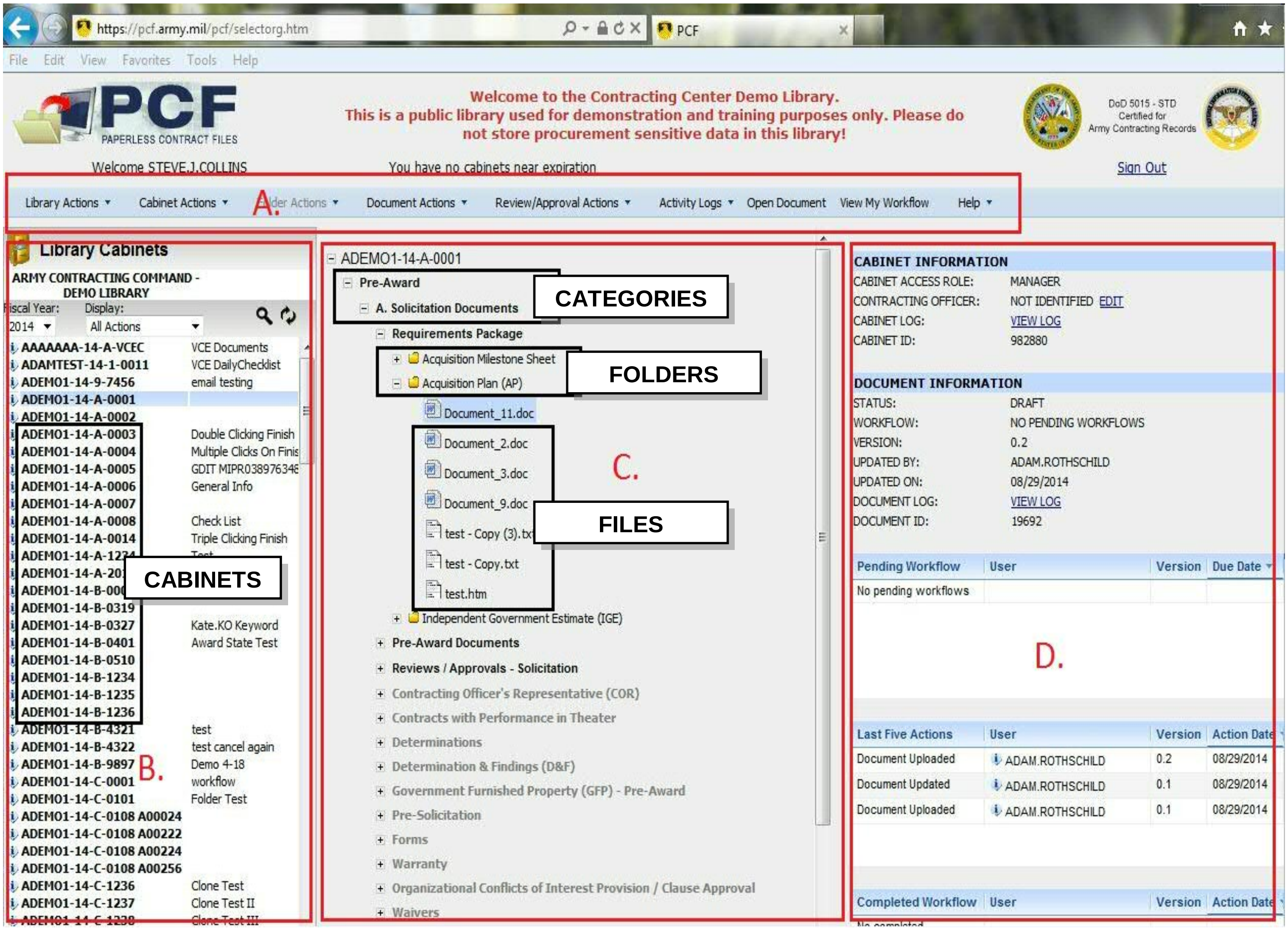
PCF TIP SHEET

(Last Updated: 9 September, 2014)

https://pcf.army.mil



Screen Shot Key:

Section A. – Menu/Action Bar

- Functions accessible through dropdown menus
- Functions available/enabled are based upon what is currently selected and your access level in the cabinet.

Section B. – Cabinet Section

- Library Cabinets - Access to open all available cabinets (only cabinets you have access to are listed/can be opened). Can be filtered by fiscal year (then further sorted by: All, Pre-award, or Awarded) or Recent cabinets.
- Favorite Cabinets – Access to cabinets you have added as a Favorite.

Section C. – Main Area

- Cabinet Structure (Tree) is listed here.
- Access to folders and documents within a cabinet.

Section D. – Meta Data Panel

- Cabinet/Folder/Workflow info.

Hierarchy of PCF Organizational Elements:

- Cabinet
  - Category
    - Sub-Category (optional)
      - System Folder
        - File
          - User Folder (optional)
            - File

PCF User Guide

For more detailed steps and guidance, login to PCF, go to HELP → PCF USER DOCUMENTATION in the Menu Bar, and open PCF USER GUIDE.

VCE Helpdesk Contact Information

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Create a New Cabinet from Scratch:

Q: What should become a cabinet in PCF?

A: Any and all procurement actions should become a PCF cabinet (e.g., solicitations, basic contracts, orders, modifications).

* A new cabinet SHOULD NOT BE CREATED for the contract if a solicitation is already a PCF Cabinet. Instead, add the contract number to the solicitation cabinet. This is done via CABINET ACTIONS→EDIT CABINET PROFILE.

1. Click LIBRARY ACTIONS →CREATE CABINET.
2. Choose the BUY TYPE for this cabinet.
3. Fill out the SOLICITATION NUMBER, CONTRACT NUMBER, DELIVERY/TASK ORDER NUMBER, and MODIFICATION NUMBER as applicable to the BUY TYPE selected.
4. (OPTIONAL) Fill out KEYWORDS, COMMENTS, and Contracting Officer fields.
5. Choose to build folders via SELECTION LIST.
6. Click NEXT.
7. A prompt will appear confirming the cabinet name. Click OK to continue to SECURITY TAB (Step 9)

Now you will need to setup the SECURITY for this cabinet. **Any group you are part of will be automatically added as MANAGERS - additional modifications to the access list may not be required.**

MODIFYING SECURITY:

Steps 8-15 are optional; if changes to the cabinet security are not needed, skip to the top of the next column.

8. Click the edit button for the access role you want to change (e.g., EDIT MANAGERS). The ADD CABINET USERS window will open.
9. To add a GROUP:
   a. In the GROUPS list, select (single-click) the group to add.
   b. Next to GROUP MEMBERS, clicks ADD.
10. To add an INDIVIDUAL:
   a. In the FIND field, type in the persons AKO user name. As you type, you can scroll through the list that appears or continue to type to narrow down the list.
   b. Select the person you want to add.
   c. Next to their username, clicks ADD.
11. Repeat Steps 9 or 10 as needed until all the groups and individuals you want to add as MANAGERS are listed under the SELECTED USERS/GROUPS panel.
12. (OPTIONAL) To remove a user or group, select their name under SELECTED USERS/GROUPS and click REMOVE SELECTED.
13. Click DONE.
14. Repeat Steps 8-14 if a different access role needs to be modified.
15. Click SUBMIT when finished.

Q: What are the three different access roles a group or individual can have to a cabinet?

A: A group or individual can either be a MANAGER, an EDITOR or a READER to a cabinet:

- **MANAGERS** – Full access to the cabinet; CAN change cabinet profile information; CAN modify cabinet access list; CAN upload, modify, view, comment on, or delete documents.
- **EDITORS**** – Partial access to the cabinet; CANNOT change cabinet profile information; CANNOT modify cabinet access list; CAN upload, modify, view, comment on, or delete documents.
- **READERS**** – Very Limited access to the cabinet; CANNOT change cabinet profile information; CANNOT modify cabinet access list; CANNOT upload, modify, delete, or view/post comments on documents. CAN ONLY VIEW DOCUMENTS.

* **IT IS NOT NECESARRY TO ADD A GROUP OR INDIVIDUAL TO MULTIPLE ROLES**. IF ADDED TO MORE THAN ONE ROLE, THE HIGHER LEVEL OF ACCESS APPLIES.

** Typically EDITORS is the role for lawyers, ordering officers, etc. who may need to upload/view documents or make/view comments; READERS would be for auditors or others who should only have read access to documents and should not be able to view comments.

The last two parts of creating a new cabinet is answering the Records Management questions and setting up the SYSTEM FOLDERS that will be available in the cabinet.

PROVIDE ANSWERS TO THE THREE QUESTIONS ON THE RECORDS MANAGEMENT TAB:

Note: The answers should be related to the total Contract or Order that the cabinet pertains to. The answers to these three questions will be used to establish the cabinets retention rate (i.e., how long the data is required to be archived) once the action is closed.

CHOOSE THE FOLDERS VIA FOLDER SELECTION LIST:

16. The master list of system folders will appear.
17. To add a folder, check the box next to the folder name. To remove a folder, uncheck the box next to the folder name.
18. Click SUBMIT. The cabinet will be created and will contain all selected folders.

Q: Will I be able to add folders later after a cabinet is created?

A: Yes. Go, open the cabinet and go to CABINET ACTIONS→EDIT CABINET PROFILE→ FOLDER SELECTION LIST TAB. You will then be able to add more folders from the master list of system folders.

Create a New Cabinet by Cloning an Existing Cabinet

Cloning an existing cabinet helps speed up the cabinet creation process by allowing the new cabinet to re-use some of the information from the existing cabinet, thus requiring less input from the User. The clone process re-uses the same Buy Type, Security and, at least initially, includes all of the same folders that exist in the original cabinet.

1. Open the cabinet you want to clone. *NOTE: This cabinet should be the same Buy Type, have the same security, and include the right folders that will be needed for the new cabinet. Keep in mind that the folder list available to cabinets created this way may not reflect the latest DASA(P) approved list.*
2. Go to CABINET ACTIONS→CLONE CABINET.
3. Choose whether or you not you want to clone the cabinet with or without Pre-Award documents. *NOTE: Choosing Yes will establish this new cabinet as a Multi-Award cabinet.*
4. Set the New CABINET INFORMATION. Some information will be filled in already.
5. Click NEXT. The SECURITY section will open. The security of this new cabinet will be set to the same as the original cabinet (opened in step 1).
6. (OPTIONAL) If changes are needed to the security, perform steps 8-15 found to the left on this page under MODIFYING SECURITY.
7. Click NEXT.
8. Answer the questions in the Records Management tab is it relates to the new action/cabinet.
9. Click FINISH.
10. A prompt will appear confirming that the new cabinet has been created. Click YES to make another clone (and repeat steps 2-9). Click NO to go back to the original cabinet.
11. After you click NO, you must click the REFRESH icon () under LIBRARY CABINETS in order to view/access the new cabinet. *NOTE: the cabinet exists after step 9 is performed, but you will not be able to see the new cabinet in the list until this step is performed.*

   NOTE: Cloned Cabinets will include the same folders of the original cabinet. You cannot modify the folders of the new cabinet during the Clone Cabinet process, but you can modify them after the cabinet exists by opening it and then going to CABINET ACTIONS→EDIT CABINET PROFILE.

Uploading Documents

The following steps are based on the cabinet already being created and opened. You must be a MANAGER, EDITOR or TEMPORARY REVIEWER in order to upload documents.
NOTE: If a file has already been uploaded into PCF, DO NOT use the steps below. Instead, see UPDATE SELECTED DOCUMENT.

1. **To upload multiple files to any folder:**
   a. Go to CABINET ACTIONS→UPLOAD MULTIPLE DOCUMENTS.
   b. Use the **BROWSE METHOD** or **DRAG AND DROP METHOD** to add files (see steps below in ADDING FILES TO THE UPLOAD MANAGER).
   c. Next to each file that is listed, click into the blank/empty cell under the FOLDER NAME column to view a list of folders currently in the cabinet. Select the folder from the drop down list that you want the corresponding file to go into.
   d. Repeat 1.b. above for each file. *NOTE: YOU WILL GET AN ERROR IF YOU DO NOT SELECT A FOLDER NAME FOR EACH FILE.*
   e. (Optional) Check the files in the list. If there is a file in the list that you do not want to upload into PCF, select it and click REMOVE SELECTED or press DELETE.
   f. (Optional) If a document is already FINAL, and will not need to be changed, reviewed or approved while in PCF, click in the DOCUMENT STATUS cell next to the file and select FINAL VERSION.
   g. Click START TRANSFERS to upload the files.
   h. Click CLOSE when the PROGRESS next to each file indicates SUCCESS.
2. **To upload multiple files to one specific folder:**
   a. Select (single click) a folder.
   b. Go to FOLDER ACTIONS→UPLOAD MULTIPLE DOCUMENTS.
   c. Use the **BROWSE METHOD** or **DRAG AND DROP METHOD** to add files (see steps below in ADDING FILES TO THE UPLOAD MANAGER).
   d. (Optional) Check the files in the list. If there is a file in the list that you do not want to upload into PCF, select it and click REMOVE SELECTED or press DELETE.
   e. (Optional) If a document is already FINAL, and will not need to be changed, reviewed or approved while in PCF, click in the DOCUMENT STATUS cell next to the file and select FINAL VERSION.
   f. Click START TRANSFERS to upload the files.
   g. Click CLOSE when the PROGRESS next to each file indicates SUCCESS.
3. **To upload a single file to one specific folder :**
   a. Select (single click) a folder
   b. Go to FOLDER ACTIONS→UPLOAD SINGLE DOCUMENT.
   c. Click BROWSE.
   d. Navigate to where the file is saved.
   e. Double-click the file
   f. Click SUBMIT.

ADDING FILES TO THE UPLOAD MANAGER (step 1.b. or 2.c. above)

THE BROWSE METHOD
1. Click the BROWSE button.
2. Navigate to the folder where your files are saved.
3. Select (single click) the file you want to add.
   HINT: If you have multiple files in this folder that you want to upload into PCF, hold down the CTRL key and single click each file.
4. Once all the files you want are selected, click OPEN.
5. If you have more files that you want to upload, repeat steps these steps, or follow the steps under the DRAG AND DROP METHOD.

THE DRAG AND DROP METHOD
1. Leave the UPLOAD MANAGER open, but switch to a windows folder or explorer window that contains the files you want to upload.
2. Select (single click) the file that you want to upload. *HINT: If you have multiple files in this folder that you want to upload into PCF, you can drag a box around them or hold down the CTRL key and single click on those multiple documents.*
3. Click and Drag any one of the highlighted files. Drag and drop it onto the blank white space on the UPLOAD MANAGER window. All selected files in the previous step should now be listed in the UPLOAD MANAGER.
4. If you have more files in a different folder that you want to upload, then repeat steps 2.b.i-2.b.iv., or continue go to step 2.a. or 2.c., otherwise continue to step 3.

Accessing Files/Navigating a Cabinet

To access files in an open cabinet you need to either:

1. Use the VIEW/FIND DOCUMENTS function.
2. Drill down in the cabinet's CATEGORIES to access the FOLDERS and FILES.

To access files via VIEW/FIND DOCUMENTS:

1. Click CABINET ACTIONS→ VIEW/FIND DOCUMENTS
   NOTE: All current documents in the cabinet will be displayed…see OPENING/VIEWING A DOCUMENT for further instructions.

To drill down/navigate a cabinet:

1. Click a CATEGORY name to expand the contents of that category.
2. Repeat step one for other CATEGORIES or FOLDERS (click the title/name – not the plus/minus signs).
3. After expanding a folder, you will see a list of documents loaded into that folder.
   HINT: Only folders with YELLOW folder icons have files in them. A GRAY folder icons signifies an empty folder.

   NOTE: See OPENING/VIEWING A DOCUMENT for further instructions.

Q: What's the difference between a CATEGORY and a FOLDER?

A: CATEGORIES appear in **bold** and can *only* contain other categories or folders. Folders are not bolded, have a folder icon next to them, and only contain FILES (or occasionally USER FOLDERS (sub-folders).

Opening/Viewing a Document

To view a document

1. Select (single click) the document.
2. Click OPEN DOCUMENT or DOCUMENT ACTIONS→OPEN DOCUMENT.
3. If prompted, select OPEN.
   NOTE: If you want to save a copy of this file to your computer, click SAVE instead of OPEN. You can then navigate to the folder you want to save it to and open the file after you have saved it.

Updating/Replacing a Document

If a file has previously been uploaded into a PCF folder, and the file now has been changed or needs to be changed, use the following steps to replace the previous version:

To update/replace a document with a newer version

1. Select (single click) the current version in PCF.
2. Click DOCUMENT ACTIONS→UPDATED SELECTED DOCUMENT.
3. (OPTIONAL) If you need to download the document in order to make changes first, click the link to the document and save the document to your computer, then open the document outside of PCF, make your changes and save the file to your computer.
4. (OPTIONAL) Enter comments related to what changes have been made between the two different versions of this document.
5. Click BROWSE.
6. Navigate to where the newer version of the file is saved to on your computer.
7. Select (single click) the file and click OPEN.
8. Click UPLOAD FILE. The file selected in step 7 will replace the previous version of the file.

Deleting a Document

Only DRAFTS can be deleted in PCF - FINAL VERSIONS can only be deleted by PCF Administrators. (However, FINAL VERSIONS can be replaced with a new DRAFT)

1. Select (single click) the document.
2. Go to DOCUMENT ACTIONS→DELETE DOCUMENT
3. Choose DELETE THIS DRAFT or DELETE THIS DRAFT AND ALL PRIOR DRAFTS
4. Click CONFIRM DOCUMENT DELETION.