms and Reports Menu.

a. Select “Non-Approved Orders”.

b. Place your cursor on the line with a CPIN in your Order.

c. Displayed across the bottom will the approvals that have been received on that order up to the time all approvals are input.

d. Once all required approvals have occurred, the order will drop off this screen and the data can be reviewed in Orders History. If the Order remains on the “Non-Approved Orders” screen for a week or longer, check to see that you did select “Submit and Exit” to Commit it to the approval process. Remember, until you “Submit” the Order, only the CPINs Office and you can see the Order.

READ: Now that we've used the "Non-Approved Orders" Screen, let's take a look at the fields. This screen will provide information pertaining to the evaluation process of your request for the CPINs. A detailed explanation of the fields:

Order #	This is a system generated number.
TODO	The Non-JCALS TODO number for now.
Req #	This is the requisition number user assigned

Req Date	This is the requisition date assigned by the TODO. It can be the system default date or a date on which the TODO received the request from a software user.
CPIN	This is the requested CPIN
Rev #	This is the revision number of the CPIN being requested
Order Screen	Indicates the request was entered on the Order Screen
Special Requisition	Indicates the request was entered on the Special Requisition Screen
Initiator User ID	Displays the Login of the person who entered the request
Priority	Displays the priority of the request
MCTR	Managing Center represents where the CPIN is managed. (OC – Oklahoma City; OO – Hill AFB, Ogden; WR – Warner-Robins AFB, GA; AG – AFMETCAL, Heath, OH; NG – Northrup-Grumman)
ES Code	Represents the Equipment Specialist responsible for the CPIN
ES Name	Displays the Equipment Specialist name
ES Appr	Displays the approval/disapproval of the ES
FDO Name	Displays the Foreign Disclosure Officer Name for FMS Orders. Not applicable to USAF TODOs.
FDO Appr	Displays the approval/disapproval of the FDO. Not applicable to USAF TODOs.
MCTR Name	Displays the person’s name at the Managing Center who processed or input the request.
MCTR Appr	Displays the approval/disapproval of the Managing Center

TODO Computer Software Requirements List (CSRL)

(<u>Orders</u> Menu)

READ: The CSRL is a listing of CPINs for which the TODO has established Initial Distribution (ID) to automatically receive <u>new revisions</u> of software. There are three places in ACPINS where you can see a CSRL, but the CSRL under the Orders Menu is the only one at which you can designate CPINs which are distributed to specific TODAs through your TODO. To view this version of the CSRL:

DO: Select “Orders” on the Forms and Reports Menu.

a. Select “CSRL”

b. Enter the “TODO” account number

c. Select “Query” in the upper left-hand corner of the screen.

d. View the requirements listed on the screen.

e. If you want to determine if a particular CPIN is listed, once the list is displayed, put the cursor <u>on the line with the first CPIN</u>. Then click “Query” and the CPINs will clear. Then enter the CPIN for which you are looking and click on “Query” again. If the CPIN is not found, the message stating the CPIN is not found on this CSRL will appear. However, you will get the same message if you have made a typo entering the number. Double-check your CPIN before you re-enter to determine if this is the case.

READ: The CSRL can be printed and or saved to disk in PDF format.

DO: Print the CSRL by:

a. Once the CSRL is displayed, select “Print CSRL”

b The CSRL will display in PDF, select the print option

c. Follow the print instructions, each PC could be different.

d. Close the PDF screen

e. Select “Exit”. This will return you to the “Forms & Reports”

CPIN ID Cancellation / Increase/Decrease Quantity

READ: Now that you have established ID for CPINs, other functions of the Order Processing Screen allow you to cancel ID for CPINs you no longer require, decrease quantity or increase quantity.

DO: Select "Orders"

- **a.** Select "Orders" from the drop-down menu.
- **b.** Complete TODO, Req #, Req Date fields. <u>You will use different Req #s and Req Dates than those you originally used to establish ID.</u>
- **c.** Enter the CPIN you wish to cancel the ID quantity.
- **d.** TAB and "Rev," “MCTR” and Scty will fill in.
- **e.** Click the cursor in the “ID Qty” box.
- **f.** The ID Qty, which you have previously established, should automatically populate the "Qty" box.
- **g.** Once you populate the ID Qty box in any Order, <u>you must change the quantity in some way</u>. If you forget, you will get the message reminding you there has been no change to existing ID qty and that you must either increase, decrease or cancel. (If you decide no changes are needed, click the “Delete” button above to remove the CPIN from the Order and leave the ID quantity unchanged.)
- **h**. To cancel, change the quantity to all zeroes (000).
- **i.** Hit “Enter” and you should get the message asking for you to confirm the cancellation; "Do you want to delete ID for this CPIN?"
- **j.** Click "Yes"

  Note: Actions to cancel ID quantity or decrease ID quantity are automatically approved by ACPINS and are not reviewed by approving authorities such as equipment specialists. These two actions can be verified immediately by looking at the CSRL. If it is discovered ID is cancelled or decreased in error, the TODO must re-submit the request for the CPIN on a new Order.

k. ID Quantity for other CPINs can be deleted on this same order, and changes to ID for different CPINs can also be included. For additional ID Cancellations, follow the same steps as above.

l. To increase an ID quantity, enter the CPIN and then “Tab.”

m. After the Rev, MCTR and SCTY are filled in; click the cursor in the “ID Qty” field. When the previous quantity has populated the field, increase the number. Continue with the Order and “Save or Save & Exit” if it is complete.

n. You will get the system message "Information saved to Database.

Special Requisition Screen

READ: Occasionally there will be special circumstances that are outside the normal ordering/distribution process. The “Special Requisition Screen” has been provided for those times. These could include (1) you may be a contractor, do not have a TODO code, and may only need to request software for testing; (2) you are “shipped short”. (This category includes not receiving all units, such as only getting 2 out of 4 diskettes, or it can mean you are on ID for three copies and you only received 2); or (3) you need to have disks 2 of 4 and 3 of 4 replaced because they were damaged when they were run over by a forklift. This screen is not a substitute for changing your ID quantity. Always keep in mind the Order placed on the Special Requisition Screen is a One-Time Qty only and ID must be established for future revisions.

DO: Select “Orders” from the “Forms and Reports” Menu

a. Select “Special Requisition” from the drop-down menu

b. Enter the “TODO” number (Mandatory for TODOs logged in)

c. Hit TAB

d. Enter the “Requisition” # (New Number Required for each Order)

e. Under “Special Comments” enter a justification for why you are using the normal “Orders” screen. (Mandatory)

f. Hit TAB

g. Enter the First Name, TAB and enter the Last Name, then "TAB" again

h. Enter the address the CPIN is to be delivered to (Mandatory) & TAB

i. Enter the City, and TAB

j. Enter the State, and TAB

k. Enter the Zip Code

l. Place the cursor in the CPIN field (For now, only one allowed per order)

m. Either type in the CPIN or select it off the List.

n. TAB past the Revision, or change it and hit TAB again.

o. Enter the Quantity, hit TAB

p. Using the arrow, select a priority

q. Select “Save”. This is the only screen that does not have a “Submit & Exit” button at this time. A message will be displayed reminding you that this is a one-time request, click OK. A message will then be displayed telling you the data is saved, click OK.

r. Select “Exit”. This action will return you to the “Forms & Reports” menu.

s. The order will remain on the “Non-Approved” screen until the evaluation process is complete.

TODO Address Maintenance Screen

READ: This screen will display the TODO address and list the personnel authorized to order using the TODO account. It is also the screen to establish Sub-Accounts in ACPINS. When changes are required to the TODO information or address, the user must submit a revised AFTO Form 43 to 558 CBSS/GBHCB. Inaccurate information in the address will result in CPINs being shipped to the wrong location. In addition, persons not shown on the AFTO Form 43 are not authorized to request CPINs. This screen is used by the Managing Centers to verify authorized personnel.

DO: From the “Forms & Reports” menu select “Orders”

a. Select “TODO Address Maintenance”

b. Enter your TODO number and click “Query.”

c. Review the address. If you are experiencing problems receiving your CPINs, check the address. This is the address to which your software will be shipped unless you enter an "Alternate Address." The next problem area can be if there has been a "Cancel Date" entered in the field on the far right top line of the address screen. A red date in this field means your account has been cancelled. If this is incorrect <u>Contact the ACPINS Program Office immediately</u>.

d. Software delivery problems can be caused by someone not authorized trying to request CPINs. Select “Personnel” from the lower right hand corner

e. Review the list of personnel for accuracy. If you need to make changes to the personnel authorized to request software, you must do so on an AFTO Form 43. This is a view only screen and you can't make changes here.

f. Select either “Previous” to return to the address screen or “Exit” to return to the “Forms & Reports” menu. For Training, return to the TODO Address Screen to look at the Sub-Account Process.

g. Since ACPINS issues automatic e-mail notifications for certain actions, it is important to keep the ACPINS Program Office advised of any changes to your e-mail address.

Establishing TODO Sub-Accounts

READ: One of the newest changes to the TODO Address Maintenance Screen is the capability to incorporate Sub-Account information into ACPINS.

DO: At the TODO Address Maintenance Screen, click the “Sub-Accounts” button.

a. Your TODO code should be filled in.

b. Put your cursor on the first yellow block under the “Sub-Account” heading. This is where you will assign your user the number you will use to track their information and requirements in ACPINS. You can use the same number that you use in ATOMS.

c. If there are existing accounts, scroll down to a blank line and enter a number that you will remember. Then complete the fields "Remarks" and "Security Class." For class purposes, write down the Sub Account #. The Security Class field here is the classification of the office/shop. When you've completed the information, then leave the number highlighted.

d. In the "Sub-Account Personnel" field below, the sub-account number you just created should be to the left.

e. Next, using the drop-down-arrow, designate the person(s) to be Primary or Alternate(s) in the sub-account. Use the scroll bar below the fields to complete the information to the right.

f. "Clearance" here is the security clearance for individuals in that office/shop. It is the TODO's responsibility to see that classified software is handled according to regulations.

g. Use the "Address" button in the lower right corner of the screen to bring up a screen to input address information for that sub-account. If the Address button is partially or completely hidden, drag the bottom of the screen down using your cursor until the button is visible.

h. Once the address information is complete, click "Save" and use the "Previous" button to return to the "Sub-Account" screen.

Designating CPINs for Sub-Accounts

READ: Once Sub-Accounts have been created at the TODO Address Maintenance Screen, you can now designate on the CSRL which CPINs and quantities are used by which Sub-Accounts. All software distribution goes through the TODO.

DO: On the ACPINS Forms and Reports Menu, select "Orders" and then "CSRL."

a. To designate any CPIN for a Sub-Account, click the check box to the left of the CPIN.

b. You will immediately be taken to the "Sub-Account Details" screen where you will designate which sub-account gets how many copies of the software.

c. Remember, the sub-accounts' total quantity must be equal to or less than the ID established for that CPIN by the TODO. If you exceed the quantity, you will get the message "TODO ID qty has been exceeded. Reduce Sub-Account qty or increase TODO ID qty." Once you have completed input, click "Save."

d. Once you have designated all CPINs for your sub-accounts, you can also query a Sub-Account CSRL. From the Orders CSRL, select the "Sub-Account Query" button. Then you can print using the "Print Sub-Acct" Button.

Canceling/Closing a Sub-Account

a. When you want to cancel, or close, a Sub-Account, you first must remove that Sub-Account from any CPINs you marked for them.

b. Pull up the CSRL for the TODO, then click the "Sub-Account" query button. Print the Sub-Account CSRL to insure you remove the sub-account from all applicable CPINs. Do "File" and then "Close" to exit the PDF format. To return to the TODO CSRL Screen, click "Exit."

c. On the TODO CSRL Screen, click the button to the left of each CPIN you had designated for the Sub-Account. After clicking in the box, you will be again taken to the Sub-Account Details Screen. Use "Delete" to take the Sub-Account number from the list. Click "Save" before exiting.

e. After you have removed the Sub-Account from all CPINs, go to the TODO Address Maintenance Screen. You will be allowed to use the "Delete" button to cancel, or remove, the account.

Orders and Distribution History

READ: Another capability of ACPINS is to preserve records of previous transactions, or "History." Particularly helpful are the "Orders", "TODO Address" and "Special Requisition" History Screens which provide a record of who initiated the request and dates of input and approval, as well as who actually approved/denied the requests. The "Orders History Screen" is helpful in answering questions about CPIN actions.

Orders and Distribution History

DO: From the "Forms & Reports" menu select "History"

a. Select "Orders and Distribution"

b. Select "Orders"

c. If you have the TODO Code, the TODO's Req # and Req Date, enter those and then click "Query" in the upper left corner.

d. A wide range of information appears on the Orders Details History screen. Included will be the CPIN, Rev, the managing center, Scty class of the CPIN, and whether the CPIN request was ID or One Time. For information about approvals, click the "Orders Approval History" button.

e. Enter the TODO code. If you are uncertain of the Requisition #, put the cursor in the "TODO Req #" field and click "Query." All requisition numbers with requisition dates you have submitted will be available to view by using your PC's up and down arrows to scroll through the requests. To move within the requests, use the sets of arrows on the screen.

f. A third way to query is to enter the TODO Code, put the cursor in the "TODO Req #" block and then click "List" at the top of the screen. This will produce a drop-down list of all requisition numbers and requisition dates for that TODO from which you can select one.

g. Recently, the capability to query only by the TODO code and CPIN was added to this screen. This allows you to see all actions related to that CPIN such as increases or decreases in quantity. Use the "Up" and "Dn" buttons at the right to find the record. Then to see approval history for that record, use the button.

TODO Address History Screen

READ: If the TODO hasn't received the software and ACPINS currently shows a correct address, another possibility is there was an address change after software was shipped and the software shipped to the old address. The "TODO Address History" is another source for research.

DO: From the “Forms & Reports” menu select “History”

a. Select “Orders and Distribution History”

b. Select “TODO Address History”

c. You can enter the TODO and click “Query” OR

f. If you want to identify address changes made to your TODO’s address, enter your TODO code and click “Query.” Once the screen is populated, you can use your PC’s up and down arrow to move through the history records.

TODO Sub-Account History

READ: TODO Sub-Account History information is also available by using the History Menu item “TODO Address.” Both address and personnel changes for the Sub-Accounts can be viewed, as well as the distribution of CPINs for the Sub-Accounts.

DO: From the ACPINS Forms & Reports Menu, select “History,” then “Orders & Distribution History” and “TODO Address.”

a. Enter the TODO Code and click “Query.”

b. Click the “Sub-Accounts” button to bring up the “TODO Sub-Account History” and “Sub-Account Personnel Information History” Screens.

c. Click the “Address” button in the lower right to see the address records for the TODO. Further information is available by using the scroll bar at the bottom.

d. With the Sub-Account “Address” screen open, click the “Previous” button to return to the original screen. If the button is partially or completely hidden, drag the bottom of the screen down until it can be seen.

e. To see history records of those sub-accounts for which you have designated CPINs, click the “Sub-Account Details” button.

f. This screen can be queried only by the CPIN at this time.

g. This screen can be queried only by the CPIN at this time. After you enter the CPIN and click “Query,” You will see “insert” records where Sub-Accounts are added to the CPIN and "deleted" records where sub-accounts were taken off.

h. When you are through, click "Exit" to leave the screen.

Special Requisition History

READ: Although the Special Requisition Screen does not make changes to CPIN ID, there may be questions about when and who requested software and to what address it was shipped. This is where the Special Requisition History is helpful.

DO: From the "Forms & Reports" menu select "History"

a. Select "Orders and Distribution History"

b. Select "Special Requisition"

c. Enter the first name and then the last name in the appropriate fields. Click on "Query" This should make available all special requisitions shipped for an individual. OR, enter a TODO code and click query. This will bring up all special requisitions for that TODO. You can either use your PC's up and down arrows to scroll through, or use the arrows to the right.