PCF (Paperless Contract Files)

CONTRACTING USER'S GUIDE

VIRTUAL CONTRACTING ENTERPRISE (VCE)

ARMY CONTRACT WRITING SYSTEM

December 2018
v. 4.0

1.0 Introduction

1.1 What Is PCF?

Paperless Contract Files, or PCF, is a secure web-based application. PCF is designed and certified to store official contract files, as required per FAR Subpart 4.8, in an electronic centralized depository.

As a web-based Records Management Application (RMA), it is NOT approved for Classified Information. Failure to adhere to this policy is grounds for dismissal in accordance with US Code, title 18, 1001.

The application involves four primary components of functionality:

- **Document Storage**: the processes involved creating virtual containers (i.e., PCF Cabinets) and uploading documents into those containers.
- **Document Access**: the processes involved in viewing uploaded documents and/or modifying those documents as needed.
- **Document Workflow**: the processes involved in submitting documents (or cabinets) for formal reviews and approvals, performing and completing reviews and approvals, and logging those actions in PCF.
- **Acquisition Management**: the process of gathering data on each contract action to manage and forecast contracting actions in PCF.

1.2 Accessing PCF

The URL for PCF is https://pcf.army.mil. To login to PCF:

1. The user must have a valid, active AKO account.
2. The user's local or organizational administrator must create a PCF Account in a specific PCF Organization, using the user's correct AKO name (Contracting Office users **only**; not applicable for Customers).

> NOTE: For members of a Contracting Office, there is no formal registration process for PCF. The local or organizational PCF administrator is responsible for creating a user's PCF Account. To find a local or organizational administrator, go to https://pcf.army.mil/public/contacts.jsp.
>
> Customers who wish to have access to PCF must self-register (go to the VCE Main Menu at https://vceportal.army.mil, select MODULES in the menu bar, and select LAUNCH VCE CUSTOMER REGISTRATION). Once the registration is submitted, the users local Customer Gatekeeper is responsible for approving permissions that would cause the customer's PCF account to be created automatically.

3. CAC Login: the user's CAC must be registered and up to date on the AKO website (www.us.army.mil) otherwise CAC login to PCF may not work (AKO Username and Password can be used to login instead).

Access to specific content in PCF is broken out into 2 components:

- Organizational Access – For Contracting users, provided when a PCF Administrator creates a PCF Account for the user within that specific PCF Organization. For Customer users, provided when the Customer Gatekeeper approves PCF related permissions and the Organization has at least one cabinet that identifies that customer's specific PM/Directorate. See Section 1.2.1 Organizational Access in PCF for more information.
- Cabinet Access – provided when the user, or a group the user is in, is added to a cabinet's access list. See Section 1.2.2 Cabinet Access in PCF for more information.

NOTE: A PCF Organization is like a private library; a user gets a key to the library (i.e., can login to the org. in PCF) once the local PCF Administrator creates a PCF Account for the user.

Within that private library, the content itself (Contract Files/PCF Cabinets) is also private. Even though a user may have the key to the library (able to login to the PCF Organization), that user will most likely not have a key to every Cabinet within that library. Cabinet Access is the component that manages the "keys" to the individual cabinets.

Every time a user accesses a PCF organization's library, they will certify and verify their adherence to the following:

Classified Information
I agree NOT to enter Classified Information into this system. Failure to adhere to this policy is grounds for dismissal in accordance with US Code, title 18, 1001.
Privacy Act Statement
Any information collected is governed by and in accordance with the Privacy Act of 1974, as amended by 5 U.S.C. Section 552a, under the authority of 10 USC Section 3013, and AR 600-20. This information may also being collected in conjunction with the provisions of the Government Paperwork Elimination Act. This information may be disclosed to agency workforce and contractors who have been engaged by the agency to assist in the performance of routine services related to this system and will only be used by staff in accordance with official duties to manage agency programs. Recipients of information shall be required to comply with the requirements of the Privacy Act of 1974, as amended, pursuant to 5 USC 552a(m).
Document Certification/Verification
I certify that in instances in which I have the authority to add documents to the official contract file for which I have been granted access that: any electronic copies uploaded to PCF are true, complete, accurate, and readable; these copies are reasonable facsimiles; and, the original, hard copy formats, will be preserved in accordance with the Command's policy.
Nondisclosure Statement
I understand the requirements of the Procurement Integrity Act (41 USC §§2101-2107) and the Provisions of the FAR, e.g. FAR 3.104 and 15.207, that govern the release of source selection sensitive information and procurement sensitive data and will not knowingly disclose any source selection sensitive information or procurement sensitive data contained within the Paperless Contract Files (PCF) application directly or indirectly to anyone other than a person authorized

by the Head of the Agency or the Contracting Officer. I also understand that unauthorized access to or disclosure of this information may result in damage or other serious consequences to the Government.

1.2.1 Organizational Access to PCF

PCF is broken out into multiple organizations or schemas, which help to organize PCF users, data, and access into logical groupings (see Section 1.2.1.1 Active PCF Organizations for a complete list of active PCF Organizations). For Contracting Users, when a PCF Administrator for a PCF Organization creates a PCF Account for a user, that user will have access to login to that PCF Organization. For Customer Users, when a Customer Gatekeeper assigns the user applicable PCF permissions, the user will get access to any PCF Organization that has at least one cabinet with the user's PM/Directorate identified. Most users will only have access to a single organization, but some users will require access to multiple organizations.

For Contracting Users, when a PCF Administrator creates a user account, the admin must assign the account one (and only one) of six Organizational Roles, which determines functionality (within the specific PCF Organization only) as follows.

> NOTE: Two additional organizational roles, Customer_User and Customer_Reader_All, are available for customers who self-register for VCE Customer Access and assigned the applicable permission by their local Customer Gatekeeper. PCF Admins **cannot** create or modify these PCF Customer accounts except to grant an existing account the permission to create customer cabinets.

1.2.1.1 Contracting User Organizational Roles

Role Name	Available Functionality	Examples
USER	• Ability to login to the specific PCF Organization. • Ability to create new PCF Cabinets. • Potential for the user to be added to a Cabinet's Access List. • Potential for the user to be selected as a Reviewer or Approver in a Formal PCF Workflow action.	• Most users (e.g., KOs, Specialists)
ADMIN	• Same functionality available to a USER. • Automatic MANAGER Cabinet Access to all PCF Cabinets within the org (does not display in the cabinet access list as a MANAGER). • Ability to delete cabinets and final documents. • Ability to reactivate closed cabinets. • Access to admin only functionality for managing users and cabinets.	• PCF Administrators
READER_ALL	• Same functionality available to a USER.	• Senior Leadership • HQ Personnel

Role Name	Available Functionality	Examples
	• Automatic READER Cabinet Access to all PCF Cabinets within the org (does not display in the cabinet access list as a READER). • NOTE: If a READER_ALL user, or a PCF group the user belongs to, has been added as a MANAGER or EDITOR to a specific cabinet, the higher level of access will be in affect (MANAGER > EDITOR > READER).	• Legal/Policy (as appropriate)
EDITOR_ALL	• Same functionality available to a USER. • Automatic EDITOR Cabinet Access to all PCF cabinets within the org (does not display in the cabinet access list as an EDITOR). • NOTE: If a EDITOR_ALL user, or a PCF group the user belongs to, has been added as a MANAGER to a specific cabinet, the higher level of access will be in affect (MANAGER > EDITOR > READER)	• Legal/Policy (as appropriate)
MNGR_ALL	• Same functionality available to a USER. • Automatic MANAGER Cabinet Access to all PCF Cabinets within the org (does not display in the cabinet access list as a MANAGER).	• Closeout Teams • Power Users • Division/Group Leads (as appropriate)
SUBADMIN	• Same functionality available to a USER. • Automatic MANAGER access to all Cabinets ((does not display in the cabinet access list as a MANAGER). • Similar to an ADMIN, but with fewer rights. • No access to Cabinet Transfer or Expired Cabinet functionality (reserved for ADMINS only) • Can create new PCF accounts with the USER role only (e.g., cannot create new ADMINS or switch USERS to ADMINS)	• Local/Site specific PCF POCs

1.2.1.2 Customer User Organizational Roles

Role Name	Available Functionality	Examples
CUSTOMER_USER	• User account for Army Customers. • Ability to login to the specific PCF Organization. • Potential for the user to be added to a Cabinet's Access List as a CUSTOMER_MANAGER, CUSTOMER_EDITOR, or CUSTOMER_READER.	• CORs • Engineers

Role Name	Available Functionality	Examples
	• Account created automatically when Customer's Gatekeeper assigns VCE-PCF Customer User Permissions; cannot be created manually within PCF. • PCF Admin can assign Customer Cabinet Creation permissions.	
CUSTOMER_ READER_ALL	• User account for Army Customers. • Ability to login to the specific PCF Organization. • Potential for the user to be added to a Cabinet's Access List as a CUSTOMER_MANAGER, CUSTOMER_EDITOR, or CUSTOMER_READER. • Account created automatically when Customer's Gatekeeper assigns VCE-PCF Customer User Permissions; cannot be created manually within PCF. • Automatic CUSTOMER_READER access to Acquisition Management Data **only** (e.g., Acquisition Milestones) in ALL cabinets where the PM/DIRECTORATE in the cabinet matches the PM/DIRECTORATE of the user. • PCF Admin can assign Customer Cabinet Creation permissions. • Will **only** have Document Access if Account is specifically added to a Cabinet as a CUSTOMER_EDITOR or CUSTOMER_READER.	• COR's Supervisor • Customer Senior Leadership

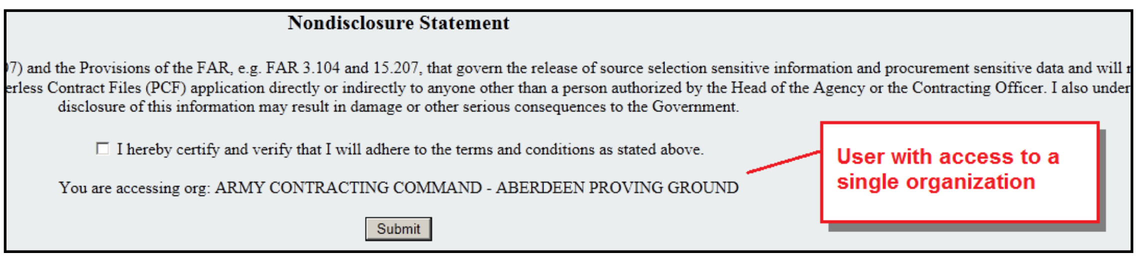
1.2.1.3 Active PCF Organizations

- ARMY CONTRACTING COMMAND - ABERDEEN PROVING GROUND
- ARMY CONTRACTING COMMAND - NEW JERSEY
- ARMY CONTRACTING COMMAND - ORLANDO
- ARMY CONTRACTING COMMAND - REDSTONE
- ARMY CONTRACTING COMMAND - ROCK ISLAND
- ARMY CONTRACTING COMMAND - WARREN
- ARMY CONTRACTING COMMAND - 408th CSB CONTRACTING CENTER
- ARMY CONTRACTING COMMAND - 409th CSB CONTRACTING CENTER
- ARMY CONTRACTING COMMAND - 410th CSB CONTRACTING CENTER
- ARMY CONTRACTING COMMAND - 411th CSB CONTRACTING CENTER
- ARMY CONTRACTING COMMAND - 413th CSB CONTRACTING CENTER
- ARMY CONTRACTING COMMAND - 414th CSB CONTRACTING CENTER
- ARMY CONTRACTING COMMAND - AFGHANISTAN

- MICC CONTRACTING SITES
- NATIONAL GUARD BUREAU
- UNITED STATES ARMY MEDICAL RESEARCH ACQUISITION ACTIVITY (USAMRAA)
- US ARMY HEALTH CONTRACTING ACTIVITY
- USACE - ARMY GEOSPATIAL CENTER
- USACE - ENGINEER RESEARCH AND DEVELOPMENT CENTER
- USACE - GREAT LAKES AND OHIO RIVERS DIVISION
- USACE - HUMPHREYS ENGINEER CENTER SUPPORT ACTIVITY
- USACE - HUNTSVILLE ENG & SUPPORT CTR CONTRACTING
- USACE - MISSISSIPPI VALLEY DIVISION
- USACE - NORTH ATLANTIC DIVISION
- USACE - NORTHWESTERN DIVISION
- USACE - PACIFIC OCEAN DIVISION
- USACE - SOUTH ATLANTIC DIVISION
- USACE - SOUTH PACIFIC DIVISION
- USACE - SOUTHWESTERN DIVISION
- USACE - TRANSATLANTIC DIVISION

1.2.1.4 Access to a Single Organization

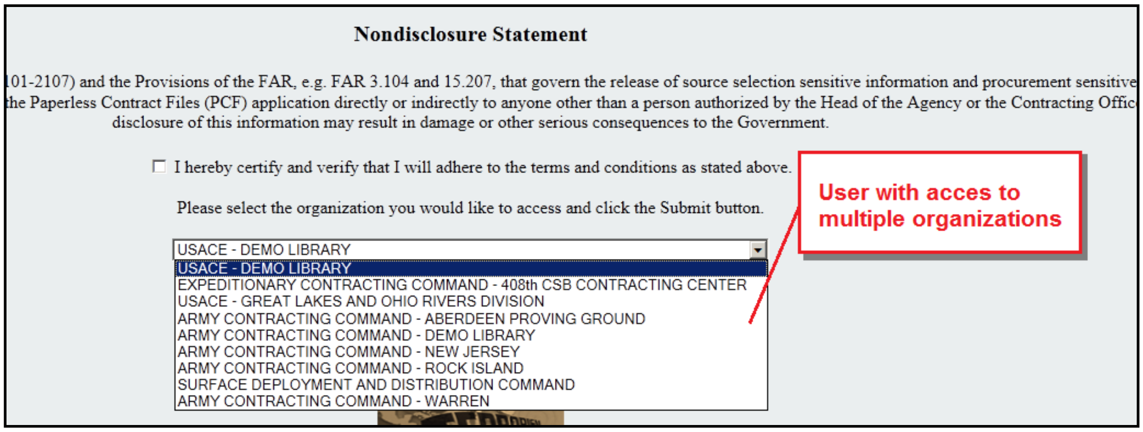
If a user has access to a single PCF organization, he/she will automatically enter that organization after logging into PCF.



1.2.1.5 Access to Multiple Organizations

If a user has access to multiple organizations, he/she will need to specifically select an organization to go into as part of the login process. A user can only be working in one PCF Organization at a time, and must go back to the org selection screen to switch to a different available org as needed.

If a user is not seeing a specific organization in his/her drop down list that is expected to be listed, the local/organizational PCF Administrator of that organization needs to check to see if a PCF Account exists for the user in that PCF organization, and check to make sure if the account in that organization is using the correct AKO username.



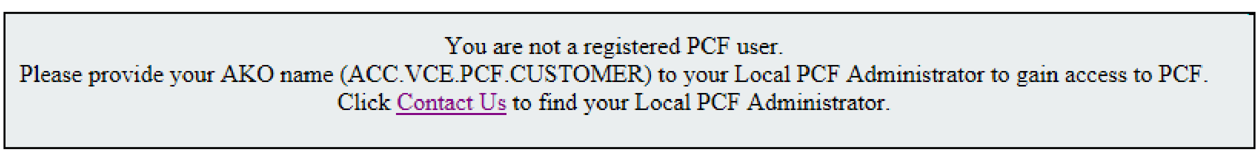
NOTE: If you have access to multiple organizations, to easily switch to a different organization once you've already entered a different PCF organization, click the BACK button in your Browser to go back to the Org Selection Screen.

Users with access to multiple organizations can set the default organization that will be pre-selected when logging into PCF under HELP --> MY PCF PROFILE (Set "Default Org to Open PCF" field). This function is **not** available for Customers.

1.2.1.6 No Access to any PCF Organization

If a user does not have access to any PCF Organization, he/she will receive a Not Authorized error message. At this point, the local/organizational PCF Administrator needs to check to see if a PCF Account exists for the user, and check to make sure if the user's PCF Account uses the correct AKO username.

Customers that receive this message should contact their local Customer Gatekeeper to check that the appropriate PCF permissions have been assigned to the Customer's Profile.



1.2.2 Cabinet Access in PCF

In PCF, Contract Files are known as Cabinets. Each PCF Cabinet has its own access list. Unless a user's PCF Account is setup with the ADMIN, SUBADMIN, MANAGER_ALL, EDITOR_ALL, READER_ALL, or CUSTOMER_READER_ALL Organizational Role, the only cabinets a user will have access to are cabinets where he/she (or a group he/she is part of) has been added to the cabinet access list (i.e., to the Cabinet Security tab).

Customers Users added to a cabinet (i.e., CUSTOMER_MANAGERS, CUSTOMER_EDITORS and CUSTOMER_READERS) will only have access to "Customer Viewable" Documents (see Section 3.11 for more information). Contracting/Non-Customer Users added to a cabinet (i.e., MANAGERS, EDITORS, and READERS) will be

have access to all documents in the cabinet.

The Cabinet Security is initially set when the cabinet is first created. After that, any MANAGER of the cabinet can modify the Cabinet's Access List via CABINET ACTIONS --> EDIT CABINET (in the CABINET SECURITY tab).

Cabinet Access Roles determine what functionality will be available (or not available) for the users within the cabinet. If a user or group the user belongs to is **not** assigned to one of these four roles, the user will **not** have access to the cabinet or any of its content.

The following two charts describe the general functionality that applies for a specific Cabinet Access role. For a detailed list every function and what roles can utilize that function, see Section 1.3.1 PCF Menu Bar.

1.2.2.1 Contracting/Non Customer Users - Cabinet Access Role Descriptions

Contracting Users Cabinet Access Roles	Basic Role Description/Rights**	Potential Example of Use
MANAGER	• Open/Upload/Modify/Finalize Documents • Modify cabinet information (e.g., Cabinet Name, Access List, Available Folders) • Modify Acquisition Management Information • Delete Draft Documents	• Cabinet Creator (automatically assigned) • Cabinet Creator's group(s) (automatically assigned) • KOs/Specialists • PCF Administrators
EDITOR	• Open / Upload / Modify/Finalize Documents • Modify Acquisition Management Information	• Legal Advisor • Policy Personnel
READER	• Open Documents • View Acquisition Management Information	• Customers
TEMPORARY REVIEWER/APPROVER*	• Same rights as an EDITOR, but only temporarily assigned until the pending review/approval is complete.	• Users who need to perform a review/approval, but do not need "permanent" access to the cabinet.

* The Temporary Reviewer/Approver role is assigned only if/when the cabinet or a document within the cabinet is submitted to the user in a Formal PCF Workflow, and that user is not currently assigned as a MANAGER or EDITOR. A user will lose the temporary role once the pending workflow is completed, and will either go back to being a READER (if previously setup as a READER) or lose access to the cabinet (if not setup as a READER).

1.2.2.2 Customer Users - Cabinet Access Role Descriptions

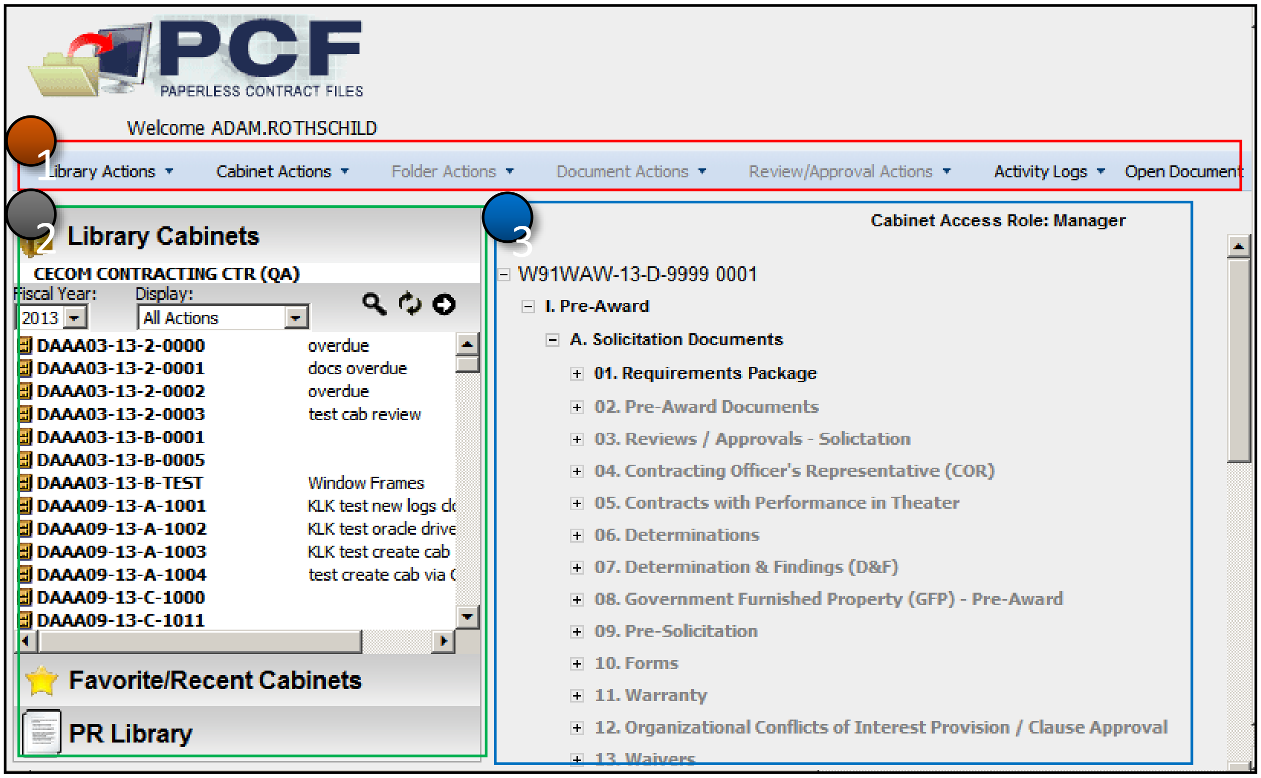
Customer Users Cabinet Access Role	Basic Role Description/Rights**	Potential Example of Use

CUSTOMER_MANAGER
 	
(NOTE: Role is only available in “Customer Cabinets” (i.e., a Cabinet a Customer has created but has not yet been submitted or assigned to Contracting)
	• Can Manage the Cabinet Profile in “Customer Cabinets” (e.g., manage Cabinet Security).
	• Upload documents.
	• Open and Update “Customer Viewable” documents.
	• Edit access to three Acquisition Management dialogs
	  o Acquisition Milestones
	  o Funding/FMS Info
	  o Supplemental Info
	• Read access to three Acquisition Management dialogs
	  o Protest Records
	  o Post-Award Information
	  o Claim Records
		• Customers involved with creating and/or managing “Customer Cabinets”.
		• Customers that are involved in uploading, updating, and/or reviewing “Customer Viewable” documents (e.g., Requirement Documents).
		• Customers that can contribute in providing Acquisition Management related information regarding the action (e.g., forecasting milestones).

CUSTOMER_EDITOR	• Upload documents.
	• Open and Update “Customer Viewable” documents.
	• Edit access to three Acquisition Management dialogs
	  o Acquisition Milestones
	  o Funding/FMS Info
	  o Supplemental Info
	• Read access to three Acquisition Management dialogs
	  o Protest Records
	  o Post-Award Information
	  o Claim Records
		• Customers that are involved in uploading, updating, and/or reviewing “Customer Viewable” documents (e.g., Requirement Documents).
		• Customers that can contribute in providing Acquisition Management related information regarding the action (e.g., forecasting milestones).

CUSTOMER_READER	• Open “Customer Viewable” documents. • View access to Acquisition Management dialogs.	• Customers that need to view “Customer Viewable” documents (e.g. Requirement Documents) and Acquisition Management related information (e.g., Acquisition Milestones.)

1.3 Layout of PCF



The PCF application is laid out into three main sections; each section is used for different purposes.

1. **PCF Menu Bar**: Provides access to a majority of PCF functions. See Section 1.3.1 PCF Menu Bar for a list of all available actions in the PCF Menu Bar

2. **Left Navigation Panel**: Broken out into three sections/stack panels:
   - Library Cabinets: Default stack panel that is displayed when logging in to PCF. It is a list of PCF Cabinets, sorted by Fiscal Year, to which the user has access to. See Section 1.3.2. Library Cabinets Stack Panel for more information.
   - Favorites Cabinets: A customizable list of PCF cabinets that user can use to organize and quickly access specific cabinets. See Section 1.3.3 Favorites Stack Panel for more information.
   - PR Library: (not used by all PCF Organizations/Users). When used, the PR library is a “holding grounds” for incoming Purchase Requests (i.e., PRs). Users have the ability to assign PRs to specific users, groups, and/or PCF Cabinets. See Section 1.3.4 PR Library Stack Panel for more information.

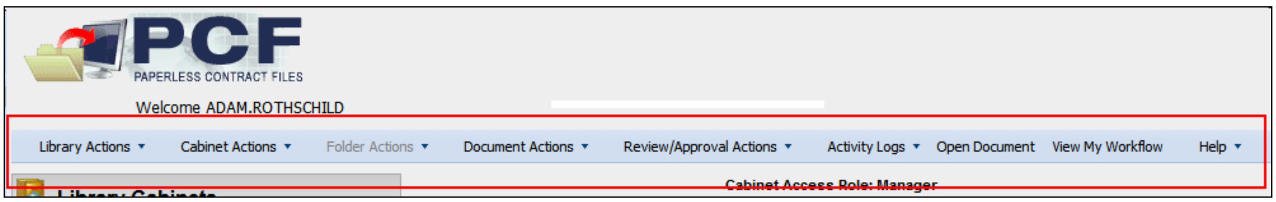
3. **Main Area**: Shows one of two potential displays:
   - Open Cabinet
     - Cabinet Structure: After clicking a cabinet, the left section of the main area displays the folder structure of that “opened” cabinet. See Section 1.3.5 Cabinet Structure for more information.
     - Cabinet Meta-data: After clicking a cabinet, the right section of the main area displays various meta-data (information) about the selected cabinet, folder,

and/or document. See Section 1.3.6 Cabinet Meta-data Panel for more information.

- My Workflow: displays tabs related to documents and cabinets involved in a formal PCF Workflow process as well as other lists of cabinets for situational awareness. See Section 1.3.7 View My Workflow for more information.

1.3.1 PCF Menu Bar

The PCF Menu Bar provides access to a majority of PCF functions (via dropdown menus). The menu bar is context based, meaning the specific menus and/or individual functions that will be enabled (i.e., not grayed out) is based on what the user has currently selected within the cabinet and what Cabinet Access Role the user is assigned to in the cabinet. **As an alternative to using the menu bar to access functions, users can also right click an object (e.g., Cabinet, Folder, or Document) to access to the corresponding functions for that object (e.g., CABINET ACTIONS, FOLDER ACTIONS, or DOCUMENT ACTIONS).**



The rest of this section contains a description of each function available in the menu bar. Click on the function name for more information.

LIBRARY ACTIONS

Function Name	Description	Manager	Editor	Reader	Customer Manager	Customer Editor	Customer Reader
Select Library	Switch between the Org's Active library (default selection), and the Org's Retention library (Closed PCF cabinets).	X	X	X			
Search Library	Search for cabinets based on different criteria; or search for documents (by filename and/or different criteria).	X	X	X	X	X	X
Search for Cabinets Across All Orgs	Search for cabinets that may be located in other orgs.	X	X	X	X	X	X
Create Cabinet	Create a new cabinet.	X	X	X	Cabinet Creation Permission **must** be granted by a PCF Admin		

Function Name	Description	Manager	Editor	Reader	Customer Manager	Customer Editor	Customer Reader
Procurement Management Review (PMR)							
PMR Assistant (CER)	Opens the PMR Assistant for conducting Contract Execution Reviews (CER).	X	X	X			
Management Toolkits	Opens the PMR Assistant for conducting Organizational Program Reviews. (e.g. GPC program reviews)	X	X	X			
Restore Default View	Restores width of left and right navigational panels to default widths.	X	X	X	X	X	X

CABINET ACTIONS

Function Name	Description	Manager	Editor	Reader	Customer Manager	Customer Editor	Customer Reader
EDIT CABINET	Change/modify cabinet information for the selected cabinet.	X			X		
Acquisition Management							
Acquisition Milestones	View/Modify the Acquisition Milestone Forecasted and Actual Dates and related comments.	X	X	View Only	X	X	View Only
Funding/FMS Information	View/Modify anticipated Funding Documents (PR/PRONS), anticipated Funding Information (Dollars), and FMS Information (as applicable)	X	X	View Only	X	X	View Only
Supplemental Information	View/Modify supplemental information as applicable for the action.	X	X	View Only	X	X	View Only
PRAFT Information	Peer Review Automated Forecasting Tool; View/Modify the progress/completion of a Peer Review	X	X	View Only			
Protests							

Function Name	Description	Manager	Editor	Reader	Customer Manager	Customer Editor	Customer Reader
Create Protest	Track the receipt and resolution of a submitted protest against the action/cabinet.	X	X				
View Protests	View protest records created against the action/cabinet.	X	X	View Only	View Only	View Only	View Only
Post Award Information	View Post Award related information from other systems/sources – **only** available for "Awarded" actions (i.e., Cabinet has an Actual Award Date saved).	X	X	View Only	View Only	View Only	View Only
Contractor Claims							
Create Claim	Track the receipt and resolution of a submitted claim against an awarded action – **only** available for "Awarded" actions (i.e., Cabinet has an Actual Award Date saved).	X	X				
View Claims	View claim records created against the action/cabinet – **only** available for "Awarded" actions (i.e., Cabinet has an Actual Award Date saved).	X	X	View Only	View Only	View Only	View Only
Definitization Information	Identify the Undefinitized Contractual Action (UCA) that a Modification will be definitizing – **only** available in a "Definitizing Mod Cabinet" (i.e., Procurement Action = MODIFICATION - DEFINITIZATION)	X	X				
Upload Multiple Documents	Upload multiple documents to different folders within the selected cabinet.	X	X		X	X	
View/Find Documents	Display Documents in the cabinet. Provides ability to search for documents (by	X	X	X	X	X	X

Function Name	Description	Manager	Editor	Reader	Customer Manager	Customer Editor	Customer Reader
	name) and open documents						
Folder Finder	Look for folders already in the cabinet, folders not yet added to the cabinet, or empty folders.	X	X	X	X	X	X
Add System Folder							
By Folder Selection List	Add System Folders via the Folder Selection List tab (similar to EDIT CABINET).	X			X		
By Folder Finder	Add System Folders via the Folder Finder --> Inactive Folder tab.	X			X		
By Category	Add System Folders, similar By Folder Selection List, but broken out by category.	X			X		
Manage Favorites	Add selected cabinet to the FAVORITES panel.	X	X	X	X	X	X
Peer/Cabinet Reviews							
Submit for Peer/Cabinet Review	Initiate a Cabinet Review.	X	X		X	X	
Cancel Peer/Cabinet Review	Cancel a pending Cabinet Review – enabled only if cabinet is currently pending review.	X			X		
Complete Peer/Cabinet Review	Mark a Cabinet Review as complete – enabled only if a cabinet is currently pending review and the user is the current reviewer.	N/A	N/A	N/A	N/A	N/A	
Clone Cabinet	Create a new cabinet by cloning a cabinet.	X					
Gatekeeper Actions	Assign, Return, or Re-route a Submitted Customer Cabinet.	Functionality is only available/applicable for designated Contracting Gatekeepers					
Cancel Cabinet	Move an unawarded cabinet to the Retention Library as a canceled action.	X			X		

Function Name	Description	Manager	Editor	Reader	Customer Manager	Customer Editor	Customer Reader
Closeout Cabinet	Move contract, order, and/or mod cabinets to the Retention Library as a closed action.	X					
Customer Actions	Submit a "Customer Cabinet" to Contracting (or Cancel a submitted Cabinet)				X		
Finalize All Documents	Convert all or some Draft Documents to Final.	X					
Expand Categories							
Expand Pre-Award	Expand all objects (categories and folders) located under "I. Pre-Award" (or equivalent) of the cabinet.	X	X	X	X	X	X
Expand Award/Post Award	Expand all objects (categories and folders) located under "II. Post-Award" and "III. Contract Administration" (or equivalent) of the cabinet.	X	X	X	X	X	X
Expand All	Expands all categories and folders located in the cabinet.	X	X	X	X	X	X

FOLDER ACTIONS

Function Name	Description	Manager	Editor	Reader	Customer Manager	Customer Editor	Customer Reader
Upload Multiple Documents	Upload multiple documents to the selected folder.	X	X		X	X	
Upload Single Document	Upload a single document to the selected folder.	X	X		X	X	
Move Documents	Move all or some of the selected folder's contents to a different cabinet and/or folder.	X	X		X	X	
Copy Documents	Copy all or some of the selected folder's contents to a different cabinet.	X	X		X	X	
Add Subfolder	Add a USER FOLDER below the selected system folder.	X			X		

Function Name	Description	Manager	Editor	Reader	Customer Manager	Customer Editor	Customer Reader
Rename Folder	Rename a selected folder – active only for USER FOLDERS.	X			X		
Move Folder	Move a USER FOLDER (only) and any of its contents under a different SYSTEM FOLDER – active only for USER FOLDERS.	X			X		
Remove Folder	Delete the selected folder (folder must be empty).	X			X		

DOCUMENT ACTIONS

Function Name	Description	Manager	Editor	Reader	Customer Manager	Customer Editor	Customer Reader
Open Document	Save/Open selected document.	X	X	X**	X	X	X**
Update Selected Document	Replace selected document with a different version.	X	X		X	X	
Rename Document	Change the file name of the selected document.	X	X		X	X	
Move Document	Move selected document to a different folder and/or cabinet.	X	X		X	X	
Copy Document	Copy selected document to a folder in a different cabinet.	X	X		X	X	
Delete Document	Delete selected file (draft documents only).	X***			X***		
Finalize Document	Convert the selected DRAFT document to a FINAL version.	X	X				
Unlock Document	Unlock a document that is in a locked status due to an incomplete/unfinished Update Selected Document process	X					

** A READER and CUSTOMER_READER will not have access to DOCUMENT ACTIONS --> OPEN DOCUMENT, but will have access to the OPEN DOCUMENT function in the PCF Menu Bar and would use that function to open a selected document. Documents can also be opened from a cabinet by double clicking the file name.

*** Cabinet MANAGERS cannot delete Final documents. Only PCF Admins can delete Final documents (or delete the Final version to roll back to a draft status if/when available).

Customer Users will **only** be able to access/open/perform DOCUMENT ACTIONS on "Customer Viewable" Documents. "Contracting Access Only" Documents will **not** be listed/available for Customer Users. See Section 3.11 Viewable Status for more information.

REVIEW/APPROVAL ACTIONS

Function Name	Description	Man ager	Editor	Reader	Customer Manager	Customer Editor	Customer Reader
Document Review							
Submit for Review	Initiate a review process for the selected document.	X	X		X	X	
Submit for Concurrence	Initiate a concurrence process for the selected document.	X	X		X	X	
Cancel Review/Concurrence	Cancel a pending review process.	X	X		X	X	
Document Approval							
Submit for Approval	Request approval for the selected document.	X	X		X	X	
Submit for Signature	Request a signature for the selected document.	X	X		X	X	
Cancel Approval/Signature	Cancel a pending approval process.	X	X		X	X	
Mark Document Reviewed	Adds an entry to the document's log that the user has reviewed the document. Completes the Review Process if the user is a pending reviewer.	X	X		X	X	
Mark Document Concurred	Adds an entry to the document's log that the user concurs with the document. Completes the Concurrence Process if the user is a pending concurrer.	X	X		X	X	
Re-Route Document w/o Reviewing / Concurring	Pass pending review to a different user without performing review – enabled only if the document has been submitted for review/concurrence and the user is the current reviewer/concurrer.	N/A	N/A	N/A	N/A	N/A	N/A
Mark Document Approved	Approve the selected document.	X	X		X	X	

Upload Signed Document	Upload a signed version of a document – enabled for the pending signer only.	N/A	N/A	N/A	N/A	N/A	N/A
Reject Document	Reject the selected document - enabled for the pending approver/signer only.	N/A	N/A	N/A	N/A	N/A	N/A
Re-Route Document w/o Approving/Signing	Pass pending approval/signature to a different user without approving or signing the selected document – enabled for the pending approver/signer only.	N/A	N/A	N/A	N/A	N/A	N/A

ACTIVITY LOGS

Function Name	Description	Man ager	Editor	Reader	Customer Manager	Customer Editor	Customer Reader
Cabinet Log	Open the cabinet log (e.g., workflow history and comments) for the selected cabinet.	X	X	X	X	X	X
Document Log	Open the document log (e.g., current and previous versions, workflow history and comments) for the selected document.	X	X	X	X	X	X
RPA Log	Open the Requirements Package Assistant (RPA) log for the selected cabinet.	X	X	X	X	X	X
Job Status Log	Open the job status history for any major actions (e.g., clone cabinet, finalize all documents) the user has taken in the PCF library.	N/A	N/A	N/A	N/A	N/A	N/A

OPEN DOCUMENT

Function Name	Description	Man ager	Editor	Reader	Customer Manager	Customer Editor	Customer Reader
Open Document	Save/Open selected document.	X	X	X	X	X	X

VIEW MY WORKFLOW

Function Name	Description	Manager	Editor	Reader	Customer Manager	Customer Editor	Customer Reader
View My Workflow	Open PCF workflow page (PCF Homepage).	X	X	X	X	X	X

My PCF Summary

Function Name	Description	Manager	Editor	Reader	Customer Manager	Customer Editor	Customer Reader
My PCF Summary	Runs a VCE-BI report regarding assigned PCF cabinets.	X	X	X			

HELP TOPICS

Function Name	Description	Manager	Editor	Reader	Customer Manager	Customer Editor	Customer Reader
PCF User Documentation	Open a list of user documents (e.g., the PCF User Guide, PCF Release Notes.	X	X	X	X	X	X
PCF Folder Structures	Open a list of all possible system folders.	X	X	X	X	X	X
My PCF Profile	Update your e-mail address and primary contracting organization in PCF.	X	X	X	X	X	X
Contact AESD Support	Display AESD contact information for requesting technical support.	X	X	X	X	X	X
PCF Contacts	Locate PCF POCs within a Command.	X	X	X	X	X	X
Acquisition Guidance Videos	Open a list of reference videos.	X	X	X	X	X	X
Message of the Day	Opens the PCF Message of the Day (system messages, announcements).	X	X	X	X	X	X
PCF Customer Gatekeepers	Look to see if a PM/Directorate (Customer Office) has an established/active Customer Gatekeeper	X	X	X	X	X	X

1.3.1.1 Accessing Menu Bar Functions via Right Click

As an alternative method of using the PCF Menu Bar to access functions, users can right click on objects in PCF to get that object's corresponding list of functions.

- CABINET - Right clicking a cabinet on the left hand side or the cabinet name at the top of an open cabinet will open the CABINET ACTIONS menu.
- FOLDER - Right clicking a folder in an open cabinet will open the FOLDER ACTIONS menu.
- DOCUMENT - Right clicking a document in an open cabinet will open the DOCUMENT ACTIONS menu.

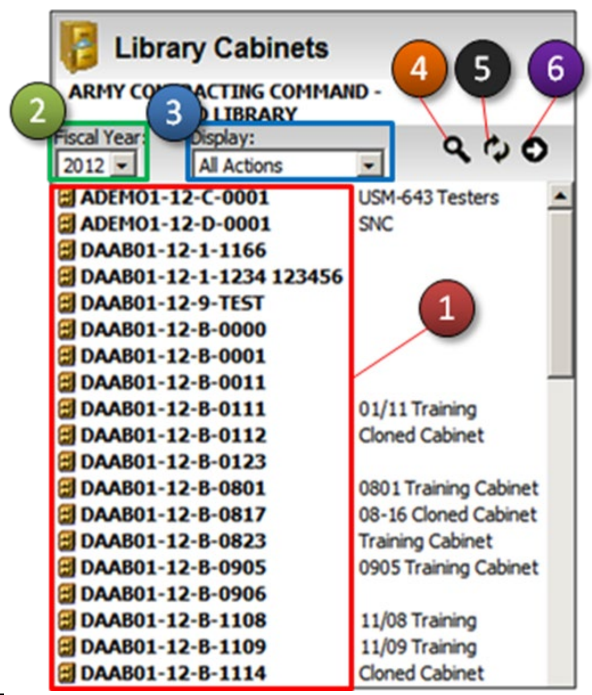
Users can also right click folders in the Favorite Cabinets section to access MANAGE FAVORITES functionality.

1.3.2 Library Cabinets Stack Panel

After logging into PCF, the LIBRARY CABINETS stack panel in the Left Navigation Panel will list cabinets the user has access to for the selected fiscal year.

1. **To open a cabinet:** click a cabinet from the list.

2. **To display cabinets associated with a different fiscal year:** change the year in the fiscal year drop down menu. The default selection is the current fiscal year.



NOTE: The fiscal year a cabinet is associated with in PCF is based on the fiscal year referenced in the Cabinet Name (i.e., PAN, Solicitation Number, or Contract/Order/Mod Number). For example, if an order or modification is awarded in FY 2014, but is associated with an FY 2008 base contract, all of the cabinets (the base contract, the orders, and the mods) would be found under FY 2008.

3. **To change the displayed list of cabinets**: change the setting under the display drop down menu. The default selection is All Actions, which will display both solicitation (pre-award actions) and contracts/orders/mods (awarded actions) for the selected fiscal year that the user has access to.

4. **To search for cabinets**: click the magnifying glass icon. See Section 1.3.8 Search for Cabinets for more information.

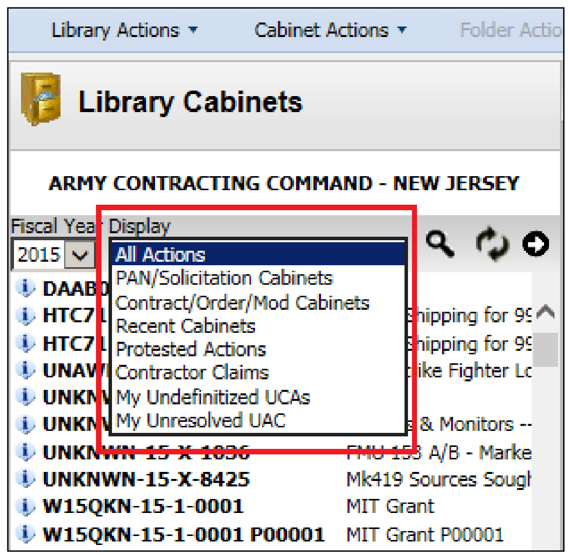
5. **To refresh/reload the list of cabinets:** click the refresh icon.

6. **To switch to the previous/next page of the Fiscal Year:** click the left/right arrow icons as needed.

> NOTE: The Left and Right paging arrow icons will only appear if the user has access to more than 300 cabinets for the current filter/display settings.

1.3.2.1 Library Cabinets Display Drop Down

The DISPLAY drop down in the LIBRARY CABINETS stack panel allows a user to filter the list of cabinets based on certain values. The available Display options are described below.

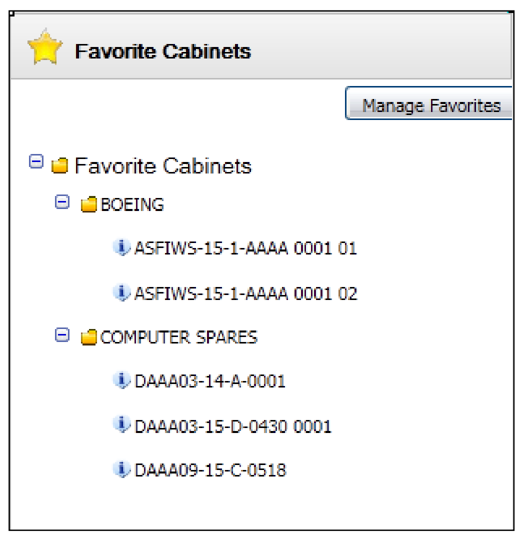


Name of Display Option	What it Displays
All Actions	Default selection; displays all cabinets the user has access to for the selected Fiscal Year.
PAN/Solicitation Cabinets	Displays all cabinets the user has access to for the selected Fiscal Year that do **not** have a Contract/Order/Mod number assigned.
Contract/Order/Mod Cabinets	Displays all cabinets the user has access to for the selected Fiscal Year that have a Contract/Order/Mod number assigned.
Recent Cabinets	Displays the last 25 cabinets the user has opened/accessed.
Protested Actions	Displays all cabinets the user has access to that have one or more unresolved Protest Records. See Section 5.6 Protests for more information.

Name of Display Option	What it Displays
Contractor Claims	Displays all cabinets the user has access to that have one or more unresolved Claim Records. See Section 5.8 Contractor Claims for more information.
My Undefinitized UCAs	Displays all Undefinitized Contractual Actions ("UCA Cabinets") the user has access to that have **not** been definitized by an awarded "MODIFICATION - DEFINITIZATION Cabinet". See Section 2.1.3.1 Undefinitized Contractual Actions (UCAs) and Definitization Modifications in PCF for more information.
My Unresolved UACs	Displays all Unauthorized Commitments ("UAC Cabinets") that have not been established as resolved. See Section 2.1.3.2 Unauthorized Commitments (UACs) in PCF for more information.
Contracting Cabinets	Displays all cabinets the user has access to that were either created by a Contracting User or were created by a Customer User and have since been submitted/assigned to Contracting.
Customer Cabinets	Displays all cabinets that the user has access to that were created by a Customer User but have **not** yet been submitted/assigned to Contracting (Contracting Users will typically **not** have access to Customer Cabinets/see anything here).
Primary PCO/Spec Actions	Displays all cabinets that the user has access to that they are identified as either the Primary Contracting Officer or Primary Contract Specialist on (Customer Users will **not** see anything here).

1.3.3 Favorite Cabinets Stack Panel

The FAVORITE CABINETS stack panel in the Left Navigation Panel provides the ability for the user to setup a customized list of cabinets, so that the user can access those cabinets more efficiently (as opposed to searching through the LIBRARY CABINETS section). Users can create custom named categories under FAVORITES and then add individual cabinets to this section and open those cabinets from here as needed. See Section 1.3.3.1 Managing Favorites for more information.



1.3.3.1 Managing Favorites

Cabinets must be assigned to a Favorites Category (a sub-folder under Favorites that the user creates him/herself) (i.e., a cabinet cannot be added under Favorites, it has to go into a category (i.e., a folder) under Favorites).

As an alternative to using the MANAGE FAVORITES button to access the below functionality, users can also right click the FAVORITE CABINETS folder or a custom category below that folder to access functionality.

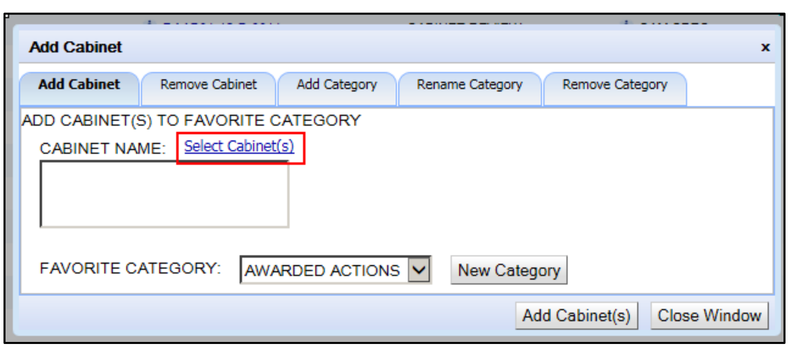
To Add a Cabinet to a Favorite Category:

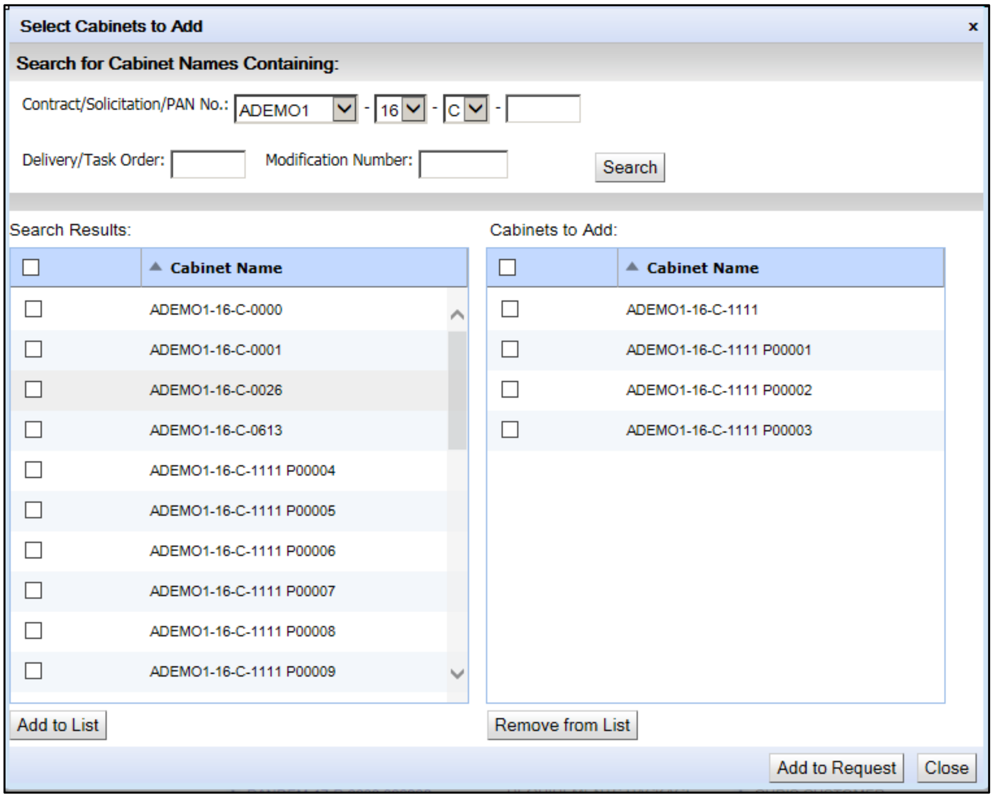
Method 1:

1. Open the cabinet.
2. Click CABINET ACTIONS --> MANAGE FAVORITES.
3. Click the ADD CABINET tab, if it is not already selected.
4. The open cabinet should appear under CABINET NAME. Below that, select the favorite category to assign the cabinet to.
5. (Optional) Click the SELECT CABINET(S) link to select additional cabinet(s) to be added to the category.
    a. Enter the Contract/Order/Modification number(s), click SEARCH.
    b. Click the checkbox(es) next to the cabinet(s) to be included from the search results, click ADD TO LIST.
    c. (Optional) If accidentally selected of one or more cabinet that does not need to be added to the category, click the checkbox(es) next to the specific cabinets, and then click REMOVE FROM LIST.
    d. Click ADD TO REQUEST to continue or CLOSE to not add any additional cabinets to the listing.
6. Click ADD CABINET(S) button.
7. Click CLOSE WINDOW.

Method 2:

1. Click the FAVORITES CABINETS section on the left hand side.
2. Click the MANAGE FAVORITES button.
3. Click the SELECT CABINET(S) link to select additional cabinet(s) to be added to the category.
4. Enter the Contract/Order/Modification number(s), click SEARCH.
    a. Click the checkbox(es) next to the cabinet(s) to be included from the search results, click ADD TO LIST.
    b. (Optional) If accidentally selected of one or more cabinet that does not need to be added to the category, click the checkbox(es) next to the specific cabinets, and then click REMOVE FROM LIST.
    c. Click ADD TO REQUEST to continue or CLOSE to not add any additional cabinets to the listing.
5. Click ADD CABINET(S) button.
6. Click CLOSE WINDOW.





To Remove a Cabinet from a Favorite Category:

1. Click the FAVORITES CABINETS section on the left hand side.
2. Click the MANAGE FAVORITES button.
3. Click the REMOVE CABINET tab.
4. Check the box(es) next to the cabinet(s) to be removed from the favorite category.
5. Click REMOVE CABINET.
6. Click OK.
7. Click CLOSE WINDOW.

> NOTE: Removing a cabinet from a favorite category will **not** delete the cabinet or otherwise impact PCF in any manner beyond removing the cabinet from the user's favorite category in the Favorites Cabinets section.

To Create a Favorite Category:

1. Click the FAVORITES CABINETS section on the left hand side.
2. Click the MANAGE FAVORITES button.
3. Click the ADD CATEGORY tab.
4. Enter a name for the category.

> NOTE: The category name can be anything you want up to 50 characters (e.g., a program name, a vendor name, a customer name, etc.)

5. Click ADD Category.
6. Click OK.

7. Repeat steps 3-7 as needed to create multiple categories as needed; click CLOSE WINDOW when finished.

NOTE: This will create the category under Favorites section, but additional steps need to be taken to assign cabinets to this category. See To Add a Cabinet to a Favorites Category for additional information.

To Rename a Favorite Category:

1. Click the FAVORITES CABINETS section on the left hand side.
2. Click the MANAGE FAVORITES button.
3. Click the RENAME CATEGORY tab.
4. Select the existing favorite category.
5. Click into the empty text field and enter the new name.
6. Click RENAME CATEGORY.

To Remove a Favorite Category:

1. Click the FAVORITES section on the left hand side.
2. Click the MANAGE FAVORITES button.
3. Click the REMOVE CATEGORY tab.
4. Check the box(es) next to the favorite category(ies) to be removed.
5. Click REMOVE CATEGORY.
6. Click OK.
7. Click CLOSE WINDOW.

NOTE: Removing a category does **not** delete any cabinets assigned to that category or impact PCF beyond removing the category from the user's own Favorites Cabinets section.

To Open Cabinets from the FAVORITES CABINETS Section:

1. Expand the FAVORITE category/folder until the desired cabinet is listed.
2. Click the cabinet from the list to open it.

1.3.4 PR Library Stack Panel

The PR Library is a holding queue for incoming/unidentified Purchase Requests (PRs). Users can access PRs from this queue and assign them to specific individuals and/or to specific cabinets. When a PR is assigned to a specific PCF Cabinet, that file will be listed/available automatically in the Cabinet's FUNDING DOCUMENTATION folder.

NOTE: Not all Organizations are using the PR Library in PCF. The PR Library stack panel will **only** be displayed if your Organization uses it. Please check with your local PCF administrator to see if your org uses the PR Library or if you are unable to find a specific purchase request.

When a user first opens the PR Library, assuming the PR Library in PCF is in use, they will have access to easily see what PRs have been provided and assigned to their general Proc Point (i.e., group) sorted by the date the PR was provided to the PR Library.

Users can also search for Purchase Requests by PRON (Purchase Request Order Number).

PRs are stored/available in the PR Library for a maximum period of 30 days.

Once a PR is opened, the user can assign the PR to a specific individual and/or to a specific PCF Cabinet. Users can also do this assignment to multiple PRs in one action as needed.

To Upload PRs to the PR Library:

NOTE: Only specifically identified PR Admins can upload/add new PRs to the PR Library.

1. Open the PR LIBRARY section on the left hand side.
2. Click LIBRARY ACTIONS --> UPLOAD PR ZIP FILE.
3. Click BROWSE.
4. Navigate to and double click the PR Zip File.
5. The PR Library will refresh. The PR Admin should perform a cursory review to make sure the new PRs are now listed.

To Open a PR:

1. Open the PR LIBRARY section on the left hand side.
2. Expand through the dates and available Proc Point groups OR enter the specific PRON number under SEARCH FOR PURCHASE REQUEST and click SEARCH
3. Click the PRON to open the PR file.

   NOTE: If the PR file does not open/is not visible after completing step 3, try selecting VIEW AS HTML on the left hand side and then redo steps 2-3 above.

4. Review the PR to make sure it contains the right information.

To Assign a PR to an Individual:

1. Open a PR (see To Open a PR).
2. Select the appropriate individual under AKO NAME.

   NOTE: Only individuals currently assigned to the Proc Point group will be listed. If you do not see a specific individual listed under the AKO Name drop down, change the Proc Point to the appropriate group and then re-do step 2 or contact your local admin to make sure the individual is assigned to the appropriate Proc Points.

3. (optional) Uncheck the Email box to **not** send an e-mail notification to the assigned individual.
4. Click CHANGE PROC POINT/AKO NAME.

   NOTE: If Email is left checked, an e-mail notification will be sent to the selected individual letting them know the PR has been assigned to him/her.

To Assign a PR to a PCF Cabinet:

1. Open a PR (see To Open a PR).
2. Select the appropriate Contract number, DO/TO number, and Mod number.
3. Click CHANGE CABINET.

   NOTE: The PCF Cabinet must already exist/must have already been created. An error message will appear if the cabinet selected in step 2 does not exist.

4. The PR file will close. In the PR Library, the PR will reflect that it was assigned to a PCF Cabinet. The file itself will also now be uploaded as a Final Record to the selected cabinet.

> NOTE: If the PR was previously assigned to a PCF Cabinet, changing the Contract number, DO/TO number and Mod number from the original assignment will cause the PR to be moved from the original cabinet to the new cabinet.

To Delete a PR:

1. Open a PR (see To Open a PR).
2. Click DELETE.

> NOTE: If the PR was previously assigned to a PCF Cabinet, deleting the PR will only remove it from the PR library. The PR will still be available/accessible in the last cabinet the PR was assigned to prior to deletion.

To Assign Multiple PRs to an Individual:

> NOTE: This process allows the user to select multiple PRs he/she has access to and assign them all to the same individual.

1. Open the PR LIBRARY section on the left hand side.
2. On the left hand side, check MULTIPLE SELECT.
3. Expand the date(s)/groups to see the list of PRs.
4. Check the box next to each PR to be assigned to an individual.
5. On the left hand side, click PROCESS.
6. The list of checked PRs (step 4) will appear. (optional) If a PR was selected in error, click REMOVE next to the PR to remove it from the list.
7. Select the appropriate individual under AKO NAME.

> NOTE: Only individuals currently assigned to the Proc Point group will be listed. If you do not see a specific individual listed under the AKO Name drop down, change the Proc Point to the appropriate group and then re-do step 7 or contact your local admin to make sure the individual is assigned to the appropriate Proc Points.

8. (optional) Uncheck the Email to **not** send an e-mail notification to the assigned individual.
9. Click CHANGE PROC POINT/AKO NAME.

> NOTE: If Email is left checked, an e-mail notification will be sent to the selected individual letting them know the PR has been assigned to him/her.

To Assign Multiple PRs to a PCF Cabinet:

1. Open the PR LIBRARY section on the left hand side.
2. On the left hand side, check MULTIPLE SELECT.
3. Expand the date(s)/groups to see the list of PRs.
4. Check the box next to each PR to be assigned to an individual.
5. On the left hand side, click PROCESS.

6. The list of checked PRs (step 4) will appear. (optional) If a PR was selected in error, click REMOVE next to the PR to remove it from the list.
7. Select the appropriate Contract number, DO/TO number, and Mod number.
8. Click CHANGE CABINET.

NOTE: The PCF Cabinet must already exist/must have already been created. An error message will appear if the cabinet selected in step 2 does not exist.

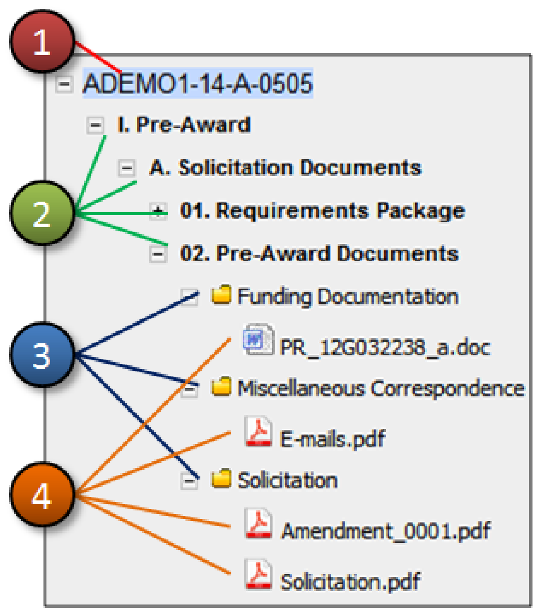
9. The PR file will close. In the PR Library, the PR will reflect that it was assigned to a PCF Cabinet. The file itself will also now be uploaded as a Final Record to the selected cabinet.

NOTE: If the PR was previously assigned to a PCF Cabinet, changing the Contract number, DO/TO number and Mod number from the original assignment will cause the PR to be moved from the original cabinet to the new cabinet.

1.3.5 Cabinet Structure

Documents uploaded to PCF need to be stored and organized in a logical and consistent manner. To aid with this organization, PCF uses a specific structure approved by DASA(P) consisting of a few different layers/organizational objects:

1. **Cabinet**
2. **Categories**
3. **Folders**
4. **Documents**



Cabinet:
A virtual electronic container used to organize and store documents in PCF. The PCF Cabinet is created by a PCF user, where the user defines the following elements:

1. Cabinet's Information (e.g., Cabinet Name and other identifying information)
2. Cabinet's Security (i.e., which Contracting and Customer users can access the cabinet and files uploaded to the cabinet – Customers are limited to access "Customer Viewable Documents" only).
3. Cabinet's Records Management Information (i.e., information to be used to establish the archival retention rate of the cabinet, to establish Acquisition Milestones for the action, and to provide to Army Senior Leadership).
4. Cabinet's folders (i.e., the folders that will be available in the cabinet).

Every procurement action (i.e., solicitation, base contract, order, and modification) needs to be setup as its own PCF Cabinet in order to satisfy Senior Leadership reporting on PCF information.

As an alternative to using the PCF Menu Bar, right click a Cabinet Name (either at the top of the open cabinet or from the left hand side of the screen) to access the CABINET ACTIONS menu for that cabinet.

Category:
An element used to provide logical organization of PCF Folders. Categories are established as part of the PCF Folder Structure and cannot be changed, removed, or otherwise modified.

There can be anywhere from 1-3 levels of categories depending on when/how the cabinet was created. Any new cabinet created in PCF as of 4 May, 2012, will have 3 levels of Categories.

Only categories or folders can exist under categories.

Folder:
An element used to provide logical organization of uploaded files/documents. Folders are added to a cabinet when the cabinet is first created and additional folders can be added to an existing cabinet when/if needed.

There are 2 types of folders in PCF:

1. **System Folders**: Folders whose name and location within the cabinet are already defined. The full list of system folders is presented to the user during cabinet creation in the FOLDER SELECTION LIST, and the user chooses which folders to include in the cabinet (folders can also be added/removed from the cabinet after it is created).

   > NOTE: Cabinets created after 10/16/2018 (or cloned from cabinets created after this date) will use the DASA(P) approved "Army Cabinet Index - October 2018" (ACI) as the source of available System Folders. The ACI Folder Structure contains approximately 321 folders that can potentially be added to cabinets.
   >
   > Once a cabinet is created, its folder structure **cannot** be changed outside of deleting that cabinet and creating a new cabinet for the new action (i.e., if a new folder structure is deployed after a cabinet has been created, that cabinet will continue to use the original folder structure it was built with).

2. **User Folders**: Sub-folders to a System Folder that a user names and adds to a cabinet to help organize multiple files under the System Folder.

   > EXAMPLE: Under the CONTRACTOR’S OFFEROR System Folder, it would be logical/appropriate for users to create Custom User Folders to help keep proposal files from multiple offerors organized separately.

As an alternative to using the PCF Menu Bar, right click a Folder to access the FOLDER ACTIONS menu.

Document:
A file that is uploaded into PCF. Files cannot be uploaded to the general cabinet or categories within the cabinet. Files must be uploaded into an existing folder in a PCF Cabinet.

Documents can be marked with one of two Viewable Statuses: “Contracting Access Only” or “Customer Viewable”   The specific Viewable Status determines if Customer Users added to the cabinet (i.e., CUSTOMER_EDITORS or CUSTOMER_READERS) will **only** be able to access documents marked with the “Customer Viewable” status.

As an alternative to using the PCF Menu Bar, right click a Document to access the DOCUMENT ACTIONS menu.

1.3.6 Cabinet/Document Meta-data Panel

While navigating within a PCF cabinet, the right side of the screen will provide details related to the selected object within that cabinet (i.e., cabinet, category, folder, and document).   See the next page for a description of each object available in this meta-data panel.

Cabinet Information will display on the right side once a cabinet is opened and will continue to display while the cabinet is open, no matter what lower level object in that cabinet is selected.

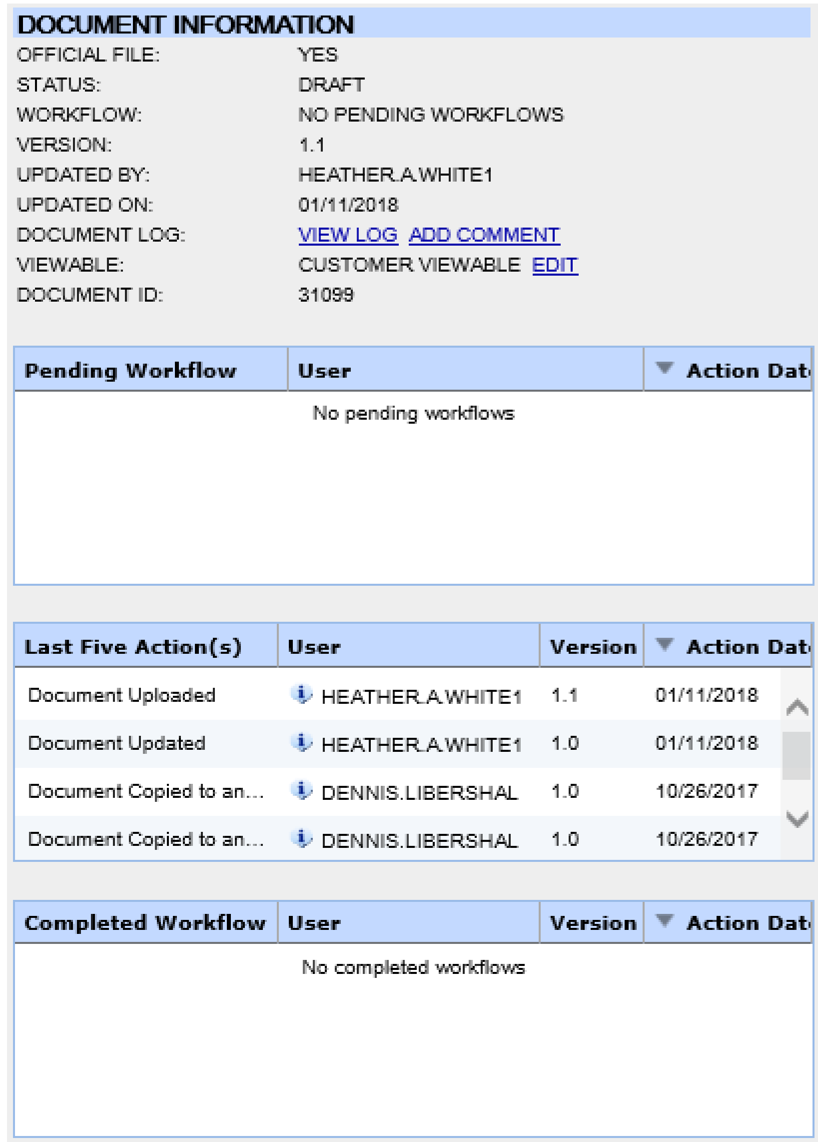
CABINET INFORMATION	
CABINET ACCESS ROLE:	MANAGER
CONTRACTING/GRANT OFFICER:	ADAM.ROTHSCHILD EDIT INFO
CONTRACT SPECIALIST:	HEATHER.A.WHITE1 EDIT INFO
CABINET CREATED BY:	KIARA.POTTS
RPA POC:	CHRIS.CUSTOMER EDIT INFO
ACQUISITION STATUS:	PREAWARD
CABINET LOG:	VIEW LOG ADD COMMENT
PRE-AWARD NUMBER:	PANDEM-16-P-0000 000427
SOLICITATION NUMBER:	ADEMO1-17-R-0055
FOLLOW ON TO EFFORT:	HC1028-09-C-1258 INFO
CABINET ID:	1363209
RPA STATUS:	IN PROGRESS VIEW/EDIT
ACQUISITION MILESTONES:	VIEW/EDIT
FUNDING/FMS INFO:	VIEW/EDIT
SUPPLEMENTAL INFO:	VIEW/EDIT
PRAFT INFO:	VIEW/EDIT
PROTESTS:	VIEW CREATE

Folder Information will display on the right side when a folder is selected.

FOLDER INFORMATION	
FOLDER TYPE:	SYSTEM GENERATED FOLDER
FOLDER ID:	1363213
FOLDER CLASS ID:	1792
DOCUMENT COUNT:	
CUSTOMER VIEWABLE:	1
CONTRACTING ONLY:	0

Note: Customers that have been added to the cabinet will be able to see only “Customer Viewable” documents that have been uploaded to the cabinet. If they see a yellow folder, they can use the document count to tell if there are “Contracting Access Only” documents uploaded into the cabinet.

Document Information will display on the right side when a file is selected.



See the next three pages for detailed descriptions of each field available in the meta-data panel.

CABINET INFORMATION

Meta-data Panel Object	Description
Cabinet Access Role	Access Role the user has within the cabinet.

Contracting/Grant Officer	Lists the Primary Contracting/Grant Officer currently identified on the cabinet.
Contract Specialist	Lists the Primary Contract Specialist currently identified on the cabinet.
Cabinet Created By	Lists the person that created the cabinet.
RPA POC	AKO Name of identified RPA POC (will only display if RPA has been started).
Acquisition Status	Displays the current status of the acquisition (No Milestones Scheduled, Preaward, Awarded-Active/Inactive/Unknown, or Closed) per information set in PCF (e.g., Acquisition Milestones) and/or external systems (e.g., FPDS-NG or SPS).
UAC Status	If the cabinet is a UAC Cabinet, will display the UAC status.
Dollars Obligated (Action)	Current value of the individual contractual action, as pulled from the associated FPDS-NG record. **Not displayed if no ACTUAL AWARD DATE has been saved** in ACQUISITION MILESTONES or if no matching CAR is available after an ACUTAL AWARD DATE is saved. Opens the Post-Award Information dialog.
Dollars Obligated (Total)	Current total value of all associated/obligated actions (i.e., base contract/order and any mods to the base contract/order), as pulled from the associated FPDS-NG record. **Not displayed if no ACTUAL AWARD DATE has been saved** in ACQUISITION MILESTONES or if no matching CAR is available after an ACUTAL AWARD DATE is saved. Opens the Post-Award Information dialog.
Cabinet Log	Click VIEW LOG to open the Cabinet Log; click ADD COMMENT to add a new comment to the Cabinet Log.
Pre-Award Number	Displays the PAN (Pre-Award Number) associated with the PCF Cabinet (if available),
Solicitation Number	Displays the Solicitation Number associated with the PCF Cabinet (if available).
RPA Status	If/When a RPA has been created by the contracting office (Contracting Officer or Specialist) the status will display and a link [View/Edit] will open the dialog.
Acquisition Milestones	Opens the Acquisition Milestones dialog.
Funding/FMS Info	Opens the Funding/FMS Information dialog.
Meta-data Panel Object	**Description**
Supplemental Info	Opens the Supplemental Information dialog.
PRAFT Info	Opens the Peer Review Automated Forecasting Tool

Protests	Click VIEW to access existing Protest Records; click CREATE to create a new Protest Record
Post-Award Info	Opens the Post-Award Information dialog. Only available after an ACTUAL AWARD DATE is entered/saved in ACQUISITION MILESTONES.
Claims	Click VIEW to access existing Claim Records; click CREATE to create a new Claim Record. Only available after an Actual Award Date is entered/saved in ACQUISITION MILESTONES.
Definitization Info	Identify the UCA (Undefinitized Contractual Action) that a Definitization Modification is addressing. Only available on MODIFICATION - DEFINITIZATION Cabinets (i.e., Procurement Action = MODIFICATION - DEFINITIZATION).
Pending Workflow (Cabinet)	Shows the current Reviewer of a Cabinet currently submitted for review. Only displays if the Cabinet is currently pending review, and only displays when nothing else in the cabinet has been selected.
Last Five Actions (Cabinet)	Shows the Last Five Cabinet Log Events. Only displayed when nothing else in the cabinet has been selected.
Completed Workflow (Cabinet)	Shows any completed or canceled Cabinet Reviews that have occurred. Only displayed when nothing else in the cabinet has been selected.
Missed/Upcoming Milestones	Shows any Forecasted Milestone that has been missed (i.e., forecasted date is in the past) or is upcoming (i.e., forecasted date is 14 days or less than the current date). Only displayed when nothing else in the cabinet has been selected,

FOLDER INFORMATION

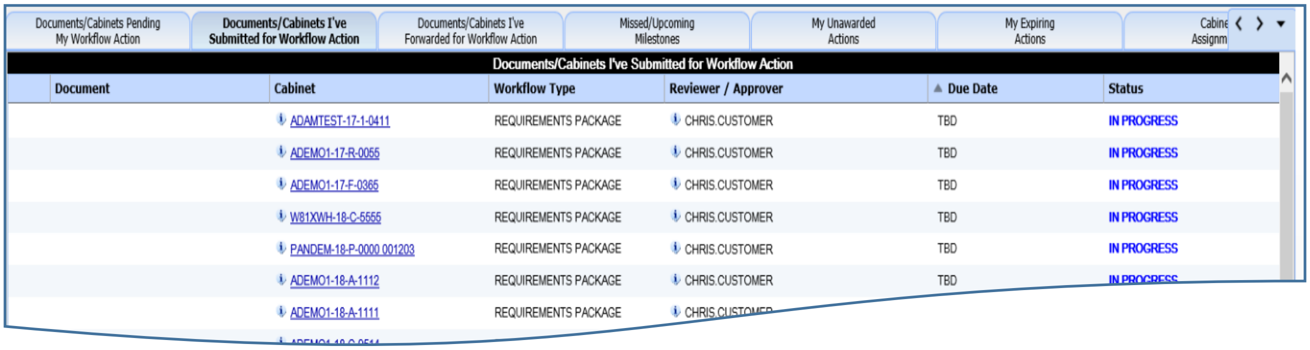
Meta-data Panel Object	Description
Folder Type	Displays if the selected folder is a System Generated Folder or a User Created Folder.
Document Count	Displays the count of documents currently in the folder, as per their Viewable Status designation (i.e., count of “Customer Viewable” documents and count of “Contracting Access Only” documents in the folder).

DOCUMENT INFORMATION

Meta-data Panel Object	Description

Status	Displays if the document is in a Draft status, Final Status or Pending workflow
Workflow	Displays the workflow type if the document is currently pending formal workflow.
Version	Displays the current PCF version number of the document.
Uploaded By	Displays the user who uploaded the current version of the document.
Uploaded On	Displays the date that the current version of the document was uploaded.
Document Log	Click VIEW LOG to open the Document Log; click ADD COMMENT to add a new comment to the Document Log.
RPA Document Status	If the document has been identified as part of the RPA, displays the current RPA status for the document.
Viewable	Displays the current Viewable Status of the Document (“Contracting Access Only” or “Customer Viewable”. Customers can **only** view Customer Viewable documents and will **not** see this Viewable Status field under the Document Information section.
Pending Workflow (Document)	Displays the workflow type, the current reviewer/approver, the version sent for review, and the requested due date of the workflow for any active formal workflows. Only displayed when a document is selected.
Last Five Actions (Document)	Displays the action, the user performing the action, the version the action was performed on, and the date the action was performed. Only displayed when a document is selected.
Completed Workflow (Document)	Displays the type of completion action taken, the user that completed the workflow event, the version the workflow event was performed against, and the date that action was taken. Only displayed when a document is selected.

1.3.7 View My Workflow



View My Workflow is a personalized view in PCF that displays/tracks documents and cabinets that are involved in a Formal Workflow process in PCF (i.e., a document/cabinet that is currently pending review would show up under the pending reviewer's My Workflow view). My Workflow will appear in the main part of the screen when a user first logs into PCF.

There are up to eight tabs that make up the My Workflow View. Depending on your role and access, some of the workload tabs may not display.

Workflow Tab	**What it Displays**	**When Item Disappears from My Workflow**
Documents/Cabinets Pending My Workflow Action	Displays a list of documents and cabinets currently pending review, concurrence, approval, signature for the logged-in user.	Immediately after the user completes the workflow or the workflow is canceled.
Documents/Cabinets I've Submitted for Workflow Action	Displays a list of documents and cabinets that the logged-in user has submitted for review, concurrence, approval, or signature.	14 days after the pending reviewer/approver completes the workflow or the workflow is canceled.
Documents/Cabinets I've Forwarded for Workflow Action	Displays a list of documents and cabinets (that are still pending workflow) that the logged-in user has forwarded for review, concurrence, approval, or signature as part of completing his/her own pending workflow.	Immediately after the user completes the workflow or the workflow is canceled.
Missed/Upcoming Milestones	Displays a list of Milestones that are either Missed (forecasted to be completed in the past) or Upcoming (forecasted to be completed within the next 14 days) for cabinets that the user is assigned to as the Primary KO or Specialist. **This tab is not available for Customer Users.**	When an Actual Date for the Milestone is entered or when the current Forecast Date is revised.
My Unawarded Actions	For Contracting Users: Displays a list of cabinets that have at least one Milestone forecasted, but has no Actual Award date for cabinets that the user is	When an Actual Award Date is entered.

Workflow Tab	What it Displays	When Item Disappears from My Workflow
	assigned to as the Primary or Secondary KO or KS. For Customer Users: Displays a list of cabinets that have at least one Milestone forecasted , but has no Actual Award date for any cabinets that the user has access to.	
RPA Workflow	For Contracting and Customer Users: Displays a list of cabinets where the user is the Primary or Secondary Customer POC, or the Primary KO or KS and there is an "In Progress" or "Accepted" Requirements Package to be tracked.	14 days past the "Acceptance" of the complete RPA by the Contracting Office.
My Expiring Actions	For Contracting Users: Displays a list of "awarded" cabinets (i.e., cabinet **must** have an Actual Award Date entered/saved), where the user is the Primary or Secondary KO or KS and, as per the current Completion Date of the action based on information in FPDS-NG, the action is set to expire in 120 days or less, or is 14 days or less past its expiration dates. For Customer Users: Displays a list of "awarded" cabinets (i.e., cabinet **must** have an Actual Award Date entered/saved), where the user is a CUSTOMER_EDITOR or CUSTOMER_READER, and, as per the current Completion Date of the action based on information in FPDS-NG, the action is set to expire in 120 days or less, or is 14 days or less past its expiration dates.	When, per information from FPDS-NG, the action's completion date is no longer 120 days or less in the future or 14 days or more in the past. Used for situational awareness regarding actions that are about to end. PCF takes automatic NO action when the contract/order/action ends, and in some cases, no action may be needed (e.g., if no extension will be exercised or no follow-on contract/order is needed, then no additional action needs to be taken).
Cabinet Assignment	Displays a list of Cabinets that have been created by Customers and submitted to Contracting, but have not been assigned to a Contracting Officer or Specialist. Used by Contracting Gatekeepers (and PCF Admins) **only** for processing/assigning cabinets that Customers have created and submitted to Contracting. **This tab is only**	When a Contracting Gatekeeper or Admin takes action on a submitted Customer Cabinet (e.g., Assigns the Cabinet to a Contracting Officer and/or Specialist or Returns the Cabinet to the Customer for additional work).

Workflow Tab	What it Displays	When Item Disappears from My Workflow
	available for Contracting Gatekeepers and Admins.	
My Unassigned Actions	Displays any Customer Cabinets that the user is a CUSTOMER_MANAGER in that have either **not** yet been submitted to a Contracting Gatekeeper for KO/Specialist assignment, or that have been previously submitted and are currently pending/awaiting assignment. **This tab is not available for Contracting Users.**	When a Contracting Gatekeeper or PCF Admin assigns the cabinet to a KO/Specialist.

Click VIEW MY WORKFLOW in the PCF Menu Bar at any time to return to the My Workflow View. See Section 4.2 Formal Workflow in PCF for more information regarding review and approval processes in PCF. See Section 5.2 Acquisition Milestones for more information regarding the Acquisition Milestone functionality.

NOTE: Contracting Users can set the default View My Workflow tab that will be opened first when logging into PCF under HELP --> MY PCF PROFILE (Set "Default Workflow tab to Open" field); not available for Customer Users.

NOTE: Admins can view another user's workflow using the HELP → USER WORKFLOW functionality. This function allows user to look at the VIEW MY WORKFLOW tabs as a different user (e.g., to see what documents are currently pending; to see what PCF Cabinets have missed/upcoming milestones for a particular user).

1.3.8 Select Library

All PCF orgs have 2 libraries: An active library, which is the default library when logging in, and a retention library, which is where any cabinet that is canceled (via CABINET ACTIONS --> CANCEL SOLICITATION) or closed (via CABINET ACTIONS --> CLOSEOUT CABINET) will move to.

All cabinets in the retention library are read only. Contact the local Org Admin for cabinets that need to be reactivated (e.g., for additional contract file management/updates).

To change libraries, click LIBRARY ACTIONS --> SELECT LIBRARY and select either the default (active) library or the retention library (the currently selected library will have a bullet next to it).

See Section 2.4 Closing Cabinets for more information on the process that moves a cabinet from the default/active library to the retention library.

1.3.9 Search Library

LIBRARY ACTIONS --> SEARCH LIBRARY allows a user to search for cabinets or search for documents (by filename).

1.3.9.1 Search for Cabinets

1. Click LIBRARY ACTIONS --> SEARCH LIBRARY or click the magnifying glass icon under the LIBRARY CABINETS section on the left hand side.
2. Select the SEARCH FOR CABINETS tab if not already selected.
3. Enter the search parameters in one or more fields for your search.
4. Click SEARCH. The Search window will close and the resulting list of cabinets based on the search parameters will show up on the left panel.

> NOTE: The SEARCH FOR CABINET function will return a list of all cabinets with the selected library (active or retention) within the PCF organization that match the user's search parameters, including cabinets that the user may not have access to.
>
> After searching for cabinets, cabinets that the user does not have access to will be grayed out and italicized in the list, and the user will **not** be able to access/open the cabinet or its contents; instead the user will get an error message.
>
> See Also: Section 1.3.10 Search for Cabinets Across All Orgs

1.3.9.2 Search for Files

1. Click LIBRARY ACTIONS --> SEARCH LIBRARY or click the magnifying glass icon under the LIBRARY CABINETS section on the left hand side.
2. Select the SEARCH FOR FILES tab if not already selected.
3. Enter the search parameters in the Document Name field and at least one additional field.

> NOTE: At a minimum, the first two characters of the file name must be entered in the Document Name field AND one other search criteria must be completed. Use "%" as a wildcard in the Document Name field as needed (e.g., "ac%" will find documents starting with "Acquisition…" or "Acceptance...")

4. Click SEARCH. The resulting list of files based on the search parameters will show up at the bottom of the Search window.
5. (optional) Click on a Cabinet name to close the Search window and open the selected cabinet.
6. (optional) Click on a Document Name to open/download the document and leave the Search window open.
7. (optional) Click on a Folder/Location to close the Search window and open the selected cabinet and jump directly to the specific folder/location of the document.

1.3.10 Search for Cabinets Across All Orgs

LIBRARY ACTIONS --> SEARCH FOR CABINETS ACROSS ALL ORGS allows users to search to see if a cabinet exists (based on the cabinet name) in any PCF Organization. This can be used to see if a specific cabinet (i.e., solicitation, contract, order or mod) exists somewhere in PCF, regardless of if the searching user has access or not.

1. Click LIBRARY ACTIONS --> SEARCH FOR CABINETS ACROSS ALL ORGS.
2. Enter the complete Pre-Award Number (PAN) or the complete Solicitation or Contract Number.
3. (optional) Enter the Delivery/Task Order and/or Modification Number as applicable.
4. Click SUBMIT.

All cabinets existing in any PCF org matching the search criteria will appear, including the PCF Org the cabinet is located in, the cabinet's status, and the individual users assigned as MANAGERS of the cabinet.

1.4 My PCF Summary

MY PCF SUMMARY (new addition to the PCF Menu Bar) allows users to run a VCE-BI report filtered on/at various levels of information summarizing PCF information ((e.g., Cabinet Assignment, Unawarded Actions) based on the established filter values. Dialog allows the users to identify specific information to be used as a filter in the report. These options can be used for a one time/adhoc run of the PCF summary report and/or saved as default for future runs.

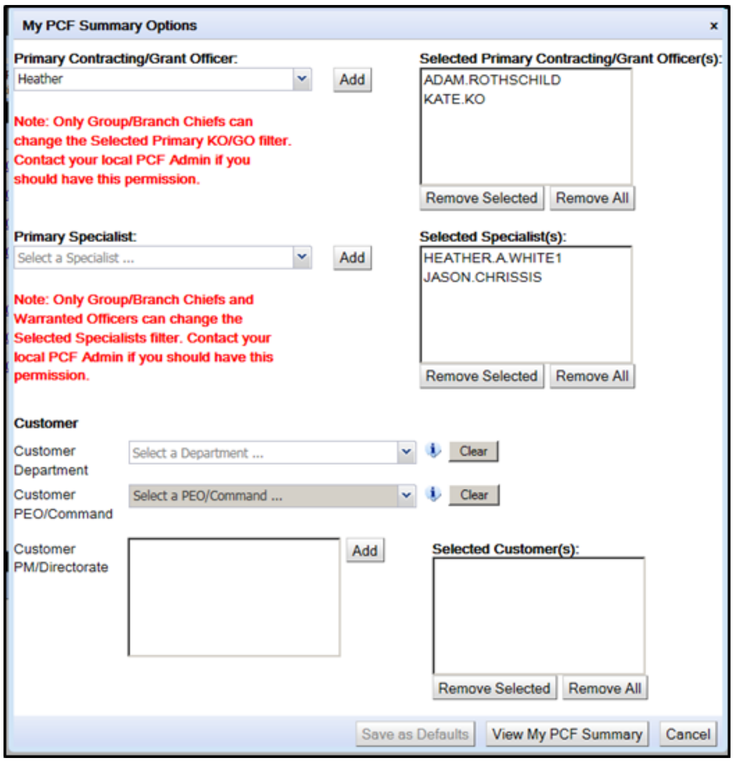
NOTE: This function is only available for Contracting/Grant Officers (per VCE-Warrants), Contract Specialists (per VCE-M&S), PCF Users with the BRANCH CHIEF permission, and PCF Admins.Users. Also, the user **must** have an active (separate) VCE-BI account to run the report.

1.4.1 Running a My PCF Summary Report

Running a report using the My PCF Summary function

1. Select MY PCF SUMMARY
2. (optional) Add or remove the Selected Primary Contracting/Grant Officer(s) to be included (Branch Chiefs and Admins only).
    a. Contracting/Grants Officers that are **not** also a Branch Chief or Admin will **only** be able to run the PCF Summary report where the user him/herself is identified as the Primary Contracting/Grant Officer.
3. (optional) Add or remove the Selected Primary Specialist(s) to be included.
    a. Contract Specialists cannot modify the Primary Contracting/Grant Officer selection (step 2) or the Contract Specialist option (i.e., can only run the PCF Summary report where the user him/herself is identified as the Primary Contract Specialist).
4. (optional) Use the customer filter(s) to limit the report to information to specific customer PM/Directorate(s) results.

5. Select VIEW MY PCF SUMMARY in order to see the results. (New window will open running the VCE-BI report – user may need to enter CAC PIN in order to proceed.)
6. If changes are made to the selections from the default initially displayed, a confirmation dialog will display offering to save the new selections as default and to select “Yes” in order to keep those settings for next time, or “No” to just view the report.



Note: Multiple Values in the same filter/option will be used as an “OR” while the different values across the three different fields will be used as an “AND” (e.g., the screenshot establishes “Show me the report where the [KO is “ADAM.ROTHSCHILD” or “KATE.KO”] AND where the [KS is “HEATHER.A.WHITE1” or “JASON.CHRISSIS”]”).

1.4.2 Saving a new default report:

1. Follow the steps in the above description on how to run a report until it has the settings that you would like to establish as the defaults when running a PCF summary report from this function.
2. Select SAVE AS DEFAULT to save those values for the next time the report is run.

Note: If no changes have been made from the existing default, this option will not be selectable.

2.0 Document Storage

In order to store documents in PCF, a PCF cabinet must first be created for the action that those documents apply to. Once the cabinet exists, users with appropriate access to the cabinet will be able to store documents in the cabinet as needed.

Customer Users can **only** create Cabinets if they have been specifically granted permission by a local PCF Administrator of the Organization and the steps involved in section 2.1 would **not** apply for Customers that have the permission.

2.1 Creating Cabinets

There are two ways to create a cabinet:

1. Create Cabinet from Scratch (LIBRARY ACTIONS --> CREATE CABINET) – The user enters/selects all information required to create the cabinet. See Section 2.1.1 Create a Cabinet from Scratch for more information.
2. Clone an Existing Cabinet (CABINET ACTIONS --> CLONE CABINET) – The user selects a cabinet to clone and the process re-uses some information from an existing cabinet to create a new cabinet. Used to reduce the amount of user driven information and help speed up the process of Cabinet Creation. Users have an option to CLONE WITH PRE-AWARD DOCUMENTS or CLONE WITHOUT DOCUMENTS. See Section 2.1.2 Clone an Existing Cabinet for more information.

2.1.1 Create a Cabinet from Scratch

1. Click LIBRARY ACTIONS --> CREATE CABINET.
2. Enter data on the Information tab.
   a. Select the cabinet's CABINET TYPE.
   b. (optional) Fill out the Solicitation Number, Contract Number, Delivery/Task Order and Modification Number fields as required by the selected Cabinet Type.

> NOTE: PCF rules for Order Number and Modification Number naming conventions are derived from 'DFARS 204.7004 Supplementary PII Numbers'. This guidance has been interpreted to allow the greatest variety in alpha-numeric DO/TO and Modification naming configurations, while maintaining adherence to the regulations.
>
> If no Contract/Order/Mod number is available/established yet to assign to the PCF Cabinet, then step b. can be skipped and the Cabinet will be assigned a PAN (Pre-Award Number) as the Cabinet's Name.
>
> General Rules:
> - Order Number: Must be either a 4 alpha-numeric characters other than "0000" or will require the entry of a 13-character "F" order number depending on the Reference Contract Format selected;
> - Modification Number: If a mod to a 4 character DO/TO, must be 2 alpha-numeric characters other than "00"; If a mod to a base contract or 13-character order, must be 6 alpha-numeric characters starting with "P" or "A".
> - See Appendix 10.1 for more information.

   c. Complete the following fields:
      i. Procurement Action.

ii. Procurement Method.
iii. Procurement Type.
iv. Procurement Category.
v. Primary Contract Type.
vi. Special Designation.

d. Fill out the Keywords/Description field.

> NOTE: The Keywords/Description field is a free text field used to help identify what action the Cabinet is for. It could be the program name, a description of the item being procured, an NSN or Customer Requirement number, or anything else that helps others in identifying the action.

e. (optional) Fill out the Comments field.

3. Click NEXT.

> NOTE: If a Cabinet already exists with the same name in any PCF organization, an error will appear.

4. If no Solicitation Number or Contract Number was entered, click YES to continue. If a Solicitation or Contract/Order/Mod Number was entered, click OK to continue
5. Complete the following fields on the Contacts tab as applicable/required for the action.
   a. Primary Contracting Officer.
   b. Primary Contract Specialist.
   c. (optional) Secondary Contracting Officer.
   d. (optional) Secondary Contract Specialist.
   e. (optional) Lawyer/Legal Advisor.
   f. (optional) Procurement Analyst.
   g. (optional) Cost/Price Analyst.

> NOTE: The source of selectable names in the upper part of the Contacts tab (i.e., Contracting POCs) comes from a separate application called VCE-M&S. A user **must** have an M&S account setup for the name to be listed/selectable, and the user's M&S account **must** be setup with the correct AKO name. Contact your local M&S or PCF Administrator if there are issues with the available names.

   h. Customer Department.
   i. Customer PEO/Command.
   j. Customer PM/Directorate.

> NOTE: If you are unsure as to which specific values for Customer Department, Customer PEO/Command, and Customer PM/Directorate, click CUSTOMER SEARCH to search for a Customer by Funding Office ID (Customer DODAAC) or by name.

   k. Project/Program Title.
   l. (optional) Forecasted COR.

> NOTE: The source of selectable COR names comes from existing OSD CORT data based on the PM/DIRECTORATE selected. Identifying the Forecasted

> COR in PCF does **not** constitute an official appointment of that person as the COR to the action. This field in PCF is available for planning purposes **only**. The COR appointment process **must** occur via OSD CORT.

m. (optional) Select Edit to add Customer POC(s) for this action. The Add Cabinet Users window will open.
    i. Scroll through the Available POCs list and select the individual to add.
    ii. Click the '>' button to the right of the Available POCs field to add the group to the SELECTED POCs field.
    iii. Click 'Done'.

> NOTE: The source of selectable Customer POC names comes from the VCE Customer Registration process and is comprised of individuals who have registered and been approved/assigned a PCF related permission.
>
> Customer users added to the Customer POC field will **not** have access to the cabinet. Customer users **must** be added to the Cabinet Security tab in order to have access to the cabinet. Users added to the Customer POC field will receive email notifications related to certain actions performed in the cabinet (e.g. milestone revisions or protest record creations).

n. (optional) Enter Customer Requirement Number for this action.

6. Click NEXT.
7. (optional) Modify the Cabinet Access list on the Security tab.

> NOTE: The cabinet creator, Primary Contracting Officer, Primary Contract Specialist, Secondary Contracting Officer, Secondary Contract Specialist, and any PCF group(s) the user belongs to will automatically be listed as MANAGERS of the cabinet. The Lawyer/Legal Advisor will automatically be listed as EDITORS of the cabinet. Contracting Officer, Contract Specialist, and lawyer roles identified on the Contacts tab will not be able to be removed from the Security tab. Contact your local PCF admin for changes/issues related to PCF Group Membership.

a. Adding Contracting Users (i.e., MANAGERS/EDITORS/READERS)
    i. Click the appropriate EDIT button for the Cabinet Access Role (i.e., EDIT MANAGERS, EDIT EDITORS, and EDIT READERS). The Add Cabinet Users window will open.
    ii. To ADD A GROUP:
        1. Scroll through the GROUPS list and select the group to add.
        2. Click the ADD button to the right of the GROUP MEMBERS field to add the group to the SELECTED USERS/GROUPS field.

> NOTE: The GROUP MEMBERS field is for reference only (i.e., to see the individuals that are part of the selected group). Individual group members cannot be added from this field. To add individual users, see step 7.a.iii.

    iii. To ADD AN INDIVIDUAL USER:
        1. In the FIND field, enter the user's AKO USERNAME.

2. Click the ADD button to the right of the FIND field to add the user to the SELECTED USERS/GROUPS field.

iv. Repeat steps 7.a.ii and 7.a.iii as needed until all groups and individual users have been added for the selected Cabinet Access Role.

v. Click DONE.

> NOTE: Any user/group added as a MANAGER/EDITOR/READER will have access to view all files stored in the cabinet.

b. Adding Customer Users (i.e., CUSTOMER_EDITORS and CUSTOMER_READERS):

i. Click the appropriate EDIT button for the Cabinet Access Role (to manage CUSTOMER_EDITORS or CUSTOMER_READERS).

ii. (optional) Change the Customer Information (i.e., Department, PEO/COMMAND, PM/DIRECTORATE, PROJECT/PROGRAM TITLE) and click FILTER AVAILABLE CUSTOMER LIST to find/add Customers beyond the individual PM/Directorate identified in the cabinet.

iii. Select the Customer and click the '>' button to move him/her to the Selected Customers table.

iv. Repeat step 7.b.iii as needed to add additional customers.

v. Click Done.

> NOTE: Customers with access to a cabinet will have limited access to any files in the cabinet. Customers will be able to access the Acquisition Management dialogs (e.g., Acquisition Milestones) and CUSTOMER VIEWABLE documents.

c. Repeat step 7 as needed for other Cabinet Access Roles.

d. (optional) Check the box next to "Send invitations to newly added users." This will send an e-mail to all NEW USERS ADDED to notify them that they now have access to this cabinet.

> NOTE: This notification/checking the box would most likely not be needed when the cabinet is first created, since the cabinet will not contain any files at first.

8. Click NEXT.
9. Provide answers to the several fields on the Records Management tab.

> **Records Management Fields:**
> - Type of Acquisition: Used to establish the retention rate of the contract file once the cabinet is closed. Select all that apply.
> - Is this a Follow On/Bridge Effort: Select the correct response from the drop-down, and then enter the contract/order number that the action is a follow on to if a "Yes" selection is made.
> - Follow On To Contract/Order Number: Enter if yes selected above.
> - Reason for Bridge: If the action is identified as a bridge effort, select the applicable reason.

- Description of Other: If the action is identified as a bridge effort and the reason for bridge is marked as 'Other', then input a short description of the reason.
- Dollars to be Obligated: Enter the anticipated (or actual) value of the individual action being executed.
- Total Contract/Order Value: Enter the total contract/order value/ceiling for the entire procurement action including all options (e.g., Base and all mods or Order and all mods).
- Anticipated Period of Performance (Months): Include a best estimate as to the Period of Performance for this effort. If the Period of Performance is not known at this time, enter "TBD".
- Anticipated Place of Performance: (optional) Include a best estimate as to the Place of Performance for this effort.
- Scope: Insert a narrative description of the action. The information provided should match any previous description contained in files such as the Acquisition Plan, PWS, SOW, Executive Summary, etc. If this field is completed by the contracting office, it may be necessary to contact the Customer (Program Management Office, Requiring Activity, etc.) for additional information.

10. Click NEXT. If no Solicitation Number or Contract Number was entered, the PAN/Cabinet Name will be presented. Click OK to continue.
11. Select the folders to add to the cabinet.
    a. Expand or collapse the categories as needed.
    b. Check the boxes next to folders you want to add to the cabinet.
    c. Uncheck the boxes next to the folders you want to remove from the cabinet.
12. Click SUBMIT.
13. A confirmation window will appear; click OK. The created cabinet will now be opened.
14. The Acquisition Milestones dialog will automatically open. See Section 5.2, Acquisition Milestones for guidance on the use of the acquisition milestones.

2.1.2 Clone an Existing Cabinet

NOTE: To help speed up the cabinet creation process, the Clone Cabinet process uses the same exact Cabinet Security and Folders for the new cabinet (i.e., anyone setup with access to the original, existing cabinet would get access to the new cabinet, and any folders that were added to the original, existing cabinet would be available in the new cabinet).

NOTE: Only newer cabinets, created after 4 May 2012, can be cloned. If the cabinet was created prior to 4 May, 2012, an error message will appear after step 2. If a cabinet was created after 4 May, 2012, but does not use the CURRENT folder structure, the cabinet can still be cloned, but a warning message will appear stating that the newly created cabinet will not be using the current/most recent folder structure.

NOTE: A cabinet can be cloned either with pre-award documents or without. Cloning with Pre-award documents will create copies of all pre-award documents existing in the original cabinet into the new cabinet. The Clone With Documents process is designed to provide copies of pre-award documents across related cabinets (i.e., Base Contract Cabinets that are part of a related multi-award). Cabinets with a Modification Number cannot cloned with documents.

NOTE: The CABINET TYPE of the new cabinet will be the same as the Cabinet Type of the original, existing cabinet and cannot be changed. In other words, you would not be able to clone a Basic Contract (Cabinet Type = New Acquisition/Solicitation) to create a Delivery Order/Task Order Cabinet (Cabinet Type = DO/TO); you'd have to clone an existing Delivery Order/Task Order cabinet to create a new Delivery Order/Task Order cabinet.

1. Open the existing Cabinet that you want to Clone.

   NOTE: You must be a MANAGER of the cabinet in order to be able to continue.

2. Click CABINET ACTIONS --> CLONE CABINET.

   NOTE: If you get a CLONE CABINET ERROR message, the message will address one of two issues:
   - The open cabinet was created prior to 4 May 2012, and is using an older, now obsolete Folder Structure. Cabinets created prior to 4 May 2012 cannot be cloned
   - The open cabinet has been designated as a legacy Multi-Award cabinet. Legacy Multi-Award cabinets cannot be cloned.

3. Indicate if all pre-award files should be copied into the new cabinet.
   a. Select NO to use the existing folder structure and cabinet security in the new cabinet, but not copy any of the files of the existing cabinet. (Clone Without Documents).
   b. Select YES to use the existing folder structure and cabinet security, as well as to copy all files located under the Pre-Award category into the new cabinet. (Clone With Documents). This would **only** be used to establish cabinets for a multiple award.

   NOTE: The cabinet **must** contain a solicitation number in order to Clone With Documents (i.e., in order to be able to select YES and proceed).

   NOTE: Cloning With Documents can take a few minutes to complete depending on the amount of pre-award files in the cabinet.

4. Click CONTINUE.

   NOTE: If YES was selected in step 3, the following issues/messages may appear:
   - If a message appears related to the current cabinet not having a solicitation number, click OK to the error, then either select NO and click CONTINUE (to clone without documents) or click CANCEL, add a solicitation number to the cabinet (via CABINET ACTIONS --> EDIT CABINET) and start the clone process over.
   - A message will appear if the existing cabinet contains files under the Pre-Award category that are in a DRAFT, PENDING REVIEWAPPROVAL or APPROVED status. All pre-award documents must be set to FINAL in order to Clone With Documents.
     - Click YES to FINALIZE all yet to be finalized Pre-Award documents and proceed.

- Click NO to cancel the Clone With Documents process.

5. Enter data on the Information tab.
   a. Fill out the Solicitation Number (if applicable – see note below), Contract Number, Delivery/Task Order and Modification Number fields as required by the selected Cabinet Type.

   NOTE: If YES was selected in step 3 (Clone With Documents), the solicitation number will be auto-populated and cannot be changed.

   The Cabinet Type of the new cabinet cannot be changed during the clone process, regardless if it's a Clone Without Documents (NO in step 3) process or Clone With Documents (YES in step 3)

   NOTE: PCF rules for Order Number and Modification Number naming conventions are derived from 'DFARS 204.7004 Supplementary PII Numbers'. This guidance has been interpreted to allow the greatest variety in alpha-numeric DO/TO and Modification naming configurations, while maintaining adherence to the regulations.

   If no Contract/Order/Mod number is available/established yet to assign to the PCF Cabinet, then step b. can be skipped and the Cabinet will be assigned a PAN (Pre-Award Number) as the Cabinet's Name.

   General Rules:
   - Order Number: Must be either a 4 alpha-numeric characters other than "0000" or will require the entry of a 13-character "F" order number depending on the Reference Contract Format selected;
   - Modification Number: If a mod to a 4 character DO/TO, must be 2 alpha-numeric characters other than "00"; If a mod to a base contract or 13-character order, must be 6 alpha-numeric characters starting with "P" or "A".
   - See Appendix 10.1 for more information.

   b. Complete the following fields:
      i. Procurement Action.
      ii. Procurement Method.
      iii. Procurement Type.
      iv. Procurement Category.
      v. Primary Contract Type.
      vi. Special Designation.
   c. Fill out the Keywords/Description field.

   NOTE: The Keywords/Description field is a free text field used to help identify what action the Cabinet is for. It could be the program name, a description of the item being procured, an NSN or Customer Requirement number, or anything else that helps others in identifying the action.

   d. (optional) Fill out the Comments field.

6. Click NEXT.

NOTE: If a Cabinet already exists with the same name in any PCF organization, an error will appear.

7. If no Solicitation Number or Contract Number was entered, click YES to continue. If a Solicitation or Contract/Order/Mod Number was entered, click OK to continue
8. Complete the following fields on the Contacts tab as applicable/required for the action.
   a. Primary Contracting Officer.
   b. Primary Contract Specialist.
   c. (optional) Secondary Contracting Officer.
   d. (optional) Secondary Contract Specialist.
   e. (optional) Lawyer/Legal Advisor.
   f. (optional) Procurement Analyst.
   g. (optional) Cost/Price Analyst.

   NOTE: The source of selectable names in the upper part of the Contacts tab (i.e., Contracting POCs) comes from a separate application called VCE-M&S. A user **must** have an M&S account setup for the name to be listed/selectable, and the user's M&S account **must** be setup with the correct AKO name. Contact your local M&S or PCF Administrator if there are issues with the available names.

   h. Customer Department.
   i. Customer PEO/Command.
   j. Customer PM/Directorate.

   NOTE: If you are unsure as to which specific values for Customer Department, Customer PEO/Command, and Customer PM/Directorate, click CUSTOMER SEARCH to search for a Customer by Funding Office ID (Customer DODAAC) or by name.

   k. Project/Program Title.
   l. (optional) Forecasted COR.

   NOTE: The source of selectable COR names comes from existing OSD CORT data based on the PM/DIRECTORATE selected. Identifying the Forecasted COR in PCF does **not** constitute an official appointment of that person as the COR to the action. This field in PCF is available for planning purposes **only**. The COR appointment process **must** occur via OSD CORT.

   m. (optional) Select Edit to add Customer POC(s) for this action. The Add Cabinet Users window will open.
      i. Scroll through the Available POCs list and select the individual to add.
      ii. Click the '>' button to the right of the Available POCs field to add the group to the SELECTED POCs field.
      iii. Click 'Done'.

> NOTE: The source of selectable Customer POC names comes from the VCE Customer Registration process and is comprised of individuals who have registered and been approved/assigned a PCF related permission.
>
> Customer users added to the Customer POC field will **not** have access to the cabinet. Customer users **must** be added to the Cabinet Security tab in order to have access to the cabinet. Users added to the Customer POC field will receive email notifications related to certain actions performed in the cabinet (e.g. milestone revisions or protest record creations).

n. (optional) Enter Customer Requirement Number for this action.

9. Click NEXT.
10. (optional) Modify the Cabinet Access list on the Security tab.

> NOTE: The Cabinet Access List of the new cabinet will be the same list of users and groups assigned to the original cabinet. Generally, modifying the Cabinet Access List should not be needed during Cloning.
>
> NOTE: The cabinet creator, Primary Contracting Officer, Primary Contract Specialist, Secondary Contracting Officer, Secondary Contract Specialist, and any PCF group(s) the user belongs to will automatically be listed as MANAGERS of the cabinet. The Lawyer/Legal Advisor will automatically be listed as EDITORS of the cabinet. Contracting Officer, Contract Specialist, and lawyer roles identified on the Contacts tab will not be able to be removed from the Security tab. Contact your local PCF admin for changes/issues related to PCF Group Membership.

a. Adding Contracting Users (i.e., MANAGERS/EDITORS/READERS)
   - i. Click the appropriate EDIT button for the Cabinet Access Role (i.e., EDIT MANAGERS, EDIT EDITORS, and EDIT READERS). The Add Cabinet Users window will open.
   - ii. To ADD A GROUP:
     1. Scroll through the GROUPS list and select the group to add.
     2. Click the ADD button to the right of the GROUP MEMBERS field to add the group to the SELECTED USERS/GROUPS field.

     > NOTE: The GROUP MEMBERS field is for reference only (i.e., to see the individuals that are part of the selected group). Individual group members cannot be added from this field. To add individual users, see step 10.a.iii.

   - iii. To ADD AN INDIVIDUAL USER:
     3. In the FIND field, enter the user's AKO USERNAME.
     4. Click the ADD button to the right of the FIND field to add the user to the SELECTED USERS/GROUPS field.
   - iv. Repeat steps 10.a.ii and 10.a.iii as needed until all groups and individual users have been added for the selected Cabinet Access Role.
   - v. Click DONE.

> NOTE: Any user/group added as a MANAGER/EDITOR/READER will have access to view all files stored in the cabinet.

b. Adding Customer Users (i.e., CUSTOMER_EDITORS and CUSTOMER_READERS):
   vii. Click the appropriate EDIT button for the Cabinet Access Role (to manage CUSTOMER_EDITORS or CUSTOMER_READERS).
   viii. (optional) Change the Customer Information (i.e., Department, PEO/COMMAND, PM/DIRECTORATE, PROJECT/PROGRAM TITLE) and click FILTER AVAILABLE CUSTOMER LIST to find/add Customers beyond the individual PM/Directorate identified in the cabinet.
   ix. Select the Customer and click the > button to move him/her to the Selected Customers table.
   x. Repeat step 7.b.iii as needed to add additional customers.
   xi. Click Done.

> NOTE: Customers with access to a cabinet will have limited access to any files in the cabinet. Customers will be able to access the Acquisition Management dialogs (e.g., Acquisition Milestones) and CUSTOMER VIEWABLE documents.

c. Repeat step 10 as needed for other Cabinet Access Roles.
d. (optional) Check the box next to “Send invitations to newly added users.” This will send an e-mail to all NEW USERS ADDED to notify them that they now have access to this cabinet.

11. Click NEXT.
12. Provide answers to the several fields on the Records Management tab.

Records Management Fields:

- Type of Acquisition: Used to establish the retention rate of the contract file once the cabinet is closed. Select all that apply.
- Is this a Follow On/Bridge Effort: Select the correct response from the drop-down, and then enter the contract/order number that the action is a follow on to if a “Yes” selection is made.
- Follow On To Contract/Order Number: Enter if yes selected above.
- Reason for Bridge: If the action is identified as a bridge effort, select the applicable reason.
- Description of Other: If the action is identified as a bridge effort and the reason for bridge is marked as ‘Other’, then input a short description of the reason.
- Dollars to be Obligated: Enter the anticipated (or actual) value of the individual action being executed.
- Total Contract/Order Value: Enter the total contract/order value/ceiling for the entire procurement action including all options (e.g., Base and all mods or Order and all mods).
- Anticipated Period of Performance (Months): Include a best estimate as to the Period of Performance for this effort. If the Period of Performance is not known at this time, enter “TBD”.
- Anticipated Place of Performance: (optional) Include a best estimate as to the Place of Performance for this effort.

- Scope: Insert a narrative description of the action. The information provided should match any previous description contained in files such as the Acquisition Plan, PWS, SOW, Executive Summary, etc. If this field is completed by the contracting office, it may be necessary to contact the Customer (Program Management Office, Requiring Activity, etc.) for additional information.

13. Click NEXT. If no Solicitation Number or Contract Number was entered, the PAN/Cabinet Name will be presented. Click OK to continue.
14. (optional) If you chose to Clone Without Documents (NO in step 3), click REVIEW FOLDER SELECTION LIST to open the Folder Selection List and add additional folders by checking them in the list
    a. Select the folders to add to the cabinet.
        i. Expand or collapse the categories as needed.
        ii. Check the boxes next to folders you want to add to the cabinet.
        iii. Uncheck the boxes next to the folders you want to remove from the cabinet.

    Click FINISH (or SUBMIT).
15. If you chose to Clone Without Documents, you will also be asked if you need to create another cloned cabinet from the source cabinet. If you click YES, repeat steps 3-8 above. If you click NO, you will be returned to the normal PCF view.
16. If you chose to Clone Without Documents, on the last cabinet created (if multiple are created) the Acquisition Milestones dialog for that cabinet will automatically open.

NOTE: After clicking NO, the last cabinet cloned will open. If you don't see new cabinets you just created, refresh your Library Cabinets list by clicking the refresh icon in the Library Cabinets section

NOTE: If you choose to clone with documents, you will not be provided an opportunity to modify the folders available in the new cabinet during the Clone Cabinet process described above. If you need to add/remove folders from the new cabinet(s) after the Clone Cabinet process, you'll need to open the new cabinet after the fact and go to CABINET ACTIONS --> EDIT CABINET.

2.1.3 Special Cabinet Types

This section covers two specific types of procurement scenarios and how these types of actions are handled in PCF:

- Undefinitized Contractual Actions (UCAs) and Definitization Modifications
- Unauthorized Commitments (UACs)

2.1.3.1 Undefinitized Contractual Actions (UCAs) and Definitizing Modifications in PCF

In PCF, the process for establishing an action as an Undefinitized Contractual Action (UCA) and then establishing that action as definitized involves creating two separate PCF Cabinets, a "UCA" Cabinet, and a "MODIFICATION - DEFINITIZATION" Cabinet that are eventually tied together.

The first cabinet is created with specific values for the PROCUREMENT ACTION and PROCURMENT METHOD fields in the Cabinet Profile to establish the cabinet as a "UCA"

Cabinet. A second cabinet is then eventually created with a specific value as the PROCUREMENT ACTION in the Cabinet Profile to establish the cabinet as a Definitizing Modification (MODDDEF) Cabinet. When the “MODIFICATION - DEFINITIZATION” Cabinet is awarded (i.e., when a user enters an Actual Award Date in the ACQUISITION MILESTONES function), the “UCA” Cabinet that the modification is definitizing is identified, establishing a resolution to the original UCA.

To Create a “UCA” Cabinet

1. When creating the cabinet, on the Information tab, set the PROCURMENT ACTION field to one of the following values as applicable:
   - Letter Contract
   - Modification – New Work (only when PROCUREMENT METHOD = UNDEFINITIZED CONTRACTUAL ACTION)
   - Modification – Changes (only when PROCUREMENT METHOD = NOT TO EXCEED)

   NOTE: Setting the PROCURMENT ACTION and PROCUREMENT METHOD fields as per the above establishes the action as a “UCA” Cabinet. Until a “MODIFICATION - DEFINITIZATION” Cabinet is created and awarded with this “UCA” identified as the action the mod is definitizing, the UCA is considered undefinitized, and will be listed when MY UNDEFINITIZED UCAS is selected from the DISPLAY drop down in the LIBRARY CABINETS stack panel.

2. Complete the process of creating the cabinet.

To Create a “MODIFICATION - DEFINITIZATION” Cabinet

1. When creating the cabinet, on the Information tab, set the PROCUREMENT ACTION field to MODIFICATION - DEFINITIZATION.

To Associate a UCA Cabinet within a MODIFICATION - DEFINITIZATION Cabinet

NOTE: Once a MODIFICATION - DEFINITIZATION Cabinet is created, Cabinet MANAGERS can perform the following process prior to award to identify the UCA that this modification WILL be definitizing (once it is awarded). **Performing this process prior to award is optional (e.g., so the anticipated association can be tracked prior to award)**; once the modification is established as “awarded” in PCF (i.e., when an Actual Award Date is saved in the ACQUISITION MILESTONES function), the user will be required to identify the UCA that this awarded modification is definitizing, even if they have already established the association ahead of time as per the below).

1. Open the “MODIFICATION - DEFINITIZATION” Cabinet.
2. Go to CABINET ACTIONS --> ACQUISITION MANAGEMENT --> DEFINITIZATION INFORMATION.

   NOTE: This function is **only** available within “MODIFICATION - DEFINITIZATION” Cabinets.

The Definitization Info dialog can also be opened by clicking VIEW/EDIT next to DEFINITIZATION INFO in the Cabinet Meta-Data Panel on the right hand side.

3. Select the UCA that the MODIFICATION - DEFINITIZATION will be definitizing from the list of AVAILABLE UCA CABINETS.

NOTE: A Cabinet **must** be established as a “UCA Cabinet” to be listed in the AVAILABLE UCA CABINETS.

If this Definitzation Modification will be definitizing more than one UCA, hold down CTRL while selecting multiple actions.

4. Click ADD.
5. Repeat steps 3-4 as needed to identify multiple UCAs that this modification will be definitizing.
6. Click ASSOCIATE TO CAB to save your changes.

NOTE: Performing the above process will **not** establish the UCA as definitized in VCE metrics/reporting, and only establishes the intended association prior to award. The MODIFICATION - DEFINITIZATION Cabinet **must** be “awarded” (i.e., an Actual Award Date must be entered/saved in the ACQUISITION MILESTONES function) to complete the definitization of the UCA in this regard.

To Definitize a UCA Cabinet within a MODIFICATION - DEFINITIZATION Cabinet

NOTE: In order to establish a UCA as definitized, a MODDDEF Cabinet **must** be “awarded” in PCF (i.e., an Actual Award Date must be entered/saved in the ACQUISITION MILESTONES function). Saving the Actual Award Date in a MODIFICATION - DEFINITIZATION Cabinet will cause the DEFINITIZATION INFORMATION dialog to open so the user can identify (or confirm) the UCA(s) that the modification is definitizing.

The MODDDEF Cabinet **must** have a Contract/Order/Mod number assigned to it (via CABINET ACTIONS --> EDIT CABINET) before the below process can be performed.

1. Open the “MODIFICATION - DEFINITIZATION” Cabinet.
2. Go to CABINET ACTIONS --> ACQUISITION MANAGEMENT --> ACQUISITION MILESTONES.

NOTE: Acquisition Milestones can also be opened be opened by clicking VIEW/EDIT next to ACQUSITION MILESTIONES in the Cabinet Meta-Data Panel on the right hand side.

3. Enter an ACTUAL DATE for the AWARD milestone.

NOTE: All required milestones (as denoted by a red asterisk) must have both an Initial Forecast Date and an Actual Date, before an Actual Award Date will be able to be saved.

4. Click SAVE or SAVE & CLOSE. If all milestone information is entered as required, the Definitization Information dialog window will open.

NOTE: If information is missing from the ACQUISTION MILESTONES (e.g., a required milestone does not have an Actual Date entered), error messages will appear at the top of the dialog. These issues must be addressed before the Actual Award Date can be entered/saved (and continuing to step 5)

5. Select the UCA that the MODIFICATION - DEFINITIZATION will be definitizing from the list of AVAILABLE UCA CABINETS.

NOTE: Steps 5-7 may not be needed if the UCA(s) has previously been identified/associated via the DEFINITIZATION INFORMATION function prior to "awarding" the cabinet.

A Cabinet **must** be established as a "UCA Cabinet" to be listed in the AVAILABLE UCA CABINETS.

If this Definitization Modification will be definitizing more than one UCA, hold down CTRL while selecting multiple actions.

6. Click ADD.
7. Repeat steps 3-4 as needed to identify multiple UCAs that this modification will be definitizing.
8. Click DEFINITIZE TO CAB to save your changes.

NOTE: Once a "MODIFICATION - DEFINITIZATION" Cabinet has an Actual Award Date and the UCA(s) the modification definitized has been identified per the above process, the UCA Cabinet(s) are now considered definitized, and will no longer show in the MY UNDEFINITIZED UCAS display/view under the LIBRARY CABINETS display option.

2.1.3.2 Unauthorized Commitments (UACs) in PCF

In PCF, the process for establishing an action as an Unauthorized Commitment (UAC) involves creating a PCF Cabinet with a specific CABINET TYPE ("UNAUTHORIZED COMMITMENT") and then filling out a specific UAC tab on the Cabinet Profile. The UAC tab would **only** be available in a "UAC Cabinet".

To Create a "UAC" Cabinet

1. When creating the cabinet, on the Information tab, set the CABINET TYPE to UNAUTHORIZED COMMITMENT (UAC). This will cause a separate UAC tab to be added to the Cabinet Profile.

NOTE: Most UAC actions would be created in PCF without identifying a Solicitation or Contract/Order/Mod number to begin with (i.e., the UAC Cabinet will originally have a Pre-Award Number (PAN) assigned as the cabinet name). If/When the unauthorized commitment ends up getting ratified via a Contract/Order/Mod, a user would come back into the Cabinet Profile (via CABINET ACTIONS --> EDIT CABINET) and enter the Contract/Order/Mod number that was assigned as part of the ratification approval.

2. Complete the rest of the required fields on the Information tab.
3. Click NEXT.
4. Click YES or OK to the confirmation message.
5. Complete the UAC tab with as much information as available.

NOTE: Although only one field on the UAC tab is required to begin with (DATE OF NOTIFICATION), users are recommended to enter as much information as available. If the action does end up getting ratified, all fields on the UAC tab will be required before the unresolved UAC will be established as resolved.

UAC Tab Fields:

- Date of Notification: The date the Contracting Office was notified of the unauthorized commitment (always required).
- Date of Commitment: The date the unauthorized commitment was made.
- AKO Name of Individual Making Commitment: The name of the individual making the commitment.
- Grade: The grade of the individual making the commitment.
- Title: The title of the individual making the commitment.
- DUNS Number: The DUNS for the vendor the unauthorized commitment was made with.
- Ratification Approval Authority: Identifies the level of approval required for making a ratification decision
- Ratification Approved: Establishes if ratification for the commitment was approved or not.
- Ratified By: If ratification was approved, identify the commitment execution method (via contract/order/mod or other than contract/order/mod e.g. customer GPC)
- Date of Decision: Date ratification was either approved or denied.
- Reason for Decision: Text box to provide justification/clarification regarding the decision to ratify the commitment or not.
- Planned Final Payment Date: If ratification was approved, identify the planned final payment date.

6. Complete the process of creating the cabinet.

NOTE: Setting the CABINET TYPE to “Unauthorized Commitment” establishes the Cabinet is an unresolved “UAC” Cabinet, and the cabinet will be listed when MY

UNRESOLVED UACs. Until additional information is provided for the cabinet (see below), the UAC action is considered unresolved.

To Establish Resolution to an Unresolved "UAC"

1. Open the Unresolved UAC "Cabinet."
2. Go to CABINET ACTIONS --> EDIT CABINET.
3. (optional) If ratification of the commitment was approved, set the Contract/Order/Mod number on the cabinet as applicable if not set already.
4. Select the UAC tab.
5. Perform one of the following steps:
    a. **If the ratification was approved via a Contract/Order/Mod**, complete ALL fields on the UAC tab, including setting RATIFICATION APPROVAL to YES and RATIFIED BY to "Contract/Order/Mod."
    b. **If the ratification was approved via something other than a Contract/Order/Mod (e.g., paid by Customer GPC)**, complete ALL fields on the UAC tab, including setting RATIFICATION APPROVAL TO YES and RATIFIED BY to "Other than Contract/Order/Mod."
    c. **If the ratification was not approved**, set RATIFICATION APPROVAL to NO and enter comments for the REASON FOR DECSION.
6. Click UPDATE UAC.

NOTE: If the ratification of the commitment was approved by something OTHER THAN CONTRACT/ORDER/MOD (i.e., RATIFICATION APPROVAL = "YES" and RATIFIED BY = "OTHER THAN CONTRACT/ORDER/MOD"), or **not** approved (i.e., RATIFICATION APPROVAL = "NO"), then the UAC will be established as resolved after completing step 6.

If the ratification was approved and will be awarded as a contractual action (i.e., RATIFICATION APPROVAL = "YES" and RAITIFIED BY = "CONTRACT/ORDER/MOD"), step 7 **must** be completed to establish the "UAC Cabinet" as resolved.

7. If ratification of the commitment was approved by a Contractual action (i.e., RATIFICATION APPROVAL = "YES" and RATIFIED BY = "Contract/Order/Mod") on the UAC tab), go to CABINET ACTIONS --> ACQUISITION MANAGEMENT --> ACQUISITION MILESTONES, and enter/save the Actual Award Date.

NOTE: A UAC that is ratified by a Contract/Order/Mod **must** be "awarded" in PCF (i.e., step 7 **must** be completed) before the UAC will be established as resolved.

2.2 Modifying Cabinet

Modifying Cabinets involves the ability for a user to modify the information originally setup/entered when the cabinet was first created (i.e., Cabinet Information, Security, Records Management, Folders).

For example, to establish or change the contract/order/mod number of a cabinet (and change the cabinet's name in the process),

Only Cabinet MANAGERS can perform the following process.

1. Open the cabinet to be modified.
2. Click CABINET ACTIONS --> EDIT CABINET (or from the meta-data panel on the right hand side, click EDIT next to Contracting Officer).
3. Click the appropriate tab that corresponds to what needs to be modified. Steps for each tab are described below:
4. Information Tab:
   a. Click into the field on the Information tab and change it as needed.
   b. Click UPDATE CABINET when finished.

> NOTE: Once an Actual Award Date has been saved, the following fields in the Information tab will be uneditable by all users, including PCF Admins. If changes are needed after an Actual Award Date is entered, a PCF Admin must first remove the Actual Award Date from the ACQUISITION MILESTONES function.
> - Cabinet Type
> - Procurement Action
> - Procurement Method
> - Procurement Type
> - Procurement Category

5. Contacts Tab:
   a. Click into the field on the Contacts tab and change it as needed.
   b. Click UPDATE CONTACTS when finished.
6. Cabinet Security Tab:
   a. Adding Contracting Users (i.e., MANAGERS/EDITORS/READERS)
      i. Click the appropriate EDIT button for the Cabinet Access Role (i.e., EDIT MANAGERS, EDIT EDITORS, and EDIT READERS). The Add Cabinet Users window will open.
      ii. To ADD A GROUP:
         1. Scroll through the GROUPS list and select the group to add.
         2. Click the ADD button to the right of the GROUP MEMBERS field to add the group to the SELECTED USERS/GROUPS field.

         > NOTE: The GROUP MEMBERS field is for reference only (i.e., to see the individuals that are part of the selected group). Individual group members cannot be added from this field. To add individual users, see step 6.a.iii.

      iii. To ADD AN INDIVIDUAL USER:
         1. In the FIND field, enter the user's AKO USERNAME.
         2. Click the ADD button to the right of the FIND field to add the user to the SELECTED USERS/GROUPS field.
      iv. Repeat steps 10.a.ii and 10.a.iii as needed until all groups and individual users have been added for the selected Cabinet Access Role.
      v. Click DONE.

NOTE: Any user/group added as a MANAGER/EDITOR/READER will have access to view all files stored in the cabinet.

b. Adding Customer Users (i.e., CUSTOMER_EDITORS and CUSTOMER_READERS):
    i. Click the appropriate EDIT button for the Cabinet Access Role (to manage CUSTOMER_EDITORS or CUSTOMER_READERS).
    ii. (optional) Change the Customer Information (i.e., Department, PEO/COMMAND, PM/DIRECTORATE) and click FILTER AVAILABLE CUSTOMER LIST to find/add Customers beyond the individual PM/Directorate identified in the cabinet.
    iii. Select the Customer and click the '>' button to move him/her to the Selected Customers table.
    iv. Repeat step 7.b.iii as needed to add additional customers.
    v. Click Done.

NOTE: Customers with access to a cabinet will have NO access to any files or folders in the cabinet. Customers will be able to access the Acquisition Management dialogs **only** (e.g., Acquisition Milestones).

c. Repeat step 6 as needed for other Cabinet Access Roles.
d. (optional) Check the box next to "Send invitations to newly added users." This will send an e-mail to all NEW USERS ADDED to notify them that they now have access to this cabinet.
e. Click UPDATE SECURITY when finished.

7. Records Management Tab:
    a. Change the answers to the six fields as needed.
    b. Click UPDATE REC MGMT when complete.
8. Folder Selection List Tab:
    a. Expand or collapse the categories as needed.
    b. Check the boxes next to folders you want to add to the cabinet.
    c. Uncheck the boxes next to the folders you want to remove from the cabinet.

NOTE: If a folder is active in the cabinet and the folder contains documents or sub-folders, you will not be able to uncheck/remove the folder from the cabinet until the folder is empty.

d. Click UPDATE FOLDER LIST when finished.

2.3 Cancelling Cabinets

Cancelling a Cabinet should be performed when the requirements for a procurement action were generated, but then the need for that procurement action is canceled. It is intended to address the FAR requirement to retain a Contract File for canceled solicitations (as per FAR 4.801(c)(1)).

NOTE: This function can only be performed on cabinets that do **not** contain an Actual Award Date. **When a Cabinet is canceled, the solicitation number (if used) and the contract/order/mod number (if used) will not be able to be used on any other cabinet.**

Remove the Solicitation and/or Contract/Order/Mod number (via CABINET ACTIONS --> EDIT CABINET) before continuing below if the Solicitation and/or Contract/Order/Mod number will need to be reused on a different cabinet.

1. Open the Cabinet
2. Click CABINET ACTIONS --> CANCEL CABINET
3. Enter a Reason for Cancellation.
4. Click SUBMIT to continue or CLOSE to cancel the cancel action.

NOTE: Cancelling a Cabinet causes the following to occur as part of the process:

- All existing users/groups with MANAGER and/or EDITOR rights in the cabinet are converted to READERS in the cabinet
- The cabinet is moved from the organization's active library to its retention library, and can still be accessed by switching to the retention library (via LIBRARY ACTIONS --> SELECT LIBRARY).

NOTE: If a cabinet needs to be "reactivated" (i.e., moved from the retention library back to the active library), you must contact your local PCF Admin with this request.

2.4 Closing Cabinets

Closing a Cabinet should be performed when an awarded action is eligible to be closed (see FAR subpart 4.804).

NOTE: This function can only be performed on cabinets that contain a contract/order/mod number. This function cannot be performed on PAN or Solicitation Cabinets. **When a Cabinet is closed, the solicitation number (if used) and the contract/order/mod number on that cabinet will not be able to be reused on any other cabinet.**

The cabinet cannot be closed if the ACQUISITION STATUS = PREAWARD (I.e., cabinet has at least one date entered and saved in ACQUISTION MILESTONES, but no ACTUAL AWARD DATE entered and saved).

1. Open the cabinet.
2. Click CABINET ACTIONS --> CLOSEOUT CABINET.
3. Click BROWSE button, upload the 1594 Closeout Document.
4. (optional) Enter the Date of Final Payment.
5. (optional) Enter the Closeout Date (defaults to today's date)

   NOTE: Date of Final Payment and Closeout Date **cannot** be a future date.

6. Click SUBMIT.

NOTE: Closing out a cabinet causes the following to occur as part of the process:

- All existing users/groups with MANAGER and/or EDITOR rights in the cabinet are converted to READERS in the cabinet

- All DRAFT documents are converted to FINAL.
- The cabinet and any related cabinets*** are moved from the organization's active library to its retention library, and once closed can still be accessed by switching to the retention library (via LIBRARY ACTIONS --> SELECT LIBRARY).
- ***When a cabinet is closed, all cabinets related to that cabinet are also closed (e.g., any Modification cabinets related to the base cabinet being closed).

NOTE: If a cabinet needs to be "reactivated" (i.e., moved from the retention library back to the active library), you must contact your local PCF Admin with this request.

2.5 Deleting Cabinets

"Normal" PCF end-users (i.e., non-Admins) are not authorized to delete cabinets. Users are encouraged to refer to the FAR (part 4) regarding Contract File management, as the Contract File (PCF Cabinet) might still be needed, even though cabinet deletion appears to be required. For example, canceled actions may still require a Contract File to be established/maintained/ retained, and instead of being deleted from PCF, they should be archived in PCF's retention library via the CABINET ACTIONS --> CANCEL CABINET function. See Section 2.3 Cancelling Cabinets for more information.

Additionally, depending on the specific situation, there may be alternative approaches available (e.g., renaming a cabinet instead of deleting it and creating a new one).

If the cabinet needs to be deleted, the user should contact his/her local PCF admin with the request, along with justification for deletion. **Only PCF Admins can delete cabinets.**

2.6 Folder Management

Folders are organizational objects found within PCF Cabinets; they store files or sub-folders. There are two general types of folders involved in PCF, System Folders and User Folders:

2.6.1 System Folders

System folders are folders that are available as part of a standard PCF folder structure. Users select folders to add to a cabinet from a master list of system folders based on the type of documents that will be stored within that cabinet. System folders cannot be renamed or moved. **Only PCF Admins and MANAGERS of the cabinet can add system folders to the cabinet**. System folders can be added to a cabinet during the cabinet creation process or after the cabinet has been created.

2.6.1.1 Adding System Folders During Cabinet Creation

(See Section 2.1 Creating a Cabinet for more information)

1. After completing the first 3 tabs of the Cabinet Profile (Information, Security, and Record Management tabs), the Folder Selection List tab will open.

   NOTE: If you are creating a cabinet via the clone without documents process, you will not automatically get to the folder selection list, since the clone process is designed in part to skip having to select folders for the new cabinet. You can optionally click REVIEW FOLDER SELECTION LIST as the final part of the Clone Cabinet Process if you want to add/remove system folders from the newly created cabinet in this situation (or you can add/remove system folders after the cabinet is created.

2. (optional) Expand/Collapse the Cabinet's Categories as needed by clicking + and -
3. Check any folders you want to add.
4. (optional) Uncheck any folders you don't want in the cabinet.
5. Click Submit.

2.6.1.2 Adding/Removing System Folders to an Existing Cabinet
(See Section 2.2 Cabinet Modification for more information)

NOTE: As an alternative method to the below process for adding additional system folders, users can select CABINET ACTIONS --> ADD SYSTEM FOLDER --> BY FOLDER SELECTION LIST or BY CATEGORY. System Folders can also be added via CABINET ACTIONS --> FOLDER FINDER, INACTIVE FOLDERS tab.

1. Open the Cabinet to be modified.
2. Go to CABINET ACTIONS --> EDIT CABINET.
3. Click the Folder Selection List tab.
4. Check any folders you want to add.
5. Uncheck any folders you want removed from the cabinet.

   NOTE: Folders must be empty (i.e., contain no documents) before they can be removed from the cabinet.

6. Click UPDATE FOLDER LIST to apply the changes.

2.6.2 User Folders
User folders are custom user named folders that are added as sub-folders to system folders. User folders can only be added as sub-folders to existing System Folders. Multiple user folders, however, can be added under a single system folder, and will be automatically sorted alphabetically within that folder. User folders cannot be added as sub-folders to Categories or other User Folders (Exception: If the Cabinet was migrated from a legacy system, user folders can be added under Categories). Only PCF Admins and MANAGERS of the cabinet can add, rename or delete user folders in the cabinet.

2.6.2.1 Adding a User Folder
1. Open the cabinet and navigate to and select an existing system folder. The user folder will be added as a sub-folder to this system folder.
2. Go to FOLDER ACTIONS --> ADD FOLDER.
3. Enter the NEW FOLDER NAME.
4. Click SUBMIT.

2.6.2.2 Deleting a User Folder
NOTE: The user folder must be empty/contain no documents in order to be deleted.

1. Open the cabinet and navigate to and select the existing user folder.
2. Go to FOLDER ACTIONS --> DELETE FOLDER.
3. Click YES to confirm the deletion.
4. Click OK to the deletion confirmation.

2.6.2.3 Renaming a User Folder
1. Open the cabinet and navigate to and select the existing user folder.

2. Go to FOLDER ACTIONS --> RENAME FOLDER.
3. Enter the NEW FOLDER NAME.
4. Click SUBMIT
5. Click OK to the rename confirmation.

2.6.2.4 Moving a User Folder

NOTE: As an alternative to the process below, User Folders (only) can also be dragged under a different System Folder with in the cabinet to move it (and all of its documents), or dragged to a different cabinet on the left hand side to move the folder and its contents under a System Folder of a different cabinet.

1. Open the cabinet and navigate to and select the existing user folder.
2. Go to FOLDER ACTION --> MOVE FOLDER.
3. (optional) The move folder function will default to allowing the folder and its file(s) to be moved under a different system folder within the same cabinet. If the folder/document(s) was/were uploaded to the wrong cabinet to begin with, perform step 3a-3c; otherwise skip step 3.
   a. Click the cabinet name link under SELECT NEW CABINET NAME.
   b. Enter the new cabinet's solicitation/contract number, DO/TO number and Modification number as applicable.

      NOTE: The new cabinet entered must already exist in PCF and you must have EDITOR or MANAGER rights to the new cabinet.

   c. Click SUBMIT.
4. Click into the SELECT NEW FOLDER dropdown and select the new system folder you want to move the selected folder under to (if step 3 was performed, the folders available in the drop down will display the folders available in the new cabinet).
5. Click SUBMIT.

2.6.3 Folder Finder

The Folder Finder function provides users a quick way to see what folders are currently in the cabinet (Active Folders), what System Folders are available to be added to the cabinet (Inactive Folders), and what folders are in the cabinet but currently empty.

2.6.3.1 Viewing Active Folders Using Folder Finder

NOTE: Active Folders are the folders currently added to the cabinet, including both System Folders and User Folders (sub-folders).

1. Open the cabinet to be searched.
2. Click CABINET ACTIONS --> FOLDER FINDER. The ACTIVE FOLDERS tab will open and all active folders will be displayed.
3. (optional) Filter/search the list of active folders by entering text in the FIND BY FOLDER NAME field and clicking SEARCH.
4. (optional) Click a Folder Name or Folder Path to jump to location within the cabinet.
5. Click CLOSE at the bottom when done.

2.6.3.2 Viewing/Adding Inactive Folders Using Folder Finder

NOTE: Inactive Folders are the System Folders that are available, but **not** currently added to the cabinet.

1. Open the cabinet to be searched.
2. Click CABINET ACTIONS --> FOLDER FINDER.
3. Click the INACTIVE FOLDERS tab. A list of all Inactive System Folders will be displayed.
4. (optional) Filter/search the list of inactive folders by entering text in the FIND BY FOLDER NAME field and clicking SEARCH.
5. Check the box next to the folder(s) you want to add/activate to the cabinet.
6. Click ACTIVATE SELECTED FOLDERS at the bottom. The selected folders will be added to the cabinet and the Folder Finder window will close

NOTE: The INACTIVE FOLDERS tab will **only** be available for MANAGERS of the cabinet. Using step 5 to add folders to the cabinet is an alternative method of adding folders (as opposed to adding folders via the Cabinet Profile).

This tab/functionality call also be accessed via CABINET ACTIONS --> ADD SYSTEM FOLDER --> BY FOLDER FINDER.

2.6.3.3 Viewing/Removing Empty Folders Using Folder Finder

1. Open the cabinet to be searched.
2. Click CABINET ACTIONS --> FOLDER FINDER.
3. Click the EMPTY FOLDERS tab. A list of all folders that are active/added to the cabinet but contain no documents or sub-folders will be displayed.
4. (optional) Filter/search the list of empty folders by entering text in the FIND BY FOLDER NAME field and clicking SEARCH.
5. (optional - MANAGERS only) To remove empty folders:
    a. Check the box next to the empty folder(s) you want to remove from to the cabinet.
    b. Click REMOVE SELECTED FOLDERS. The selected folders will be removed and the Folder Finder window will close (skip step 6).
6. Click CLOSE at the bottom.

NOTE: The EMPTY FOLDERS tab is available for any user that has access to a cabinet; however, the ability to remove the empty folders (see step 5 above) will **only** be available for MANAGERS of the cabinet.

2.7 Uploading Documents

Uploading documents in PCF is similar to adding file attachments to e-mail messages. The process will always involve copying the local file, as opposed to moving the local file (i.e., the file will still be available in the original local destination, but once uploaded, the copy in PCF would be considered the official/most current copy).

There are 4 separate methods to get started with uploading documents into PCF

- CABINET ACTIONS --> UPLOAD MULTIPLE DOCUMENTS (upload multiple files to any existing folders in the cabinet)

- FOLDER ACTIONS --> UPLOAD MULTIPLE DOCUMENTS (upload multiple files to a single folder in the cabinet)
- FOLDER ACTIONS --> UPLOAD SINGLE DOCUMENT (upload a single file to a single folder in the cabinet)
- Drag and Drop from Local File System (does **not** work in Internet Explorer 9 and below)

Some additional guidance regarding uploading documents:
- Filenames should be succinct, but should help describe the contents of the file.
- Avoid special characters in the filename.
- Filenames can have a max length of 100 characters including the "." and 3-4 character file extension.
- Individual files should be no larger than 500 MBs.
- Uploading E-Mail – E-Mail messages must be saved to the user's local computer before being uploaded to PCF. From Outlook, messages can be saved locally in the following formats: MSG*, TXT, PDF**, and then uploaded to PCF.

* MSG format and Encrypted E-Mail: If saving an E-Mail as an MSG file (which is the default format if a user drags and drops E-Mail to a local folder on his/her computer), the E-Mail must be unencrypted first before it is saved locally and uploaded to PCF. If an encrypted E-Mail is saved locally as an MSG file without first turning encryption off and then uploaded to PCF, the MSG file will not be viewable by PCF users that were not included on the original message. E-mails that are digitally signed, but not encrypted, will not have this issue and will be viewable by any applicable PCF user (the user may get a warning message, but the file will still be accessible).

** E-Mail messages can only be saved as PDFs if the user has Adobe Acrobat Professional. This process converts the selected messages to a PDF Portfolio file. Note that PDF Portfolio files can only be uploaded to certain folders in PCF (see below).

- PDF Portfolio files can only be uploaded to the following system folders (or to custom sub-folders a user adds below these folders):

Folder Name (that allows PDF Portfolio Files)*	**Folder Location**
ACO Correspondence	II. Award / I. Administration (Contract / Order / Agreement / Grant / OTA) / 08. Administrative Contracting Officer (ACO) Documentation/
Correspondence Logs	II. Award / H. Construction Contract Administration / 06. Correspondence/
Drawings	II. Award / H. Construction Contract Administration / 08. Drawings / Specifications / Submittals Documentation/
Drawings / Technical Data / Technical Data Package (TDP)	I. Pre-Award / A. Requirements Development / 03. Pre-Solicitation Requirements Documents/

Folder Name (that allows PDF Portfolio Files)*	Folder Location
EEO Compliance / Clearance / Correspondence	I. Pre-Award/C. Evaluation / 04. Evaluations/
Incoming Correspondence / Documents / Memoranda	II. Award / H. Construction Contract Administration / 06. Correspondence/
Late Submissions of Bids / Offers	I. Pre-Award/C. Evaluation / 03. Industry Documents/
Miscellaneous Correspondence / Documents / Memoranda - Drawings / Specifications / Submittals	II. Award / H. Construction Contract Administration / 08. Drawings / Specifications / Submittals Documentation/
Miscellaneous Correspondence / Documents / Memoranda – Construction	II. Award / I. Administration (Contract / Order / Agreement / Grant / OTA) / 07. Correspondence/
Miscellaneous Correspondence / Documents / Memoranda – General	II. Award / H. Construction Contract Administration / 08. Drawings / Specifications / Submittals Documentation/
Miscellaneous Correspondence / Documents / Memoranda - Post-Award	II. Award / F. Post Award Documents / 01. Post-Award Documentation/
Miscellaneous Correspondence / Documents / Memoranda - Pre-Award	I. Pre-Award / B. Solicitation /06. Pre-Solicitation Documents/
Miscellaneous Correspondence / Documents / Memoranda - Requirement Package	I. Pre-Award / A. Requirements Development / 03. Pre-Solicitation Requirements Documents/
Miscellaneous Correspondence / Documents / Memoranda – Services	II. Award / G. Services Contract Administration / 01. Services Contract Administration Documentation
Miscellaneous Source Selection Documentation	I. Pre-Award/C. Evaluation / 04. Evaluations/
Mistakes in Quote(s) / Bid(s) / Proposal(s) / Submittal(s) and Disposition	I. Pre-Award/C. Evaluation / 04. Evaluations/
Offeror Initial: Quote(s) / Bid(s) / Proposal(s) / Submittal(s)	I. Pre-Award/C. Evaluation / 03. Industry Documents/
Offeror Revised: Quote(s) / Bid(s) / Proposal(s) / Submittal(s)	I. Pre-Award/C. Evaluation / 03. Industry Documents/
Offeror Successful: Quote(s) / Bid(s) / Proposal(s) / Submittal(s)	I. Pre-Award/C. Evaluation / 03. Industry Documents/
Outgoing Correspondence / Documents / Memoranda	II. Award / H. Construction Contract Administration / 06. Correspondence/
Unsolicited Proposal Documentation	I. Pre-Award/C. Evaluation / 03. Industry Documents/

* These folders names come from the current ACI Folder Structure (deployed October 16, 2018) and may not apply, have the same name, or be available in cabinets created prior to this date or cloned from cabinets created prior to this date.

- ZIP files can only be uploaded to the following folders (or to custom sub-folders a user adds below these folders):

Folder Name (that allows ZIP Files) *	Folder Location
Drawings / Technical Data / Technical Data Package (TDP)	I. Pre-Award / A. Requirements Development / 03. Pre-Solicitation Requirements Documents/
Late Submissions of Bids / Offers	I. Pre-Award/C. Evaluation / 03. Industry Documents/
Miscellaneous Correspondence / Documents / Memoranda - Drawings / Specifications / Submittals	II. Award / H. Construction Contract Administration / 08. Drawings / Specifications / Submittals Documentation/
Mistakes in Quote(s) / Bid(s) / Proposal(s) / Submittal(s) and Disposition	I. Pre-Award/C. Evaluation / 04. Evaluations/
Offeror Initial: Quote(s) / Bid(s) / Proposal(s) / Submittal(s)	I. Pre-Award/C. Evaluation / 03. Industry Documents/
Offeror Revised: Quote(s) / Bid(s) / Proposal(s) / Submittal(s)	I. Pre-Award/C. Evaluation / 03. Industry Documents/
Offeror Successful: Quote(s) / Bid(s) / Proposal(s) / Submittal(s)	I. Pre-Award/C. Evaluation / 03. Industry Documents/
Unsolicited Proposal Documentation	I. Pre-Award/C. Evaluation / 03. Industry Documents/

* These folders names come from the current ACI Folder Structure (deployed October 16, 2018) and may not apply, have the same name, or be available in cabinets created prior to this date or cloned from cabinets created prior to this date.

- The following file types/extensions are prohibited from being uploaded to PCF:

  - EXE
  - BAT
  - COM
  - GZ
  - XDFL
  - JAR
  - RAR
  - TAR
  - WAR
  - EAR
  - SCG
  - PIF
  - LNK

2.7.1 Upload Multiple Documents

1. Open the cabinet you want the files to go into.
2. Click CABINET ACTIONS --> UPLOAD MULTIPLE DOCUMENTS, or select a specific folder and click FOLDER ACTIONS --> UPLOAD MULTIPLE DOCUMENTS.
3. The Upload Manager window will open and you will now select the local files you want to upload into the PCF cabinet.

NOTE: There are 2 ways to add files to the upload manager: the BROWSE method (step 5), and the DRAG AND DROP method (step 6). These methods can be used interchangeably as needed/as based on personal preference.

4. Using BROWSE to select files.
    a. Click BROWSE
    b. Navigate to a local directory (or a share drive) where the files are saved.
    c. Select (single click) the files you want to add/upload.

    NOTE: To select multiple files in one directory to add, hold down the CTRL key and single click each file; to select all files in the directory, press CTRL-A.

    d. Click OPEN after all files needed to be uploaded have been selected.
    e. Repeat step 4 as needed.
5. Using Drag and Drop to select files.
    a. Leave the UPLOAD MANAGER/PCF window open.
    b. Switch to/open a windows folder or explorer window and navigate to the folder that contains files to be uploaded. Have it minimized so that PCF/the Upload Manager window is open in the background.
    c. Select/single click the files that you want to add/upload.

    NOTE: To select multiple files in one directory to add, hold down the CTRL key and single click each file; to select all files in the directory, press CTRL-A. You can also drag a box around files to select multiple files at once.

    d. Click and drag any one of the highlighted files. Drag and drop it on to the blank white space of the Upload Manager in PCF. All selected files from step 5.c should now be listed in the Upload Manager window.
    e. Repeat step 5 as needed.
    f. Switch back to PCF when done.

6. If CABINET ACTIONS --> UPLOAD MULTIPLE DOCUMENTS was used, next to each file listed, click into the blank cell under the FOLDER NAME column. A drop down list of all existing folders in the cabinet will appear. Scroll through and select the folder you want the corresponding file to be uploaded into.

    NOTE: All files selected during steps 5 and 6 must be associated with a specific folder (step 7) or an error will occur and the files will not be uploaded.

7. (optional) As needed/as appropriate, click into the corresponding cell under the DOCUMENT STATUS column to change the status from DRAFT to FINAL VERSION.

    NOTE: By default, all selected documents will be listed as DRAFT under DOCUMENT STATUS. A file should be uploaded as a FINAL VERSION if the file has already been approved/sign outside of PCF, and/or will most likely not need to be changed or modified. See Section 3.10 Document Versioning for more information.

8. (optional) Review the files listed. If there is a duplicate file or a file that does not need to be uploaded, select it and click REMOVE SELECTED.

9. Click START TRANSFERS to upload the selected files into the designated folders of the PCF cabinet. Check the PROGRESS column to indicate SUCCESS for each file.

> NOTE: If one or more files displays FAILED instead of SUCCESS under PROGRESS, click START TRANSFERS again. If the file still fails to upload, check the filename and remove any special characters from the filename, then close and reopen PCF and try again. If you are still having problems after that, please report any errors to your local PCF admin.

10. Click CLOSE after SUCCESS is indicated for all files. The cabinet will refresh and the files will now be listed in the specified folders.

2.7.2 Upload a Single Document

1. Open the cabinet and navigate to and select the folder you want the file to go into.
2. Click FOLDER ACTIONS --> UPLOAD SINGLE DOCUMENT.
3. (optional) Under SELECT FOLDER, select/change the available folder in the cabinet you want the file to go into.
4. Under SELECT DOCUMENT, click BROWSE.
5. Navigate to a local directory (or a share drive) where the file is saved.
6. Select/single click the file you want to upload and click OPEN (or double-click the file)
7. Click UPLOAD.
8. A confirmation message will appear. Click YES to upload another document then repeat steps 3-8. Click NO to return to the cabinet.

> NOTE: All files uploaded via the UPLOAD SINGLE DOCUMENT function will be uploaded as DRAFTS; files cannot be uploaded as FINAL VERSIONS using this method, but they can be FINALIZED in PCF after uploading. See Section 3.8 Finalizing Documents for more information.

2.7.3 Drag and Drop from Local File System to Upload Documents

From a local folder/drive on the computer (e.g., My Documents, C:/, a Network/Share drive), users can drag one or more files into a folder of an open cabinet (or a folder in a cabinet listed on the left) to upload the document(s) into PCF.

1. Open PCF
2. In PCF, get the destination cabinet displayed on the left or open the cabinet and expand the categories to display the destination folder.
3. Within a folder/drive on your computer, select one or more documents.

> NOTE: Hold down CTRL while clicking to select multiple files.

4. If uploading to a cabinet under LIBRARY CABINETS:
    a. Select and drag the document(s) and drop it on the cabinet name.
    b. Click UPLOAD HERE
    c. In the drop down menu, select a folder in the cabinet you want to upload the document(s) into.
    d. Click SUBMIT. The documents will be uploaded to the selected folder within the cabinet.

NOTE: The cabinet will **not** automatically open/display the uploaded files when performing step 4.

5. If uploading to a folder within an open cabinet:
    a. Select and drag the document(s) and drop it on the folder name.
    b. Click UPLOAD HERE. The folder will refresh and display the uploaded documents.

NOTE: All files uploaded via Dragging and Dropping will be uploaded as DRAFTS; files cannot be uploaded as FINAL VERSIONS using this method, but they can be FINALIZED in PCF after uploading. See Section 3.8 Finalizing Documents for more information.

3.0 Document Access and Revisions

3.1 Viewing a Document

There are 3 potential methods to get to and open a document in PCF

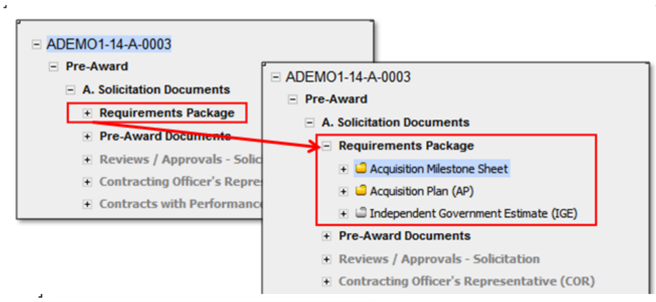
Method	Process
"Normal" method	Open the cabinet, navigate to the file by expanding the specific categories and folders that the file resides in, single click the file, and then click OPEN DOCUMENT, or DOCUMENT ACTIONS --> OPEN DOCUMENT, or double click the file name. See Section 3.1.1 Navigating a Cabinet for more information.
"View/Find Documents" method	Open the cabinet, go to CABINET ACTIONS --> VIEW/FIND DOCUMENTS, and then locate and single click the file. See Section 3.2 View/Find Documents for more information.
"My Workflow" method	Single-click on the document pending review/approval via MY WORKFLOW – the cabinet will open to the specific location and the document will be selected. From there, click OPEN DOCUMENT, or DOCUMENT ACTIONS --> OPEN DOCUMENT, or double click the file name. Available only for documents currently sent to or by the user. See Section 4.2.3 Performing Formal Workflows for more information.

NOTE: You will be prompted to OPEN or SAVE the document. Either way, this involves downloading a copy of the file from PCF to your computer, and opening that local copy. If you plan on updating/modifying the document, it's recommended to click SAVE instead of OPEN so that you can save the file to a specific local destination, and then locate your modified version when uploading it back into PCF (see Section 3.3 Modifying a Document for more information).

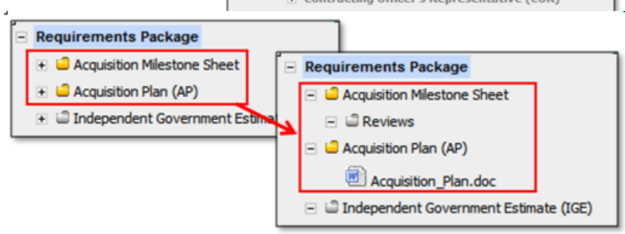
3.1.1 Navigating a Cabinet

After opening a cabinet, click the plus/minus signs to expand categories and folders to access folders and files contained within those objects. Visual clues on categories and folders aid the user in determining if the category/folder contains other objects or is empty.

All categories in the cabinet will be displayed when the cabinet is opened, even if they don't contain any folders. An emboldened category contains something in it (i.e., sub-categories or folders). A grayed out category has nothing underneath it (currently).



All folders will have a folder icon listed next to them. A yellow folder icon indicates that the folder contains something in it (i.e., sub-folders and/or documents). A gray folder icon indicates that the folder has been added to the cabinet and is available to be used, but does not have anything in it (currently).



3.1.2 Expanding Categories

As described in section 3.1.1, categories and folders can be expanded by clicking the plus sign next to the category or folder.
An additional function (CABINET ACTIONS --> EXPAND CATEGORIES) provides the ability to expand multiple (or all) categories and folders in a cabinet at once so that the user does not have to expand objects one at a time.

1. Open the cabinet.
2. Click CABINET ACTIONS --> EXPAND CATEGORIES --> (see a., b., and c., below)
    a. EXPAND PRE-AWARD - Expands all objects (categories and folders) located under “I. Pre-Award” (or equivalent) of the cabinet.*
    b. EXPAND AWARD/POST-AWARD - Expands all objects (categories and folders) located under “II. Post-Award” and “III. Contract Administration” (or equivalent) of the cabinet.*
    c. EXPAND ALL - Expands all categories and folders located in the cabinet

> *NOTE: Older cabinets may only have EXPAND ALL available.

3.2 View/Find Documents

The CABINET ACTIONS --> VIEW/FIND DOCUMENTS function allows users to see a list of all documents currently uploaded to the cabinet (as opposed to using the normal cabinet/folder structure to organize documents). The function provides six tabs that allow for viewing different lists of documents currently in the open cabinet.

Customer users will **only** have access to the “Customer Viewable Documents” tab.

3.2.1 All Documents

> The ALL DOCUMENTS tab displays a list of all files uploaded to the cabinet. Documents can be opened from this view, and it also allows users to search the files for specific filenames.

1. Open the cabinet.
2. Click CABINET ACTIONS --> VIEW/FIND DOCUMENTS. The All Documents tab opens by default. A list of all files in the cabinet will be displayed.
3. (optional) Enter text in the Filter Document Name field and click SEARCH DOCUMENTS to search for files (based on the filename only).
4. (optional) To open a document, single click the filename; you’ll then be prompted to open or save the file.
5. (optional) To open the cabinet back to the folder that the document falls under (with the document selected), single click the location (folder) name.

3.2.2 Documents by Category

The DOCUMENTS BY CATEGORY tab allows the user to select a specific category in the cabinet to display a list of any files uploaded to folders under that category. Documents can be opened from this view.

1. Open the cabinet.
2. Click CABINET ACTIONS --> VIEW/FIND DOCUMENTS, then select the DOCUMENTS BY CATEGORY tab.
3. Selected a specific (bolded) category. A list of files that fall under the selected category will be displayed.
4. (optional) To open a document, single click the filename; you'll then be prompted to open or save the file.
5. (optional) To open the cabinet back to the folder that the document falls under (with the document selected), single click the location (folder) name.

3.2.3 Documents Pending Workflow

The DOCUMENTS PENDING WORKFLOW tab displays a list of any files in the cabinet that are currently involved in a formal PCF workflow (e.g., review or approval). Users can open the document from this view, and it also allows the user to finalize one or more pending documents or cancel the pending workflow.

1. Open the cabinet.
2. Click CABINET ACTIONS --> VIEW/FIND DOCUMENTS, then select the DOCUMENTS PENDING WORKFLOW tab.
3. (optional) To open a document, single click the filename; you'll then be prompted to open or save the file.
4. (optional) To open the cabinet back to the folder that the document falls under (with the document selected), single click the location (folder) name.
5. (optional) To convert one or more documents listed to a final version, check the box(es) under the SELECT column (or click the SELECT column header to select all listed documents, then click FINALIZE DOCUMENT(S) and follow the prompts. This will cancel the pending workflow(s) in addition to finalizing the document(s).
6. (optional) To cancel the workflow on one or more of the documents, check the box(es) under the SELECT column (or click the SELECT column header to select all listed documents, then click CANCEL WORKFLOW and follow the prompts.. This will cancel the pending workflow(s) but keep the document(s) in a draft status.

3.2.4 Deleted Documents

The DELETED DOCUMENTS tab displays a list of any files that were in the cabinet at some point but have since been removed/deleted entirely from the PCF cabinet. Users can open the document from this view, and it also allows the user to restore (i.e., un-delete) the deleted document back into the cabinet.

NOTE: Only documents that have been completely deleted from the PCF cabinet will be displayed here. If a document is uploaded to PCF, and then updated with a new version (via DOCUMENT ACTIONS --> UPDATED SELECTED DOCUMENT), this will increase the version number of the document. If that new/current version of the document is then deleted, and the previous version is restored, the deleted version will be available in the Document's log, but since the document was not completely removed from the cabinet, it would **not** be listed in this DELETED DOCUMENTS view. See Section 3.3 Modifying a Document, Section 3.5 Deleting a Document, and Section 3.10 Document Versioning for more information.

1. Open the cabinet.
2. Click CABINET ACTIONS --> VIEW DOCUMENTS, then select the DELETED DOCUMENTS tab.
3. (optional) To open a document, single click the filename; you'll then be prompted to open or save the file (Note: this will **not** restore the file back to the PCF Cabinet).
4. (optional) To restore one or more deleted document(s), check the box(es) under the SELECT column (or click the SELECT column header to select all listed documents), then click RESTORE DOCUMENT(S) and follow the prompts. The document will then be active and available in the PCF cabinet.

3.2.5 Customer Viewable Documents

The CUSTOMER VIEWABLE DOCUMENTS tab displays a list of all files uploaded to the cabinet with a current viewable status of "Customer Viewable". Documents can be opened from this view, and it also allows users to search the files for specific filenames.

Note: This is the only View/Find tab that Customer Users will see in a cabinet they have been granted access to.

1. Open the cabinet.
2. Click CABINET ACTIONS --> VIEW DOCUMENTS, then select the CUSTOMER VIEWABLE DOCUMENTS tab.
3. (optional) To open a document, single click the filename; you'll then be prompted to open or save the file.
4. (optional – MANAGERS only) To change the viewable status of one or more deleted document(s), check the box(es) under the SELECT column (or click the SELECT column header to select all listed documents), then click CHANGE ACCESS and follow the prompts. The document(s) will then have a viewable status of CONTRACTING ACCESS ONLY.

3.2.6 Contracting Access Only Documents

The CONTRACTING ACCESS ONLY DOCUMENTS tab displays a list of all files uploaded to the cabinet with a current viewable status of "Contracting Access Only". Documents can be opened from this view, and it also allows users to search the files for specific filenames.

Note: This is the best place to quickly check (and change if needed) that the access for documents in the PCF file is set to CUSTOMER VIEWABLE.

1. Open the cabinet.
2. Click CABINET ACTIONS --> VIEW DOCUMENTS, then select the CONTRACTING ACCESS ONLY DOCUMENTS tab.
3. (optional) To open a document, single click the filename; you'll then be prompted to open or save the file.
4. (optional – MANAGERS only) To change the viewable status of one or more deleted document(s), check the box(es) under the SELECT column (or click the SELECT column header to select all listed documents), then click CHANGE ACCESS and follow the prompts. The document(s) will then have a viewable status of CUSTOMER VIEWABLE.

3.3 Modifying a Document

Modifying a document in PCF involves replacing that document in PCF with a locally saved version of the file. Only Cabinet MANAGERS and EDITORS can perform this process.

It's recommended that you start this process by downloading/saving the file from the PCF cabinet to your local computer to ensure any changes are made to the most current version (steps 1-3), however, you can replace an existing version of a file in PCF with a new locally saved version without performing these steps (but you risk overwriting content in the PCF version of the file if you do this).

1. (optional) Select and save a copy of the current file in PCF (see Section 3.1 Viewing A Document for more information).
2. (optional) Make any desired changes as needed to the local copy of the document.
3. (optional) Save the updated local copy to a specific folder location on the local computer…note that location.
4. Go back into the PCF cabinet/folder and select the document (to be replaced) in PCF.
5. Click DOCUMENT ACTIONS --> UPDATE SELECTED DOCUMENT
6. (optional) Enter any revision comments in the text block provided; these comments will be recorded in the DOCUMENT LOG.
7. Click BROWSE.
8. Navigate to the updated local copy (saved in step 3), select/single-click it and click OPEN (or double click it).
9. In PCF, click UPLOAD DOCUMENT.
10. Click YES to confirm the action.
11. Click OK to the status confirmation.

NOTE: As an alternative to steps 5-8, a file stored in a local location (e.g., My Documents folder) can be dragged and dropped onto an existing file in PCF, at which point the user can select to update that selected document. This will open the UPDATE SELECTED DOCUMENT function (step 5). Step 6 can be performed as needed, and step 7 and 8 would not be needed (i.e., PCF will already know what the new file is).

The UPDATE SELECTED DOCUMENT process replaces the existing PCF file with the updated local version and allows for proper versioning and tracking control.

Deleting the existing version in PCF and then uploading the new version (via UPLOAD MULTIPLE DOCUMENTS or UPLOAD SINGLE DOCUMENT) will not keep any previous versions or workflow history and should **not** be the standard procedure for getting updated documents into PCF.

3.4 Moving Documents in PCF

If a document has been uploaded to the wrong folder and/or the wrong cabinet, use the following process to move the document to the correct folder/cabinet (in lieu of deleting the document from the incorrect location and uploading a copy to the correct location).

Documents can be moved to a different folder one document at a time, or multiple documents from a single folder can be moved to a different (single) folder in one action.

Documents **cannot** be moved if they are currently pending in a formal PCF Workflow.

NOTE: You must be an EDITOR or MANAGER of the cabinet to perform the Move function.

3.4.1 Moving a Single Document in PCF

NOTE: As an alternative to the process below, documents can also be dragged to a different folder with in the cabinet to move it, or dragged to a different cabinet on the left hand side to move or copy it.

1. Open the Cabinet containing the document.
2. Navigate to the folder containing the document.
3. Select/Single-click the document.
4. Click DOCUMENT ACTIONS --> MOVE DOCUMENT.
5. (optional) The move function will default to allowing the file to be moved to a different folder within the same cabinet. If the document was uploaded to the wrong cabinet to begin with, perform step 5a-5c; otherwise skip step 5.
   a. Click the cabinet name link under SELECT NEW CABINET NAME.
   b. Enter the new cabinet's solicitation/contract number, DO/TO number and Modification number as applicable.

      NOTE: The new cabinet must already exist in PCF and you must have EDITOR or MANAGER rights to the new cabinet.

   c. Click SUBMIT.
6. Click into the SELECT NEW FOLDER dropdown and select the folder you want to move the file to (if step 5 was performed, the folders available in the drop down will display the folders available in the new cabinet).
7. Click SUBMIT. The document will be moved to the new cabinet/folder location specified in steps 5 and 6.

3.4.2 Moving multiple documents in PCF

NOTE: The below process allows for one or more documents in a single folder to be moved to a different folder in the same or different cabinet.

1. Open the Cabinet containing the documents.
2. Navigate to and select/single-click the folder containing the documents.
3. Click FOLDER ACTIONS --> MOVE DOCUMENTS
4. (optional) The move function will default to allowing the file(s) to be moved to a different folder within the same cabinet. If the document(s) was/were uploaded to the wrong cabinet to begin with, perform step 4a-4c; otherwise skip step 4.
   a. Click the cabinet name link under SELECT NEW CABINET NAME.

b. Enter the new cabinet's solicitation/contract number, DO/TO number and Modification number as applicable.

> NOTE: The new cabinet entered must already exist in PCF and you must have EDITOR or MANAGER rights to the new cabinet.

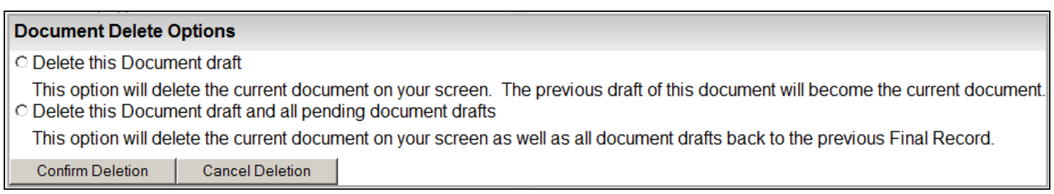
c. Click SUBMIT.

5. Click into the SELECT NEW FOLDER dropdown and select the folder you want to move the file(s) to (if step 4 was performed, the folders available in the drop down will display the folders available in the new cabinet).
6. In the SELECT DOCUMENTS TO MOVE window, select the document(s) to be moved. Hold down CTRL to select multiple documents.
7. Click SUBMIT. All documents selected in step 6 will be moved to the new cabinet/folder location specified in steps 4 and 5.

3.5 Deleting a Document

> NOTE: Cabinet MANAGERS (only) can delete DRAFT documents. If you are not a MANAGER of the cabinet, or if the document is a FINAL version, contact your local PCF administrator (Admins can delete FINAL versions via this function and will need to enter comments as to why the Final version is being deleted). Documents can only be deleted one file at a time.

1. Open the cabinet containing the document.
2. Navigate to the folder containing the document.
3. Select/single-click the document.
4. Click DOCUMENT ACTIONS --> DELETE DOCUMENT.
5. If Document is in a DRAFT STATUS, the following dialog is presented:



a. Select DELETE THIS DOCUMENT DRAFT to delete the latest version of the document and make the previous version the current version (if the document is version 0.1, then this option will remove the file from PCF).
b. Select DELETE THIS DOCUMENT AND ALL PENDING DOCUMENT DRAFTS to delete the latest and all previous versions of the document (remove the file from PCF entirely).

6. Click CONFIRM DELETION.

3.6 Renaming a Document

1. Open the cabinet containing the document.
2. Navigate to the folder containing the document.
3. Select/single-click the document.
4. Click DOCUMENT ACTIONS --> RENAME DOCUMENT
5. Enter the new filename in the text field and click SAVE.

NOTE: Only the prefix of the file name can be changed. The file extension is grayed out and **cannot** be changed.

3.7 Copying Documents

If a document needs to be available in multiple cabinets, the following process can be used to copy the document (or multiple documents) to an additional cabinet (in lieu of uploading a copy of the document to the additional cabinet from scratch).

NOTE: Files **cannot** be copied to a different folder in the same cabinet via this process.

3.7.1 Copying a Single Document in PCF

NOTE: As an alternative to the process below, documents can also be dragged to a different cabinet on the left hand side to move or copy it into the new cabinet.

1. Open the Cabinet containing the document.
2. Navigate to the folder containing the document.
3. Select/Single-click the document.
4. Click DOCUMENT ACTIONS --> COPY DOCUMENT.
5. Click SELECT A DESTINATION CABINET.
6. Enter the new cabinet's solicitation/contract number, DO/TO number and Modification number as applicable.

   NOTE: The new cabinet must already exist in PCF and you must have EDITOR or MANAGER rights to the new cabinet.

7. Click SUBMIT.
8. Click into the SELECT NEW FOLDER dropdown and select the folder in the new cabinet that you want to copy the file into.
9. Click SUBMIT. The document will be moved to the new cabinet/folder location specified in steps 6 and 8.

3.7.2 Copying Multiple Documents in PCF

NOTE: The below process allows for one or more documents in a single folder to be copied to a different folder in a different cabinet.

1. Open the Cabinet containing the documents.
2. Navigate to and select/single-click the folder containing the documents.
3. Click FOLDER ACTIONS --> COPY DOCUMENTS
4. Click SELECT A DESTINATION CABINET.
5. Enter the new cabinet's solicitation/contract number, DO/TO number and Modification number as applicable.

   NOTE: The new cabinet entered must already exist in PCF and you must have EDITOR or MANAGER rights to the new cabinet.

6. Click SUBMIT.
7. Click into the SELECT NEW FOLDER dropdown and select the folder in the new cabinet that you want to copy the file into.
8. In the SELECT DOCUMENTS TO MOVE window, select the document(s) to be moved. Hold down CTRL to select multiple documents.

9. Click SUBMIT. All documents selected in step 8 will be moved to the new cabinet/folder location specified in steps 5 and 7.

3.8 Finalizing Documents

Documents in PCF can either be in a Draft or Final status. This status can be set when the document is uploaded using the UPLOAD MULTIPLE DOCUMENTS function or drafts can be converted to final after they are uploaded to PCF (e.g., after they are approved by the appropriate parties).

NOTE:

- Draft documents can be converted to Final versions by MANAGERS of the cabinet using the DOCUMENT ACTIONS --> FINALIZE DOCUMENT or CABINET ACTIONS --> FINALIZE ALL DOCUMENTS functions.
- Final Documents can be replaced (updated) with a new draft version (using the DOCUMENT ACTIONS --> UPDATE SELECTED DOCUMENT function).
- Final Documents cannot be submitted for formal PCF workflow.
- Final Documents can **only** be deleted by a PCF Administrator.
- Draft Documents that are currently involved in a pending PCF workflow can be finalized, but this action will automatically cancel the pending workflow.

3.8.1 Finalizing a Single Draft Document

1. Open the cabinet and navigate to and select the file to be finalized.
2. Click DOCUMENT ACTIONS --> FINALIZE DOCUMENT.
3. Click YES.

3.8.2 Finalizing Multiple Draft Documents

1. Open the cabinet that has the documents to be finalized.
2. Click CABINET ACTIONS --> FINALIZE ALL DOCUMENTS.
3. Under the SELECT column, check the box(es) next to the file(s) to be finalized or click the SELECT column header to select all documents.
4. Click FINALIZE DOCUMENT(S).
5. Click YES.

3.9 Document Status

A document status and versioning number convention is used in PCF to aid in the organization of previous and current versions of documents. Generally, a document can either have a status of Draft or Final in PCF.

Draft Documents:

- “Working” documents – implies that the document will most likely need to be updated, reviewed, or approved in some manner before being considered as a Final version.
- Drafts can be involved in formal PCF Workflow processes (submitted for formal workflow). See Section 4.2 Formal Workflow in PCF in for more information.
- Documents uploaded via UPLOAD MULTIPLE DOCUMENTS can be set to Draft or Final as part of the upload process. The default status during this process would be Draft. See Section 2.7.1 Upload Multiple Documents, step 7, for more information.

- Documents uploaded via UPLOAD SINGLE DOCUMENT are automatically uploaded as Drafts and would need to be finalized after being uploaded.
- Drafts can be converted to Final versions at any time by any MANAGER of the cabinet (unless the document has been formally rejected) via the following functions:
    - DOCUMENT ACTIONS --> FINALIZE DOCUMENT. See Section 3.8.1 Finalizing a Single Draft Document for more information.
    - CABINET ACTIONS --> FINALIZE ALL DOCUMENTS. See Section 3.8.2 Finalizing Multiple Draft Documents for more information.
    - CABINET ACTIONS --> VIEW/FIND DOCUMENTS, VIEW ALL WORKFLOW tab. See Section 3.2.3 Documents Pending Workflow for more information.
- When a cabinet is closed out via CABINET ACTIONS --> CLOSE CABINET, all remaining Draft documents in the cabinet(s) being closed will automatically be converted to Final versions as part of the closeout process. See Section 2.4 Closing Cabinets for more information.

Final Documents:

- "Finished" Documents – implies that the document is complete, and will not require updates, reviews or approvals.
- Final documents cannot be involved in formal PCF Workflow processes
- Documents can be uploaded to the PCF cabinet as Final via the UPLOAD MULTIPLE DOCUMENTS function. See Section 2.7.1 Upload Multiple Documents, step 7, for more information.
- Documents that were uploaded as Drafts can be converted to Final at any time by any MANAGER of the cabinet.
- Final Documents can **only** be deleted by PCF Administrators.
- Final Documents can be updated/modified/replaced with a new Draft version (via DOCUMENT ACTIONS --> UPDATE SELECTED DOCUMENT)

3.10 Document Versioning

Draft Documents:

- When a document is initially uploaded as a draft, the document will have a version number of 0.1. When/if that document is updated (via DOCUMENT ACTIONS --> UPDATE SELECTED DOCUMENT), the version number will increase by "1".
- The number to the right of the decimal (0.n) would be the "n^{th}" Draft version of the document in PCF. For example, if the current version of the document is 0.9 (the ninth draft version) is updated, the version number will become 0.10 (the tenth draft version).
- Version 0.1 would be the first draft and 0.10 is the tenth draft - even though "0.1" and "0.10" are mathematically equivalent, in PCF, draft versions 0.1 and 0.10 are not equal and would most likely **not** be the same document.

Final Documents:

- When a document is finalized in PCF (either uploaded as final or converted from draft), the document will have a whole number as the version number.

- The number to the left of the decimal (x.0) represents the latest available Final version. In this situation, if the number to the right of the decimal is 0, then the document is a final version. If the number to the right of the decimal is something other than 0 (e.g., 1.1), it means the document was previously finalized and then at some point after that, was updated with a new draft version.
- For example, a document is uploaded as a Draft (0.1), it is then updated with a new version to become Draft 0.2). Then 0.2 is finalized to become Final 1.0. Then someone realizes an update is required for that document, so it is updated to become Draft 1.1. Draft 1.1 is then reviewed/approved and is finalized to become Final 2.0 (the next available whole number).

3.11 Viewable Status

With the incorporation of customer access into PCF, a document level viewable status has been created. Each document is either identified as “Customer Viewable” or “Contracting Access Only”. All pre-existing documentation in PCF has a default status of “Contracting Access Only” but this can be changed by contracting users.

When a Contracting User (non-Customer) uploads documents into PCF, the viewable status of the documents will default to a viewable status of “Contracting Access Only” (unless the document is uploaded within the Requirements Package Assistant, see section 7.2 Uploading Documents as part of RPA for more information). When a Customer uploads a document into PCF, the viewable status will default to a status of “Customer Viewable”. MANAGERS of the cabinet can change the viewable status of ANY document in the cabinet regardless of who uploaded the document.

Updating a document in PCF will **not** change the document’s current viewable status (e.g. if a contracting user updates a customer viewable document it will retain the “Customer Viewable” Status.

Customers Users added to a cabinet (i.e., CUSTOMER_MANAGERS, CUSTOMER_EDITORS and CUSTOMER_READERS) will **only** have access to “Customer Viewable” Documents. Contracting/Non-Customer Users added to a cabinet (i.e., MANAGERS, EDITORS, and READERS) will be have access to **all** documents in the cabinet.

4.0 Document Workflow

4.1 Informal Workflow in PCF

Informal Workflow involves using PCF to access and potentially modify documents as part of a review or approval, but using other means (i.e., not PCF; e.g., phone, e-mail) to initiate the request.

Informal Workflows require no action in PCF other than making sure the Reviewer/Approver has access to the specific PCF cabinet. From there, the user would be able to view (and potentially modify) documents in the cabinet as needed.

At any point in time, cabinet MANAGERS and EDITORS can perform the MARK DOCUMENT REVIEWED, MARK DOCUMENT CONCURRED, and MARK DOCUMENT APPROVED functions under REVIEW/APPROVAL ACTIONS menu as long as the document is a draft and not currently in a formal workflow. Customer users can also perform these actions, but only if the document has a “Customer Viewable” status, and only if they are a CUSTOMER_MANAGER or CUSTOMER_EDITOR of the cabinet. This would be an optional step, but would be a way to log the completion of an informal (or proactive) workflow process by the user.

4.2 Formal Workflow in PCF

Formal Workflow involves using PCF to submit, perform, and complete document reviews, concurrences, approvals or signatures. In Formal Workflow, a user (the “initiator”) formally SUBMITS a document (or cabinet) for review/approval, an e-mail is automatically sent to the reviewer/approver, the reviewer/approver then PERFORMS the workflow request by accessing (and potentially modifying) the file(s), and finally COMPLETES the workflow process by performing a specific action in PCF (e.g., Mark Document Reviewed or Approved, Reject Document, etc.))

In a Formal Workflow process, the actions of submitting and completing the workflow, and all related comments involved with these actions are tracked/store in corresponding Activity Log for future reference and historical record.

Only Draft documents can be submitted for formal workflow. The submittal functions will not be available/enabled if the document is a Final version.

Customer users can perform formal workflow actions (e.g. submit or complete) only if the document has a “Customer Viewable” status, and only if they are a CUSTOMER_MANAGER or CUSTOMER_EDITOR of the cabinet.

4.2.1 Initiating a Formal Workflow in PCF

There are five Formal Workflows that can be started in PCF:

Workflow Process	Basic Description	Function to Initiate Workflow Process
Document Review	Submit a single draft file to one or more users for review	REVIEW/APPROVAL ACTIONS --> DOCUMENT REVIEW --> SUBMIT FOR REVIEW

Workflow Process	Basic Description	Function to Initiate Workflow Process
Document Concurrence	Submit a single draft file to one or more users for concurrence	REVIEW/APPROVAL ACTIONS --> DOCUMENT REVIEW --> SUBMIT FOR CONCURRENCE
Document Approval	Submit a single draft file to one user for approval	REVIEW/APPROVAL ACTIONS --> DOCUMENT APPROVAL --> SUBMIT FOR APPROVAL
Document Signature	Submit a single draft file to one user for signature	REVIEW/APPROVAL ACTIONS --> DOCUMENT APPROVAL --> SUBMIT FOR SIGNATURE
Cabinet Review	Submit a PCF Cabinet to one user for review	CABINET ACTIONS --> PEER/CABINET REVIEW --> SUBMIT FOR PEER/CABINET REVIEW

NOTE: You must be an EDITOR or MANAGER of the cabinet to initiate a formal workflow process.

4.2.1.1 Submitting a Document for Review

1. Open the cabinet, navigate to and select (single click) the document.
2. Click REVIEW/APPROVAL ACTIONS --> DOCUMENT REVIEW --> SUBMIT FOR REVIEW.
3. If the intended REVIEWER is listed in the CURRENT ACCESS LIST:
   a. Select the user.
   b. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

   NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

   c. Click ADD.

NOTE: The CURRENT ACCESS LIST displays all users that currently have MANAGER, EDITOR, or (if the document has a viewable status of “Customer Viewable”), CUSTOMER_MANAGER or CUSTOMER_EDITOR rights to the PCF Cabinet.

4. If the intended REVIEWER is not listed in the in the CURRENT ACCESS LIST:
   a. Click SELECT CONTRACTING USER NOT LISTED.
   b. Type in their AKO Name.
   c. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

d. Click ADD.

NOTE: If the user is not listed under the CURRENT ACCESS LIST, adding them as a reviewer (via step 4) will assign that user TEMPORARY REVIEWER rights, which will give the user temporary access to the specific PCF Cabinet (and all files) until the user completes the workflow request, at which time his/her access to the cabinet will be removed.

Customer users **must** be added to the cabinet security as CUSTOMER_MANAGER or CUSTOMER_EDITOR in order to be listed in the current access list to be sent a document for workflow.

5. Repeat steps 3 and 4 as needed to add multiple reviewers.
6. (optional) Click into the ADDITIONAL COMMENTS field and enter any detailed comments for the Reviewer(s).
7. Click the Calendar Icon and select a DUE DATE.
8. (optional) Check the box to flag the review request as a high priority.
9. Click SUBMIT.
10. Click OK to the confirmation. An e-mail notification will be sent to the selected reviewer(s).

4.2.1.2 Submitting a Document for Concurrence

1. Open the cabinet, navigate to and select (single click) the document.
2. Click REVIEW/APPROVAL ACTIONS --> DOCUMENT REVIEW --> SUBMIT FOR CONCURRENCE.
3. If the intended CONCURROR is listed in the CURRENT ACCESS LIST:
   a. Select the user.
   b. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

   NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

   c. Click ADD.

NOTE: The CURRENT ACCESS LIST displays all users that currently have MANAGER, EDITOR, or (if the document has a viewable status of "Customer Viewable"), CUSTOMER_MANAGER or CUSTOMER_EDITOR rights to the PCF Cabinet.

4. If the intended CONCURROR is not listed in the in the CURRENT ACCESS LIST:
   a. click SELECT CONTRACTING USER NOT LISTED
   b. Type in their AKO Name
   c. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

> NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

d. Click ADD.

> NOTE: If the user is not listed under the CURRENT ACCESS LIST, adding them as a reviewer (via step 4) will assign that user TEMPORARY REVIEWER rights, which will give the user temporary access to the specific PCF Cabinet (and all files) until the user completes the workflow request, at which time his/her access to the cabinet will be removed.
>
> Customer users **must** be added to the cabinet security as CUSTOMER_MANAGER or CUSTOMER_EDITOR in order to be listed in the current access list to be sent a document for workflow.

5. Repeat steps 3 and 4 as needed to add multiple reviewers.
6. (optional) Click into the ADDITIONAL COMMENTS field and enter any detailed comments for the Reviewer(s).
7. Click the Calendar Icon and select a DUE DATE.
8. (optional) Check the box to flag the review request as a high priority.
9. Click SUBMIT.
10. Click OK to the confirmation. An e-mail notification will be sent to the selected concurror(s).

4.2.1.3 Submitting a Document for Approval

1. Open the cabinet, navigate to and select (single click) the document.
2. Click REVIEW/APPROVAL ACTIONS --> DOCUMENT APPROVAL --> SUBMIT FOR APPROVAL.
3. If the intended APPROVER is listed in the CURRENT ACCESS LIST:
   a. Select the user.
   b. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

> NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

   c. Click ADD.

> NOTE: The CURRENT ACCESS LIST displays all users that currently have MANAGER, EDITOR, or (if the document has a viewable status of “Customer Viewable”), CUSTOMER_MANAGER or CUSTOMER_EDITOR rights to the PCF Cabinet.

4. If the intended APPROVER is not listed in the in the CURRENT ACCESS LIST:
   a. Click SELECT CONTRACTING USER NOT LISTED.
   b. Type in their AKO Name.
   c. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

d. Click ADD.

NOTE: If the user is not listed under the CURRENT ACCESS LIST, adding them as a reviewer (via step 4) will assign that user TEMPORARY APPROVER rights, which will give the user temporary access to the specific PCF Cabinet (and all files) until the user completes the workflow request, at which time his/her access to the cabinet will be removed.

Customer users **must** be added to the cabinet security as CUSTOMER_MANAGER or CUSTOMER_EDITOR in order to be listed in the current access list to be sent a document for workflow.

5. (optional) Click into the ADDITIONAL COMMENTS field and enter any detailed comments for the Approver.
6. Click the Calendar Icon and select a DUE DATE.
7. (optional) Check the box to flag the approval request as a high priority.
8. Click SUBMIT.
9. Click OK to the confirmation. An e-mail notification will be sent to the selected approver.

4.2.1.4 Submitting a Document for Signature

1. Open the cabinet, navigate to and select (single click) the document.
2. Click REVIEW/APPROVAL ACTIONS → DOCUMENT APPROVAL → SUBMIT FOR SIGNATURE.
3. If the intended SIGNER is listed in the CURRENT ACCESS LIST:
   a. Select the user.
   b. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

   NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

   c. Click ADD.

NOTE: The CURRENT ACCESS LIST displays all users that currently have MANAGER, EDITOR, or (if the document has a viewable status of “Customer Viewable”), CUSTOMER_MANAGER or CUSTOMER_EDITOR rights to the PCF Cabinet.

4. If the intended SIGNER is not listed in the in the CURRENT ACCESS LIST:
   a. Click SELECT CONTRACTING USER NOT LISTED.
   b. Type in their AKO Name.
   c. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

   NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

d. Click ADD.

> NOTE: If the user is not listed under the CURRENT ACCESS LIST, adding them as a reviewer (via step 4) will assign that user TEMPORARY APPROVER rights, which will give the user temporary access to the specific PCF Cabinet (and all files) until the user completes the workflow request, at which time his/her access to the cabinet will be removed.
>
> Customer users **must** be added to the cabinet security as CUSTOMER_MANAGER or CUSTOMER_EDITOR in order to be listed in the current access list to be sent a document for workflow.

5. (optional) Click into the ADDITIONAL COMMENTS field and enter any detailed comments for the Reviewer(s).
6. Click the Calendar Icon and select a DUE DATE.
7. (optional) Check the box to flag the review request as a high priority.
8. Click SUBMIT.
9. Click OK to the confirmation. An e-mail notification will be sent to the selected signer.

4.2.1.5 Submitting a Cabinet for Review

1. Open the cabinet to be submitted.
2. Click CABINET ACTIONS --> PEER/CABINET REVIEW -->SUBMIT FOR PEER/CABINET REVIEW.
3. (optional) Enter information as appropriate for PROPOSED CONTRACTORS, TOTAL DOLLAR VALUE, AMOUNT OF FUNDS AVAILABLE and CONGRESSIONAL 24 HOUR HOLD.
4. If the intended REVIEWER is listed in the CURRENT ACCESS LIST, select the reviewer and click ADD.

> NOTE: The CURRENT ACCESS LIST displays all users that currently have MANAGER, EDITOR, CUSTOMER_MANAGER, or CUSTOMER_EDITOR rights to the PCF Cabinet.

5. If the intended REVIEWER is not listed in the in the CURRENT ACCESS LIST:
   a. click SELECT CONTRACTING USER NOT LISTED
   b. Type in their AKO Name
   c. Click ADD.

> NOTE: If the user is not listed under the CURRENT ACCESS LIST, adding them as a reviewer (via step 5) will assign that user TEMPORARY REVIEWER rights, which will give the user temporary access to the specific PCF Cabinet (and all files) until the user completes the workflow request, at which time his/her access to the cabinet will be removed.
>
> Customer users **must** be added to the cabinet security as CUSTOMER_MANAGER or CUSTOMER_EDITOR in order to be listed in the current access list to be sent a document for workflow.

6. (optional) Click into the ADDITIONAL COMMENTS field and enter any detailed comments for the Reviewer.

7. Click the Calendar Icon and select a DUE DATE.
8. Click SUBMIT.
9. Click OK to the confirmation. . An e-mail notification will be sent to the selected reviewer.

4.2.2 Cancelling Formal Workflows

NOTE: Any MANAGER of a cabinet can cancel formal workflow processes at any given time, even where the user is not the workflow initiator or current reviewer, concurror, approver, or signer.

4.2.2.1 Cancelling a Document Review/Concurrence

1. Open the cabinet, navigate to and select (single click) the document.
2. Click REVIEW/APPROVAL ACTIONS --> DOCUMENT REVIEWS --> CANCEL REVIEW/CONCURRENCE
3. Select to cancel the review for any/all of the pending reviewers/concurrors (i.e., if a document is pending review/concurrence by multiple people, it is possible to select only one or some of those people – the document will still be pending review by any users not selected).
4. Click CONFIRM REVIEW CANCELLATION or CONFIRM CONCUR CANCELLATION.
5. Click OK to the confirmation.

4.2.2.2 Cancelling a Document Approval/Signature

1. Open the cabinet, navigate to and select (single click) the document.
2. Click REVIEW/APPROVAL ACTIONS --> DOCUMENT APPROVALS --> CANCEL APPROVAL/SIGNATURE.
3. Click OK to the confirmation.

4.2.2.3 Cancelling a Cabinet Review

1. Open the cabinet.
2. Click CABINET ACTIONS --> PEER/CABINET REVIEW --> CANCEL PEER/CABINET REVIEW.
3. Click OK to the confirmation.

4.2.3 Performing Formal Workflows

Various actions are available for the reviewer/approver when performing the different workflow processes.

Workflow Process	Functions available to be performed	Reference Information
Document Review	• View the submitted document • View other documents • Modify the document • Modify other documents • Upload additional documents • Complete the workflow request	• Section 3.1 • Section 3.1 • Section 3.3 • Section 3.3 • Section 2.7 • Section 4.2.4.1
Document Concurrence	• View the submitted document • View other documents • Modify the document • Modify other documents • Upload additional documents • Complete the workflow request	• Section 3.1 • Section 3.1 • Section 3.3 • Section 3.3 • Section 2.7 • Section 4.2.4.2

Document Approval	• View the submitted document • View other documents • Modify other documents • Upload additional documents • Complete the workflow request	• Section 3.1 • Section 3.1 • Section 3.3 • Section 2.7 • Section 4.2.4.3
Document Signature	• View the document • View other documents • Modify other documents • Upload additional documents • Upload signed document/Complete the workflow request	• Section 3.1 • Section 3.1 • Section 3.3 • Section 2.7 • Section 4.2.4.4
Cabinet Review	• View documents • Modify documents • Upload additional documents • Complete the workflow request	• Section 3.1 • Section 3.3 • Section 2.7 • Section 4.2.4.5

4.2.3.1 Performing a Formal Document Review

NOTE: Performing a document review consists of viewing the submitted document. Optionally, it can also involve modifying the file, viewing additional files, and/or uploading additional files. Unless the document pending review is UPDATED AND MARKED REVIEWED (see step 8.g.), additional steps must be taken to complete the review (see Section 4.2.4.1 Completing a Formal Document Review for more information).

1. Log into PCF (https://pcf.army.mil)
2. From the DOCUMENTS/CABINETS PENDING MY WORKFLOW ACTION screen, select (single click) the document listed and identified in the workflow request e-mail.
3. Click OPEN DOCUMENT (or DOCUMENT ACTIONS --> OPEN DOCUMENT, or double click the file name).
4. If prompted, click OPEN to download the file to a local temporary folder (file will open from there) or SAVE to download to specific local folder (e.g., “My Documents” or “Desktop”) and then open from there.

   NOTE: If you know you will be only reviewing the content, and will not need to make changes, the recommended action is to click OPEN. If you know you will need to make changes to the document, the recommended action is to click SAVE and save the file to a specific/known location/folder on your computer, as you will need to eventually go back to that folder when you update the document in PCF (step 8 below).

5. Review the document.
6. (optional) View other documents to support the review
   a. Navigate to and select (single click) other documents in the cabinet.
   b. Click OPEN DOCUMENT (or DOCUMENT ACTIONS --> OPEN DOCUMENT, or double click the file name).
   c. If prompted, click OPEN to download the file to a local temporary folder (file will open from there) or SAVE to download to specific local folder (e.g., “My Documents” or “Desktop”) and then open from there.
7. (optional) Upload your own documents into the cabinet as part of your review (see Section 2.7 Uploading Documents for more information).

8. (optional) Modify the document
    a. Mark up the document as needed and save locally; note the local location.
    b. If PCF is closed, repeat steps 1-2 above.
    c. Click DOCUMENT ACTIONS --> UPDATE SELECTED DOCUMENT
    d. (optional) Enter any revision comments related to what has changed.
    e. Click BROWSE
    f. Navigate to and select the local updated file, then click OPEN.
    g. Click UPLOAD FILE ONLY or UPLOAD AND MARK REVIEWED.*
    h. Click YES to the confirmation to upload the document.

*NOTE: UPLOAD FILE ONLY will replace the existing file in PCF with the new file BUT the review process will still need to be completed (i.e., the document would still be listed as pending review) (see Section 4.2.4.1 Completing a Formal Document Review – MARK DOCUMENT REVIEWED or RE-ROUTE DOCUMENT W/O REVIEWING).

UPLOAD AND MARK REVIEWED will replace the existing file in PCF with the new file and direct the user into completing the formal document review. If UPLOAD AND MARK REVIEWED was selected, proceed with the following steps:

i. Click OK to the DOCUMENT HAS BEEN UPLOADED message.
j. Click YES to WOULD YOU LIKE TO MARK THE DOCUMENT REVIEWED?
k. (optional) Set or modify the role you served during the workflow.
l. Click into the Reviewer's Comments text field and enter comments related to your review.
m. (optional) If you are aware that the document requires additional review, and want to forward the review on to an additional reviewer:

1. Check the box next to ADDITIONAL REVIEW REQUIRED?
2. If the next reviewer is listed in the CURRENT ACCESS LIST:
    a. Select the user.
    b. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

    NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

    c. Click ADD.
3. If the next reviewer is not listed in the CURRENT ACCESS LIST:
    a. Click SELECT CONTRACTING USER NOT LISTED.
    b. Click into the SELECT USER box and type in the next reviewer's AKO name.
    c. Optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

    NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

    d. Click SUBMIT.

4. Click the CALENDAR icon and select the requested DUE DATE.
5. (optional) Check the box to flag the review request as a high priority.

n. Click SUBMIT.

9. Repeat steps 1-8 as needed. After performing the review if any of the following conditions apply, the review is not complete:

   - Step 8 (modifying/updating the document) was not performed as part of the review.
   - Step 8 was performed and at step 8.g, UPLOAD FILE ONLY was selected.
   - Step 8 was performed and at step 8.g, UPLOAD AND MARK REVIEWED was selected, but step 8.n was not performed (i.e., user cancels the MARK REVIEWED window or closes PCF before completing step 8.n).

   In these situations, the reviewer will need to complete the review process via additional steps. See Section 4.2.4.1 Completing a Formal Document Review for more information.

4.2.3.2 Performing a Formal Document Concurrence

NOTE: Performing a document concurrence consists of viewing the submitted document. Optionally, it can also involve modifying the file, viewing additional files, and/or uploading additional files. Unless the document pending concurrence is UPDATED AND MARKED CONCURRED or UPDATED AND MARKED CONCURRED WITH COMMENTS (see step 8.g), additional steps must be taken to complete the workflow request. See Section 4.2.4.2 Completing A Formal Document Concurrence for more information.

1. Log into PCF (https://pcf.army.mil)
2. From the DOCUMENTS/CABINETS PENDING MY WORKFLOW ACTION screen, select (single click) the document listed and identified in the workflow request e-mail.
3. Click OPEN DOCUMENT (or DOCUMENT ACTIONS --> OPEN DOCUMENT, or double click the file name).
4. If prompted, click OPEN to download the file to a local temporary folder (file will open from there) or SAVE to download to specific local folder (e.g., “My Documents” or “Desktop”) and then open from there.

   NOTE: If you know you will be only reviewing the content, and will not need to make changes, the recommended action is to click OPEN. If you know you will need to make changes to the document, the recommended action is to click SAVE and save the file to a specific/known location/folder on your computer, as you will need to eventually go back to that folder when you update the document in PCF (step 8 below).

5. Review the document.
6. (optional) View other documents to support the review
   a. Navigate to and select (single click) other documents in the cabinet.
   b. Click OPEN DOCUMENT (or DOCUMENT ACTIONS --> OPEN DOCUMENT, or double click the file name).

    c. If prompted, click OPEN to download the file to a local temporary folder (file will open from there) or SAVE to download to specific local folder (e.g., “My Documents” or “Desktop”) and then open from there.
7. (optional) Upload your own documents into the cabinet as part of your review. See Section 2.7 Uploading Documents for more information.
8. (optional) Modify the document
    a. Mark up the document as needed and save locally; note the local location.
    b. If PCF is closed, repeat steps 1-2 above.
    c. Click DOCUMENT ACTIONS --> UPDATE SELECTED DOCUMENT
    d. (optional) Enter any revision comments related to what has changed.
    e. Click BROWSE
    f. Navigate to and select the local updated file, then click OPEN.
    g. Click UPLOAD FILE ONLY, UPLOAD AND MARK CONCURRED, or UPLOAD AND MARKED CONCURRED WITH COMMENTS.*
    h. Click YES to the confirmation to upload the document.

*NOTE: UPLOAD FILE ONLY will replace the existing file in PCF with the new file BUT the concurrence process will still need to be completed (i.e., the document would still be listed as pending concurrence).

UPLOAD AND MARK CONCURRED or UPLOAD AND MARK CONCURRED WITH COMMENTS will replace the existing file in PCF with the new file and direct the user into completing the formal document concurrence. If either of these actions were selected (at step 8.g.), proceed with the following steps:

i. Click OK to the DOCUMENT HAS BEEN UPLOADED message.
j. Click YES to WOULD YOU LIKE TO MARK THE DOCUMENT CONCURRED?
k. Select if you CONCURRED, CONCURRED WITH COMMENTS or NON-CONCURRED with the document.
l. (optional) Set or modify the role you served during the worklflow.
m. Click into the Concurror’s Comments text field and enter comments related to your review.
n. (optional) If you are aware that the document requires additional concurrence, and want to forward the workflow request on to an additional user:
    1. Check the box next to ADDITIONAL CONCURRENCE REQUIRED?
    2. If the next concurror is listed in the CURRENT ACCESS LIST:
        a. Select the user.
        b. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

        NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

        c. Click ADD.
    3. If the next concurror is not listed in the CURRENT ACCESS LIST:
        a. Click SELECT CONTRACTING USER NOT LISTED.
        b. Click into the SELECT USER box and type in the next concurror’s AKO name.

c. Optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

> NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

d. Click SUBMIT.

4. Click the CALENDAR icon and select the requested DUE DATE.
5. (optional) Check the box to flag the review request as a high priority.

o. Click SUBMIT.

9. Repeat steps 1-8 as needed. After performing the review if any of the following conditions apply, the concurrence workflow request is not complete:

    - Step 8 (modifying/updating the document) was not performed as part of the review.
    - Step 8 was performed and at step 8.g, UPLOAD FILE ONLY was selected.
    - Step 8 was performed and at step 8.g, UPLOAD AND MARK CONCURRED, or UPLOAD AND MARK CONCURRED WITH COMMENTS was selected, but step 8.n was not performed (i.e., user cancels the MARK CONCURRED window or closes PCF before completing step 8.o).

    The reviewer will need to complete the review process via additional steps. See Section 4.2.4.2 Completing a Formal Document Concurrence for more information.

4.2.3.3 Performing a Formal Document Approval

1. Log into PCF (https://pcf.army.mil)
2. From the DOCUMENTS/CABINETS PENDING MY WORKFLOW ACTION screen, select (single click) the document listed and identified in the Approval Request e-mail.
3. Click OPEN DOCUMENT (or DOCUMENT ACTIONS --> OPEN DOCUMENT, or double click the file name).
4. If prompted, click OPEN to download the file to a local temporary folder (file will open from there) or SAVE to download to specific local folder (e.g., “My Documents” or “Desktop”) and then open from there.
5. Review the document.
6. (optional) View other documents to support the approval.
    a. Navigate to and select (single click) other documents in the cabinet.
    b. Click OPEN DOCUMENT (or DOCUMENT ACTIONS → OPEN DOCUMENT, or double click the file name).
    c. If prompted, click OPEN to download the file to a local temporary folder (file will open from there) or SAVE to download to specific local folder (e.g., “My Documents” or “Desktop”) and then open from there.
7. After reviewing the document, the approver will need to complete the approval process via additional steps. See Section 4.2.4.3 Completing a Formal Document Approval for more information.

4.2.3.4 Performing a Formal Document Signature

1. Log into PCF (https://pcf.army.mil)

2. From the DOCUMENTS/CABINETS PENDING MY WORKFLOW ACTION screen, select (single click) the document listed and identified in the Signature Request e-mail.
3. Click OPEN DOCUMENT (or DOCUMENT ACTIONS --> OPEN DOCUMENT, or double click the file name).
4. If prompted, click OPEN to download the file to a local temporary folder (file will open from there) or SAVE to download to specific local folder (e.g., "My Documents" or "Desktop") and then open from there.

NOTE: During a Signature workflow process, It is recommended that you click SAVE, and save to a known local location, as you will eventually need to refer back to that location when you replace the file in PCF with your signed version.

5. Review the document.
6. (optional) View other documents to support the approval.
   a. Navigate to and select (single click) other documents in the cabinet.
   b. Click OPEN DOCUMENT (or DOCUMENT ACTIONS --> OPEN DOCUMENT, or double click the file name).
   c. If prompted, click OPEN to download the file to a local temporary folder (file will open from there) or SAVE to download to specific local folder (e.g., "My Documents" or "Desktop") and then open from there.
7. After reviewing the document, the signer will need to complete the signature process via additional steps. See Section 4.2.4.4 Completing a Formal Document Signature, Method 1: Uploading the Signed Document, for more information.

4.2.3.5 Performing a Formal Cabinet Review

1. Log into PCF (https://pcf.army.mil)
2. From the DOCUMENTS/CABINETS PENDING MY WORKFLOW ACTION screen, select (single click) the cabinet identified in the Cabinet Review Request e-mail.
3. Navigate to and select a document needing review.
4. Click OPEN DOCUMENT (or DOCUMENT ACTIONS → OPEN DOCUMENT, or double click the file name) to open the selected document.
5. If prompted, click OPEN to download the file to a local temporary folder (file will open from there) or SAVE to download to specific local folder (e.g., "My Documents" or "Desktop") and then open from there.
6. Repeat steps 4-6 as needed to open/review additional documents.
7. (optional) Upload your own documents into the cabinet as part of your review. See Section 2.7 Uploading Documents for more information.
8. (optional) Modify documents as needed
   a. Mark up the document as needed and save locally; note the local location.
   b. If PCF is closed, repeat steps 1-2 above.
   c. Navigate to and select the document in PCF that needs to be updated
   d. Click DOCUMENT ACTIONS → UPDATE SELECTED DOCUMENT
   e. (optional) Enter any revision comments related to what has changed.
   f. Click BROWSE
   g. Navigate to and select the local updated file, then click OPEN.
   h. Click UPLOAD FILE.
   i. Repeat step 9 as needed to modify additional documents.
9. After reviewing whatever files need to be reviewed as part of the cabinet review, the reviewer will need to complete the cabinet review process via additional steps. See Section 4.2.4.5 Completing a Formal Cabinet Review for more information.

4.2.4 Completing Formal Workflows

Each of the five formal workflow processes must either be completed (by the current reviewer/approver) or canceled (by any MANAGER of the cabinet) in order for PCF to correctly log and close the workflow process.

Each type of workflow process has different methods for the reviewer/approver to perform the process of completing the workflow.

4.2.4.1 Completing a Formal Document Review

> NOTE: There are 3 potential ways to complete a formal Document Review (other than cancelling the workflow request). These completion methods can be performed by the Current Reviewer(s) only.

Method 1: Update And Mark Reviewed: Complete the Document Review as part of updating the pending document with a new version. See Section 4.2.3.1 Performing a Formal Document Review, and specifically perform step 8 using the UPDATE AND MARK REVIEWED button at step 8.g.

Method 2: Mark Document Reviewed: Mark the pending document as reviewed

1. After performing the document review, make sure the document pending review is selected.
2. Click REVIEW/APPROVAL ACTIONS --> MARK DOCUMENT REVIEWED.
3. (optional) Set or modify the role you served during the workflow.
4. Click into the Reviewer's Comments text field and enter comments related to your review.
5. (optional) If you are aware that the cabinet requires additional review, and want to forward the review on to an additional reviewer:
    a. Check the box next to ADDITIONAL REVIEW REQUIRED?
    b. If the next reviewer is listed in the CURRENT ACCESS LIST:
        i. Select the user.
        ii. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

            > NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

        iii. Click ADD.
    c. If the next reviewer is not listed in the CURRENT ACCESS LIST:
        i. Click SELECT CONTRACTING USER NOT LISTED.
        ii. Type in their AKO Name.
        iii. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

            > NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

        iv. Click ADD.
    d. Click the CALENDAR icon and select the requested DUE DATE.

    e. (optional) Check the provided box to flag the review request as a high priority.
6. Click SUBMIT.

Method 3: Re-Route Document Without A Review: Re-route the pending review to a new reviewer.

NOTE: This completion method allows the reviewer to note that he/she did not actually review the document, but is instead submitting the review to a new user that will perform the review. It is designed to be used when a document is submitted to a centralized person within a group/department and that person needs to staff it/assign it to someone else (e.g., an admin assistant or chief is going to delegate the document review to someone within their group/department).

1. Determine who needs to actually perform the review (based on comments from the Initiator, from content within the actual file, or other additional information).
2. Click REVIEW/APPROVAL ACTIONS --> RE-ROUTE DOCUMENT W/O REVIEWING/CONCURRING.
3. Click into the Comments text field and enter comments related to your findings (e.g., “Sending to Jane Smith for concurrence based on her expertise with this subject matter”).
4. (optional) Set or modify the role you served during the workflow.
5. If the next reviewer is listed in the CURRENT ACCESS LIST:
    a. Select the user.
    b. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

    c. Click Add.
6. If the next reviewer is not listed in the CURRENT ACCESS LIST:
    a. Click SELECT CONTRACTING USER NOT LISTED.
    b. Type in their AKO Name.
    c. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

    d. Click ADD.
7. Click the CALENDAR icon and select the requested DUE DATE.
8. (optional) Check the provided box to flag the review request as a high priority.
9. Click SUBMIT.

4.2.4.2 Completing a Formal Document Concurrence

NOTE: There are 3 potential ways to complete a formal Document Concurrence (other than cancelling the workflow request). These completion methods can be performed by the Current Concurror(s) only.

Method 1: Update And Mark Concurred (or Update And Mark Concurred With Comments): Complete the Document Concurrence as part of updating the pending document with a new version. See Section 4.2.3.2 Performing a Formal Document Concurrence, and specifically perform step 8 using the UPDATE AND MARK CONCURRED or UPDTE AND MARK CONCURRED WITH COMMENTS button at step 8.g.

Method 2: Mark Document Concurred: Mark the pending document as concurred (or not concurred)

1. After performing the document review, make sure the document pending review is selected.
2. Click REVIEW/APPROVAL ACTIONS --> MARK DOCUMENT CONCURRED.
3. Select CONCURRED, CONCURRED WITH COMMENTS or NON-CONCURRED as appropriate.
4. (optional) Set or modify the role you served during the workflow.
5. Click into the Concurror's Comments text field and enter comments related to your review.
6. (optional) If you are aware that the cabinet requires additional concurrence, and want to forward the document on to the next concurror:
    a. Check the box next to ADDITIONAL CONCURRENCE REQUIRED?
    b. If the next concurror is listed in the CURRENT ACCESS LIST:
        i. Select the user.
        ii. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

            NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

        iii. Click Add.
    c. If the next concurror is not listed in the CURRENT ACCESS LIST:
        i. Click SELECT CONTRACTING USER NOT LISTED.
        ii. Type in their AKO Name.
        iii. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

            NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

        iv. Click ADD.
    d. Click the CALENDAR icon and select the requested DUE DATE.
    e. (optional) Check the provided box to flag the concurrence request as a high priority.
7. Click SUBMIT.

Method 3: Re-Route Document Without Concurring: Re-route the pending concurrence request to a new concurror.

NOTE: This completion method allows the concurror to note that he/she did not actually review the document (does not concur nor non-concur), but is instead submitting the concurrence request to a new user that will concur or not concur. It is designed to be used when a document is submitted to a centralized person within a group/department and that person needs to staff it/assign it to someone else (e.g., an admin assistant or chief is going to delegate the document concurrence to someone within their group/department).

1. After reviewing the document, determine who needs to actually perform the concurrence (based on comments from the Initiator, content within the actual file, or other additional information).
2. Click REVIEW/APPROVAL ACTIONS --> RE-ROUTE DOCUMENT W/O REVIEWING/CONCURRING.
3. Click into the Concurror' s Comments text field and enter comments related to your findings (e.g., "Sending to Jane Smith for concurrence based on her expertise with this subject matter").
4. If the next concurror is listed in the CURRENT ACCESS LIST:
    a. Select the user.
    b. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

       NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

    c. Click Add.
5. If the next concurror is not listed in the CURRENT ACCESS LIST:
    a. Click SELECT CONTRACTING USER NOT LISTED.
    b. Type in their AKO Name.
    c. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

       NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

    d. Click ADD.
6. Click the CALENDAR icon and select the requested DUE DATE.
7. (optional) Check the provided box to flag the review request as a high priority.
8. Click SUBMIT.

4.2.4.3 Completing a Formal Document Approval

NOTE: There are 3 ways to complete a formal Document Approval (other than cancelling the workflow request). These completion methods can be performed by the pending approver only.

Method 1: Mark Document Approved: Mark the current version of the document as being approved.

1. Select the document in PCF.
2. Click REVIEW/APPROVAL ACTIONS --> MARK DOCUMENT APPROVED.
3. (optional) Set or modify the role you served during the workflow.
4. (optional) Click into the Comments box and enter any comments related to the approval of the document.
5. (optional) If you are aware that the document requires additional approval or needs to be signed and want to forward the document on to the next approver/signer:

a. Check the box next to SUBMIT FOR ADDITIONAL APPROVAL or SUBMIT FOR ADDITIONAL SIGNATURE.
b. If the next approver/signer is listed in the CURRENT ACCESS LIST:
    i. Select the user.
    ii. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

> NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

    iii. Click Add.
c. If the next approver/signer is not listed in the CURRENT ACCESS LIST:
    i. Click SELECT CONTRACTING USER NOT LISTED.
    ii. Type in their AKO Name.
    iii. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

> NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

    iv. Click ADD.
d. Click the CALENDAR icon and select the requested DUE DATE.
e. (optional) Check the provided box to flag the workflow request as a high priority.

6. Click SUBMIT.

Method 2: Reject Document: Reject the document as opposed to approving it.

1. Select the document in PCF.
2. Click REVIEWE/APPROVAL ACTIONS --> REJECT DOCUMENT.
3. (optional) Set or modify the role you served during the workflow.
4. (optional) Click into the Document Reject Comments box and enter comments (e.g., the reason for rejecting or what changes are needed)
5. Select the general reason for the rejection (Document Content or Incorrect Approver/Signer).
6. Click SUBMIT.

Method 3: Re-Route Document Without Approving: Re-route the pending approval request to a new approver/signer.

> NOTE: This completion method allows the current approver to note that he/she did not actually review the document (does approve nor reject), but is instead submitting the approval request to a new user that will approve, sign, or reject the document. It is designed to be used when a document is submitted to a centralized person within a group/department and that person needs to staff it/assign it to someone else (e.g., an admin assistant or chief is going to delegate the document approval to someone within their group/department).

1. After reviewing the document, determine who needs to actually perform the approval (based on comments from the Initiator, content within the actual file, or other additional information).
2. Click REVIEW/APPROVAL ACTIONS → RE-ROUTE DOCUMENT W/O APPROVING/SIGNING.

3. (optional) Set or modify the role you served during the workflow.
4. Click into the Comments text field and enter comments related to your findings (e.g., "Sending to Jane Smith for approval based on her expertise with this subject matter".).
5. Check the box next to SUBMIT FOR ADDITIONAL APPROVAL or SUBMIT FOR ADDITIONAL SIGNATURE.
6. If the next approver/signer is listed in the CURRENT ACCESS LIST:
   a. Select the user.
   b. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

      NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

   c. Click Add.
7. If the next approver/signer is not listed in the CURRENT ACCESS LIST:
   a. Click SELECT CONTRACTING USER NOT LISTED.
   b. Type in their AKO Name.
   c. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

      NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

   d. Click ADD.
8. Click the CALENDAR icon and select the requested DUE DATE.
9. (optional) Check the provided box to flag the approval request as a high priority.
10. Click SUBMIT.

4.2.4.4 Completing a Formal Document Signature

NOTE: There are 3 ways to complete a formal Document Signature request (other than cancelling the workflow request). These completion methods can be performed by the pending signer only.

Method 1: Upload a Signed Document: Complete the Signature request by uploading a signed version of the document.

1. Log into https://pcf.army.mil
2. From the View My Workflow page click on the document that needs to be signed.
3. Click REVIEW/APPROVAL ACTIONS --> UPLOAD SIGNED DOCUMENT
4. Click the link to the file to download and save it locally.
5. Sign the document as you would any document outside of PCF and save locally.
6. On the Upload Signed Document window, click the BROWSE button and navigate to the Signed Document, highlight it and click OPEN.
7. Click the UPLOAD SIGNED DOCUMENT AND MARK APPROVED button to upload the file to PCF.
8. (optional) Enter any comments you may have.
9. (optional) Set or modify the role you served during the workflow.
10. (optional) If you are aware that the cabinet requires additional approval or needs to be signed and want to forward the document on to the next approver/signer:

a. Check the box next to SUBMIT FOR ADDITIONAL APPROVAL or SUBMIT FOR ADDITIONAL SIGNATURE.
b. If the next approver/signer is listed in the CURRENT ACCESS LIST:
    i. Select the user.
    ii. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

> NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

    iii. Click Add.
c. If the next approver/signer is not listed in the CURRENT ACCESS LIST:
    i. Click SELECT CONTRACTING USER NOT LISTED.
    ii. Type in their AKO Name.
    iii. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

> NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

    iv. Click ADD.
d. Click the CALENDAR icon and select the requested DUE DATE.
e. (optional) Check the provided box to flag the workflow request as a high priority.

7. Click SUBMIT.

Method 2: Reject Document: Reject the document as opposed to signing it.

1. Select the document in PCF.
2. Click REVIEWE/APPROVAL ACTIONS --> REJECT DOCUMENT.
3. (optional) Click into the Document Reject Comments box and enter comments (e.g., the reason for rejecting or what changes are needed)
4. Select the general reason for the rejection (Document Content or Incorrect Approver/Signer).
5. Click SUBMIT.

Method 3: Re-Route Document Without Signing: Re-route the pending signature request to a new approver/signer.

> NOTE: This completion method allows the requested signer to note that he/she did not actually review the document (does approve nor reject, and did not sign), but is instead submitting the signature request to a new user that will approve, sign, or reject the document. It is designed to be used when a document is submitted to a centralized person within a group/department and that person needs to staff it/assign it to someone else (e.g., an admin assistant or chief is going to delegate the document approval to someone within their group/department).

1. After reviewing the document, determine who needs to actually perform the approval (based on comments from the Initiator, content within the actual file, or other additional information).
2. Click REVIEW/APPROVAL ACTIONS → RE-ROUTE DOCUMENT W/O APPROVING/SIGNING.

3. Click into the Comments text field and enter comments related to your findings (e.g., "Sending to Jane Smith for approval based on her expertise with this subject matter".).
4. Check the box next to SUBMIT FOR ADDITIONAL APPROVAL or SUBMIT FOR ADDITIONAL SIGNATURE.
5. If the next reviewer is listed in the CURRENT ACCESS LIST:
   a. Select the user.
   b. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

   > NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

   c. Click Add.
6. If the next approver/signer is not listed in the CURRENT ACCESS LIST:
   a. Click SELECT CONTRACTING USER NOT LISTED.
   b. Type in their AKO Name.
   c. (optional) Select a Role from the dropdown menu to identify what role the selected user will serve during this specific workflow.

   > NOTE: The Workflow Role is used solely for historical reference/informational purposes only. It does not affect access or functionality in PCF in any manner.

   d. Click ADD.
7. Click the CALENDAR icon and select the requested DUE DATE.
8. (optional) Check the provided box to flag the approval request as a high priority.
9. Click SUBMIT.

4.2.4.5 Completing a Formal Cabinet Review

> NOTE: The following process is the **only** method of completing a formal Cabinet Review (other than cancelling the Cabinet Review) and can be performed by the Current Reviewer only.

1. After performing a cabinet review (see Section 4.2.3.5 Performing a Formal Cabinet Review), from the open cabinet, click CABINET ACTIONS --> PEER/CABINET REVIEW --> COMPLETE PEER/CABINET REVIEW.
2. Click into the Reviewer's Comments text field and enter comments related to your review.
3. (optional) If you are aware that the cabinet requires additional review, and want to forward the review on to an additional reviewer:
   a. Check the box next to ADDITIONAL REVIEW REQUIRED?
   b. If the next reviewer is listed in the CURRENT ACCESS LIST, select (single click) their name and click ADD.
   c. If the next reviewer is not listed in the CURRENT ACCESS LIST:
      i. Click SELECT CONTRACTING USER NOT LISTED.
      ii. Click into the SELECT USER box and type in the next reviewer's AKO name.
      iii. Click SUBMIT.
   d. Click the CALENDAR icon and select the requested DUE DATE.
4. Click SUBMIT.

5.0 Acquisition Management

Acquisition Management (AM) in PCF involves multiple functions that are used to capture and track various data elements regarding the specific contractual action that the PCF Cabinet corresponds to. Each Acquisition Management function is accessed within a Cabinet as needed to record applicable information. While there are various ways to access these functions, the primary method is via the CABINET ACTIONS --> ACQUISITION MANAGEMENT menu item.

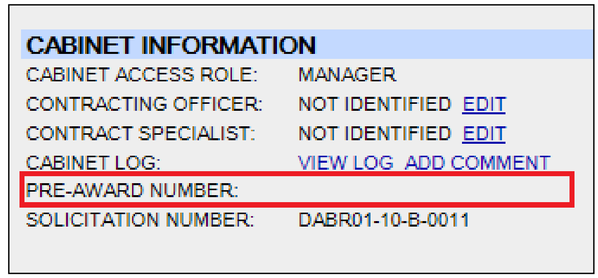
AM Function Name	Purpose
Acquisition Milestones	Capture forecasted, revised, and actual dates for applicable milestones during the pre-award phase (e.g., from “receipt of requirements” to “award”).
Funding/FMS Information	Capture and track anticipated (or actual) Funding Documents (e.g., PRs/PRONs), Funding Information (e.g., Dollars to be Obligated), and any applicable FMS information (e.g., MILSTRIP info).
Supplemental Information	Capture and track various, but relatively uncommon information (e.g., ACAT Program Info, Hybrid Contract Types)
PRAFT Information	Peer Review Automated Forecasted Tool (PRAFT) - Capture and track the progress and completion of a formal peer review as applicable.
Protests	Capture and track the receipt of and resolution to a protest submitted against the action.
Post-Award Information	After awarding an action, view official post-award information (e.g., Funding information) from official systems (e.g., FPDS-NG).
Claims	After awarding an action, capture and track the receipt of and resolution to a claim submitted against the action.

NOTE: Cabinet MANAGERS and EDITORS can create/edit information in these functions (although at certain points, such as after the action is awarded, some information will be uneditable even for MANAGERS and EDITORS); Cabinet READERS will only be able to view information others have entered.

CUSTOMER_MANAGERS and CUSTOMER_EDITORS will have limited access to create/edit information within the acquisition management dialogs, but will be able to see everything within them.

5.1 Assigning a PAN to Older Cabinets

A Cabinet must have a PAN (Pre-Award Number) to utilize any Acquisition Management function. **New cabinets will be assigned a PAN automatically when they are created.** For older cabinets that do not have a PAN, any Cabinet MANAGER can perform the following steps in to assign a PAN, and then Acquisition Management functions would be available for use in that cabinet



1. Open the Cabinet.
2. Go to CABINET ACTIONS --> EDIT CABINET
3. Complete **all** Required Fields on any (or all) of the following tabs:
    a. Information Tab
    b. Contacts Tab
    c. Records Management Tab
4. Click UPDATE.

5.2 Acquisition Milestones

The Acquisition Milestones dialog is used to capture forecasted, revised, and actual dates for applicable milestones during the pre-award phase (e.g., from “receipt of requirements” to “award”). The function can be used to establish an initial schedule of a requirement, and, after award, compare the forecasted schedule to the actual dates to address potential process enhancements on future actions.

It is recommended that the Initial Forecast Dates for all required and any “optional, but anticipated” milestones be entered soon after the cabinet is created so that an initial schedule for the action is established and available.

Saving an Actual Date for the “Award” milestone establishes the PCF Cabinet as awarded in VCE, and the action as compliant for being “forecasted” (for those Organizations who report this metric). It also enables some AM functions that are not available to be used until an Actual Award date is saved (e.g., Post-Award Information and Claims)

NOTE: The following six fields on the Cabinet Profile are required before the Acquisition Milestone function can be used/opened:

- Procurement Action (Information Tab)
- Procurement Method (Information Tab)
- Procurement Type (Information Tab)
- Procurement Category (Information Tab)
- Dollars to be Obligated (Records Management Tab or Funding/FMS Information)
- Total Contract Value (Records Management Tab or Funding/FMS Information)

The list of milestones presented in the Acquisition Milestones function are based on the specific values selected for the 6 fields listed above. The list of available milestones can only be modified by changing the values of these fields within the CABINET ACTIONS --> EDIT CABINET (i.e., additional/custom milestones are not available to be added).

1. Open the Cabinet
2. Go to CABINET ACTIONS --> ACQUISITION MANAGEMENT --> ACQUISITION MILESTONES.

NOTE: Acquisition Milestones can also be opened via the following methods:

- Click VIEW/EDIT next to ACQUSITION MILESTIONES in the Cabinet Meta-Data Panel on the right hand side.
- Click on a link in the Missed/Upcoming Milestones in the Cabinet Meta-Data Panel on the right hand side.
- Select a Milestone from the Missed/Upcoming Milestones tab under VIEW MY WORKFLOW (Primary KO and KS only)
- Select a Milestone from the My Unawarded Actions tab under VIEW MY WORKFLOW (Primary and Secondary KO and KS only).

3. (optional) Enter Milestone information as needed/available/applicable.
4. (optional) If applicable, select the Risk Rating (High, Medium, or Low) associated with an individual milestone (e.g., how important the milestone is)
5. (optional) As needed, click ADD/VIEW (or for READERS, VIEW), to add a new comment or view existing comments related to an individual milestone.
   a. To add a new comment, click into the text box, enter the comment, and then click ADD COMMENT or ADD COMMENT & CLOSE.
   b. To switch to the comments of a different milestone, select the specific Milestone from the drop down menu at the top of the Milestone Comments dialog.
6. Once finished making changes, the following buttons are available to be used as needed:
   a. OPEN PDF – prompts the user to download a PDF version of the current Acquisition Milestone information.
   b. EXPORT WITH COMMENTS – prompts the user to download a PDF version of the current Acquisition Milestone information to also include any comments added under any available milestone.
   c. SAVE – saves the changes/updates to the Acquisition Milestone function. Leaves the dialog window open.
   d. SAVE & CLOSE – saves the changes/updates to the Acquisition Milestone function and closes the dialog window.
   e. CLOSE – close the Acquisition Milestone dialog window, but does not save any new changes (e.g., new since the last time SAVE or SAVE & CLOSE was selected).

NOTE: Specific date fields can be entered on individual Milestones as needed, available, or applicable. Milestones marked as required (as denoted by a red asterisk) are **not** required to be entered (or checked for completion) until an Actual Award Date is entered. Validations to make sure all required (and forecasted) milestones will **only** occur when an Actual Award Date is entered/saved.

Milestone Date Fields:

- Initial Forecast Date:
  - Definition: The first anticipated date the milestone is expected to be complete.
  - Required to be filled out before an Actual date can be saved.
  - At Award, required to be filled out for all Required Milestones (i.e., milestones marked with a red asterisk).
  - Once saved, only a PCF Admin can change or remove the date entered (a comment will be required).
- Revised Forecast Date:
  - Definition: A change/update to the original forecast - used as needed if/when the current forecasted date needs to be changed.
  - The Revised Forecast Date field can be updated at any time by MANAGERS/EDITORS as needed (e.g., field can be changed if/when the revised forecast changes again).
  - Entering any new/updated date in the Revised Forecast Date field will require a Comment (e.g., Why the forecasted date is changing?).
- Actual Date:
  - The actual date the milestone was completed/addressed.
  - Once saved, only a PCF Admin can change or remove the date entered (a comment will be required).
  - CUSTOMER_MANAGERS and CUSTOMER_EDITORS will not be able to enter the actual dates for milestones under Phase 1, Joint Acquisition and Planning, and will have read-only access for milestones in Phases 2-4.
  - At Award, required to be filled out for all Required Milestones (i.e., milestones marked with a red asterisk).
  - The Actual Date for the Award Milestone has additional rules:
    - A Contract/Order/Mod number **must** be assigned to the PCF Cabinet before an Actual Award Date can be entered.
    - All required Milestones must have both Initial Forecast Date and an Actual Date before the Actual Award Date can be saved.
    - Any optional Milestones that have an Initial Forecast Date must also have an Actual Date before the Actual Award Date can be saved.
    - Once an Actual Award Date is saved, the six fields in the Cabinet Profile that establish the milestones, as well as the Cabinet's Cabinet Type will be locked for ALL users. A PCF admin would be able to remove the Actual Award Date if changes to this Cabinet Profile

information was needed (those changes may result in a change to the available milestones).

5.3 Funding/FMS Information

The Funding/FMS Information dialog is used to captured and track anticipated (or actual) Funding Info, including specific PRs/PRONs that will be used and the dollar amount that will be obligated. It is also used to track FMS information (e.g., MILSTRIP info) if/when applicable.

NOTE: Once an Actual Award Date is saved in the ACQUISITION MILESTONE function, PR/PRON and Funding Information will be reported from the official sources of that information (e.g., SPS/PADDS and FPDS-NG); therefore, there is no formal requirement to update the Funding Documents and Funding Information (used for planning/tracking during the Pre-award phase).

1. Open the cabinet.
2. Go to CABINET ACTIONS --> ACQUISITION MANAGEMENT --> FUNDING/FMS INFORMATION.

   NOTE: The Funding/FMS Information dialog can also be opened by clicking VIEW/EDIT next to FUNDING/FMS INFO in the Cabinet Meta-Data Panel on the right hand side.

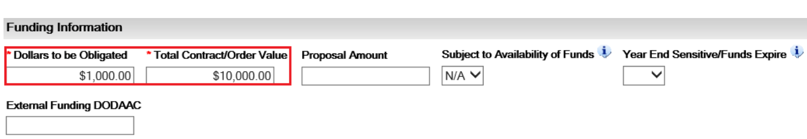
3. (optional) Enter Funding Document information
   a. Enter the PR/PRON number of the Funding Document.
   b. (optional) Enter the Planned Fund Type (e.g., “R&D”).
   c. (optional) Enter the Planned Dollars.

      NOTE: The Planned Fund Type and Planned Dollars are optional fields that can be used to enter in the anticipated fund type and/or dollars of the PR/PRON subject to recertification of funds prior to award, generally found in support of the various logistic centers within the LCMC community.

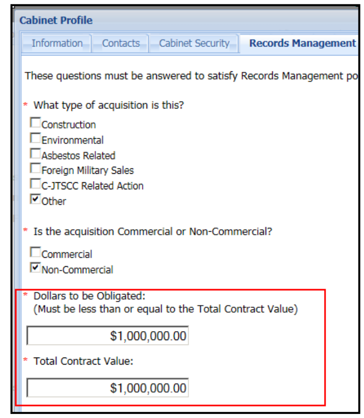
      A daily overnight feed from SPS/PADDS provides the Account Classification, Fund Type, and Dollars of approved/finalized PR/PRONS; if a matching PR/PRON is available in those systems, the information from that external record will be displayed when the PR/PRON is added (and if found, any Planned Fund Type or Planned Dollars entered for that PR/PRON will not be used).

   d. Click ADD RECORD. The PR/PRON information will now be displayed in the table.
   e. Repeat step 3 as needed to add additional Funding Documents.

4. (optional) Enter Funding Information



NOTE: Dollars to be Obligated and Total Contract Value are required fields in the Funding/FMS dialog (see below), but those values are first set on the Records Management tab when the cabinet is created (see right). These two fields can be updated in either function until an Actual Award Date is entered for the Cabinet.



5. (optional) As applicable, enter FMS Information
   a. Select YES next to FMS Support
   b. Select the Type of FMS record (Army or Non-Army)
   c. For Army FMS information, enter the MILSTRIP number; for Non-Army FMS information, enter the MILSTRIP number, Country Code, FMS Case Number and Case Line.

   NOTE: VCE receives a daily overnight feed of Army FMS cases from USASAC. The MILSTRIP entered in PCF for an Army FMS case **must** be available from this feed or the MILSTRIP will not be accepted/able to be entered. Please contact your local PCF Admin or USASAC POC if a MILSTRIP you believe should be available results in this validation error.

   If entering Non-Army related FMS information, there are no validations against other systems/information.

   d. Click ADD RECORD.
   e. Repeat step 5 as needed to add additional MILSTRIPs to the action.

5.4 Supplemental Information

The Supplemental Information dialog is available to be used as needed to capture various data elements that are often not applicable for a majority of actions. All fields in the Supplemental Information dialog are optional (and available to be used only when applicable for the action) except for one. The Primary Contract Type field is required, but this field is initial input during the Cabinet creation process in the Information tab of the Cabinet Profile.

1. Open the Cabinet
2. Go to CABINET ACTIONS --> ACQUISITION MANAGEMENT --> SUPPLEMENTAL INFORMATION.

   NOTE: The Supplemental Information dialog can also be opened by clicking VIEW/EDIT next to SUPPLEMENTAL INFO in the Cabinet Meta-Data Panel on the right hand side.

3. Fill out individual field(s) as needed/applicable:

Supplemental Information Fields:

- ACAT Support: Select the appropriate value if/when the action is in support of an ACAT program.
- Indefinite Contract (IDC) Type: Select the Indefinite Contract (IDC) Type for this procurement action.
- Delegation Of Services Oversight: If someone other than a COR will be/is providing oversight for the action, identify who that will be in this field. If a COR will be/is already appointed, leave this field blank. Completing this field will remove the requirement to have a COR appointed in OSD CORT.
- Customer Requirement Number: Identify a customer requirement number. This is an optional field that is also on the Contacts tab of the in the cabinet profile and can be updated/modified in either dialog window.
- Customer Priority: Identify the criticality ranking of the acquisition based on input by the supported customer.
- Labor Code: Identify the labor code. This is an optional free text field.
- Contract Office Priority: Allows contracting to identify a relative priority (1-3, 1 being the highest priority) of an unawarded action. Customers are not able to view, set, or modify the value.
- Request for Equitable Adjustment (REA): Allows users to identify if the action is associated with a request for equitable adjustment for reporting.
- Anticipated Place of Performance: These are an optional set of fields (City, State, Zip, and Country) that are also on the Records Management tab of the in the cabinet profile and can be updated/modified in either dialog window.
- Is this a Follow On/Bridge Effort?: Select either no, or the most appropriate identification of follow on bridge combination from the selection.
- Follow On to Contract Number: When the PCF Cabinet (new action) is a follow on to an existing contract, use this field to identify the old/existing contract/order that the new action is replacing. Once entered, the system will display the Completion Date and Dollar Value of the action as reported by FPDS-NG to be used for visibility purposes.
- Reason for Bridge: If one of the bridge selections for Follow on/Bridge Effort is selected, select a reason from the drop down for why the bridge is needed.
- Description of Other: If other is selected in the Reason for Bridge drop-down, enter a text description of why the bridge was needed.
- Market Research, Special Notice, and Local/Unpublicized Solicitations: Generate a unique solicitation number for use with Market Research, Special Notice, and/or Local/Unpublicized Solicitation number utilizing a random number generator. NOTE: This number must be manually entered in the SOLICITATION NUMBER field (within CABINET ACTIONS --> EDIT CABINET) to establish the Cabinet Name as this Solicitation Number.

- Primary Contract Type: Select the type of contract type as defined in FAR Part 16 that applies to this procurement. This field is first established the Information tab of the in the cabinet profile and can be updated/modified in either dialog window.
- Secondary Contract Type: The secondary type of contract, if the award will be a hybrid, as defined in FAR Part 16 that applies to this procurement.
- Tertiary Contract Type: The tertiary type of contract is available if the award will be a hybrid, as defined in FAR Part 16 that applies to this procurement.

5.5 PRAFT Information

The PRAFT Information function (Peer Review Automated Forecasting Tool) is available to be used as needed to track the need for and progress/completion of both formal and local peer review. Utilizing the function is optional, but once used, multiple fields will be required.

1. Open the Cabinet.
2. Go to CABINET ACTIONS --> ACQUISIITON MANAGEMENT --> PRAFT INFORMATION.

> NOTE: The PRAFT Information dialog can also be opened by clicking VIEW/EDIT next to PRAFT INFO in the Cabinet Meta-Data Panel on the right hand side.

3. (optional) Select the READY FOR REVIEW date (if selected, the PEER REVIEW TYPE field will be required).

> NOTE: This is the date that the contracting team is ready to move forward with the Initial phase of the Peer Review Process. All required documentation should be complete to include review and approval at the appropriate level.

4. Select the PEER REVIEW TYPE (optional, but required when any date fields in the PRAFT dialog are filled out (e.g., usually required when using the PRAFT Information function)).

> NOTE: Select the appropriate review type based on the Peer Review Chair authority; please refer to approval thresholds.
>
> **Peer Review Types:**
> - COCO – Chief of the Contracting Office (Directorate)
> - DASA(P) – Deputy Assistant Secretary of the Army for Procurement
> - HCA – Head of Contracting Activity
> - Local – Group or Division Chief
> - OSD – Office of the Secretary of Defense
> - PARC – Principal Assistant Responsible for Contracting

5. For any individual applicable phase the Peer Review involves, complete the following fields:
   a. Start Date: Date the review started (or is scheduled to start).

b. End Date: Date the review ended (or is scheduled to end).
c. Status: The current status of the review

> **Status values:**
> - Complete – Review for the phase has been completed
> - High Risk of Slippage – Review for the phase will most likely not be completed as scheduled (requires NOTES)
> - Moderate Risk of Slippage – Review for the phase might not be completed as scheduled (requires NOTES)
> - On Schedule – Review for the phase is in progress as scheduled.

d. Notes: Any comments/notes related to the Review

> NOTE: This field is optional unless the STATUS is set to MODERATE RISK OF SLIPPAGE or HIGH RISK OF SLIPPAGE (then NOTES will be required).
>
> If dates change, include the original date(s) for each OSD phase/SRB/CRB in the NOTES field and the specific reason for the slippage. This information will help provide metric information to Army Leadership

6. (optional) Enter any comments into the PEER REVIEW LESSONS LEARNED field regarding your experience with the Peer Review process.
7. Select any of the following buttons as needed:
   a. SAVE: saves any updates to the dialog and closes the function.
   b. RESET: clears ALL completed fields in the dialog (does not do a SAVE).
   c. CLOSE: close the function without saving changes.

5.6 Protests

The PROTEST function is used to track the receipt of and subsequent resolution to submitted protests against the action.

5.6.1 To Create a New Protest Record

1. Open the cabinet
2. Go to CABINET ACTIONS --> ACQUISITION MANAGEMENT --> PROTESTS --> CREATE PROTEST.

> NOTE: A new Protest Record can also be opened by selecting CREATE next to PROTESTS in the Cabinet Meta-Data Panel on the right hand side, or by going to the VIEW PROTESTS function, and then clicking CREATE PROTEST in that dialog window.

3. Fill out applicable fields. All Required fields (as denoted by a red asterisk) must be completed before the Protest Record can be saved.

> **Protest Record Fields:**
> - Protest Alert Received: identify if protest was received Prior To Award or After Award.
> - Debriefing Provided: Yes or No.

- Debriefing Method: Face-To-Face, Written, or Telephonic
- Contractor DUNS: the DUNS number of company the protest was submitted by (CONTRACTOR NAME will automatically populate based information from FPDS-NG).
- Protest Receipt Information
  - Filed On: date the protest was received.
  - File Number: local file number/id of the Protest (if applicable)
  - Received Via: how the protest was received (e.g., via E-mail, Letter, etc.)
  - Forecasted Resolution Date: the anticipated date the protest is expected to be resolved/addressed.
- Basis for the Protest
  - Allegations: general categories of justification for the protest (multiple selections possible)
  - Other Allegations: a text field for allegations not specifically addressed or that require additional clarification (not displayed/available for all ALLEGATION TYPES).
  - Basis Remarks: comments regarding the rationale for the protest based on input from the protestor.
  - CICA Stay in Effect: Yes, No, or N/A
  - CICA Override Approved by HCA: Yes, No, or N/A
  - ADR/Outcome Prediction Conducted: Yes, No, or N/A
  - COFC – Injunctive Relief Granted: Yes or No
- Level of the Protest:
  - Level: what level the protest was submitted to (e.g., Agency/KO, GAO, etc.).
  - Previously Protested at Agency Level: Identifies if action has be previously protested at an Agency Level.
  - GAO Case Type: Identify the GAO Case Type when/if applicable.
- Protest Remarks:
  - Discussions Held: Yes or No
  - Comments/opinions of the Protest Record creator (e.g., KO/Specialist regarding the protest.
- Point of Contact:
  - Contracting Organization Attorney: Identify the Contracting Organization Attorney that will be involved in the resolution of the Protest (selectable names come from M&S-LAWYERS module – contact your local M&S Administrator if a name is not available).
  - Bid Protest Attorney: Free text field to enter the name of the Bid Protest Attorney
  - Bid Protest Attorney Organization: AMC, KFLD, or USACE
  - Contracting Organization Attorney Remarks: Comments regarding the protest (field can only be edited by the selected Contracting Organization Attorney on the record).

- POC(s) Emails: Identify other POCs (by e-mail address) that will be involved with the protest (e.g., a local protest coordinator, group/division chief, etc.). An automatic e-mail notification is sent to all POCs (including the identified Lawyer/Legal Advisor) when the Protest Record is first created/saved, and again once it is established as resolved.

- Resolution:
  - Resolution Type: Once the protest is addressed, this field identifies the ultimate resolution of the protest (e.g., Protest Denied, Protest Sustained, etc.). Selecting a value in this field makes other fields in the section to become available and/or required. **Once the record is saved with a Resolution Type, the protest record is considered "resolved".**
  - Date of Decision: The date the resolution decision occurred.
  - (optional) Cost to Process Protest: An estimated (or actual) dollar value of the cost accrued while processing the protest (e.g., man hours/resources involved)
  - Reason For Withdrawal: CORRECTIVE ACTION TAKEN, REASON UNKNOWN, or OTHER
  - Reason for Dismissal: Based on resolution(s), can select multiple reasons as needed.
  - Basis for Voluntary Corrective Action Taken: Based on resolution(s), can select multiple reasons as needed.
  - Basis for KO or AMC sustained/GAO Corrective Action Recommendation/COFC: Based on resolution(s), can select multiple reasons as needed.
  - Partially Sustained/Granted: Based on resolution(s), select Yes, No, or N/A.
  - Briefly Describe GAO's Recommendation: free text entry
  - GAO Recommendation Rejected: Select Yes or No.
  - COFC – TRO Granted: Select Yes or No.
  - COFC – Injunctive Relief: Select Yes or No.
  - Costs Awarded Sustained/Granted: Select Yes or No.
  - Costs Awarded Undue Delay: Select Yes or No.
  - Contracting Organization Lessons Learned (free text)
  - Attorney Lessons Learned (free text)
  - Corrective Action Taken: Identifies if corrective action needed to be take based on how the protest was resolved.
  - Resolution Remarks: Comments/notes regarding the resolution (e.g., a justification of the decision).

4. Click CREATE and then OK to the confirmation message to close the window and save the Protest Record (or click CLOSE to close the window without saving/creating the record).

NOTE: Once a Protest Record is saved, it cannot be deleted; instead the Protest Record can be established as resolved with a Resolution Type of ADMIN ERROR, with clarification/justification entered in the Resolution Remarks (e.g., Protest Record created in the incorrect cabinet).

5.6.2 To View/Modify/Resolve an Existing Protest Record

1. Open the Cabinet.
2. Go to CABINET ACTIONS --> ACQUISITION MANAGEMENT --> PROTESTS --> VIEW PROTESTS. A list of existing unresolved Protest Records created in the PCF Cabinet will be displayed.

NOTE: Existing Protest Records can also be accessed by selecting VIEW next to PROTESTS in the Cabinet Meta-Data Panel on the right hand side.

3. To view a list of all Protest Records for the action (i.e., to include/access Resolved Protest Records, select the SHOW ALL radio button in the top right hand side of the dialog window.
4. To open an individual Protest Record, select the DUNS number/Contractor Name in the RECEIVED BY column.
5. Update/modify fields in the Protest Record as needed.

NOTE: See Section 5.6.1 for a list of the Protest Record Fields.

To establish a submitted Protest as Resolved, the RESOLUTION section at the bottom of the Protest Record must be completed.

6. Click SAVE to save any updates/changes.
7. (optional) Click EXPORT PDF to generate/download a PDF version of the most recently saved version of the Protest Record.

NOTE: If the record is updated/modified (step 5), but the record is not saved (step 6), the exported PDF will **not** include any changes that have been made since the last save.

8. Click CLOSE to close the dialog window (does **not** save any changes, step 6 **must** be performed first to save updates).

5.7 Post-Award Information

The Post-Award Information function is used to view specific official information about the action from external systems (e.g., SPS/PADDS and FPDS-NG), and to capture four dates related to Post-Award Milestones when/if applicable.

NOTE: The POST-AWARD INFORMTION function can **only** be accessed once an Actual Award Date is entered/saved in the ACQUISITION MILESTONES function (i.e., once the cabinet is established as “Awarded”).

In order for values to be displayed in many of fields in the dialog, the Contract/Order/Mod number assigned to the PCF Cabinet **must** match the Contract/Order/Mod number of an existing record in the appropriate external systems (e.g., SPS/PADDS and FPDS-NG), and those values cannot be changed in PCF (i.e., if any the value of any read only field is incorrect, it would have to be corrected in the appropriate external system).

1. Open the Cabinet
2. Go to CABINET ACTIONS --> ACQUSITION MANAGEMENT --> POST-AWARD INFORMATION.

> NOTE: The POST-AWARD dialog can also be opened by clicking VIEW/EDIT in the Cabinet Meta-Data Panel on the right hand side. This link will **only** be available once the PCF Cabinet has an Actual Award Date.

3. View the Post-Award Information as needed.
4. (optional) Enter dates for any of the following four Post-Award Milestones as applicable:
   a. Post Award Conference Date
   b. Award Synopsis
   c. Debrief Unsuccessful Offerors
   d. J&A Published
5. Click SAVE to save any changes and close the dialog window (i.e., click SAVE if step 4 was performed).
6. Click CLOSE to close the dialog window without saving any changes.

5.8 Contractor Claims

The CONTRACTOR CLAIMS function is used to track the receipt of and subsequent resolution to a submitted claim against the awarded action.

> NOTE: A Claim Record can **only** be created once an Actual Award Date is entered/saved in the ACQUISITION MILESTONES function (i.e., once the cabinet is established as "Awarded").

5.8.1 To Create a New Claim Record

1. Open the cabinet
2. Go to CABINET ACTIONS --> ACQUISITION MANAGEMENT --> CONTRACTOR CLAIMS --> CREATE CLAIM.

> NOTE: A new Claim Record can also be opened by selecting CREATE next to CONTRACTOR CLAIMS in the Cabinet Meta-Data Panel on the right hand side (only displayed after an Actual Award Date has been saved), or by going to the VIEW CLAIMS function, and then clicking CREATE CLAIM in that dialog window.

3. Fill out applicable fields. All Required fields (as denoted by a red asterisk) must be completed before the Claim Record can be saved.

Claim Record Fields:

- Claim Received
  - Received On: The date the claim was received by contracting.
  - Claim Submitted On Behalf Of: Identifies if the Prime Contractor or a Subcontractor submitted the claim; if Subcontract is selected, the user will be required to enter the Subcontractor DUNS number.
- Claim Accrual Information
  - Date Of Accrual Of Claim: The date the claim accrues.
  - Forecasted Resolution Date: The date the claim is expected to be resolved.
- Claim Amount Information
  - Dollar Amount of Claim: The net value of the submitted claim.
  - Did Contractor Certify Claim? (YES/NO)
- Basis for the Claim
  - Basis Type: The reason the claim was submitted.
  - Basis Remarks: Free Text field for contracting to enter comments as desired.
- Claim Appeal
  - Was An Appeal Submitted? (YES/NO). If set to YES, the following fields will be displayed:
  - Date of Appeal
  - Basis of Appeal
  - Forecasted Appeal Date
- Remarks: Free Text field for contracting to enter comments as desired.
- Point Of Contact: Allows contracting to identify if a lawyer or legal advisor is part of the claims process. The list of individuals will come from the VCE-M&S sub module, VCE-M&S Lawyers.
- Resolution: The type of resolution of the claim.
- Resolution Date: The date the claim was resolved.
- Decision Amount: The dollar value of the claim if not dismissed.
- Resolution Remarks: Remarks on the resolution of the claim.

4. Click CREATE and then OK to the confirmation message to close the window and save the Claim Record (or click CLOSE to close the window without saving/creating the record).

NOTE: Once a Claim Record is saved, it cannot be deleted; instead the Claim Record can be established as resolved with a Resolution Type of WITHDRAWN, with clarification/justification entered in the Resolution Remarks (e.g., Claim Record created in the incorrect cabinet).

5.8.2 To View/Modify/Resolve an Existing Claim Record

1. Open the Cabinet.

2. Go to CABINET ACTIONS --> ACQUISITION MANAGEMENT --> CONTRACTOR CLAIMS --> VIEW CLAIMS. A list of existing unresolved Claim Records created in the PCF Cabinet will be displayed.

> NOTE: Existing Claim Records can also be accessed by selecting VIEW next to CONTRACTOR CLAIMS in the Cabinet Meta-Data Panel on the right hand side.

3. To view a list of all Claim Records for the action (i.e., to include/access Resolved Claim Records), select the SHOW ALL radio button in the top right hand side of the dialog window.
4. To open an individual Claim Record, select the DUNS number/Contractor Name in the RECEIVED BY column.
5. Update/modify fields in the Claim Record as needed.

> NOTE: See Section 5.8.1 To Create a New Claim Record for a list of the Protest Record Fields.
>
> To establish a submitted Claim Record as Resolved, the RESOLUTION section at the bottom of the Claim Record must be completed.

6. Click SAVE to save any updates/changes.
7. (optional) Click EXPORT PDF to generate/download a PDF version of the most recently saved version of the Claim Record.

> NOTE: If the record is updated/modified (step 5), but the record is not saved (step 6), the exported PDF will **not** include any changes that have been made since the last save.

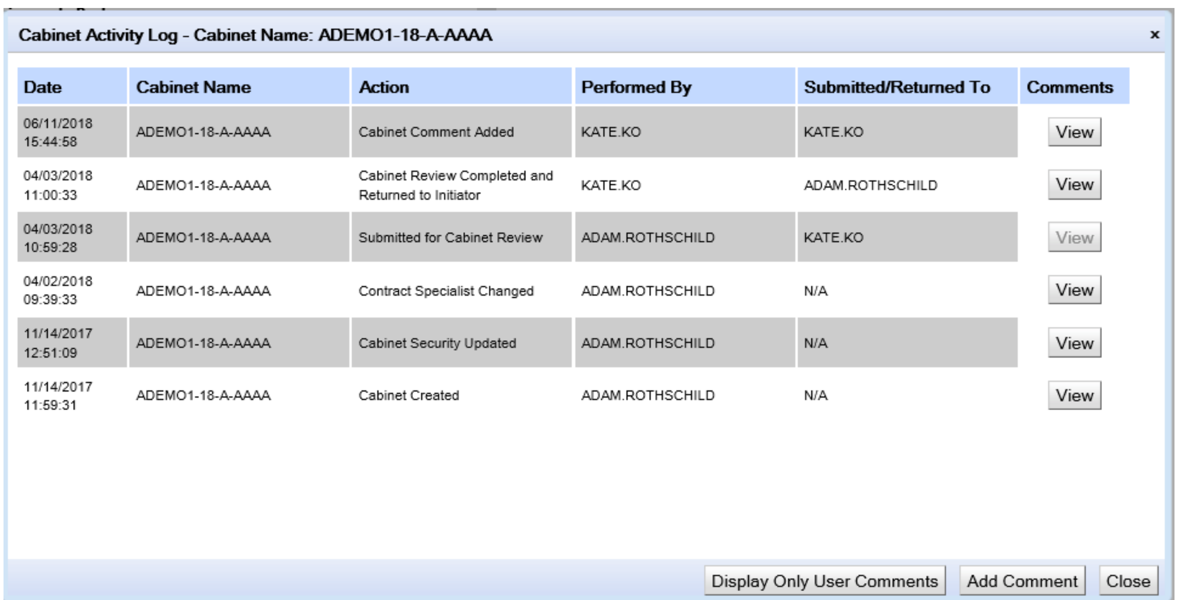
8. Click CLOSE to close the dialog window (does **not** save any changes, step 6 **must** be performed first to save updates).

6.0 Activity Logs

6.1 Cabinet Log

The Cabinet Log displays historical information regarding the open cabinet (e.g., Creation/Change dates, Cabinet Review events). The Cabinet Log also includes functionality to add comments to be entered as needed related to the cabinet.

1. Open the cabinet.
2. Click ACTIVITY LOGS --> CABINET LOG.
3. (optional) To add a comment to the Cabinet Log, click ADD COMMENT, enter your comment, and then click SUBMIT. The comment will be listed as a new log event.
4. (optional) To view specific comments of a log event (if available), click the VIEW button next to the log event. If the log event does not have comments associated with it, the VIEW button will be grayed out.
5. (optional) If comments have been entered previously, click DISPLAY ONLY USER COMMENTS to filter out all other log events from the display. To see all events again, click DISPLAY ALL.
6. Click CLOSE to close the Cabinet Log and return back to the Cabinet.


Cabinet Activity Log - Cabinet Name: ADEMO1-18-A-AAAA

Date	Cabinet Name	Action	Performed By	Submitted/Returned To	Comments
06/11/2018 15:44:58	ADEMO1-18-A-AAAA	Cabinet Comment Added	KATE.KO	KATE.KO	View
04/03/2018 11:00:33	ADEMO1-18-A-AAAA	Cabinet Review Completed and Returned to Initiator	KATE.KO	ADAM.ROTHSCHILD	View
04/03/2018 10:59:28	ADEMO1-18-A-AAAA	Submitted for Cabinet Review	ADAM.ROTHSCHILD	KATE.KO	View
04/02/2018 09:39:33	ADEMO1-18-A-AAAA	Contract Specialist Changed	ADAM.ROTHSCHILD	N/A	View
11/14/2017 12:51:09	ADEMO1-18-A-AAAA	Cabinet Security Updated	ADAM.ROTHSCHILD	N/A	View
11/14/2017 11:59:31	ADEMO1-18-A-AAAA	Cabinet Created	ADAM.ROTHSCHILD	N/A	View

Display Only User Comments | Add Comment | Close

6.2 Document Log

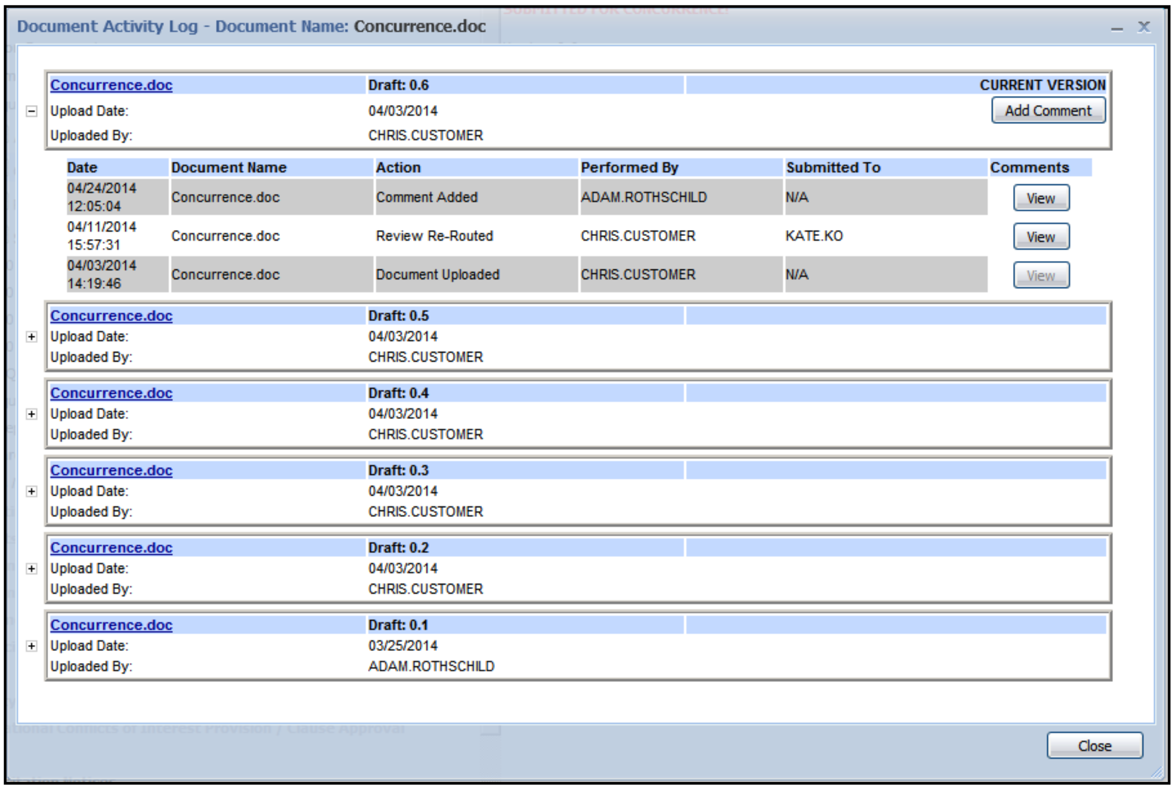
The Document Log displays historical information regarding the selected file (e.g., Upload Date and Workflow events). The Document Log includes functionality to be able to open previous versions of the document, and allows comments to be entered relative to the current version of the document.

1. Open the cabinet, expand the appropriate category and folder, and select the file.
2. Click ACTIVITY LOGS --> DOCUMENT LOG. The log events of the current version of the document will be displayed.

3. (optional) To add a comment to the log under the Current Version, click ADD COMMENT, enter your comment, and then click SUBMIT. The comment will be listed as a new log event.
4. (optional) To view log events that occurred on previous versions (if available), click the plus sign next to the previous version(s).
5. (optional) To view specific comments of a log event (if available), click the VIEW button next to the log event. If the log event does not have comments associated with it, the VIEW button will be grayed out.
6. (optional) To open the current or previous versions of the document, select the linked filename at top of the version in the log and follow the prompts as directed.

NOTE: You can open multiple versions at one time by repeating step 6 to compare changes that have occurred from one version to another.

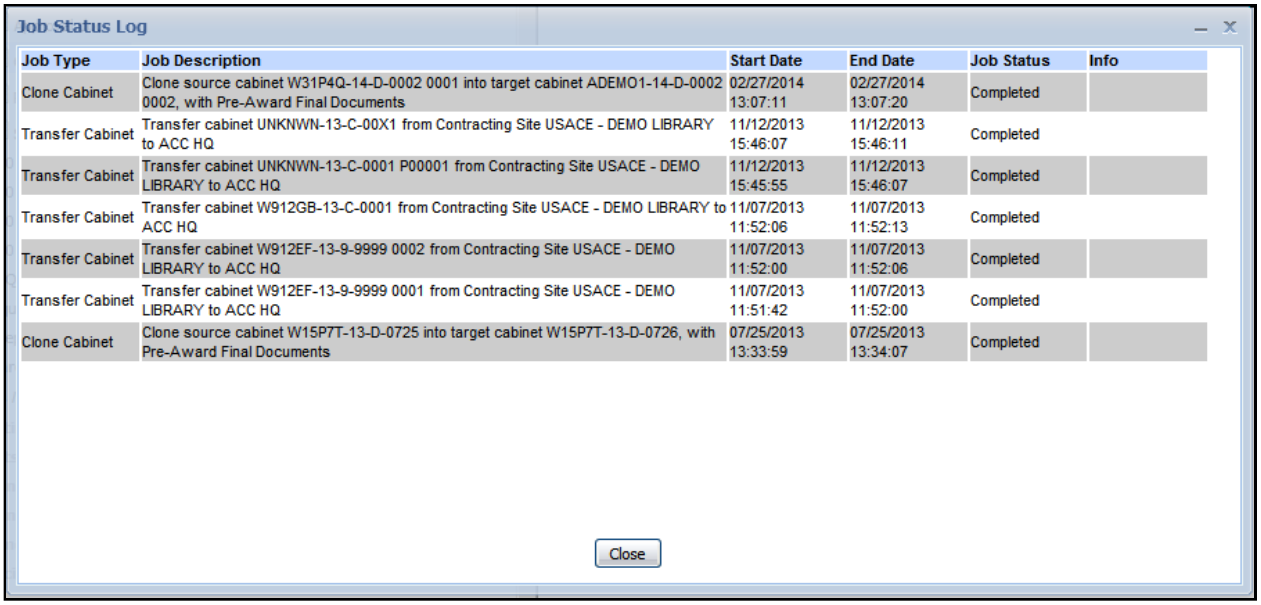
7. Click CLOSE to close the Document Log and return back to the Cabinet.



6.3 Job Status Log

The Job Status Log is a log that lists certain events that the specific user has performed in the PCF library. No two users will see the same Job Status Log. If the user has not performed any actions that are recorded in the Job Status Log, no events will be listed. Actions/Functions/Events recorded to the Job Status Log: • Clone Cabinet with Documents • Cabinet Transfer processes (available for PCF Admins Only)

1. Click ACTIVITY LOGS --> JOB STATUS LOG
2. (optional) Click the VIEW button next to a log event (when available) to view details about the event (e.g., see specific details as to why an event might have failed).


Job Status Log

Job Type	Job Description	Start Date	End Date	Job Status	Info
Clone Cabinet	Clone source cabinet W31P4Q-14-D-0002 0001 into target cabinet ADEMO1-14-D-0002 0002, with Pre-Award Final Documents	02/27/2014 13:07:11	02/27/2014 13:07:20	Completed	
Transfer Cabinet	Transfer cabinet UNKNWN-13-C-00X1 from Contracting Site USACE - DEMO LIBRARY to ACC HQ	11/12/2013 15:46:07	11/12/2013 15:46:11	Completed	
Transfer Cabinet	Transfer cabinet UNKNWN-13-C-0001 P00001 from Contracting Site USACE - DEMO LIBRARY to ACC HQ	11/12/2013 15:45:55	11/12/2013 15:46:07	Completed	
Transfer Cabinet	Transfer cabinet W912GB-13-C-0001 from Contracting Site USACE - DEMO LIBRARY to ACC HQ	11/07/2013 11:52:06	11/07/2013 11:52:13	Completed	
Transfer Cabinet	Transfer cabinet W912EF-13-9-9999 0002 from Contracting Site USACE - DEMO LIBRARY to ACC HQ	11/07/2013 11:52:00	11/07/2013 11:52:06	Completed	
Transfer Cabinet	Transfer cabinet W912EF-13-9-9999 0001 from Contracting Site USACE - DEMO LIBRARY to ACC HQ	11/07/2013 11:51:42	11/07/2013 11:52:00	Completed	
Clone Cabinet	Clone source cabinet W15P7T-13-D-0725 into target cabinet W15P7T-13-D-0726, with Pre-Award Final Documents	07/25/2013 13:33:59	07/25/2013 13:34:07	Completed	

Close

6.4 RPA Log

The RPA Log displays historical information regarding the cabinet's Requirement Package Assistant (e.g., Establishment of Requirements Package, document upload and identification Dates, notification(s), and when a package is Accepted). The RPA Log allows comments to be entered relative to the Requirements Package.

1. Click ACTIVITY LOGS --> RPA LOG
2. (optional) Click the VIEW button next to a log event (when available) to view details about the event (e.g., see comments associated with an event).

Note: This log can also be opened from within the RPA dialog by selecting "Open RPA Log".

RPA Activity Log - Cabinet Name: ADEMO1-18-1-0012 ×

Current Status:	Current RPA Customer POC:
Accepted	CHRIS.CUSTOMER

03/29/2018 11:22:31	RPA		Requirements Package Accepted	HEATHER.A.WHITE1	View
03/29/2018 11:22:28	Acquisition Strategy Document and Briefing Slides		RPA Folder Required Status Changed	HEATHER.A.WHITE1	View
03/29/2018 11:20:39	Acquisition_Strategy_V1.doc	0.1	RPA Document Status changed to 'Accepted'	HEATHER.A.WHITE1	View
03/14/2018 15:33:06	RPA		Needs Rework Notification sent to Customer POC	KAREN.KIEFFER	View
03/14/2018 15:32:33	Acquisition_Strategy_V1.doc	0.1	RPA Document Status changed to 'Needs Review'	KAREN.KIEFFER	View
03/14/2018 15:32:05	Acquisition Strategy Document and Briefing Slides		RPA Folder Required Status Changed	KAREN.KIEFFER	View
03/14/2018 15:28:57	RPA		Needs Rework Notification sent to Customer POC	KAREN.KIEFFER	View
03/14/2018 15:28:26	Acquisition_Strategy_V1.doc	0.1	RPA Document Status changed to 'Needs Rework'	KAREN.KIEFFER	View
03/14/2018 11:25:40	RPA		Needs Review Notification sent to Contracting	CHRIS.CUSTOMER	View

Add Comment Close

7.0 Requirements Package Assistant

Provide functionality within VCE-PCF that allows Contracting to define a virtual checklist and allow both Contracting and the Customer Users to collaborate/manage the documents needed to establish a Complete/Actionable Requirements Package.

7.1 Create RPA

Contracting (e.g., KO/KS or any MANAGER of the Cabinet) identifies an "RPA Customer POC" and establishes a list of "REQUIRED RPA FOLDERS" within an individual Cabinet.

> NOTE: Before an RPA can be created, the Cabinet must have at least one Customer User added to the cabinet as a CUSTOMER_EDITOR (CABINET ACTIONS > EDIT CABINET, CABINET SECURITY).

1. Open the Cabinet
2. Go to CABINET ACTIONS → REQUIREMENTS PACKAGE ASSISTANT

> NOTE: Customers **cannot** create an RPA.
> If a Customer creates a cabinet, the RPA functionality can only be utilized once the Cabinet is assigned to a KO/KS.

3. Identify an RPA Customer POC (i.e., the one customer tasked with providing requirement documents)

> NOTE: **Only** CUSTOMER_EDITORS of the Cabinet can be identified as the RPA Customer POC

4. (Optional) Identify a Backup RPA Customer POC (i.e., the backup customer tasked with providing requirement documents)

> NOTE: All CUSTOMER_EDITORS will have the same potential to interact/use the RPA dialog, but only the customers identified as RPA Customer POCs will receive email notifications generated from the use of the dialog.

5. Establish specific RPA Folders as required in terms of establishing a complete/actionable package.
    a. May use the filters to assist in identification of folders for RPA. Select a Display from the drop-down to filter the possible RPA folders based on selection of:
        i. SHOW ALL RPA FOLDERS (default display – all possible RPA Folders)
        ii. SHOW ALL ACTIVE RPA FOLDERS (will display only the possible RPA Folders that have been activated in the cabinet)
        iii. SHOW REQUIRED RPA FOLDERS (will display folders that have already been identified as Required)

        iv. SHOW NON-REQUIRED RPA FOLDERS (will display folders that have not yet been identified as Required
   b. Check the box next to the folder to identify that folder as one that you will take action on.
        i. Check the checkbox on the header to check all displayed folders.
   c. Set GLOBAL ACTIONS to CHANGE REQUIRED RPA FOLDER STATUS if not already.
   d. Select EXECUTE to change the status of all checked folders.
   e. Verify the correct folders are marked as required (YES); repeat steps a-d as needed to identify more folders as required (or to change a REQUIRED RPA FOLDER to NOT REQUIRED.
   f. Select “Create RPA Package”
        i. The RPA dialog will be established/saved within the cabinet.
        ii. An e-mail will be sent to the RPA Customer POCs and Primary Contracting Officer and Primary Contract Specialist to inform them that REQUIRED RPA FOLDERS have been identified.
        iii. A link to the RPA dialog will be listed on the RPA Customer POCs’, the Primary Contracting Officer’s and Primary Contract Specialist’s RPA Workflow tab.
        iv. Any RPA folders that were marked as required, but had not yet been added to the cabinet will be added to the cabinet (automatically).
        v. The RPA dialog can now be managed as needed to start identifying documents uploaded to the cabinet as meeting the requirement for a particular/REQUIRED RPA FOLDER.
   g. If document(s) have already been provided to contracting, select “Yes” to edit the RPA and upload/identify documents as RPA documents

BEST PRACTICE NOTE: Add the folders needed to make a complete/actionable Requirements Package as part of creating the cabinet, then use the SHOW ALL ACTIVE RPA FOLDERS display to only show/pick those folders to establish what’s required in RPA.

7.2 Uploading Documents as part of RPA

Contracting Users (MANAGERS or EDITORS) or Customer Users (CUSTOMER_EDITORS) uploads documents into the Cabinet. If the document(s) for a required RPA have not yet been uploaded to the folder in the PCF cabinet, they can be uploaded directly from within the Requirements Package Assistant (RPA). Any document identified in the RPA dialog **will** have a document status of ‘Customer Viewable’.

1. Open the Cabinet
2. Go to CABINET ACTIONS --> REQUIREMENTS PACKAGE ASSISTANT
3. Within the table, select the “ACTIONS” button for the RPA folder the document(s) will be added to.
4. Select “Identify or Upload Document”
5. In the new dialog, all documents already uploaded to that folder will be displayed – to add a new document, select “Upload” button.

6. Browse and select the correct file to be uploaded to the folder and identified in the RPA dialog.
7. Select “Submit”.

NOTE: See Appendix 10.2 for the current Army Cabinet Index and which folders can be selected as part of the Requirements Package Assistant.

7.3 Identify Documents as part of RPA

Contracting Users (MANAGERS or EDITORS) or Customer Users (CUSTOMER_EDITORS) identifies specific uploaded Documents as meeting the need of a REQUIRED RPA FOLDER. Document(s) can be uploaded into a folder using the normal upload methods (See section 2.7 for instructions), and then identified in the RPA dialog as an RPA document as shown below.

1. Open the Cabinet
2. Go to CABINET ACTIONS --> REQUIREMENTS PACKAGE ASSISTANT
3. Within the table, select the “ACTIONS” button for the RPA folder the document(s) will be added to.
4. Select “Identify or Upload Document”
5. In the new dialog, all documents already uploaded to that folder will be displayed – check the box(es) next to the correct document(s) in the folder.
6. Select “Save”

7.4 Contracting Reviews and Customers Rework Document(s)

Contracting reviews the document(s) as needed; Customer reworks the document(s) as needed.

1. Open the Cabinet
2. Go to CABINET ACTIONS --> REQUIREMENTS PACKAGE ASSISTANT
3. Within the table, select the document name for the RPA document to be reviewed or updated to open the document.
4. Select the document to be reviewed or updated to open it, and take the associated action. If updating, save a local copy of the document to update the RPA with.
5. Within the table, select the “ACTIONS” button for the RPA folder the document(s) to be updated or set to either “Needs Review” or “Accepted” status as appropriate. Note, anytime an identified RPA document is updated, the status will automatically update to “Needs Review”.
6. If needed, from within the table, select the “ACTIONS” button for the RPA folder the document(s) and select “Open Document Log” to see previous versions, comments, and actions taken on the document to ensure that all issues are addressed.
7. Repeat with other documents as needed until ready to send the package to the other customer/contracting office.

Select “Send Notifications” to notify the KO/Specialist and Customer POC that action has been taken on the RPA, and let the other party know that action(s) may need to be taken.

Note: Contracting can use the display drop-down option of SHOW DOCUMENT(S) 'NEEDS REVIEW' to quickly see all documents awaiting a review in the RPA.

Note: Customers can use the display drop-down SHOW DOCUMENT(S) 'NEEDS REWORK' to quickly see all documents awaiting customer action/update in the RPA.

7.5 Contracting Accepts Individual Documents

Contracting establishes an identified RPA document as ACCEPTED (in terms of establishing the identified document as acceptable in meeting the need as part of the Requirements Package).

1. Open the Cabinet
2. Go to CABINET ACTIONS --> REQUIREMENTS PACKAGE ASSISTANT
3. Within the table, select the "ACTIONS" button for the RPA folder the document(s) will be added to.
4. Select "Set RPA Document Status to Accepted"

Note: Only cabinet MANAGERS can perform this action

7.6 Contracting Accepts the Overall RPA

Contracting establishes the Requirements Package as ACCEPTED based on getting acceptable documents for each individual required type. In order to accept the RPA, all REQUIRED RPA FOLDERS mush have one or more documents identified with an RPA status of Accepted. Only MANAGERS of the cabinet can accept the package, and accepting the package will update the RPA log with a RPA acceptance date.

1. Open the Cabinet
2. Go to CABINET ACTIONS --> REQUIREMENTS PACKAGE ASSISTANT
3. Once all folders have document(s) identified, and all identified documents have been marked as ACCEPTED, Select the "ACCEPT" button.

Note: Only cabinet MANAGERS can perform this action

BEST PRACTICE NOTE: After accepting the package in the RPA dialog, it is recommended to enter the Actual Date for having a complete requirements package in the Acquisition Milestones dialog.

8.0 PCF Help Menu

8.1 PCF User Documentation

Will display various PCF documentation such as the current PCF User guide, Release Notes to provide information on changes to PCF, and PCF training materials.

8.2 PCF Folder Structures

Will display current and historical folder structures that may exist in the PCF library for reference.

8.3 My PCF Profile

Will display the currently logged in user's profile and preferences. It is critical that the correct email address be displayed here in order to ensure that communications from PCF are sent to the correct user. Also, the user can select some limited changes to the default behavior of PCF and identify which "Workflow Tab" to open automatically when logging into PCF, as well as allowing users with access to multiple PCF Organizations to identify which default Organization to be shown in the drop-box when accessing PCF.

1. Click HELP --> MY PCF PROFILE. The profile dialog will be displayed.
2. Verify that the Email Address, and Confirm Email Address, correctly display your valid email.
3. Verify/enter your contact phone number.
4. Identify the correct Contracting Command.
5. Identify the correct Contracting Site. (Not available for Customer Users)
6. (optional) Select a Default Workflow Tab to open. (Not available for Customer Users)
7. (optional) Select a Default Org to open PCF.
8. (optional) Select a Default Cabinet List Display and Fiscal Year (either a specific year, or "Current FY" – which will always use the Current FY, and automatically change to the new year on 1 October).
9. Select SAVE to save any changes to profile.

8.4 Contact AESD Support

Instructions for requesting VCE-PCF assistance are provided.

1. Click HELP --> Contact AESD Support. The Contact AESD Support dialog will be displayed with instructions for:
   - Local VCE-PCF Admin – link to check for local PCF POC identification.
   - Phone number to contact AESD. (1-866-335-2769 (ARMY), # Option 7)
   - Website to contact AESD to submit a ticket.
   - Email address to submit an AESD ticket.
2. Select CLOSE to close the dialog.

Note: You must have an AESD CRM account in order to submit an online AESD ticket – Call or Email AESD if you do not have access. When emailing the AESD helpdesk, you must use a .mil email address.

Please be prepared to provide specific details (e.g., PCF Organization/Library Name, Cabinet Name, Document Name, and a description of the issue).

8.5 PCF Contacts

Allows the user to identify their local PCF Admin(s) in order to contact them for assistance on local efforts.

8.6 Acquisition Guidance Videos

Various acquisition guidance videos have been developed and can be accessed from within PCF for user reference and knowledge.

8.7 Message of the Day

When logging into PCF, a Message of the Day displays, providing information to the PCF user community. If after working in PCF, the user needs to review and see the message again, they can view it here.

1. Click HELP --> MESSAGE OF THE DAY. The PCF Status: Message of the Day dialog will be displayed.
2. Select CLOSE to close the dialog.

8.8 PCF Customer Gatekeepers

Allow users to look up the current customer gatekeeper for a specific PM/Directorate to facilitate the setup of customer accounts.

9.0 Troubleshooting

9.1 Contacting Local PCF Support

PCF is supported by the local command, organization and site. For expedited support, go to https://pcf.army.mil/public/contacts.jsp to look up your designated PCF POC.

Alternatively, access HELP --> CONTACT AESD SUPPORT to submit a ticket to the VCE Helpdesk

9.2 Login Issues – Not Authorized Message

If you get an error after attempting to login to PCF, please contact your local PCF Administrator have them make sure you are setup with a PCF Profile, and have the Admin verify that your PCF profile contains your correct AKO username.

To verify your AKO username:

1. Login to the AKO website at https://www.us.army.mil.
2. In the top right hand corner, select the PEOPLE icon.
3. Enter the user's first and last name and click FIND.
4. The user's AKO name will be listed as shown below.

NOTE: The AKO username will never be an e-mail address.

9.3 User Not Selectable as a KO or Specialist

If a name is not listed in the Contracting Officer or Contract Specialist fields in the Contacts tab of a PCF Cabinet, please contact your local M&S Admin and/or PCF Admin and request that they setup an M&S account for the user. A user **must** have an active M&S account in order to show up in the Contracting Officer/Contract Specialist fields in PCF.

If a name is listed in the Contracting Officer or Contract Specialist fields in the Contacts tab of a PCF cabinet, but you get an error when selecting that name, please contact your local M&S Admin and/or PCF Admin. This error means there is not a match between the AKO name on the user's M&S account and the user's PCF account. M&S and PCF admins must determine what the correct AKO name is, and then correct it in either M&S or PCF, depending on which is wrong. If the specific user is able to login to PCF, the issue is most likely related to the user's AKO name on the M&S account, not PCF.

10.0 Appendices

10.1 Contract and Order Numbers in PCF

Updates to FAR 4.16/DFAR 204.16 as implemented by PARC Policy Alert #17-14 and the resulting impact to VCE-PCF.

Purpose: Based on recent updates to the FAR and DFAR (specifically to subparts 4.16 and 204.16), the process for naming new orders and modifications to those orders will change as per DASA(P)'s current implementation date of March 31st, 2017. See PARC Policy Alert #17-14 for additional information.

This section covers how PCF handles this change. Please refer to the FAR and DFAR, as well as the PARC Alert, for more information about these business process changes.

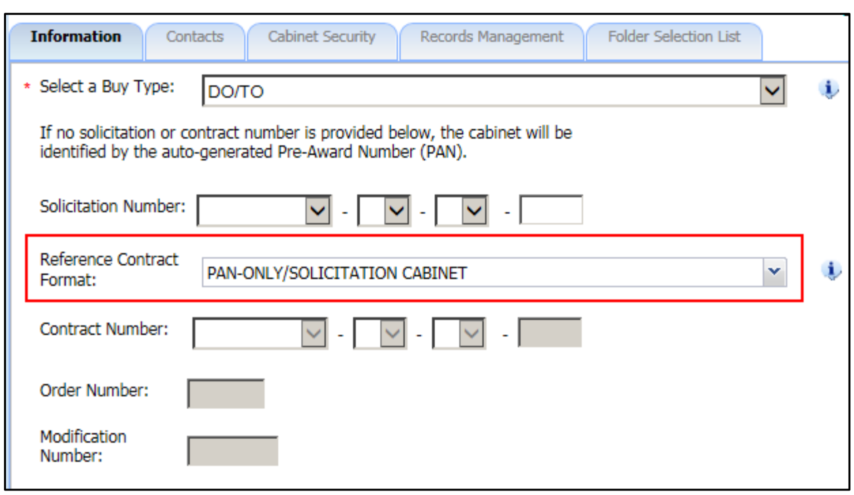
Scope: The FAR/DFAR updates involve any/all new Orders getting assigned a unique 13 character Order Number rather than the previous convention of using a 4 character Order Number. Previously, this 13 character Order Number format was only used for Orders issued against a Non-DoD issued Indefinite Delivery Vehicle, IDV (e.g., GSA Orders).

PLEASE NOTE: PCF Cabinets not related to an Order or a modification to an order will **not** be impacted by this change.

PCF Cabinet Buy Types impacted by changes to FAR 4.16 and DFAR 204.16

- DO/TO
- Mod to Order
- BOA Order
- BPA Order
- GSA Order
- Unauthorized Commitment

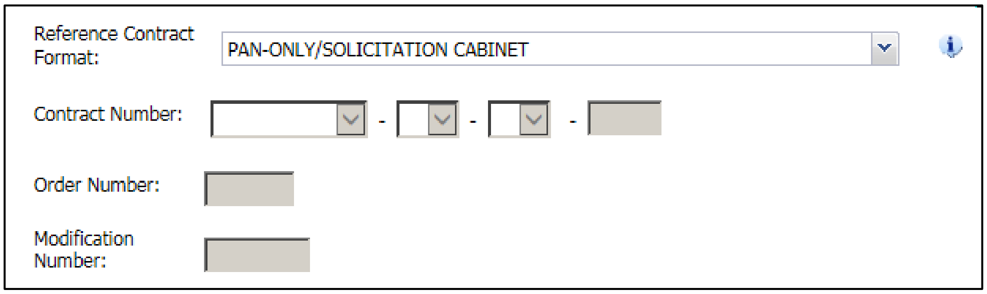
When a Cabinet Buy Type is set to a value related to an Order or a Modification to an Order, a new field (REFERENCE CONTRACT FORMAT) will be presented on the Information tab in the Cabinet Profile allowing the user to identify the naming convention rules that will be involved (once the Order number is established outside of PCF).



The REFERENCE CONTRACT FORMAT field contains 4 values to identify the naming convention:

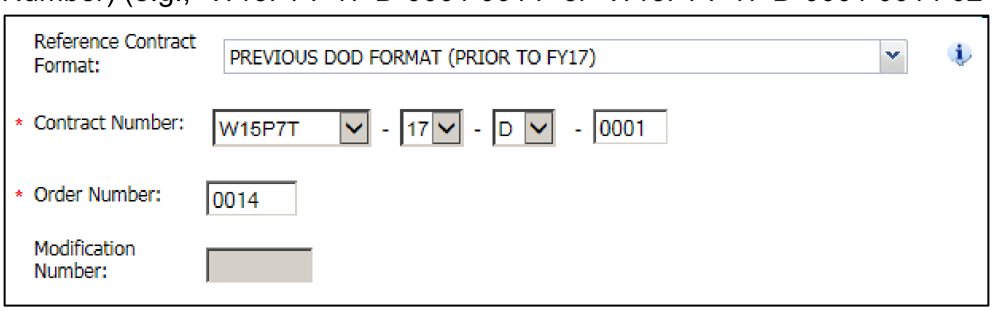
PAN ONLY/SOLICITATION CABINET - This is the default value set in the Reference Contract Format field. Leave the field set to this value while the Contract/Order/Mod Number is not yet known.

The Contract Number, Order Number, and Modification Number CANNOT be entered while the REFERENCE CONTRACT FORMAT field is set to PAN ONLY/SOLICITATION CABINET. The Cabinet Name will be the PAN (Pre-Award Number) if no Solicitation Number is entered or the Solicitation Number.



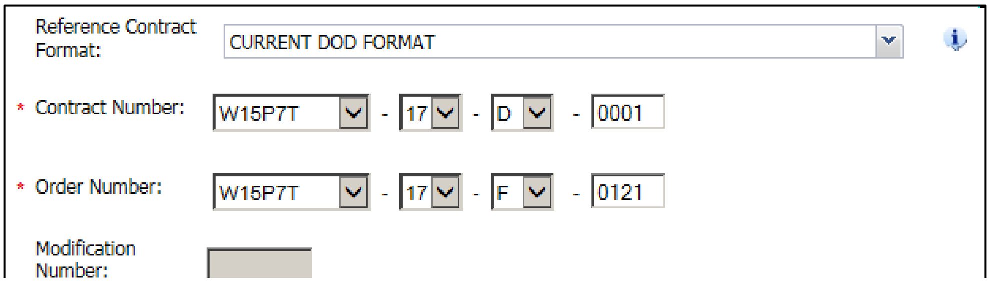
PREVIOUS DOD FORMAT (PRIOR TO FY 17) - Select this value if the action will use a 4 character Order Number. The Cabinet Name will be set to the Contract Number followed by the Order number, and, when applicable, the 2 character mod Number. Since existing Orders issued prior to the PARC Alert #17-14 are **not** required to be renamed, this value allows the old format (i.e., 4 character Order Numbers) to still be utilized in PCF, as needed.

When the REFERENCE CONTRACT FORMAT is set to PREVIOUS DOD FOMAT (PRIOR TO FY17), the Cabinet Name will be the Contract Number followed by the 4 character order number (and, when applicable, followed by a 2 character Mod Number) (e.g., “W15P7T-17-D-0001 0014” or “W15P7T-17-D-0001 0014 02”).



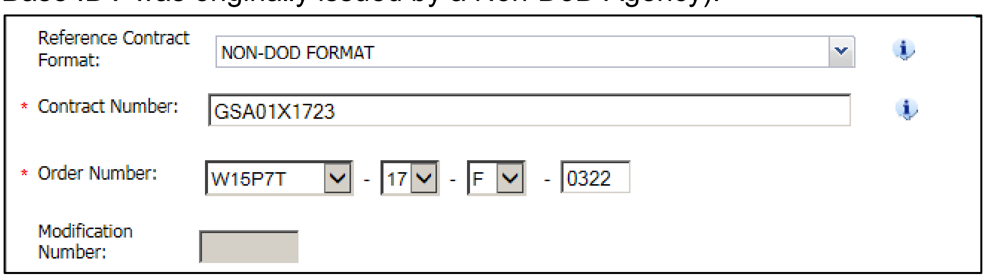
CURRENT DOD FORMAT - Select this value if the action will use a 13 character Order Number and the original Contract for the Indefinite Delivery vehicle was issued by a DOD agency. The Contract Number of the original IDV will need to be entered, but the Cabinet Name will be set to just the Order Number, and, when applicable, the 6 character Modification Number.

When the REFERENCE CONTRACT FORMAT is set to CURRENT DOD FORMAT, the Cabinet Name will be the 13 Character Order Number (and, when applicable, followed by a 6 character Mod Number) (e.g., “W15P7T-17-F-0121” or “W15P7T-17-F-0121 P00001”).



NON DOD FORMAT - Select this value if the action will use a 13 character order number, but the original contract for the Indefinite Delivery Vehicle, was issued by a Non-DOD agency and does **not** use a 13 character Uniform Contract Number format. A GSA Order would be an example of when to use this NON DOD FORMAT. The Contract Number of the original IDV will still need to be entered, but the Cabinet Name will be set to just the Order Number, and when applicable, the Modification number.

When the REFERENCE CONTRACT FORMAT is set to NON DOD FORMAT, the Cabinet Name will be the 13 Character Order Number (and, when applicable, followed by a 6 character Mod Number) (e.g., “W15P7T-17-F-0322” or “W15P7T-17-F-0322 P00001”). This format would be used for GSA Orders (or any other orders where the Base IDV was originally issued by a Non-DoD Agency).



- PCF cannot automatically determine the specific value to which the REFERENCE CONTRACT FORMAT field needs to be. The following matrix can be used to determine the applicable value:
- Has a Contract Number, Order Number, or, if applicable Modification Number been established for the action?

- If “no”, leave REFERENCE CONTRACT FORMAT set to PAN ONLY/SOLICITATION CABINET.
- If “yes”, move to the next question.
- Has my action been assigned a 4 character Order Number?
- If “yes”, set REFERENCE CONTRACT FORMAT to PREVIOUS DOD FORMAT (PRIOR TO FY17) and enter the Contract/Order/Mod Number as applicable.
- If “no”, move to the next question.
- Was my Order (with a 13 character Order Number) issued against an IDV originally issued by a DoD Agency?
- If “yes” (IDV was issued by a DoD Agency), set REFERENCE CONTRACT FORMAT to CURRENT DOD FORMAT and enter the Contract/Order/Mod Number as applicable.
- If “no” (IDV was issued by a Non-DoD Agency, like a GSA Order), set REFERENCE CONTRACT FORMAT to NON DOD FORMAT and enter the Contract/Order/Mod Number as applicable.

10.2 Army Cabinet Index – October 2018

CATEGORY/FOLDER NAME	RPA FOLDER
Army Cabinet Index - October 2018	
I. Pre-Award	
A. Requirements Development	
01. Pre-Requirements Package Initiation	
Pre-Requirements Package Initiation Documentation	X
02. Requirements Package	
Acquisition Plan (AP)	X
Acquisition Strategy Document and Briefing Slides	X
Contract Requirements Package (CRP) Checklist	X
Independent Government Estimate (IGE)	X
Justification and Approval (J&A) for Other Than Full and Open Competition	X
Justification Approval to Provide Government Furnished Property / Facilities and / or Contractor Acquired Property	X
Justification for an Exception to Fair Opportunity	X
Limited Source Justification	X
Market Research Documentation	X
Performance Specification (PS)	X
Performance Work Statement (PWS)	X
Purchase Description (PD)	X
Sole Source Justification	X
Statement of Objectives (SOO)	X
Statement of Research Objective	X
Statement of Work (SOW)	X
03. Pre-Solicitation Requirements Documents	
Acquisition Milestone Sheet	
Antiterrorism / Operations Security (AT / OPSEC) Cover Sheet	X
Capability Request (CAPR) IT Purchase	X

CHESS Statement of Non-Availability (SoNA)	X
Contingent Fees	X
Contract Data Requirements List (CDRL / DD Form 1423)	X
Contract Security Classification Specification (DD Form 254)	X
Determination for Use of Technology Investment Agreements (TIA)	X
Drawings / Technical Data / Technical Data Package (TDP)	X
GFP: DoD SMARTForm Listing - Requisition Request / Request for DoDAAC	X
Green Procurement Documents	X
Letter of Approval (LA)	X
Letter of Contemplation	X
Letter of Offer and Acceptance (LOA)	X
Letter of Request	X
Military Specifications and Standards	X
Miscellaneous Correspondence / Documents / Memoranda - Requirement Package	X
Miscellaneous Foreign Military Sale (FMS) Related Documentation	X
Ozone Depletion Substance Certification / Screening	X
Performance Requirements Summary (PRS)	X
Pre-Post Selection Board Report and Documentation	
Purchase Request / MIPR / Funding Document	X
Quality Assurance Surveillance Plan (QASP)	X
Request for Services Contract Approval	X
Statement of Non-Availability of Construction Materials (FMS)	X
B. Solicitation	
01. Pre-Solicitation / Solicitation Notices	
Combined Synopsis and Solicitation	
Notice of Subcontracting Opportunities	
Pre-Solicitation Notices / Synopsis (and Amendments) / Exemption / Responses	
Special Notice	X
Theater Business Clearance (TBC) Documentation	X
02. Reviews / Approvals	
Approval for Single Award Task / Delivery Order (TO / DO) Contract	X
Army Services Strategy Panel Review / Acquisition Strategy Checklist (Services)	
Assistance Application Review Documents	
Biddability, Constructability, Operability and Environmental Review (BCOE)	
Determination of Best Procurement Approach	X
End User Certificate (EUC)	X
Indemnification Documentation	X
Joint Acquisition Review Board (JARB) (IRAQ)	X
Justification for Performance Based Payments	X
Legal Review(s) - Solicitation	
OCONUS Performance Checklist	X
PARC Approval of Options that Extend Contract Beyond the Five-Year Regulatory Limit	
Request for Approval: Proposed Assisted / Directed Acquisition Certification	X
Small Business Coordination Record (DD Form 2579)	X
Solicitation Review(s)	
Technical Expert Status (TESA) Documentation	X
03. Peer Review / Solicitation Review Board (SRB)	
Peer Review / Solicitation Review Board (SRB) Documentation	

04. Determinations / Determinations & Findings	
806 Determination	
D&F: Authority to Use Contractors in Source Selection	X
D&F: Buy American Act	
D&F: Commerciality	
D&F: Contracting Officer Determination of Federal Prison Industries / UNICOR Comparability / Non-Comparability	
D&F: Equipment Lease vs. Purchase	X
D&F: Exemption to Use of a Small Business Coordination Record (DD Form 2579)	X
D&F: Full and Open Competition after Exclusion of Sources	X
D&F: Inclusion and Evaluation of an Option	X
D&F: Letter Contract / Undefinitized Contract Action (UCA)	X
D&F: Liquidated Damages	
D&F: Multiple Award Contracting	
D&F: Multi-Year Contract	
D&F: Non-Evaluation of an Option	X
D&F: Retention of High Value Property	
D&F: Time-and-Materials	X
D&F: Type of Contract	X
D&F: Unique Identification Exception	X
D&F: Use of Interagency Acquisition	X
Davis Bacon Wage Determination	X
Determination Approving Consolidation of Contract Requirements	X
Determination by Head of Agency Approval to Exceed Ten-Year Contract Limit on IDIQ Contracts	
Determination for Standard / Commercial / Noncommercial Warranty	X
Determination of Contractor Personnel Experience	
Determination of Personal / Non-Personal Services	
Determination of Transportation Rates	
Determination to Use Mobilization / Demobilization Clause	
Miscellaneous Determination / Determination and Finding Documentation	
Provisioning Documentation	
Service Contract Act Wage Determination	
05. Waivers	
Goal 1 Waiver Documentation	X
HCA Waiver of Submission of Cost / Price Data	
Information Technology System Management (AR 25-1 / NSS) Waiver	
Past Performance Evaluation Waiver	
Performance Based Services Waiver	
Quality Assurance Surveillance Plan (QASP) Waiver / Exemption	
Solicitation Review Board Waiver / Approval	
Tailoring of Provisions / Clauses / Conditions Inconsistent with Commercial Practices Waiver	
Waiver of Synopsis	
Wide Area Workflow (WAWF) Waiver	
06. Pre-Solicitation Documents	
Authority to Advertise	
Award Fee / Term Documentation	
Grant Officer Representative (GOR) Appointment	X

Miscellaneous Correspondence / Documents / Memoranda - Pre-Award	
Miscellaneous Forms	
07. Pre-Solicitation Conference / Site Visit	
Pre-Solicitation / Pre-Proposal Conference / Site-Visit Documentation / Attendance List / Minutes	
08. Solicitation Documents	
Broad Agency Announcement	
Solicitation	
Solicitation Amendment(s)	
Solicitation Distribution Checklist	
Source List / Solicitation Mailing List	
C. Evaluation	
01. Administrative Documentation	
8(a) Concern Award Notice - Offer / Acceptance Letter(s)	
Certificate of Competency / Denial from SBA	
Contractor Non-Disclosure Agreements	
Pilot Program for the Acquisition of Military Purpose Non-Developmental Items	
Source Selection Appointment Letters (SSAC / SSEB)	
Source Selection Evaluation Board Training Documents	X
Source Selection Participation Agreements (Conflict of Interest, Standards of Conduct, and Nondisclosure Agreements)	
02. Evaluation Criteria Documents	
Informal Source Selection Criteria	X
Lowest Price Technically Acceptable (LPTA) Selection Criteria	X
Record of Weighted Guidelines Application (DD Form 1547)	
Source Selection Plan (SSP)	
03. Industry Documents	
Assistance Application / Application-Related Documents	
Assistance Application / Application-Related Documents - Revised	
Certificate of Current Cost or Pricing Data	
Late Submissions of Bids / Offers	
Litigations (Claims / Disputes / Protests) - Pre-Award	
No Bid / Offer Replies	
Offeror Initial: Quote(s) / Bid(s) / Proposal(s) / Submittal(s)	
Offeror Revised: Quote(s) / Bid(s) / Proposal(s) / Submittal(s)	
Offeror Successful: Quote(s) / Bid(s) / Proposal(s) / Submittal(s)	
Unsolicited Proposal Documentation	
04. Evaluations	
Abstract of Offers (SF1409) / Summary of Bids	
Agreement Analysis	
Competitive Range Determination	
Contract Facilities Capital Cost of Money (DD Form 1861)	
Cost / Price Factor Evaluation	
Cost / Pricing Audit Reports	
Discussion Documentation / Evaluation Notices (ENs) / Findings	
EEO Compliance / Clearance / Correspondence	
Evaluation of Construction Contracts (SF 1420)	
Exchanges with Offerors: Clarifications and Communications	

Miscellaneous Source Selection Documentation	
Mistakes in Quote(s) / Bid(s) / Proposal(s) / Submittal(s) and Disposition	
Non-Responsive Offerors	
Other Non-Cost / Non-Price Factor Evaluation	
Past Performance Evaluation	
Pre-Award Survey Documentation	
Pre-Negotiation Conference / Briefing Minutes	
Pre-Negotiation Objectives Memorandum (POM)	
Price / Post Negotiation Memorandum (PNM) - Business Clearance Memorandum (BCM)	
Small Business Participation Plan Evaluation	
Source Selection Discussion Questions and Contractor Responses	
Source Selection Evaluation Notes	
Technical Evaluation	
05. Evaluation Decision Documents / Briefings	
Debriefing Documentation - Pre-Award	
Determination of Contractor Responsibility / Non-Responsibility / Pre-Award Survey (Proposal Receipt / Prior to Award)	
Determination of Fair and Reasonable Price (MFR)	X
PEO Briefings of Source Selection	
Pre-Award Clearance Information	
Pre-Award Notice of Unsuccessful Small Business (SB) Offerors	
Source Selection Advisory Council Documentation and Evaluations	
Source Selection Decision Document	
Source Selection Evaluation Report(s) and Briefing(s) of Evaluations	
Source Selection Team and PCO Evaluation Results & Recommendation	
System for Award Management (SAM) Documentation (CCR / ORCA / EPLS)	
06. Reviews / Approvals - Evaluation	
Architect-Engineer Qualification (SF 330) / Selection / Review Documentation	
Review(s) of Subcontracting Plan	
D. Contract / Agreement / Grant / Other Transaction Agreement (OTA) Reviews	
01. Reviews / Approvals	
Assistance Review and Approvals	
Legal Review(s) - Contract	
Make or Buy Program (Program and Evaluation)	
Requirement / Buyer's Checklist	
02. Peer Review / CRB	
Peer Review / Contract Review Board (CRB) Documentation	
03. Announcements / Notifications	
Congressional Notification of Award	
Contract Distribution Checklist / Transmittal Notices	
Notice of Award	
Notice to Proceed / Contract Receipt	
Synopsis of Award / Exemption from Synopsizing	
Unsuccessful Offeror(s') Notification	
II. Award	
E. Contract / Order / Agreement / Grant / Modification / OTA	
01. Contract / Agreement Documentation	

Agreement	
Contract / Letter Contract	
Contract Action Report (CAR)	
Delivery / Task Order	
Grant	
Modification	
Modification Log	
Other Transaction Agreement (OTA)	
F. Post Award Documents	
01. Post-Award Documentation	
Contracting Officer Award Review Certification	
D&F: Exercise of an Option	
Miscellaneous Correspondence / Documents / Memoranda - Post-Award	
Mistakes Disclosed After Award	
Notice to Contractor of Intent to Exercise Option	
Novation / Change-of-Name Agreements	
Post-Award Conference Minutes	
Post-Award Conference Report (DD Form 1484)	
02. Briefings / Debriefings	
Debriefing Documentation - Post-Award	
03. Protest Documentation	
CICA Override Documentation / Approval to Award a Contract Notwithstanding a Protest	
Contractor Claim / Certifications	
Litigations (Claims / Disputes / Protests) - Post-Award	
Notification to DPAPSS of Protest Greater Than $1B for Services or Major Defense Acquisitions Programs	
04. Reviews / Approvals - Award	
Legal Review(s) - Post-Award	
Peer Review Documentation - Post-Award	
G. Services Contract Administration	
01. Services Contract Administration Documentation	
Contract Administrator's Review Documentation	
Delivery Schedule Documentation	
Discrepancy Reports / Delinquency Documentation	
Miscellaneous Correspondence / Documents / Memoranda - Services	
H. Construction Contract Administration	
01. Construction Contract Administration Documentation	
Apprentice Certificates	
Centralized Contracting Acquisition System (CCAS)	
Insurance Certificates	
Labor Standards Interviews (SF 1445)	
List of Subcontractors	
Preconstruction Documents	
Surety Information	
02. Schedule / Progress / Reports	
Completed / Superseded Progress Schedule(s)	
Construction Photographs	
Construction Reports	

Contract Progress Reports	
Contract Progress Schedule	
Daily Reports	
Government Progress Reports	
Performance Evaluation (DD Form 2626)	
03. Payroll	
Weekly Payroll Affidavits	
Weekly Payrolls	
04. Payments	
Declining Balance Sheet	
Payment and Performance Bonds / Checklist	
Progress Payment Package	
Statement and Acknowledgment (SF 1413)	
05. Quality Assurance (QA) / Inspection / Reports	
Contractor Quality Control Documentation	
Contractor's Safety Program / Minutes of Preconstruction Safety Conference	
Inspection Reports	
Inspector Historical Log	
Notice of Final Inspection	
Site Superintendent / Safety / Quality Control Appointment Letters	
06. Correspondence	
Correspondence Logs	
Delinquent Performance Notifications	
Incoming Correspondence / Documents / Memoranda	
Miscellaneous Correspondence / Documents / Memoranda - Construction	
Outgoing Correspondence / Documents / Memoranda	
Request for Additional Classification and Rate (SF 1444)	
07. Pre-Construction / Progress Meetings	
Pre-Construction Meetings	
Progress Meetings	
08. Drawings / Specifications / Submittals Documentation	
Drawings	
Materials Submittals	
Miscellaneous Correspondence / Documents / Memoranda - Drawings / Specifications / Submittals	
Specifications	
I. Administration (Contract / Order / Agreement / Grant / OTA)	
01. Administration Documentation	
Agencies / Persons Authorized to Place Calls	
CDRL Documentation - Post Award	
Contract Administration Summary Sheet	
EDA Contract Deficiency Reports	
Environmental Plan	
Government Trip Reports / Memorandum of Observations	
Patent Rights (DD Form 882)	
Personnel Passes / Access Lists / Violations	
Public Release of Information Approval	
Royalty Reports	

Site Visit Documentation	
Synchronized Pre-Deployment and Operational Tracker (SPOT)	
Transfer Documentation	
Vehicle Passes / Insurance Documents	
Within Scope Determination	
02. Delivery / 1st Article	
Acceptance Documentation	
COR: Supply Contract Documentation	
First Article Rejection	
First Article Test Approval	
First Article Test Plan / Procedures	
GOR Documents	
Lot Acceptance Test (LAT) Approval	
Waiver of First Article	
03. Progress / Configuration Management	
Configuration Management Documentation	
Contract Progress Meetings	
Deficiency Reports	
Production Progress Reports (DD Form 315)	
04. Cost / Budget	
Analysis and Determination-Overtime Approval	
Earned Value Management (EVM) System	
Liquidated Damages Data	
Post-Award Funding Issues	
05. Payments	
Analysis and Determination of Appropriateness-Contract Financing	
Pre-Final Payment / Final Acceptance	
Pre-Performance Conference & Pre-final Payment Checklist	
Recurring Reports (DD Form 250) / Invoices / Payment Vouchers / Expenditure Logs	
06. VECP / ECP	
Engineering Change Proposals (ECP)	
Technical Data Rejections (ECP / NOR / RFD)	
Value Engineering Change Proposals (VECP)	
07. Correspondence	
Congressional Inquiries	
Miscellaneous Correspondence / Documents / Memoranda - General	
Request for Deviation	
Request for Waivers	
08. Administrative Contracting Officer (ACO) Documentation	
ACO Correspondence	
Administrative Contracting Officer (ACO) Appointment / Revocation	
Administrative Contracting Officer (ACO) Delegation	
Business Systems Verification Determination	
Contractor's Property Management System Plan	
09. Government Furnished Property (GFP)	
Property Management Systems Analysis Results	
Property Management Systems Analysis Risk Analysis	
Request for Use of Government Property / Facility	

10. Termination	
Cure Notices	
Show Cause Notices	
Termination Notice / Documentation	
J. Closeout Documentation	
01. Contract Closeout Documentation	
Contract Closeout Checklist (DD Form 1597)	
Contract Completion Statement (DD Form 1594 / PK9)	
Contractor Closeout Documentation	
Final Material Inspection and Receiving Reports (DD Form 250)	
Final Patent / Royalty Reports Cleared	
Final Performance Assessment Report Documentation	
Miscellaneous Contract Closeout Documentation	
Non-Classified Material Disposition	
Plant Clearance Documentation	
Release of Claims	
Transfer and Acceptance of DoD Real Property (DD Form 1354)	
Unliquidated Obligation Information	
02. Grant / Agreement Closeout Documentation	
Final Deliverables	
Final Payment / Unliquidated Obligation (ULO) Reconciliation	
Miscellaneous Grant / Agreement Closeout Documentation	
03. Financial Documents (ACO / DCMA / MOCAS)	
ACO Notebook Remarks Inquiry	
Administrative Data	
Closed Contract Inquiry / Reply to Contract Request	
Miscellaneous Financial Documentation	