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Module 1: PCARSS Overview

Lesson One: About PCARSS

Lesson One Exercise

Logging Into PCARSS

In this exercise, you will log into PCARSS from the eTools Portal.

Exercise Steps:
1. *Log* into the **eTools Portal**.
2. *Double-click* the **PCARSS** icon.

Lesson Two: User Roles and Processes

Lesson Two Review Questions

1. Which of the following is NOT a task of the PLCO role?

   a. Create inventory schedules
   b. Issue disposition instructions
   c. Conduct workload mass transfers
   d. Modify plant clearance cases and referrals

2. What makes the Read-only Screener role different from the Screener role?

   a. The Read-only Screener cannot create alerts
   b. The Read-only Screener cannot create requisitions
   c. The Read-only Screener cannot search for inventory
   d. None of the above

3. Which tasks can the Administrator role perform?

   a. Workload mass transfers
   b. Editing the work of any user
   c. Approve requests from Support PLCOs to perform the work of a PLCO
   d. All of the above

4. What can the QAR role do?

   a. View, edit, and complete inventory verification surveys
   b. Create alerts
   c. Conduct sales
   d. Perform the tasks of the PLCO

5. Which of the following is NOT a task of the Contractor role?

   a. Conduct sales authorized by the PLCO
   b. Mark disposal actions complete
   c. Create inventory schedules
   d. Ship inventory

Module 2: PLCO and Administrator Tasks

Lesson One: Common Tasks

Lesson One Review Questions

When uploading a flat file, the file must be in which of the following formats?

a. htm
b. ppt
c. doc
d. txt

Lesson One Exercises

1. Searching Inventory

In this exercise, you will search for inventory.

Exercise Steps:
1. *Start* from the **Home Page**.
2. *Click* the **search inventory** link.
3. *Type* **search criteria**.
4. *Click* the **Search** button.

2. Uploading Flat Files

In this exercise, you will upload flat files.

Exercise Steps:
1. *Start* from the **Home Page**.
2. *Click* the **Upload Flat Files** link.
3. *Click* the **Browse** button.
4. *Select* the desired **flat file**.
5. *Click* the **Open** button on the file selection box.

3. Performing Screener Tasks

In this exercise, you will perform Screener tasks as a PLCO.

Exercise Steps:
1. *Start* from the **Home Page**.
2. *Click* the **Perform Screener Role** link.
3. *Click* the **Home** link to return to the PLCO Home Page.

4. Viewing and Editing Preferences

In this exercise, you will view and edit your user preferences.

Exercise Steps:
1. *Click* the **Preferences** link on the menu bar.
2. *Click* the **edit** link.
3. *Edit* your **address information**.
4. *Click* the **Save** button.

Lesson Two: Contacts

Lesson Two Exercises

1. Adding a Contact

In this exercise, you will add a contact to your contacts list.

Exercise Steps:
1. *Click* the **Contacts** link on the menu bar.
2. *Click* the **add contact** link.
3. *Enter* the contact's **E-Mail address**.
4. *Click* the **find** link.

5. *Type* **information** in all appropriate fields if the information was not found.
6. *Click* the **Save Contact** button.

2. Editing a Contact

In this exercise, you will edit a contact on your contacts list.

Exercise Steps:
1. *Click* the **Contacts** link on the menu bar.
2. *Click* the icon to the left of the contact.
3. *Edit* the **contact information**.
4. *Click* the **Save Contact** button.

3. Deleting a Contact

In this exercise, you will delete a contact from your contacts list.

Exercise Steps:
1. *Click* the **Contacts** link on the menu bar.
2. *Click* the icon to the left of the contact.
3. *Click* the **OK** button on the pop-up window.

Lesson Three: Inventory Schedules

Lesson Three Review Questions

1. After what time period does a rejected inventory schedule move to the Inactive tab?

a. 10 days
b. 30 days
c. 60 days
d. 100 days

2. What is the standard format for an inventory schedule number?

a. Your Prime CAGE followed by a reference number
b. Your DoDAAC followed by a dash, a 3-digit sequence number, and the last digit of the current calendar year
c. Your DoDAAC followed by a dash, a 3-digit sequence number, the last digit of the current calendar year, and the letter “R”
d. A 3-digit sequence number and the last digit of the current calendar year followed by a dash and your DoDAAC

3. List the correct order for the steps involved in creating an inventory schedule.

___Adding contacts
___Creating line items
___Entering contract information
___Entering the schedule reference number
___Routing to a PLCO

4. Submitting schedules of excess inventory is a task of the Contractor.

a. True
b. False

5. UIIs are copied automatically when copying line items on an inventory schedule.

a. True
b. False

6. Check the statuses in which inventory schedules have the ability to be deleted:

___Draft
___Submitted
___Accepted
___Rejected

7. Check the statuses in which line items have the ability to be deleted:

___Draft
___Submitted
___Accepted
___Rejected

8. Contractors can search for inventory schedules.

a. True
b. False

9. A PLCO can edit an inventory schedule in any of these statuses, except

a. Disposition – Action Complete
b. Disposition – Action Pending
c. Accepted
d. Submitted

10. A Contractor CANNOT edit an inventory schedule in any of the following statuses except

a. Case Assigned
b. Submitted
c. Accepted
d. Rejected

11. A PLCO can edit a line item in any of these statuses, except

a. Disposition – Action Complete
b. Disposition – Action Pending
c. Accepted
d. Submitted

12. A Contractor CANNOT edit a line item in any of the following statuses except

a. Case Assigned
b. Submitted
c. Accepted
d. Rejected

13. To accept an inventory schedule, an FSC is required for each item.

   a. True
   b. False

14. After what time period does an inventory schedule become overdue if it has not yet been accepted or rejected?

   a. 3 days
   b. 10 days
   c. 30 days
   d. 200 days

15. What status does an inventory schedule go to after being unaccepted?

   a. Submitted
   b. Draft
   c. Rejected
   d. Disposition – Action Complete

16. To reject an inventory schedule, PLCO remarks are required.

   a. True
   b. False

17. Screener rules automatically default to

   a. 001 (WWW for 20 days, followed by GSA for 26 days)
   b. 002 (WWW for 20 days)
   c. 006 (GSA for 26 days)
   d. 999 (No Screening)

18. When does a screener rule take effect?

   a. When a case is established
   b. When the screener rule is set or changed at the inventory schedule level
   c. After an inventory schedule is removed from a case and added to a new case, then the new case is established.
   d. Both A and C

19. Contractors must submit request for withdrawal; only PLCOs or Administrators can withdraw inventory schedules.

    a. True
    b. False

20. A line item can be withdrawn from an inventory schedule in

    a. Accepted status
    b. Case Assigned status
    c. Disposition – Action Pending status
    d. Disposition – Action Complete status

21. List the correct order for steps involved in shipping an item.

    ___Select an inventory schedule from the workload
    ___Select an item to ship
    ___Click the Inventory Schedules link on the menu bar
    ___View the instructions and specify UIIs to ship if necessary
    ___Click the disposition link

Lesson Three Exercises

1. Managing the Inventory Schedules Workload

In this exercise, you will navigate the inventory schedules workload.

Exercise Steps:
1. *Click* the **Inventory Schedules** link on the menu bar.
2. *Click* the **Draft tab**.
3. *Click* the **Inactive tab**.
4. *Click* the **Active tab**.

2.1. Creating an Inventory Schedule – Entering the Schedule Reference Number

In this exercise, you will begin the process of creating an inventory schedule by entering the schedule reference number.

Exercise Steps:
1. *Start* from the **Home Page**.
2. *Click* the **Create Inventory Schedule** link.
3. *Type* the **Prime CAGE**.
4. *Type* the **Reference Number**.
5. *Click* the **Save** button.

2.2. Creating an Inventory Schedule – Entering Contract Data

In this exercise, you will enter the contract data for the inventory schedule you are creating.

Exercise Steps:
1. *Type* **information** in appropriate fields.
2. *Click* the **Save and Continue** button.

2.3. Creating an Inventory Schedule – Adding Line Items

In this exercise, you will enter the line items for the inventory schedule you are creating.

Exercise Steps:
1. *Enter* an **NSN** in the NSN box and click the icon.
2. *Type* **information** in the remaining fields.
3. *Click* the **Add Another Item** button to add another item to the inventory schedule.

2.4. Creating an Inventory Schedule – Using the NSN/Part Number Lookup

In this exercise, you will use the NSN/Part Number lookup to find items for the inventory schedule you are creating.

Exercise Steps:
1. *Click* the **icon** next to either the NSN or Part Number fields on the Property Item Details page, leaving the fields blank.
2. *Type* **search criteria**.
3. *Click* the **Submit** button.
4. *Select* an **item**.
5. *Click* the **Select NSN button**.
6. *Type* **information** in the remaining fields.
7. *Click* the **Save and Continue** button.

2.5. Creating an Inventory Schedule – Selecting Points of Contact

In this exercise, you will select POCs for the inventory schedule you are creating.

Exercise Steps:
1. *Select* the **contacts** you wish to associate.
2. *Click* the **Save & Submit** button to submit the inventory schedule.

2.6. Creating an Inventory Schedule – Routing the Inventory Schedule

In this exercise, you will route the inventory schedule you just created to a PLCO.

Exercise Steps:
1. *Type* the **E-Mail address** of the PLCO or Administrator to whom you wish to route the inventory schedule, or leave the field blank to route to an internal PLCO using CMT.
2. *Click* the **Continue** button.

3. Copying an Existing Inventory Schedule

In this exercise, you will copy an existing inventory schedule.

Exercise Steps:
1. *Start* from the **Home Page**.
2. *Click* the **Copy Existing Inventory Schedule** link.
3. *Click* the **Copy** link next to any inventory schedule under the Active, Draft, or Inactive tabs.
4. *Select* the **items** you would like to copy.
5. *Type* the **quantity** you wish to have of each item you are copying.
6. *Click* the **Save and Continue** button.

4. Submitting a Draft Inventory Schedule

In this exercise, you will submit a draft inventory schedule.

Exercise Steps:
1. *Click* the **Inventory Schedules** link on the menu bar.
2. *Click* the **Draft tab**.
3. *Select* the **inventory schedule** you wish to submit.
4. *Click* the **submit to PLCO** link.
5. *Type* the **E-Mail address** of the PLCO or Administrator to whom you wish to route the inventory schedule, or leave the field blank to route to an internal PLCO using CMT.
6. *Click* the **Continue** button.

5. Deleting an Inventory Schedule

In this exercise, you will delete an inventory schedule.

Exercise Steps:
1. *Click* the **Inventory Schedules** link on the menu bar.
2. *Click* the **Draft tab**.
3. *Select* the **inventory schedule** you wish to delete.
4. *Click* the **delete** link.
5. *Click* the **OK** button on the pop-up window.

6. Deleting a Line Item

In this exercise, you will delete a line item.

Exercise Steps:
1. *Start* from the **View Inventory Schedule page**.
2. *Scroll* down to the **Line Items tab**.
3. *Select* the **line item** you wish to delete.
4. *Click* the **delete** link on the View Item page.
5. *Click* the **OK** button on the pop-up window.

7. Searching for an Inventory Schedule

In this exercise, you will search for an inventory schedule.

Exercise Steps:
1. *Start* from the **Inventory Schedules Workload page**.
2. *Click* the **search schedules** link.
3. *Type* **search criteria**.
4. *Click* the **Search** button.

8. Viewing Inventory Schedule History

In this exercise, you will view the history of an inventory schedule.

Exercise Steps:
1. *Start* from the **Inventory Schedules Workload page**.
2. *Select* an **inventory schedule**.
3. *Click* the **view history** link.
4. *Click* the **Return** button.

9. Editing an Inventory Schedule

In this exercise, you will edit an inventory schedule.

Exercise Steps:
1. *Start* from the **View Inventory Schedule page**.
2. *Click* the **edit** link.
3. *Edit* the **necessary information**.
4. *Click* the **Save** button.

10. Editing a Line Item

In this exercise, you will edit a line item.

Exercise Steps:
1. *Start* from the **View Inventory Schedule page**.
2. *Scroll* down to the **Line Items tab**.
3. *Select* an **item**.
4. *Click* the **edit** link.
5. *Edit* the **necessary information**.
6. *Click* the **Save** button.

11. Accepting an Inventory Schedule

In this exercise, you will accept an inventory schedule that has been sent to you.

Exercise Steps:
1. *Select* an **inventory schedule** with Submitted status.
2. *Verify* the **FSC** is entered for each line item.
3. *Select* an **FSC** for any item not issued one.
4. *Click* the **Accept** button.

12. Unaccepting an Inventory Schedule

In this exercise, you will unnaccept an inventory schedule.

Exercise Steps:
1. *Select* an **inventory schedule** with Accepted status
2. *Click* the **unaccept** link.

13. Rejecting an Inventory Schedule

In this exercise, you will reject an inventory schedule.

Exercise Steps:
1. *Select* an **inventory schedule** with Submitted status.
2. *Click* the **edit** link on the View Inventory Schedule page.
3. *Type* **comments** regarding the rejection in the PLCO Remarks box.
4. *Click* the **Save** button.
5. *Click* the **Reject** button.

14. Applying the Screener Rule

In this exercise, you will apply a screener rule to one or more items on an inventory schedule.

Exercise Steps:
1. *Start* from the **View Inventory Schedule page**.
2. *Click* the **apply screener rule** link.
3. *Select* **items**.
4. *Click* the **Apply** button to apply the screener rule to only the selected items, or *click* the **Apply All** button to apply the screener rule to all the items in the inventory schedule, regardless of whether or not they are selected.

15. Reviewing Submitted Withdrawal Requests

In this exercise, you will review an inventory withdrawal request submitted to you by the Contractor.

Exercise Steps:
1. *Start* from the **Home Page**.
2. *Click* the **Inventory Withdrawal Requests Submitted for your Acceptance** link.
3. *Select* the **inventory schedule** you wish to approve for withdrawal.
4. *Select* **items** to approve for withdrawal.
5. *Click* the **Continue** button.
6. *Click* the **Continue** button.
7. *Type* **comments** regarding the withdrawal request to send them in an E-Mail message to the Contractor who submitted the withdrawal request.
8. *Click* the **Update and Send E-Mail to Contractor** button.

16. Resubmitting an Inventory Schedule

In this exercise, you will resubmit a rejected inventory schedule.

Exercise Steps:
1. *Start* from the **Inventory Schedules Workload page**.
2. *Select* the **rejected inventory schedule** you wish to resubmit.
3. *Click* the **re-submit** link.
4. *Type* the **E-Mail address** of the PLCO or Administrator to whom you wish to route the inventory schedule, or leave the field blank to route to an internal PLCO using CMT.

17. Viewing Disposition Instructions and Shipping Items

In this exercise, you will ship items that have been issued disposition instructions.

Exercise Steps:
1. *Start* from the **Inventory Schedules Workload page**.
2. *Select* an **inventory schedule**.
3. *Click* the **disposition** link to view the disposition details.
4. *Click* the **view** link next to an item.
5. *Select* the **UIIs** that will be shipped.
6. *Click* the **Items Shipped** button.
7. *Type* **comments** regarding the shipment.
8. *Click* the **Submit** button.

Lesson Four: Referrals

Lesson Four Review Questions

1. After what time period does an accepted referral get removed from the workload?

   a. 10 days
   b. 30 days
   c. 60 days
   d. 100 days

2. When the receiver rejects are referral, the rejected referral remains under the receiver's Incoming tab for 60 days.

   a. True
   b. False

3. When the receiver accepts a referral, the inventory schedules on it are automatically assigned to a case.

   a. True
   b. False

4. When the receiver accepts a referral, the case is automatically established.

   a. True
   b. False

5. What do all the inventory schedules assigned to a referral need to have in common?

   a. Prime contract number and Prime CAGE
   b. 1st-tier and 2nd-tier subcontractors
   c. Location CAGE
   d. All of the above

6. What status does an inventory schedule need to be in to be assigned to a referral?

   a. Draft
   b. Submitted
   c. Accepted
   d. Case Assigned

7. What is the standard format for a referral number?

a. Your Prime CAGE followed by a dash and the letter R, followed by a 5-digit sequence number.
b. Your DoDAAC followed by a dash, a 3-digit sequence number, and the last digit of the current calendar year
c. Your DoDAAC followed by a dash, a 3-digit sequence number, the last digit of the current calendar year, and the letter "R"
d. A 3-digit sequence number and the last digit of the current calendar year followed by a dash and your DoDAAC

8. Check the statuses in which referrals have the ability to be edited:

___Draft
___Submitted
___Withdrawn
___Rejected

9. Check the statuses in which referrals have the ability to be deleted:

___Draft
___Submitted
___Withdrawn
___Rejected

10. Check the statuses in which referrals have the ability to be withdrawn:

___Draft
___Submitted
___Accepted
___Rejected

11. When searching for referrals, PLCOs can only search their own workload.

a. True
b. False

Lesson Four Exercises

1. Managing the Referral Workload

In this exercise, you will navigate the referral workload.

Exercise Steps:
1. *Click* the **Referrals** link on the menu bar.
2. *Click* the **Outgoing Referrals tab**.
3. *Click* the **Incoming Referrals tab**.

2. Accepting a Referral

In this exercise, you will accept a referral that has been sent to you.

Exercise Steps:
1. *Start* from the **Referral Workload page**.
2. *Select* an **incoming referral** with the status Active – Action Required.
3. *Click* the **Accept** button.
4. *Type* **information** in the required fields.
5. *Click* the **Submit** button.

3. Rejecting a Referral

In this exercise, you will reject a referral that has been sent to you.

Exercise Steps:
1. *Start* from the **Referral Workload page**.
2. *Select* an **incoming referral** with the status Active – Action Required.
3. *Click* the **Reject** button.
4. *Type* **comments** regarding the rejection in the Rejection Remarks box.
5. *Click* the **Reject Referral** button.

4. Creating a Referral

In this exercise, you will create a referral.

Exercise Steps:
1. *Start* from the **Referral Workload page**.
2. *Click* the **add referral** link.
3. *Type* the **Referral DoDAAC**.
4. *Type* the **E-Mail address** of the PLCO who will receive the referral.
5. *Select* an **inventory schedule** to associate it with the referral.
6. *Click* the **Save Draft and Continue** button.
7. *Click* the **submit referral** link.

5. Editing a Referral

In this exercise, you will edit a referral you have created.

Exercise Steps:
1. *Start* from the **Referral Workload page**.
2. *Click* the **Outgoing Referrals tab**.
3. *Select* a **draft referral**.
4. *Click* the **edit** link.
5. *Modify* the **necessary information**.
6. *Click* the **Save** button.

6. Withdrawing a Referral

In this exercise, you will withdraw a referral you have submitted.

Exercise Steps:
1. *Start* from the **Referral Workload page**.
2. *Select* the **Outgoing Referrals tab**.
3. *Select* a **submitted referral**.
4. *Click* the **withdraw** link.

7. Searching for a Referral

In this exercise, you will search for a referral.

Exercise Steps:
1. *Start* from the **Referral Workload page**.
2. *Click* the **search referrals** link.
3. *Type* **search criteria**.
4. *Click* the **Search** button.

Lesson Five: Cases

Lesson Five Review Questions

1. You can find your withdrawn cases under the Draft tab.

a. True
b. False

2. What do all the inventory schedules assigned to a case need to have in common?

a. Prime contract number and Prime CAGE
b. 1st-tier and 2nd-tier subcontractors
c. Location CAGE
d. All of the above

3. What status does an inventory schedule need to be in to be assigned to a case?

a. Draft
b. Submitted
c. Accepted
d. Rejected

4. What is the standard format for a case number?

   a. Your Prime CAGE followed by a dash and the letter R, followed by a 5-digit sequence number.
   b. Your DoDAAC followed by a dash, a 3-digit sequence number, and the last digit of the current calendar year
   c. Your DoDAAC followed by a dash, a 3-digit sequence number, the last digit of the current calendar year, and the letter "R"
   d. A 3-digit sequence number and the last digit of the current calendar year followed by a dash and your DoDAAC

5. When searching for cases, only Administrators can search the work of any user.

   a. True
   b. False

6. Cases can be edited in all of the following statues EXCEPT

   a. Established
   b. Screening Complete
   c. Withdrawn
   d. Closed

7. What happens when an inventory schedule is detached from a case?

   a. It goes to Withdrawn status
   b. It goes to Accepted status
   c. It goes to Submitted status
   d. It goes to Disposition – Action Complete status

8. If you detach all of the inventory schedules from a case, the case will revert to Draft status.

   a. True
   b. False

9. If your case becomes overage, you will need to select an overage reason.

a. True
b. False

10. You can withdraw a case unless any item on it has a disposition code, requisition, or sale associated with it.

a. True
b. False

11. What happens to an inventory schedule when the case it is on is withdrawn?

a. It goes to Withdrawn status
b. It goes to Accepted status
c. It goes to Submitted status
d. It goes to Closed status

12. When a disposal code has been assigned to an item, the schedule gains Disposition – Action Pending status.

a. True
b. False

13. List the correct order for steps involved in issuing a final disposition code.

___Issue a disposition code
___Select a case from the workload
___Select an item to disposition
___Click the Cases link on the menu bar
___Input shipping instructions
___Click the disposition link

14. A group disposition allows you to apply one disposition code to a group of cases.

a. True
b. False

15. List the correct order for steps involved in issuing a removing a disposition code.

___Reduce the disposition quantity
___Select a case from the workload
___Select an item to remove the disposition code
___Click the Cases link on the menu bar
___Click the Submit button
___Click the disposition link

16. A disposal action can be marked complete once the required inventory on the disposition has been shipped.

a. True
b. False

17. List the correct order for steps involved in removing action complete from a disposition.

___Click the Remove Action Complete button
___Select a case from the workload
___Select an item with a completed disposition
___Click the Cases link on the menu bar
___Click the disposition link

18. What needs to take place before a case can be closed?

a. All items must have a disposition code
b. All disposal actions must be marked complete
c. Inventory verification survey must be completed
d. A and B

19. List the correct order for steps involved in issuing one shipping address to multiple items in the case workload.

___Click the Save button
___Click the add shipping info link
___Click the Cases link on the menu bar
___Select affected items and enter shipping information

Lesson Five Exercises

1. Managing the Case Workload

In this exercise, you will navigate the case workload.

Exercise Steps:
1. *Click* the **Cases** link on the menu bar.
2. *Click* the **Draft tab**.
3. *Click* the **Inactive tab**.
4. *Click* the **Active tab**.

2. Creating a Case

In this exercise, you will create a new case.

Exercise Steps:
1. *Start* from the **Home Page**.
2. *Click* the **Create a Case** link.
3. *Type* **information** in the required fields.
4. *Select* an **inventory schedule** to assign it.
5. *Click* the **Save Draft and Continue** button.

3. Establishing a Case

In this exercise, you will establish a draft case.

Exercise Steps:
1. *Start* from the **Case Workload page**.
2. *Click* the **Draft tab**.
3. *Select* the **draft case** you wish to establish.
4. *Click* the **establish case** link.
5. *Select* an **Agency/Department**.
6. *Click* the **Submit** button.

4. Viewing Case History

In this exercise, you will view the history for a case.

Exercise Steps:
1. *Start* from the **Case Workload page**.
2. *Select* a **case**.
3. *Click* the **view history** link to view the case's history.
4. *Click* the **Return** button on the View Case History page to return to the View Case Details page.

5. Searching for a Case

In this exercise, you will search for a case.

Exercise Steps:
1. *Start* from the **Case Workload page**.
2. *Click* the **search cases** link.
3. *Type* **search criteria**.
4. *Click* the **Search** button.

6. Editing a Case

In this exercise, you will edit a case.

Exercise Steps:
1. *Start* from the **View Case Details page**.
2. *Click* the **edit** link.
3. *Edit* the **necessary information**.
4. *Select* an **Overage Reason** if necessary.
5. *Associate* or *disassociate* **inventory schedules** if necessary.
6. *Click* the **Submit** button.

7. Withdrawing a Case

In this exercise, you will withdraw a case.

Exercise Steps:
1. *Start* from the **View Case Details page**.
2. *Click* the **withdraw** link.
3. *Type* **comments** regarding the withdrawal.
4. *Click* the **Submit** button.

8. Re-establishing a Withdrawn Case

In this exercise, you will re-establish a withdrawn case.

Exercise Steps:
1. *Start* from the **Case Workload page**.
2. *Click* the **Inactive tab**.
3. *Select* a **withdrawn case**.
4. *Click* the **re-establish** link.
5. *Type* **comments** regarding the re-establishment.
6. *Click* the **Submit** button.

9. Deleting a Case

In this exercise, you will delete a draft case.

Exercise Steps:
1. *Start* from the **Case Workload page**.
2. *Click* the **Draft tab**.
3. *Select* a **draft case**.
4. *Click* the **delete** link.
5. *Click* the **OK** button on the pop-up window.

10. Transferring an Individual Case

In this exercise, you will transfer an individual case from your workload.

Exercise Steps:
1. *Start* from the **Case Workload page**.
2. *Select* a **case** to transfer.
3. *Click* the **transfer** link.
4. *Type* the **E-Mail address** of the PLCO who will receive the case in the Transfer to E-Mail box.
5. *Click* the **icon**.
6. *Type* **comments**.
7. *Click* the **Transfer** button.
8. *Click* the **OK** button on the pop-up window.

11. Completing an Inventory Verification Survey

In this exercise, you will begin the inventory verification survey process.

Exercise Steps:
1. *Start* from the **View Case Details page**.
2. *Click* the **verification survey** link.
3. *Answer* the **questions** in the Technical Verification section.
4. *Select* the **Completion of this section is required** checkbox at the top of the Termination Inventory section if answers to the questions in the Termination Inventory section are required.
5. *Answer* the **questions** in the Termination Inventory Section.
6. *Click* the **Send E-Mail to Surveyor** button.

7. *Type* the **E-Mail address** of the QAR to receive the Inventory Verification Survey.
8. *Click* the **Send E-Mail** button.

12. Assigning a Disposition Code

In this exercise, you will assign a disposition code to an item.

Exercise Steps:
1. *Start* from the **View Case Details page**.
2. *Click* the **disposition** link.
3. *Select* an **inventory schedule** with the Action Needed! status in the Disposition column.
4. *Type* the **quantity** you would like to disposition in the Quantity box.
5. *Select* the **disposition code**.
6. *Select* the **Shipping Required** box if shipping is required for the disposition.
7. *Type* **comments** relevant to the disposition in the PLCO Remarks box.
8. *Click* the **Continue** button.
9. *Select* the **UIIs** you wish to disposition on the Disposition – Assign UII page.
10. *Click* the **Submit** button.
11. *Type* **information** in the required fields on the Disposition Shipping Information page.
12. *Click* the **Submit** button.

13. Issuing a Group Disposition

In this exercise, you will assign a disposition code to a group of items on the same case.

Exercise Steps:
1. *Start* from the **View Case Details page**.
2. *Click* the **disposition** link.
3. *Click* the **group disposition** link.
4. *Select* the **schedule reference number** if the items you are dispositioning are all associated with the same inventory schedule.
5. *Select* the **disposition code**.
6. *Type* **comments** in the PLCO Remarks box.
7. *Select* the **items** you wish to disposition.
8. *Modify* the **disposition quantities**, if necessary.
9. *Click* the **Continue** button.
10. *Select* the **UIIs** you wish to assign to the specified item's disposition.
11. *Click* the **Continue** button.
12. *Type* **information** in the required fields.
13. *Click* the **Submit** button.

14. Removing a Disposition Code

In this exercise, you will remove a disposition code from an item.

Exercise Steps:
1. *Start* from the **View Case Details page**.
2. *Click* the **disposition** link.
3. *Select* the **disposition** that needs to be removed.

4. *Change* the **quantity** to the quantity of the item you wish to keep with the selected disposition code. This can be 0 or a reduced quantity.
5. *Click* the **Continue** button.
6. *Uncheck* the **UIIs** that are affected by the removal of the disposition code.
7. *Click* the **Submit** button on the Assign UIIs page.
8. *Click* the **Submit** button on the Shipping Information page.

15.1 Marking a Disposition as Complete – Verifying Shipment

In this exercise, you will verify that the items have been shipped for the dispositions you wish to mark as complete.

Exercise Steps:
1. *Start* from the **Inventory Schedules Workload page**.
2. *Select* the **inventory schedule** containing the shipped items.
3. *Click* the **disposition** link.
4. *Verify* that the **items** have been shipped.

15.2 Marking a Disposition as Complete – Marking Action Complete

In this exercise, you will mark a disposition as complete.

Exercise Steps:
1. *Start* from the **View Case Details page**.
2. *Click* the **disposition** link.
3. *Select* the **pending dispositions** you wish to mark complete.
4. *Click* the **Mark Action Complete** button.

15.3 Marking a Disposition as Complete – Removing Action Complete

In this exercise, you will remove action complete status from a disposition.

Exercise Steps:
1. *Start* from the **View Case Details page**.
2. *Click* the **disposition** link.
3. *Click* the link on a **disposition** with Action Completed disposition status.
4. *Click* the **Remove Action Complete** button.

16. Closing a Case

In this exercise, you will close a case.

Exercise Steps:
1. *Start* from the **Case Workload page**.
2. *Select* a **case** that has been fully dispositioned. It will not have [disposition required] in the status.

3. *Click* the **close** link.
4. *Type* **remarks** in reference to the closing.
5. *Click* the **Submit** button.

17. Reopening a Case

In this exercise, you will reopen a closed case.

Exercise Steps:
1. *Start* from the **Case Workload page**.
2. *Click* the **Inactive tab**.
3. *Select* a **closed case**.
4. *Click* the **re-open** link.
5. *Type* **comments** regarding the reopening.
6. *Click* the **Submit** button.

18. Issuing Shipping Instructions to the Case Workload

In this exercise, you will issue shipping instructions to one or more items in the case workload.

Exercise Steps:
1. *Start* from the **Case Workload page**.
2. *Click* the **add shipping information** link.
3. *Type* **information** in the required fields.
4. *Select* the **cases** to apply the shipping information.
5. *Click* the **Save** button.

Lesson Six: Requisitions

Lesson Six Review Questions

1. Shipped requisitions appear under the Active tab.

    a. True
    b. False

2. Rejected requisitions appear under the Inactive tab.

    a. True
    b. False

3. Until when can the PLCO or Administrator make changes to the approval or rejection quantities?

    a. The requisition is completed.
    b. The final disposition code is issued.
    c. The inventory has been shipped.
    d. None of the above.

4. After you click the Completed button, what status will the requisition have?

    a. Submitted
    b. Completed
    c. Shipping Instructions Issued
    d. Shipped

5. Screeners can search for ANY inventory in PCARSS when searching for inventory to requisition.

    a. True
    b. False

6. PLCOs can only search in their own workloads when searching for inventory to requisition.

    a. True
    b. False

7. Check the statuses where PLCOs and Administrators have the ability to edit a requisition:

___Draft
___Submitted
___Shipping Instructions Issued
___Shipped
___Cancelled
___Rejected

8. Check the statuses where Screeners have the ability to edit a requisition:

___Draft
___Submitted
___Shipping Instructions Issued
___Shipped
___Cancelled
___Rejected

9. Screeners can cancel their own requisitions.

a. True
b. False

10. A PLCO is able to search for a requisition.

a. True
b. False

11. If you chose the DO – Donation disposition code, you will be required to select a school/organization for the donation.

a. True
b. False

Lesson Six Exercises

1. Managing the Requisition Workload

In this exercise, you will navigate the requisition workload.

Exercise Steps:
1. *Click* the **Requisitions** link on the menu bar.
2. *Click* the **Draft tab**.

3. *Click* the **Inactive tab**.
4. *Click* the **Active tab**.

2. Approving Items on a Requisition

In this exercise, you will approve items on a requisition.

Exercise Steps:
1. *Click* the **Requisitions** link on the menu bar.
2. *Select* a **requisition** with Submitted status.
3. *Click* the **Approve** button.
4. *Select* the **items** you wish to approve.
5. *Modify* the **quantities** under the Quantity Approved column if necessary.
6. *Click* the **Approved** button.
7. *Select* the **UIIs** you wish to assign to the specified item's requisition.
8. *Click* the **Assign UII** button.

3. Editing Line Item Shipping Information and Approval Status

In this exercise, you will edit the shipping information and approval status for an item on a requisition.

Exercise Steps:
1. *Click* the **Requisitions** link on the menu bar.
2. *Select* a **requisition** with Submitted status.
3. *Click* the  **icon** next to the item you wish to edit.
4. *Modify* the **information** in the Line Item Shipping Information section if necessary.

5. *Modify* the **quantity** you are approving in the Quantity Approved box if necessary.
6. *Modify* the **quantity** you are rejecting in the Quantity Rejected box if necessary.
7. *Click* the **Submit** button.
8. *Modify* the **selected UIIs** if necessary.
9. *Click* the **Submit** button.

4. Rejecting a Requisition

In this exercise, you will reject a requisition.

Exercise Steps:
1. *Click* the **Requisitions** link on the menu bar.
2. *Select* a **requisition** with Submitted status.
3. *Click* the **Reject** button.

5. Completing a Requisition

In this exercise, you will complete a requisition.

Exercise Steps:
1. *Click* the **Requisitions** link on the menu bar.
2. *Select* a **requisition** where all the items have been reviewed and approved and/or rejected.
3. *Click* the **Complete** button.
4. *Verify* that the **E-Mail address and message** are correct and click the Send E-Mail button.

6. Searching Inventory for Requisition

In this exercise, you will search for inventory to include on a requisition.

Exercise Steps:
1. *Start* from the **Inventory Search page**.
2. *Type* **search criteria**.
3. *Click* the **Search** button.
4. *Select* the **items** for your cart.
5. *Reduce* the **quantity** desired if necessary.
6. *Click* the **Add Items to Cart** button.

7. Viewing the Cart

In this exercise, you will view the contents of your cart.

Exercise Steps:
1. *Start* from the **My Cart page**.
2. *Click* the **Checkout Cart** button.

8. Creating a Requisition

In this exercise, you will create a new requisition from the items in your cart.

Exercise Steps:
1. *Start* from the **My Cart page**.
2. *Click* the **Checkout Cart** button.
3. *Type* **information** in the required fields.
4. *Click* the **Save** button.
5. *Select* the **draft requisition**.
6. *Verify* the **information** is correct.

7. *Click* the **Submit Requisition** button.

9. Editing a Requisition

In this exercise, you will edit a requisition.

Exercise Steps:
1. *Start* from the **View Requisition page**.
2. *Click* the **edit** link at the top of the page.
3. *Modify* the **necessary information**.
4. *Click* the **Save** button.

10. Canceling a Requisition

In this exercise, you will cancel a requisition.

Exercise Steps:
1. *Start* from the **Requisition Workload page**.
2. *Select* the **requisition** you wish to cancel.
3. *Click* the **cancel** link.
4. *Click* the **OK** button on the pop-up window.

11. Resubmitting a Requisition

In this exercise, you will resubmit a cancelled or rejected requisition.

Exercise Steps:
1. *Start* from the **Requisition Workload page**.
2. *Click* the **Inactive tab**.
3. *Select* the **Cancelled or Rejected requisition** you wish to resubmit.

4.	*Verify* the **information** is correct.
5.	*Click* the **Resubmit** button.

12. Searching for a Requisition

In this exercise, you will search for a requisition.

Exercise Steps:	
1.	*Click* the **search requisition** link on the Requisition Workload page.
2.	*Type* **search criteria**.
3.	*Click* the **Search** button.

13. Issuing a Final Disposition on Requisitioned Inventory

In this exercise, you will issue a final disposition code to a requisitioned item.

Exercise Steps:	
1.	*Start* from the **View Case Details page**.
2.	*Click* the **disposition** link.
3.	*Select* the **disposition** for the requisitioned item.
4.	*Select* a **disposition code**.
5.	*Click* the **Continue** button.
6.	*Verify* the **UIIs** are correct.
7.	*Click* the **Submit** button.
8.	*Verify* the **shipping information** is correct.
9.	*Click* the **Submit** button.

Lesson Seven: Sales

Lesson Seven Review Questions

1. The Active tab displays only your own work.

   a. True
   b. False

2. For Contractors, the sales workload contains the sales assigned to them the sales on the inventory in their workloads, and the sales assigned to their CAGE(s).

   a. True
   b. False

3. Once a sale has had the proceeds collected for all the lots, the sale will appear under which tab?

   a. Active
   b. Draft
   c. Inactive
   d. Completed

4. Only Administrators can search for sales.

   a. True
   b. False

5. Until what point can a PLCO edit a sale?

   a. When all the lots on the sale have been awarded
   b. When all bids on the sale have been completed
   c. When proceeds have been collected for all the lots on the sale
   d. When one lot on the sale has been awarded

6. What status does the sale gain if you delete all the bidders from a sale in All Bids Complete status?

   a. It goes to Pending status
   b. It goes to Draft status
   c. It goes to Closed status
   d. The status does not change

7. At what point does a sale gain Awarded status?

a. When all the lots on the sale have been awarded
b. When all bids on the sale have been completed
c. When proceeds have been collected for all the lots on the sale
d. When one lot on the sale has been awarded

8. Until what point can a PLCO revert a sale status back to pending?

a. When all the lots on the sale have been awarded
b. When all bids on the sale have been completed
c. When proceeds have been collected for all the lots on the sale
d. When one lot on the sale has been awarded

9. Check the steps you need to perform before you can delete a sale that is in All Bids Complete status.

___Remove all the bids
___Remove all the bidders
___Remove all the lots
___Cancel all awards that have been issued

Lesson Seven Exercises

1. Managing the Sales Workload

In this exercise, you will navigate the sales workload.

Exercise Steps:
1. *Click* the **Sales** link on the menu bar.
2. *Click* the **Draft tab**.
3. *Click* the **Completed tab**.
4. *Click* the **Active tab**.

2. Creating a Sales Authorization

In this exercise, you will create a new sales authorization.

Exercise Steps:
1. *Start* from the **Sales Workload page**.
2. *Click* the **create sales authorization** link.
3. *Type* **information** in the required fields.
4. *Click* the **Save and Continue** button.
5. *Select* the **items** you wish to sell.
6. *Modify* the **quantity** of each item if necessary. 7. *Click* the **Save and Continue** button.
8. *Click* the **PLCO Conducts Sale** button to conduct the sale yourself, or *click* the **Send to Contractor** button to notify the contractor of the sales authorization and have them conduct the sale.
9. *Verify* that the E-**Mail address and message** are correct.
10. *Click* the **Send E-Mail** button.

3.1. Editing a Sale – Editing Sale Information

In this exercise, you will edit the sale information.

Exercise Steps:
1. *Start* from the **Sales Workload page**.
2. *Select* a **sale** that is pending action.
3. *Click* the **edit sale** link.
4. *Modify* the **necessary information**.
5. *Click* the **Save and Continue** button.

3.2 Editing a Sale – Editing Line Items for Sale

In this exercise, you will modify the quantities of the items to include in the sale.

Exercise Steps:
1. *Start* from the **Sales Workload page**.
2. *Select* a **sale** that is pending action.
3. *Click* the **edit inventory** link.
4. *Modify* the **item quantities** as necessary.
5. *Click* the **Save and Continue** button.

4. Searching for a Sale

In this exercise, you will search for a sale.

Exercise Steps:
1. *Click* the **search sales** link on the Sales Workload Page.
2. *Type* **search criteria**.
3. *Click* the **Search** button.

5. Managing Sales Lots

In this exercise, you will create lots based on the inventory you included in the sale.

Exercise Steps:
1. *Start* from the **Sales Workload page**.
2. *Select* a **sale** that is pending action.
3. *Click* the **manage lots** link.

4. *Click* the **create lot** link.
5. *Select* the **items** to include on the lot.
6. *Type* the **quantity** you wish to include in the lot of each item.
7. *Click* the **Submit** button.

6. Searching for Existing Bidders

In this exercise, you will search for existing bidders in PCARSS and add those bidders to a sale.

Exercise Steps:
1. *Start* from the **Sales Workload page**.
2. *Select* a **sale** that is pending action.
3. *Click* the **assign bidders** link.
4. *Click* the **add bidder** link.
5. *Type* **search criteria**.
6. *Click* the **Search** button.
7. *Select* **bidders** to add them to the sale.
8. *Click* the **Add Bidder(s) to Sale** button.

7. Creating a New Bidder

In this exercise, you will create a new bidder in PCARSS and assign that bidder to a sale.

Exercise Steps:
1. *Start* from the **Bidder Search Results page**.
2. *Click* the **add new bidder** link.
3. *Type* the **bidder's information**.

4. *Click* the **Submit** button.
5. *Perform* the **steps for Searching for Existing Bidders**.

8. Entering Bids

In this exercise, you will enter each bidder's bid for each of the lots on the sale.

Exercise Steps:
1. *Start* from the **Sales Workload page**.
2. *Select* a **sale** that is pending action.
3. *Click* the **conduct sales** link.
4. *Click* the **enter bids by bidder** link.
5. *Select* a **bidder**.
6. *Select* either No Bid or No Response or *type* the **amount** of the bidder's bid.
7. *Select* a **date** if you typed a bid amount or selected the No Bid option.
8. *Repeat* **Steps 5-7** for each bidder.
9. *Click* the **Save and Continue** button.
10. *Click* the **All Bids Completed** button.

9. Viewing the Bid Summary

In this exercise, you will view a summary of all the bids currently on a sale.

Exercise Steps:
1. *Start* from the **View Sale page**.

2. *Click* **the conduct sales** link. If the conduct sales link is grayed out because all bids are complete, *click* the **Conduct Sales tab** and then the **bid summary** link.
3. Otherwise, *click* the **enter bids by bidder** link.
4. *Click* the **bid summary** link.
5. *Click* the **OK** button.

10.1. Awarding the Sale

In this exercise, you will issue an award to a sales lot.

Exercise Steps:
1. *Start* from the **Sales Workload page**.
2. *Select* a **sale** with the All Bids Complete or Awarded status.
3. *Click* the **updated** link for a lot with Pending Award Decision status.
4. *Select* the **bidder** you wish to award.
5. *Click* the **Issue Award** button to award the bidder.
6. *Select* the **UIIs** you wish to include in the lot.
7. *Click* the **Submit** button.

10.2. Awarding the Sale – Awarding to Another Bidder

In this exercise, you will award an already awarded lot to another bidder.

Exercise Steps:
1. *Start* from **View Award page**.

2. *Click* the **updated** link for a lot with Pending Award Collections status.
3. *Click* the **award to another bidder** link.
4. *Select* the **bidder** you wish to award.
5. *Click* the **Re-Issue Award** button.

11. Collecting Proceeds

In this exercise, you will collect proceeds for the sold lots.

Exercise Steps:
1. *Start* from the **Sales Workload page**.
2. *Select* a **sale** with the Awarded status.
3. *Click* the **updated** link for a lot with Pending Award Collections status.
4. *Click* the **Proceeds Collected** button.

12. Issuing a Final Disposition on Sold Inventory

In this exercise, you will verify the disposition information for a sold item.

Exercise Steps:
1. *Start* from the **View Case Details page**.
2. *Click* the **disposition** link.
3. *Select* the **disposition** for the sold item.
4. *Click* the **Continue** button.
5. *Verify* the **UIIs** are correct.
6. *Click* the **Submit** button.
7. *Verify* the **shipping information** is correct.
8. *Click* the **Submit** button.

Lesson Eight: Transfers

Lesson Eight Review Questions

1. PLCOs can perform a mass transfer of their own work.

   a. True
   b. False

2. PLCOs are limited to transferring their own cases.

   a. True
   b. False

3. Transferring a case will also transfer its associated inventory schedules, requisitions, and sales.

   a. True
   b. False

4. PLCOs are limited to transferring their own inventory sched-ules.

   a. True
   b. False

5. Inventory schedules can only be transferred if they are on a case.

   a. True
   b. False

Lesson Eight Exercises

1. Performing a Workload Mass Transfer

In this exercise, you will perform a workload mass transfer as an Administrator.

Exercise Steps:
1. *Click* the **Admin** link on the menu bar.
2. *Click* the **Mass Transfer** link.
3. *Type* the **E-Mail address** of the PLCO whose work is being transferred.

4. *Click* the **icon**.
5. *Type* the **E-Mail address** of the PLCO who will receive the work.
6. *Click* the **icon**.
7. *Type* **comments** in the Transfer Comments box.
8. *Click* the **Transfer Workload** button.

2. Transferring Cases

In this exercise, you will transfer one or more cases.

Exercise Steps:
1. *Click* the **Transfers** link on the menu bar.
2. *Click* the **Case Transfer** link.
3. *Type* **search criteria**.
4. *Click* the **Search** button.
5. *Select* the **cases** you wish to transfer.
6. *Click* the **Continue** button.
7. *Type* the **E-Mail address** of the PLCO to whom you wish to transfer the case(s).
8. *Click* the **icon**.
9. *Type* **comments**.
10. *Click* the **Transfer** button.

3. Transferring Inventory Schedules

In this exercise, you will transfer one or more inventory schedules.

Exercise Steps:
1. *Click* the **Transfers** link on the menu bar.
2. *Click* the **Inventory Schedule Transfer** link.
3. *Type* **search criteria**.
4. *Click* the **Search** button.
5. *Select* the **inventory schedules** you wish to transfer.
6. *Click* the **Continue** button.
7. *Type* the **E-Mail address** of the PLCO to whom you wish to transfer the inventory schedule(s).
8. *Click* the **icon**.
9. *Type* **comments**.
10. *Click* the **Transfer Inventory Schedule(s)** button.

Lesson Nine: PLCO Support Request Process

Lesson Nine Exercises

1. Requesting a PLCO to Support

In this exercise, you will request a PLCO to support as a Support PLCO.

Exercise Steps:
1. *Log* in as a **Support PLCO**.
2. *Type* the **E-Mail address** of the PLCO you wish to support.
3. *Click* the **Request** button.

2. Logging in as a PLCO

In this exercise, you will log in as a PLCO from the Support PLCO role.

Exercise Steps:
1. *Log* in as a **Support PLCO**.
2. *Select* the **PLCO** you wish to log in as.
3. *Click* the **Login** button.

3. Approving or Disapproving a Support Request

In this exercise, you will approve or disapprove a support request as an Administrator.

Exercise Steps:
1. *Start* from the **Home Page**.
2. *Click* the **Support PLCO Requests for your Approval** link.
3. *Select* the **support request** you wish to approve.
4. *Click* either the **Approve** or **Disapprove** buttons.

4. Revoking a Support Request

In this exercise, you will revoke a support request as an Administrator.

Exercise Steps:
1. *Click* the **Admin** link on the menu bar.
2. *Click* the **Support PLCO Requests** link.
3. *Click* the **Active** tab.
4. *Select* the **support request** you wish to revoke.
5. *Click* the **Revoke** button.

Module 3: Using Pre-defined Reports

Lesson One: About Reports

Lesson One Review Questions

1. Once you have logged into eTools, the Reports Lists can be accessed by which of the following links?

   a. My page
   b. eTools
   c. Application
   d. None of the above

2. The file formats used to display reports are defined at:

   a. The bottom of the Report List page
   b. The top of the Report List page
   c. The left side of the Report List page
   d. The right side of the Report List page

3. To see data in a specific report format, you need to click the icon at the bottom of the Report List Page.

   a. True
   b. False

4. When viewing report in HTML format, you use which of the following link to go to the next page?

   a. Next
   b. Bottom
   c. Page down
   d. Page up

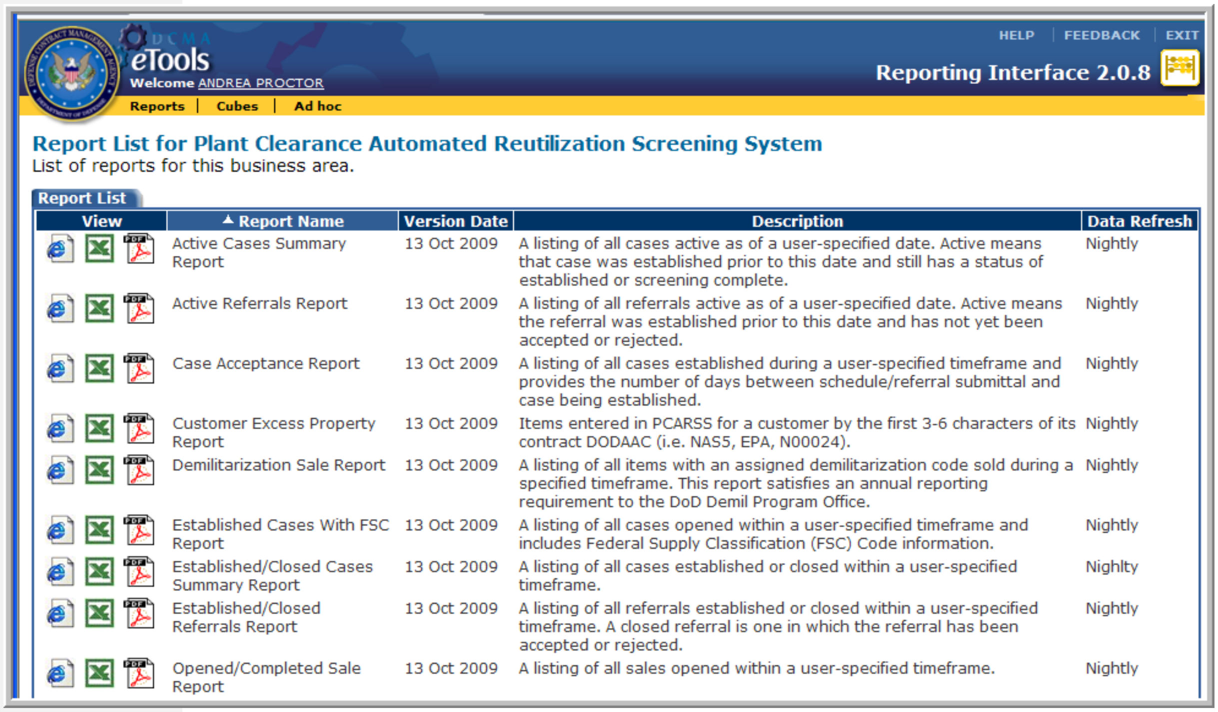
Lesson One Exercises

1. Accessing PCARSS Report Lists

In this exercise, you will log into eTools portal and open a report.

Exercise Steps:
1. From the DCMA home page, *click* the **eTools link**.
2. In the Username text field, *type* your **user name**.

3.	In the Password text field, *type* your **password** and *click* **Login**.
4.	In the My Pages list of options, *click* **Reports**
5.	*Look* for **Plant Clearance Automated Reutilization Screening System** and *click* on the **icon** beside or the highlighted text.
	The result page should look like the screen capture below:



View	Report Name	Version Date	Description	Data Refresh
	Active Cases Summary Report	13 Oct 2009	A listing of all cases active as of a user-specified date. Active means that case was established prior to this date and still has a status of established or screening complete.	Nightly
	Active Referrals Report	13 Oct 2009	A listing of all referrals active as of a user-specified date. Active means the referral was established prior to this date and has not yet been accepted or rejected.	Nightly
	Case Acceptance Report	13 Oct 2009	A listing of all cases established during a user-specified timeframe and provides the number of days between schedule/referral submittal and case being established.	Nightly
	Customer Excess Property Report	13 Oct 2009	Items entered in PCARSS for a customer by the first 3-6 characters of its contract DODAAC (i.e. NAS5, EPA, N00024).	Nightly
	Demilitarization Sale Report	13 Oct 2009	A listing of all items with an assigned demilitarization code sold during a specified timeframe. This report satisfies an annual reporting requirement to the DoD Demil Program Office.	Nightly
	Established Cases With FSC Report	13 Oct 2009	A listing of all cases opened within a user-specified timeframe and includes Federal Supply Classification (FSC) Code information.	Nightly
	Established/Closed Cases Summary Report	13 Oct 2009	A listing of all cases established or closed within a user-specified timeframe.	Nightly
	Established/Closed Referrals Report	13 Oct 2009	A listing of all referrals established or closed within a user-specified timeframe. A closed referral is one in which the referral has been accepted or rejected.	Nightly
	Opened/Completed Sale Report	13 Oct 2009	A listing of all sales opened within a user-specified timeframe.	Nightly

2. Viewing Reports in HTML format

In this exercise, you will view the reports using in HTML format.

Exercise Steps:	
1.	*Log* into **eTools portal** if you have not done so.
2.	*Open* a **report** *and select* the **established date.**

3. *Use* the **shift** key to *select* a **range**. To select two or more filters that are separated, *use* **CTRL key**.
4. *Click* on the **button** to repopulate the list box
5. *Click* on **Select all** or **Deselect all** to select or deselect all filters
6. *Scroll-down* and *click* the **Finish button** at the bottom of the page to run the report.
7. The report is displayed in HTML format.
8. *Scroll* to the **bottom** of the page.
9. *Click* on the **Page Down** link to go to the next page
10. *Click* on the **Bottom link** to go to the end of the report
11. *Click* on the **Page up** link to go back one page
12. *Click* on the **Top link** to go to the beginning page.

3. Viewing Reports in Excel Format

In this exercise, you will log into eTools portal and view a report in Excel format

Exercise Steps:
1. *Log* into **eTools portal** if you have not done so.
2. *Open* a **report** and *select* the **established date.**
3. *Use* the **shift** key to select a range. To select two or more filters that are separated, *use* **CTRL key**.
4. *Click* on the **button** under the selected field or range to repopulate the list box.
5. *Click* on **Select all** or **Deselect all** to select or deselect all filters
6. *Scroll down* and *click* the **Finish button** at the bottom of the page to run the report.

7. A File Download dialog box pops up. *Click* on **Save**.
8. From the Save As dialog box, *browse* to your pre-ferred location on your computer. *Change* the **file name** to a name you prefer.
9. *Click* on **Save**.
10. *Browse* to the **location** that you have saved your report to and double click on the saved report file.
11. *View* the **report** in Excel.

4. Viewing Reports in PDF Format

In this exercise, you will log into eTools portal and view a report in PDF format

Exercise Steps:
1. *Log* into **eTools portal** if you have not done so.
2. *Open* a **report** and *select* the **established date**.
3. *Use* the **shift** key to select a range. To select two or more filters that are separated, *use* **CTRL key**.
4. *Click* on the **button** under the selected field or range to repopulate the list box
5. *Click* on **Select all** or **Deselect all** to select or deselect all filters
6. *Scroll-down* and *click* the **Finish button** at the bottom of the page to run the report.
7. A File Download dialog box pops up. *Click* on **Save**.
8. From the **Save As** dialog box, *browse* to your **pre-ferred location** on your computer. *Change* the **file name** to a name you prefer.
9. *Click* on **Save**.

10.	*Browser* to the **location** that you have saved your report to and *double-click* on the **saved report file**.
11.	*View* the report in Excel.

Lesson Two: About PCARSS Reports

Lesson Two Review Questions

1. To select a range of criteria, which of the following key should be used?

a. Shift key
b. CTRL key
c. Alt key
d. Tab key

2. You need to click on the button next to the list box to:

a. Select a range of filters
b. Repopulate the list box
c. Select all the criteria
d. Select all the data

Lesson Two Exercises

1. Running the Active Case Summary Report

In this exercise, you will run a Active Case Summary Report that was established on 01/01/2010 using DCMA NAVAL SEA SYSTEMS DIVISION, Marine Corps and REPORTABLE as filters

Exercise Steps:	
1.	*Log* into **eTools portal** and then *click* on **Reports.**
2.	*Click* on **PCARSS link** to access PCARSS report lists
3.	From the report lists, *click* on the **Internet Explorer icon** by the Active Cases Summary Report.

4.	*Click* on the **calendar icon** and *select* **Jan. 1, 2010.**
5.	From the division, *select* **DCMA NAVAL SEA SYSTEMS DIVISION DIVISION**.
6.	*Click* on the '**Click here for CMO:**' button.
7.	From the Agency Department list box, *select* **Marine Corps**.
8.	From the Reportable/Non-Reportable list box, *select* **REPORTABLE.**
9.	*Scroll-down* to the bottom of the page, and *click* **FINISH**.
10.	The result should look like the following:

Active Cases Summary Report

Report run on: Jan 21, 2010

PLCO	CMO	Case Number	Buying Activity (DoDAAC)	Status	Established Date	Disposition Due Date	Contract Number	Line Items	Acquisition Cost	Overage Date	Overage Reason	Prime CAGE	Rep./Non-Rep.	Screening Completion Date	Processing Days
ANDREA PROCTOR	DCMA VIRGINIA (S2404A)	S2404A-P158	MU (M00027)	SCREENING COMPLETE	22 Apr 2008	20 Aug 2008	M6785401C0001	112	$72,620.75	8 Nov 2008	DISPOSITION INSTRUCTIONS ISSUED ON TIME FOR ALL ITEMS	07BS6	REPORTABLE	12 May 2008	639 days
DOUGLAS CARLSON	DCMA SYRACUSE (S3306A)	S3306A-C659	MU (M00027)	SCREENING COMPLETE	14 May 2009	11 Sep 2009	M6785405D2002	1	$60,000.00	30 Nov 2009	DISPOSITION INSTRUCTIONS ISSUED ON TIME FOR ALL ITEMS	03538	REPORTABLE	29 Jun 2009	252 days
DOUGLAS CARLSON	DCMA SYRACUSE (S3306A)	S3306A-C749	--Not Reported--	SCREENING COMPLETE	28 May 2009	25 Sep 2009	M6785400C2032	1	$64,522.00	14 Dec 2009	DISPOSITION INSTRUCTIONS ISSUED ON TIME FOR ALL ITEMS	1EG52	REPORTABLE	28 May 2009	238 days
DOUGLAS CARLSON	DCMA SYRACUSE (S3306A)	S3306A-C999	MU (M00027)	SCREENING COMPLETE	6 Jul 2009	3 Nov 2009	M6785405D2002	271	$31,498.86	22 Jan 2010		03538	REPORTABLE	21 Aug 2009	199 days
DOUGLAS CARLSON	DCMA SYRACUSE (S3306A)	S3306A-D019	MU (M00027)	SCREENING COMPLETE	6 Jul 2009	3 Nov 2009	M6785405D2002	92	$130,617.58	22 Jan 2010		03538	REPORTABLE	21 Aug 2009	199 days
							Summary	**477**	**$359,259.19**						

1

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Module 4: PCARSS Cubes

Lesson One: Cube Overview

Lesson One Review Questions

1. Which of the following is NOT a component of a cube?

   a. Cube view
   b. Dimensions folder
   c. Toolbar
   d. List box

2. The information displayed in the dimension folders is in the form of:

   a. A parallel
   b. A hierarchy
   c. A list box
   d. Pop-up menu

3. The dimensions folders is located at the

   a. Bottom of the cube view
   b. Left of the cube view
   c. Right of the cube view
   d. Top of the cube view

The toolbar is used to manipulate how data is displayed.

   a. True
   b. False

Lesson Two: Using Cubes

Lesson Two Review Questions

1. Filtering will limit the view of information within the cube and show only the information based on the selection you have made

   a. True
   b. False

2. Which of the following is correct about Dimensions bar?

   a. It can print data
   b. It can view more data
   c. It is a better way to display data
   d. Is simply another way to filter through data

3. After a dimension is selected from the dimensions bar, the dimension will be highlighted in

   a. Red
   b. Black
   c. White
   d. Blue

4. Drilling down means that you will go to a different category to see more information

   a. True
   b. False

5. Which of the following is true about expanding?

   a. Expanding shows the dimension of higher level
   b. Expanding shows the dimension name of the higher level.
   c. Expanding shows less data than drilling down
   d. Expanding shows more data than drilling down

6. Nesting displays one set of data as it relates to another set of data.

   a. True
   b. False

7. Which of the following is true about Tools on the tool bar?

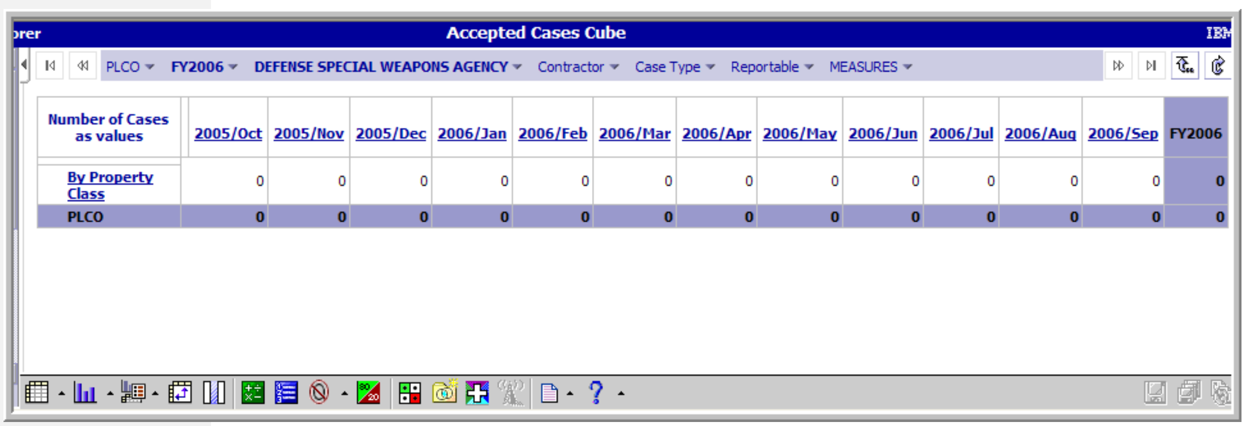
   a. Tools on the tool bar are used to apply a new dimension
   b. Tools on the tool bar are used to add more data to the cube.
   c. Tools on the tool bar are used to manipulate how data is displayed.
   d. Tools on the tool bar are used to delete unwanted data.

Lesson Two Exercises

1. Filtering using the Dimensions Folders

In this exercise, you will practice using filters through Dimensions Folders

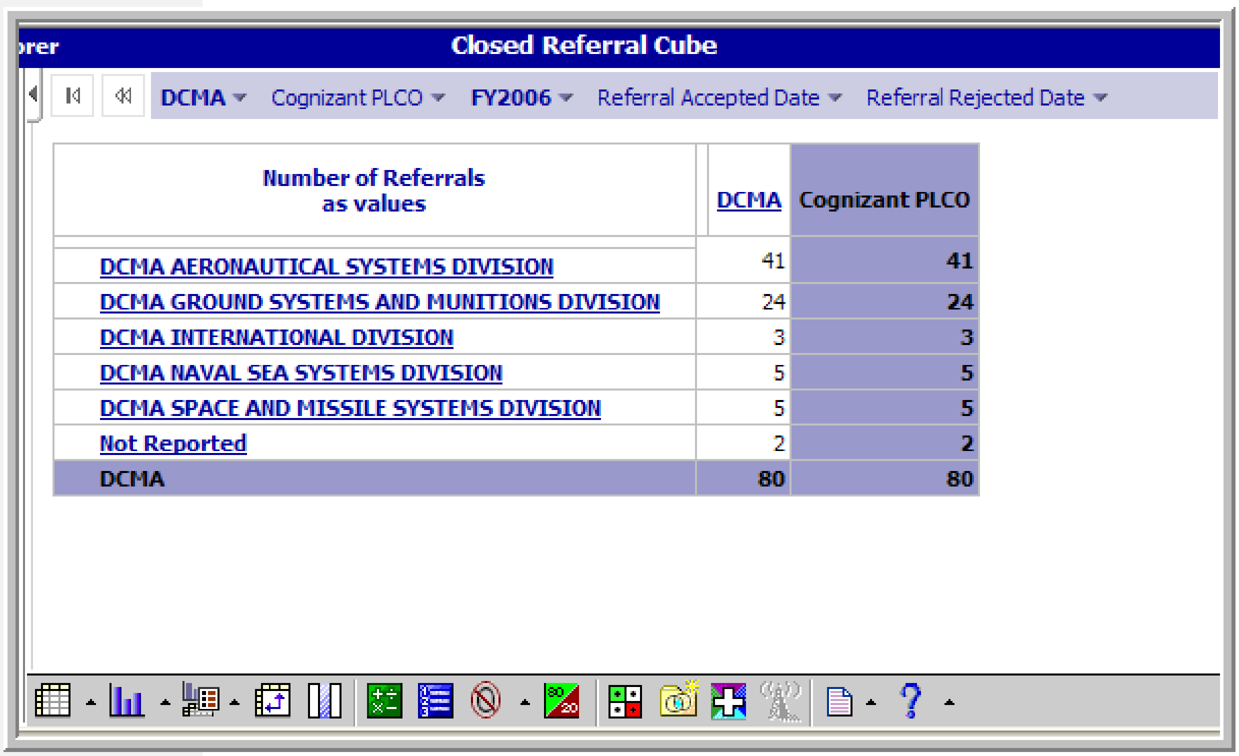
Exercise steps:	
1.	*Click* on **Cubes** on the yellow menu bar.
2.	*Open* **Active Case Cube** by double-clicking on the Internet Explorer's icon next to it.
3.	*Click* on the **plus sign** next to Agency Department.
4.	From the lower level folders, *right-click* on **DEFENSE SPECIAL WEAPONS AGENCY.**
5.	From the drop-down menu, *select* **Filter**.
6.	*Click* on the **plus sign** next to Established Date.
7.	From the lower level folders, *right-click* on **FY2006**.
8.	From the drop-down menu, *select* **Filter**.
The result should look like the following:	



2. Filtering using the Dimensions Bar

In this exercise, you will practice using filters through Dimensions Bars

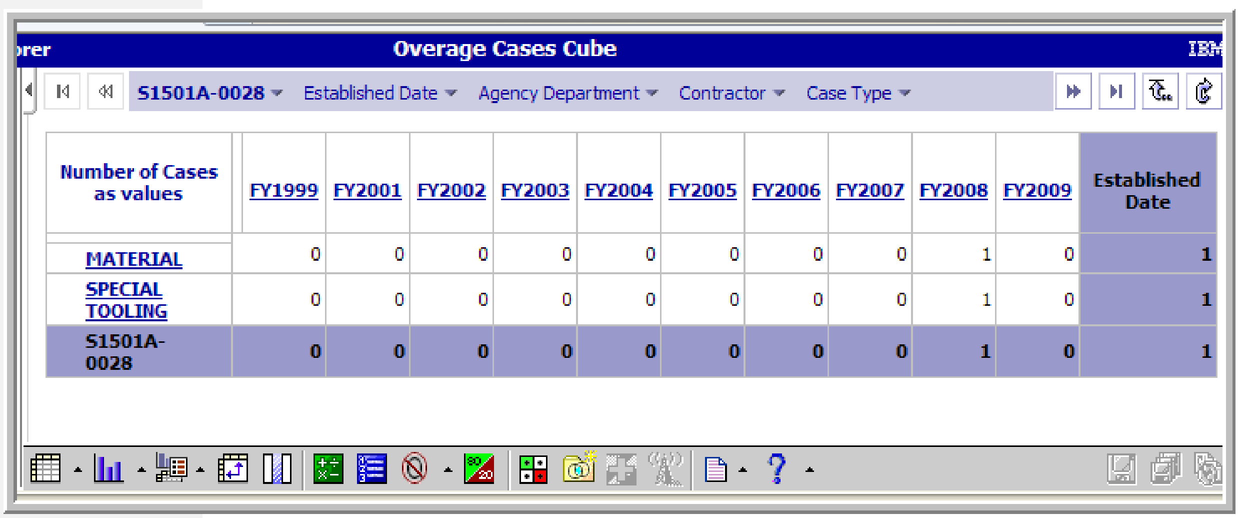
Exercise steps:
1. *Open* **Closed Referral Cube** by double clicking on the Internet Explorer's icon next to it.
2. From the dimensions bar, *click* on **Prime PLCO** and then **DCMA**.
3. From the dimensions bar, *click* on **Established Date** and *select* **FY2006**.
The result should look like the followg:



3. Drilling down

In this exercise, you will practice drilling down the data cube.

Exercise Steps:	
1.	*Open* **Overage Cases Cube** by double-clicking on the Internet Explorer's icon next to it.
2.	In the cube view, *click* on **By Property Class**.
3.	*Click* on **DCMA**.
4.	*Click* on **DCMA GROUND SYSTEMS AND MUNITIONS DIVISION**.
5.	*Click* on **DCMA COMBAT VEHICLES DETROIT (S2305A)**.
6.	*Click* on **DCMA COMBAT VEHICLES-INDIANAPOLIS/GRAND RAPIDS (S1501A)**.
7.	*Click* on **CHARLA KENNEDY.**
8.	*Click* on **S1510A-0028**.
The result should look like the following:	

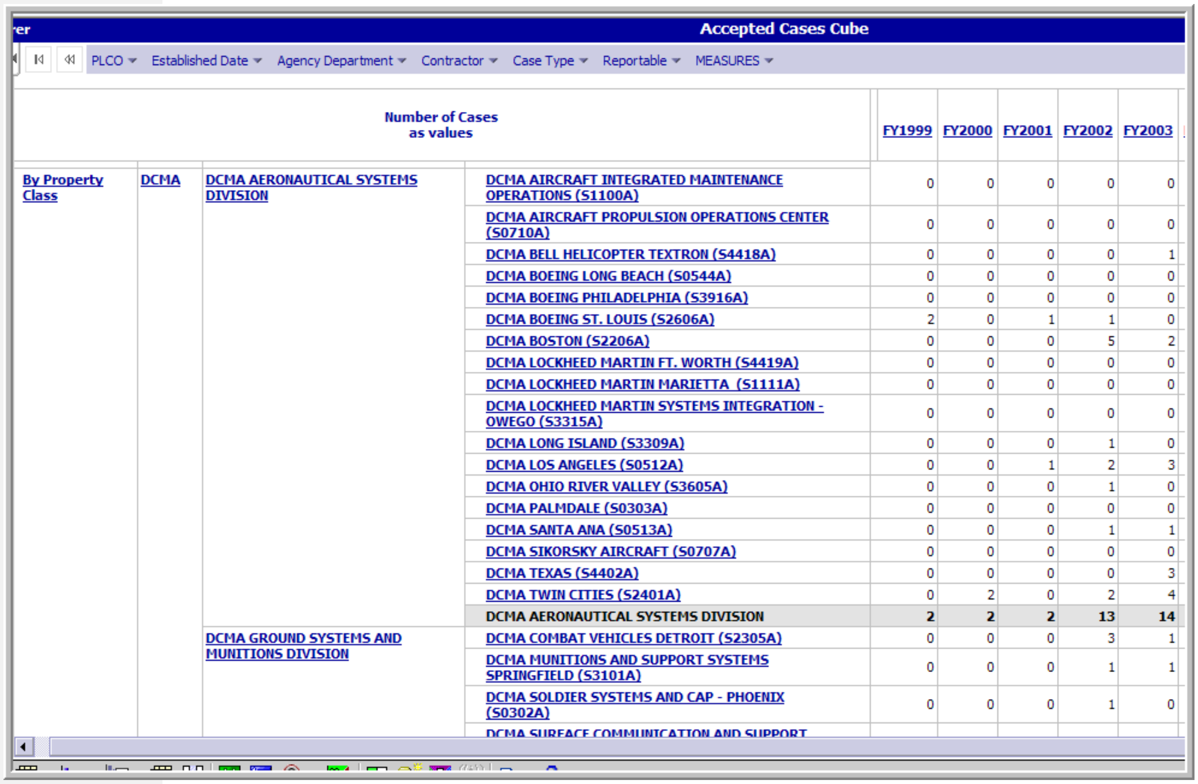


Number of Cases as values	FY1999	FY2001	FY2002	FY2003	FY2004	FY2005	FY2006	FY2007	FY2008	FY2009	Established Date
MATERIAL	0	0	0	0	0	0	0	0	1	0	1
SPECIAL TOOLING	0	0	0	0	0	0	0	0	1	0	1
S1501A-0028	0	0	0	0	0	0	0	0	1	0	1

4. Expanding

In this exercise, you will practice expanding the data cube.

Exercise Steps:	
1.	*Open* **Accepted Cases Cube** by double-clicking on the Internet Explorer's icon next to it.
2.	In the cube view, *move* the **mouse cursor** over the narrow cell above By Property Class.
3.	*Right-click* on the **gray cell**.
4.	From the drop-down menu, *click* on **Expand** to expand the By Property Class dimension.
5.	*Move* the **mouse cursor** over the narrow cell above DCMA.
6.	*Right-click* on the **gray cell**.
7.	From the drop-down menu, *click* on **Expand** to expand the DCMA dimension.
8.	*Move* the **mouse cursor** over the narrow cell above DCMA AERONAUTICAL SYSTEMS DIVI-SION.
9.	*Right-click* on the **gray cell**.
10.	From the drop-down menu, *click* on **Expand** to expand the DCMA AERONAUTICAL SYSTEMS DIVISION dimension.
The result should look like the following:	

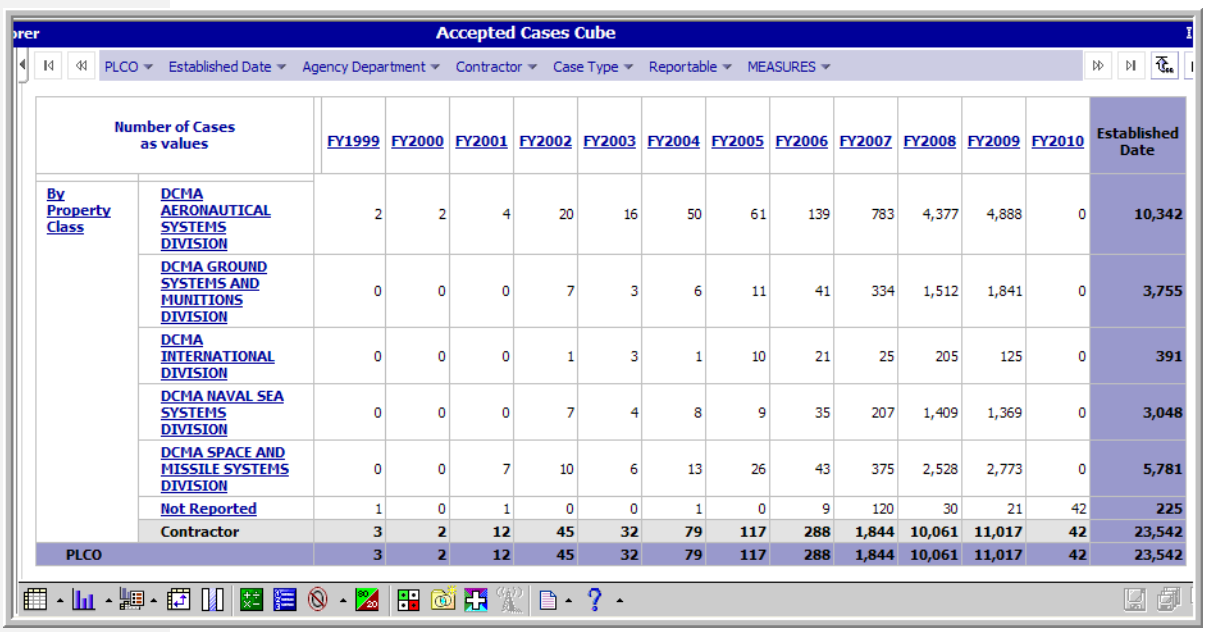


Number of Cases as values				FY1999	FY2000	FY2001	FY2002	FY2003
By Property Class	DCMA	DCMA AERONAUTICAL SYSTEMS DIVISION	DCMA AIRCRAFT INTEGRATED MAINTENANCE OPERATIONS (S1100A)	0	0	0	0	0
			DCMA AIRCRAFT PROPULSION OPERATIONS CENTER (S0710A)	0	0	0	0	0
			DCMA BELL HELICOPTER TEXTRON (S4418A)	0	0	0	0	1
			DCMA BOEING LONG BEACH (S0544A)	0	0	0	0	0
			DCMA BOEING PHILADELPHIA (S3916A)	0	0	0	0	0
			DCMA BOEING ST. LOUIS (S2606A)	2	0	1	1	0
			DCMA BOSTON (S2206A)	0	0	0	5	2
			DCMA LOCKHEED MARTIN FT. WORTH (S4419A)	0	0	0	0	0
			DCMA LOCKHEED MARTIN MARIETTA (S1111A)	0	0	0	0	0
			DCMA LOCKHEED MARTIN SYSTEMS INTEGRATION - OWEGO (S3315A)	0	0	0	0	0
			DCMA LONG ISLAND (S3309A)	0	0	0	1	0
			DCMA LOS ANGELES (S0512A)	0	0	1	2	3
			DCMA OHIO RIVER VALLEY (S3605A)	0	0	0	1	0
			DCMA PALMDALE (S0303A)	0	0	0	0	0
			DCMA SANTA ANA (S0513A)	0	0	0	1	1
			DCMA SIKORSKY AIRCRAFT (S0707A)	0	0	0	0	0
			DCMA TEXAS (S4402A)	0	0	0	0	3
			DCMA TWIN CITIES (S2401A)	0	2	0	2	4
			DCMA AERONAUTICAL SYSTEMS DIVISION	**2**	**2**	**2**	**13**	**14**
		DCMA GROUND SYSTEMS AND MUNITIONS DIVISION	DCMA COMBAT VEHICLES DETROIT (S2305A)	0	0	0	3	1
			DCMA MUNITIONS AND SUPPORT SYSTEMS SPRINGFIELD (S3101A)	0	0	0	1	1
			DCMA SOLDIER SYSTEMS AND CAP - PHOENIX (S0302A)	0	0	0	1	0
			DCMA SURFACE COMMUNICATION AND SUPPORT					

5. Nesting

In this exercise, you will practice nesting data in the cube.

Exercise Steps:
1. *Open* **Active Cases Cube** by double clicking on the Internet Explorer's icon next to it.
2. From the Dimensions Folder, *left-click* on the **Contractor folder** to select it.
3. *Right –click* on **Contractor folder**. A drop-down menu appears.
4. From the drop-down menu, *select* **Nest Rows**.
The result should look like the following:

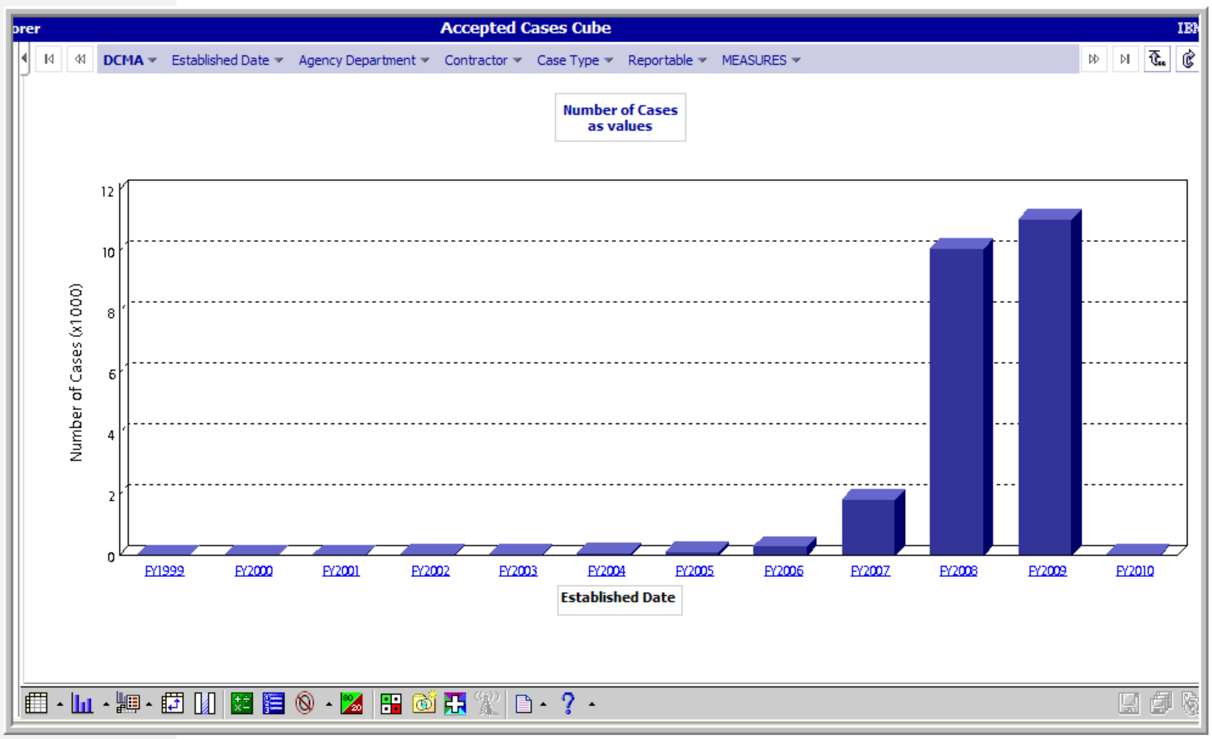


Number of Cases as values		FY1999	FY2000	FY2001	FY2002	FY2003	FY2004	FY2005	FY2006	FY2007	FY2008	FY2009	FY2010	Established Date
By Property Class	DCMA AERONAUTICAL SYSTEMS DIVISION	2	2	4	20	16	50	61	139	783	4,377	4,888	0	10,342
	DCMA GROUND SYSTEMS AND MUNITIONS DIVISION	0	0	0	7	3	6	11	41	334	1,512	1,841	0	3,755
	DCMA INTERNATIONAL DIVISION	0	0	0	1	3	1	10	21	25	205	125	0	391
	DCMA NAVAL SEA SYSTEMS DIVISION	0	0	0	7	4	8	9	35	207	1,409	1,369	0	3,048
	DCMA SPACE AND MISSILE SYSTEMS DIVISION	0	0	7	10	6	13	26	43	375	2,528	2,773	0	5,781
	Not Reported	1	0	1	0	0	1	0	9	120	30	21	42	225
	Contractor	3	2	12	45	32	79	117	288	1,844	10,061	11,017	42	23,542
PLCO		3	2	12	45	32	79	117	288	1,844	10,061	11,017	42	23,542

6. Using Tools

In this exercise, you will practice using chart tools.

Exercise Steps:	
1.	*Open* **Accepted Cases Cube** by double clicking on the Internet Explorer's icon next to it.
2.	*Click* on the **plus sign** next to PLCO
3.	*Click* on the **plus sign** next to By Property Class
4.	*Right-click* on **DCMA** and then *select* **Replace Rows**.
5.	Form the tool bar, *click* on **Chart icon**.
The result should look like the following:	



Lesson Three: Using PCARSS CUBES

Lesson Three Exercises

You have been asked to do a trend analysis of the DCMA's accepted cases of the last 10 years. Specifically, you need to find out the information for DCMA's AERONAUTICAL SYSTEM DIVISION in the fiscal year 2009. The following exercise will guide you through the steps on how to collect the data you need.

Exercise Steps:
1. *Open* **Accepted Cases Cube** by double-clicking on the Internet Explorer's icon next to it.
2. *Click* on the **plus sign** next to PLCO.
3. *Click* on the **plus sign** next to By Property Class
4. *Right-click* on **DCMA** and from the drop-down menu, *select* **Filter**.
5. *Write* down the **number** for DCMA for each year during the last 10 years.
6. *Click* on **DCMA AERONAUTICAL SYSTEMS DIVISION**.
7. *Click* on **FY2009**.
8. *Write* down the **number** for each month of the FY2009.
The result should look like the following:

rer **Accepted Cases Cube**

DCMA AERONAUTICAL SYSTEMS DIVISION ▾ FY2009 ▾ Agency Department ▾ Contractor ▾ Case Type ▾ Reportable ▾ MEASURES ▾

Number of Cases as values	2008/Oct	2008/Nov	2008/Dec	2009/Jan	2009/Feb	2009/Mar	2009/Apr	2009/May	2009/Jun	2009/Jul	2009/Aug	2009/Sep	FY2009
DCMA AIRCRAFT INTEGRATED MAINTENANCE OPERATIONS (S1100A)	18	3	15	12	24	15	16	8	15	14	10	0	**150**
DCMA AIRCRAFT PROPULSION OPERATIONS CENTER (S0710A)	27	33	29	32	24	31	42	32	23	23	28	0	**324**
DCMA BELL HELICOPTER TEXTRON (S4418A)	7	16	4	14	11	8	4	3	8	14	8	0	**97**
DCMA BOEING LONG BEACH (S0544A)	2	3	4	2	2	6	1	0	4	4	5	0	**33**
DCMA BOEING PHILADELPHIA (S3916A)	20	21	15	13	19	35	34	19	28	41	29	0	**274**
DCMA BOEING ST. LOUIS (S2606A)	15	11	8	6	11	35	27	23	21	16	11	0	**184**
DCMA BOSTON (S2206A)	36	20	12	24	27	54	36	42	45	43	52	0	**391**
DCMA LOCKHEED MARTIN FT. WORTH (S4419A)	23	10	24	12	24	23	14	10	20	20	9	0	**189**
DCMA LOCKHEED MARTIN SYSTEMS INTEGRATION - OWEGO (S3315A)	6	6	2	7	4	9	6	2	2	13	6	0	**63**
DCMA LONG ISLAND (S3309A)	11	25	8	7	16	46	43	20	37	32	32	0	**277**
DCMA LOS ANGELES (S0512A)	15	13	6	14	30	18	15	12	24	14	22	0	**183**
DCMA OHIO RIVER VALLEY (S3605A)	19	40	19	20	25	37	26	30	29	42	31	0	**318**
DCMA PALMDALE (S0303A)	6	7	9	3	10	7	5	4	12	9	9	0	**81**
DCMA SANTA ANA (S0513A)	31	37	25	43	35	43	24	21	11	38	49	0	**357**
DCMA SIKORSKY AIRCRAFT (S0707A)	23	139	31	42	19	43	42	18	50	44	22	0	**473**
DCMA TEXAS (S4402A)	24	21	12	29	34	42	36	41	43	38	47	0	**367**
DCMA TWIN CITIES (S2401A)	50	36	26	34	33	42	30	29	39	33	46	0	**398**
DCMA AERONAUTICAL SYSTEMS DIVISION	**333**	**441**	**249**	**314**	**348**	**494**	**401**	**314**	**411**	**438**	**416**	**0**	**4,159**

Lesson Four: Advanced Topics

Lesson Four Review Questions

1. The four operation types are: Arithmetic, Percentage, Analytic, and Financial.

   a. True
   b. False

2. Which of the following is not true about ranking?

   a. Ranking allows you to rank the data either in ascending or descending order
   b. You can also limit the ranking to the criteria you set
   c. You can also create your own rank name that you like
   d. Ranking allows you to rank the data in only descending order

3. In the data cube, an exception means that the value in a data cell is either higher or lower than an expected standard.

   a. True
   b. False

4. Which of the following is not true about custom subsets?

   a. To make subset dimensions stand out from predefined dimensions, the systems place two small circles on the folder icon indicating it is a custom subset
   b. The Custom Subsets tool allows you to create customized subsets of dimensions that can display more information
   c. To make subset dimensions stand out from predefined dimensions, the systems highlight the folder that contains a custom subset.

5. Which of the following is not true about Drill Through?

   a. Drill Through allows you to generate a detailed report of the selected dimensions
   b. Drill Through tool will generate a report of 'underneath' data that you would have to drill through the cube to look at
   c. Drill through generates a report of what is shown on the screen
   d. Drill through is not the same as drill down.

Lesson Four Exercises:

1. Calculation

In this exercise, you will calculate the average number of accepted cases for DCMA divisions from FY 1999 to FY2010.

Exercise Steps:
1. *Open* **Accepted Cases Cube** by double clicking on the Internet Explorer's icon next to it.
2. *Click* on the **plus sign** next to PLCO.
3. *Click* on the **plus sign** next to By Property Class.
4. *Right-click* on **DCMA** and then *select* **Replace Rows.**
5. *Click* on the **white space** to the left of DCMA GROUND SYSTEMS AND MUNITIONS DIVISION to select the row. To perform calculation, you must select a row or columns first.
6. From the tool bar, *click* on **Calculation tool**. Calculation tool dialog box pops up.
7. From the Operation type drop-down list, *select* **Analytic**.
8. From Operation drop-down list, *select* **Average.**
9. In the Calculation name field, *type* **DCMA Average.**
10. Under Includes Categories list box, *click* on **Select All** to select all DCMA divisions.
11. *Click* **OK** to perform analytic calculation.
The result should look like the following:

Accepted Cases Cube

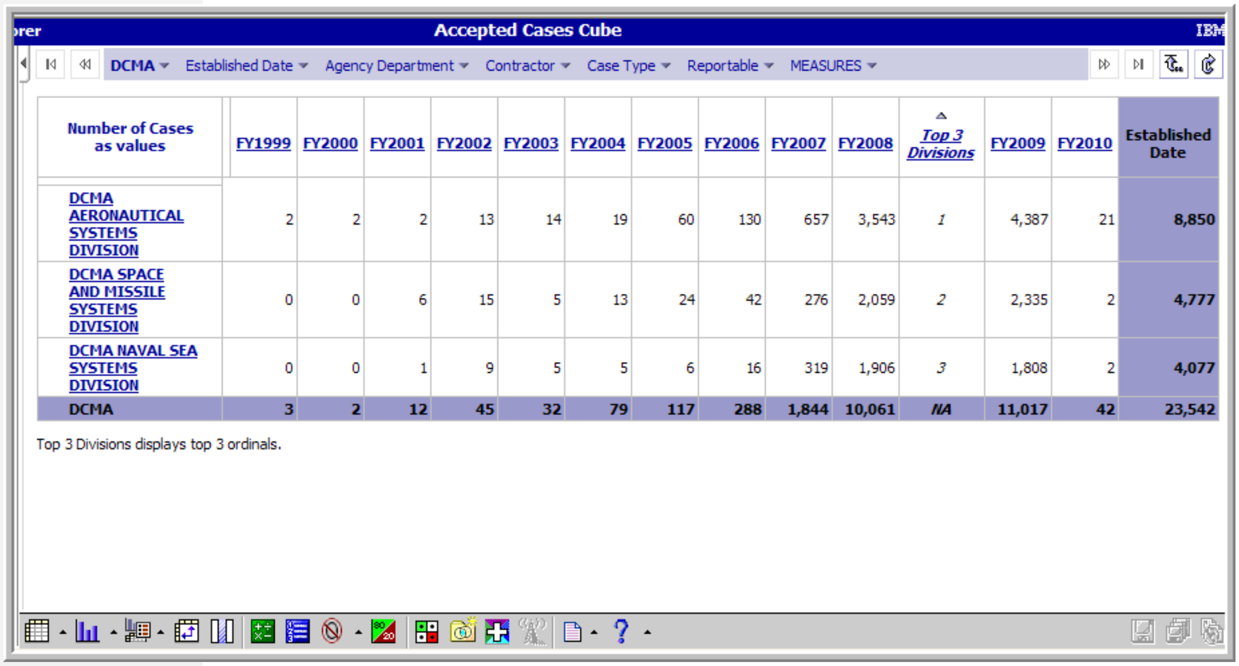
DCMA · Established Date · Agency Department · Contractor · Case Type · Reportable · MEASURES

Number of Cases as values	FY1999	FY2000	FY2001	FY2002	FY2003	FY2004	FY2005	FY2006	FY2007	FY2008	FY2009	FY2010	Established Date
DCMA AERONAUTICAL SYSTEMS DIVISION	2	2	2	13	14	19	60	130	657	3,543	4,387	21	**8,850**
DCMA GROUND SYSTEMS AND MUNITIONS DIVISION	0	0	3	7	4	6	7	30	207	1,210	1,002	14	**2,490**
DCMA INTERNATIONAL DIVISION	1	0	0	1	4	7	13	44	212	1,048	1,302	0	**2,632**
DCMA NAVAL SEA SYSTEMS DIVISION	0	0	1	9	5	5	6	16	319	1,906	1,808	2	**4,077**
DCMA SPACE AND MISSILE SYSTEMS DIVISION	0	0	6	15	5	13	24	42	276	2,059	2,335	2	**4,777**
DCMA SPECIAL PROGRAMS DIVISION	0	0	0	0	0	0	0	0	0	0	0	1	**1**
Not Reported	0	0	0	0	0	29	7	26	173	295	183	3	**716**
DCMA Average	*0*	*0*	*2*	*6*	*5*	*11*	*17*	*41*	*263*	*1,437*	*1,574*	*6*	*3,363*
DCMA	**3**	**2**	**12**	**45**	**32**	**79**	**117**	**288**	**1,844**	**10,061**	**11,017**	**42**	**23,542**

2. Ranking

In this exercise, you will practice the ranking tool.

Exercise Steps:
1. *Open* **Accepted Cases Cube** by double-clicking on the Internet Explorer's icon next to it.
2. *Click* on the **plus sign** next to PLCO.
3. *Click* on the **plus sig**n next to By Property Class.
4. *Right-click* on **DCMA** and then *select* **Replace Rows**.
5. *Click* on the **white space** above **FY2008** to select the column.
6. From the tool bar, *click* on **rank tool**.
7. From the **Sorting order** drop-down list, *select* **Ascending**.
8. *Change* the **rank number** by the Show ordinals drop-down list from 10 to 3.
9. *Type* **Top 3 Divisions** in the Rank name field.
10. *Click* **OK** to start ranking.
The result should look like the following:



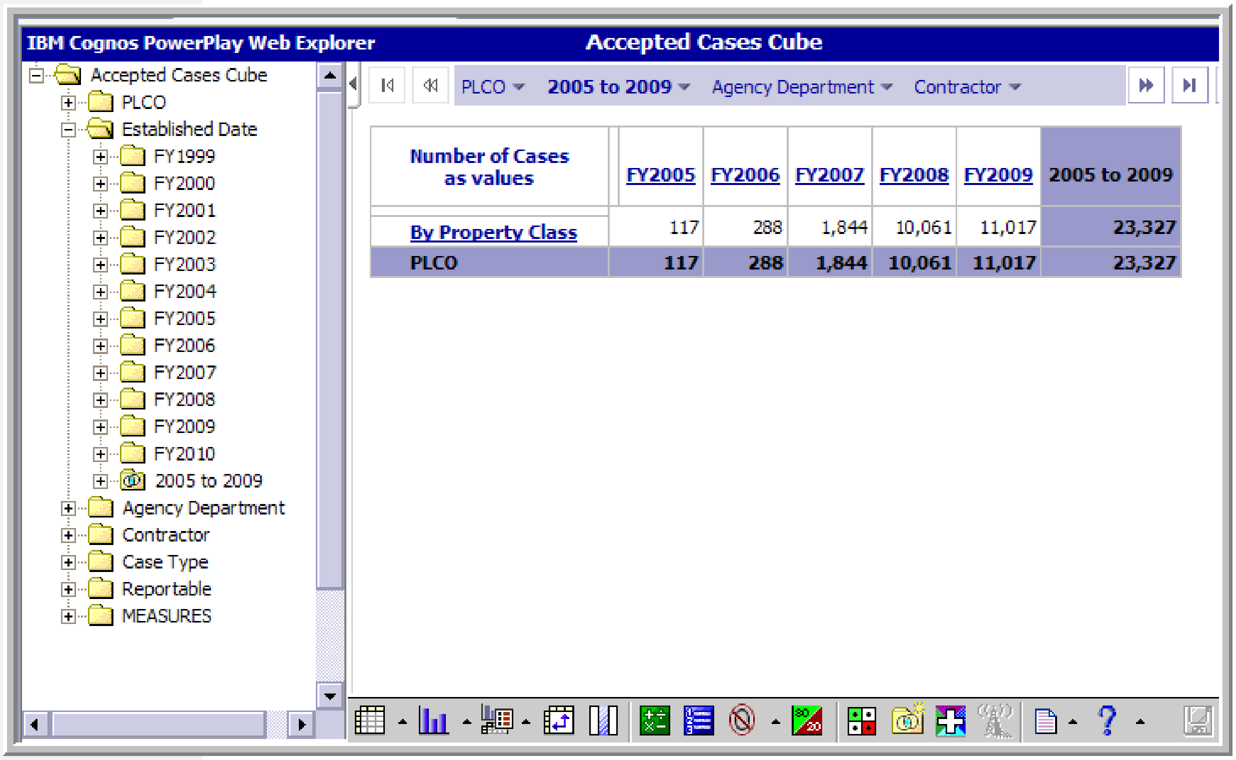
Number of Cases as values	FY1999	FY2000	FY2001	FY2002	FY2003	FY2004	FY2005	FY2006	FY2007	FY2008	Top 3 Divisions	FY2009	FY2010	Established Date
DCMA AERONAUTICAL SYSTEMS DIVISION	2	2	2	13	14	19	60	130	657	3,543	*1*	4,387	21	**8,850**
DCMA SPACE AND MISSILE SYSTEMS DIVISION	0	0	6	15	5	13	24	42	276	2,059	*2*	2,335	2	**4,777**
DCMA NAVAL SEA SYSTEMS DIVISION	0	0	1	9	5	5	6	16	319	1,906	*3*	1,808	2	**4,077**
DCMA	**3**	**2**	**12**	**45**	**32**	**79**	**117**	**288**	**1,844**	**10,061**	***NA***	**11,017**	**42**	**23,542**

Top 3 Divisions displays top 3 ordinals.

3. Custom Subsets

In this exercise, you will practice the custom subsets tool.

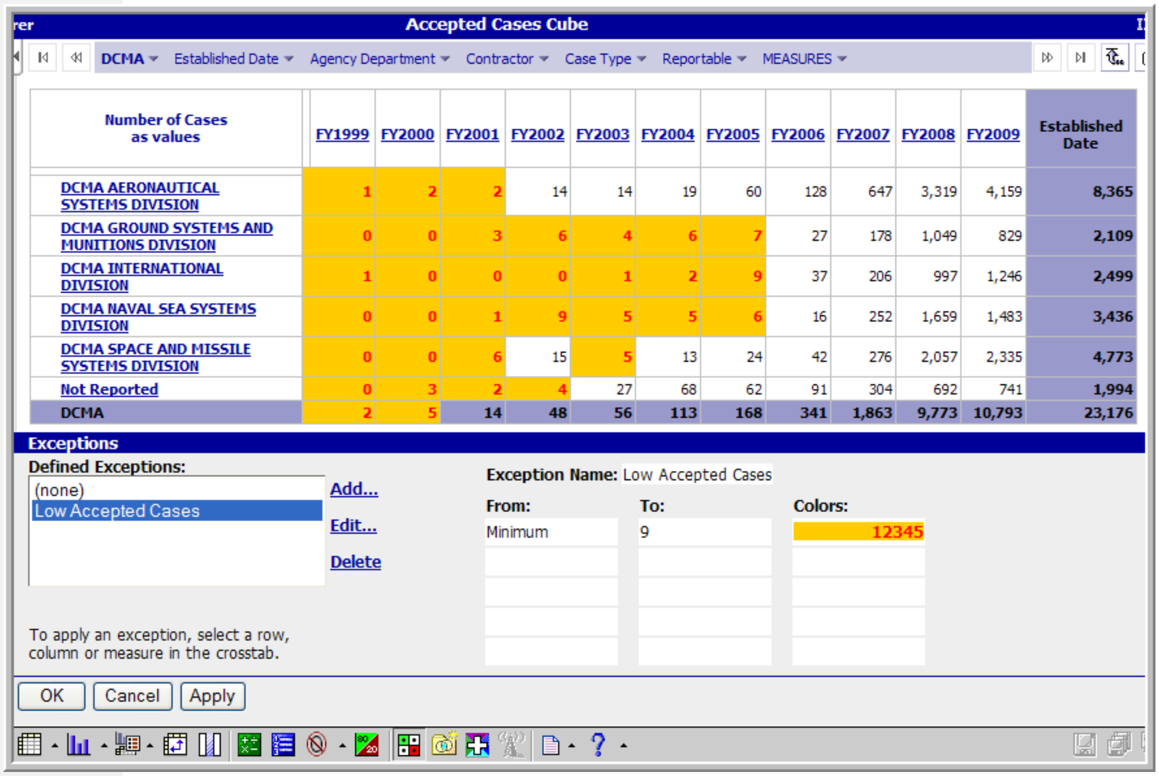
Exercise Steps:	
1.	*Open* **Accepted Cases Cube** by double-clicking on the Internet Explorer's icon next to it.
2.	*Click* on **Custom Subsets Tool**.
3.	*Type* **2005 to 2009** in the Custom Subset Name filed.
4.	*Select* **Established Date** from the **Dimension** drop-down box.
5.	*Click* on **Nex**t button.
6.	*Hold down* the **Ctrl key**, *select* **FY2005** through-out FY2009 from the Available Categories.
7.	*Click* on the **green right arrow** to set the selected categories.
8.	Click **Finish**.
9.	From the dimensions folder, *click* on the **plus sign** beside the Established Date. A new subset folder 2005 to 2009 has been added to the Established Date dimensions.
The result should look like the following:	


IBM Cognos PowerPlay Web Explorer
Accepted Cases Cube
Accepted Cases Cube
PLCO
Established Date
FY1999
FY2000
FY2001
FY2002
FY2003
FY2004
FY2005
FY2006
FY2007
FY2008
FY2009
FY2010
2005 to 2009
Agency Department
Contractor
Case Type
Reportable
MEASURES
PLCO
2005 to 2009
Agency Department
Contractor
Number of Cases as values
FY2005 FY2006 FY2007 FY2008 FY2009 2005 to 2009
By Property Class 117 288 1,844 10,061 11,017 23,327
PLCO 117 288 1,844 10,061 11,017 23,327

4. Custom Exception Highlighting

In this exercise, you will practice the Custom Exception Highlighting tool.

Exercise Steps:
1. *Open* **Accepted Cases Cube** by double clicking on the Internet Explorer's icon next to it.
2. *Click* on the **plus sign** next to PLCO.
3. *Click* on the **plus sig**n next to By Property Class.
4. *Right-click* on **DCMA** and then *select* **Replace Rows**.
5. *Click* on **Custom Exception Highlighting** tool icon.
6. From the exception dialog box, *click* on **Add**.
7. *Type* **Low Accepted Cases** for your exception definition in the Exception Name field.
8. In the **From:** drop-down box, *select* **Minimum** and in the **To:** drop-down box *type* **9**.
9. From the first pop-up box under Text*, select* the **red color**.
10. From the first pop-up box under Cell, *select* the **yellow color**.
11. *Click* on **OK**.
12. In the cube view, *click* on the **white space** above FY199 to select the column. *Hold down* the **CTRL key** to make multiple selection from FY2000 to FY2009 and then *click* on **Apply.**
All the cells that have the value below 10 are highlighted as exception. The result should look like the following:



Number of Cases as values	FY1999	FY2000	FY2001	FY2002	FY2003	FY2004	FY2005	FY2006	FY2007	FY2008	FY2009	Established Date
DCMA AERONAUTICAL SYSTEMS DIVISION	1	2	2	14	14	19	60	128	647	3,319	4,159	8,365
DCMA GROUND SYSTEMS AND MUNITIONS DIVISION	0	0	3	6	4	6	7	27	178	1,049	829	2,109
DCMA INTERNATIONAL DIVISION	1	0	0	0	1	2	9	37	206	997	1,246	2,499
DCMA NAVAL SEA SYSTEMS DIVISION	0	0	1	9	5	5	6	16	252	1,659	1,483	3,436
DCMA SPACE AND MISSILE SYSTEMS DIVISION	0	0	6	15	5	13	24	42	276	2,057	2,335	4,773
Not Reported	0	3	2	4	27	68	62	91	304	692	741	1,994
DCMA	2	5	14	48	56	113	168	341	1,863	9,773	10,793	23,176

Module 5: Ad Hoc Reports

Lesson One Review Questions

1. Which of the following is a true statement about Ad hoc?

   a. *Ad hoc* is a Latin phrase which means "for other purpose".
   b. *Ad hoc* is a Latin phrase which means "for modification".
   c. *Ad hoc* is a Latin phrase which means "for adaptation".
   d. *Ad hoc* is a Latin phrase which means "for this purpose".

2. Which of the following is NOT a true statement about Ad hoc Report?

   a. An Ad Hoc report provides you with great flexibility to select the types of data to be shown
   b. An Ad Hoc report provides you with great flexibility to Change the display of selected data
   c. An Ad Hoc report provides you with great flexibility to Report the data in different format
   d. Only B and C are true statement.

3. Which of the following is NOT true about Ad Hoc Query?

   a. An ad hoc query is a query that you use to obtain information as the need arises
   b. An ad hoc query is a query that is predefined
   c. An ad hoc query is a query that is not routinely performed
   d. An ad hoc query is also called non-standard inquiry.

Lesson One Exercises

1. Insert Data

In this exercise, you will practice inserting date into the ad hoc report.

Exercise Steps
1. *Select* **Insert Data** from the main menu if it is not selected.
2. *Click* the "**+**" sign to expand the data table.
3. *Select a* **data field** and then click on the **Insert button** at the bottom.

2. Edit data
In this exercise, you will practice editing data the ad hoc report.

Exercise Steps:
1. *Select* **Edit Data** from the main Menu.
2. *Click* the **column heading** of the data field in the report area to select it.
3. *Select* the tools in the main menu to edit data.

3. Change layout
In this exercise, you will practice changing layout of the ad hoc report

Exercise Steps:
1. *Select* **Change Layout** from the main menu.
2. *Select* **Change Border Styles** from the options list.
3. *Select* **3 pt** from the **Width** drop-down box.
4. *Click* **OK**.

4. Run report

In this exercise, you will practice running the ad hoc report.

Exercise Steps:
1. *Select* **Run Report** from the main menu.
2. *Select* **Preview with No Data**.
3. *Select* a **desired format** to generate the report.
4. *Select* **Run Report** from the main menu.
5. *Select* **Preview with No Data**.
6. *Select* a **desired format** to generate the report.

Appendix: Review Question Answers

Module One Keys: User Roles and Processes

(Highlighted choice is the correct answer)

Lesson Two

1. Which of the following is NOT a task of the PLCO role?

   a. Create inventory schedules
   b. Issue disposition instructions
   c. Conduct workload mass transfers
   d. Modify plant clearance cases and referrals

2. What makes the Read-only Screener role different from the Screener role?

   a. The Read-only Screener cannot create alerts
   b. The Read-only Screener cannot create requisitions
   c. The Read-only Screener cannot search for inventory
   d. None of the above

3. Which tasks can the Administrator role perform?

   a. Workload mass transfers
   b. Editing the work of any user
   c. Approve requests from Support PLCOs to perform the work of a PLCO
   d. All of the above

4. What can the QAR role do?

   a. View, edit, and complete inventory verification surveys
   b. Create alerts
   c. Conduct sales
   d. Perform the tasks of the PLCO

5. Which of the following is NOT a task of the Contractor role?

   a. Conduct sales authorized by the PLCO
   b. Mark disposal actions complete
   c. Create inventory schedules
   d. Ship inventory

Module Two Keys: PLCO and Administrator Tasks

(Highlighted choice is the correct answer)

Lesson One

When uploading a flat file, the file must be in which of the following formats?

a. htm
b. ppt
c. doc
d**. txt**

Lesson Three

1. After what time period does a rejected inventory schedule move to the Inactive tab?

a. 10 days
b. 30 days
c. **60 days**
d. 100 days

2. What is the standard format for an inventory schedule number?

a. **Your Prime CAGE followed by a reference number**
b. Your DoDAAC followed by a dash, a 3-digit sequence number, and the last digit of the current calendar year
c. Your DoDAAC followed by a dash, a 3-digit sequence number, the last digit of the current calendar year, and the letter "R"
d. A 3-digit sequence number and the last digit of the current calendar year followed by a dash and your DoDAAC

3. List the correct order for the steps involved in creating an inventory schedule.

4 Adding contacts
3 Creating line items
2 Entering contract information
1 Entering the schedule reference number
5 Routing to a PLCO

4. Submitting schedules of excess inventory is a task of the Contractor.

a. True
b. False

5. UIIs are copied automatically when copying line items on an inventory schedule.

a. True
b. False

6. Check the statuses in which inventory schedules have the ability to be deleted:

x__Draft
___Submitted
___Accepted
x__Rejected

7. Check the statuses in which line items have the ability to be deleted:

x__Draft
___Submitted
___Accepted
x__Rejected

8. Contractors can search for inventory schedules.

a. True
b. False, only PLCOs and Administrators have search ability.

9. A PLCO can edit an inventory schedule in any of these statuses, except

a. Disposition – Action Complete
b. Disposition – Action Pending
c. Accepted
d. Submitted

10. A Contractor CANNOT edit an inventory schedule in any of the following statuses except

a. Case Assigned
b. Submitted
c. Accepted
d. Rejected

11. A PLCO can edit a line item in any of these statuses, except

a. Disposition – Action Complete
b. Disposition – Action Pending
c. Accepted
d. Submitted

12. A Contractor CANNOT edit a line item in any of the following statuses except

a. Case Assigned
b. Submitted
c. Accepted
d. Rejected

13. To accept an inventory schedule, an FSC is required for each item.

a. True
b. False

14. After what time period does an inventory schedule become overdue if it has not yet been accepted or rejected?

a. 3 days
b. **10 days**
c. 30 days
d. 200 days

15. What status does an inventory schedule go to after being unaccepted?

a. Submitted
b. Draft
c. Rejected
d. Disposition – Action Complete

16. To reject an inventory schedule, PLCO remarks are required.

a. True
b. False

17. Screener rules automatically default to

a. 001 (WWW for 20 days, followed by GSA for 26 days)
b. 002 (WWW for 20 days)
c. 006 (GSA for 26 days)
d. 999 (No Screening)

18. When does a screener rule take effect?

a. When a case is established
b. When the screener rule is set or changed at the inventory schedule level
c. After an inventory schedule is removed from a case and added to a new case, then the new case is established.
d. Both A and C

19. Contractors must submit request for withdrawal; only PLCOs or Administrators can withdraw inventory schedules.

a. **True**
b. False

20. A line item can be withdrawn from an inventory schedule in

a. Accepted status
b. Case Assigned status
c. Disposition – Action Pending status
d. Disposition – Action Complete status

21. List the correct order for steps involved in shipping an item.

2 Select an inventory schedule from the workload
4 Select an item to ship
1 Click the Inventory Schedules link on the menu bar
5 View the instructions and specify UIIs to ship if necessary
3 Click the disposition link

Lesson Four

1. After what time period does an accepted referral get removed from the workload?

   a. 10 days
   b. 30 days
   c. 60 days
   d. 100 days

2. When the receiver rejects are referral, the rejected referral remains under the receiver's Incoming tab for 60 days.

   a. True
   b. False, rejected referrals disappear from the receiver's workload upon rejection.

3. When the receiver accepts a referral, the inventory schedules on it are automatically assigned to a case.

   a. True
   b. False

4. When the receiver accepts a referral, the case is automatically established.

   a. True
   b. False, the case is automatically created, but will appear under the Draft tab of the case workload. You will need to establish the case.

5. What do all the inventory schedules assigned to a referral need to have in common?

   a. Prime contract number and Prime CAGE
   b. 1st-tier and 2nd-tier subcontractors
   c. Location CAGE
   d. All of the above

6. What status does an inventory schedule need to be in to be assigned to a referral?

   a. Draft
   b. Submitted
   c. Accepted
   d. Case Assigned

7. What is the standard format for a referral number?

   a. Your Prime CAGE followed by a dash and the letter R, followed by a 5-digit sequence number.
   b. Your DoDAAC followed by a dash, a 3-digit sequence number, and the last digit of the current calendar year
   c. Your DoDAAC followed by a dash, a 3-digit sequence number, the last digit of the current calendar year, and the letter "R"
   d. A 3-digit sequence number and the last digit of the current calendar year followed by a dash and your DoDAAC

8. Check the statuses in which referrals have the ability to be edited:

   x__Draft
   ___Submitted
   ___Withdrawn
   x__Rejected

9. Check the statuses in which referrals have the ability to be deleted:

   x__Draft
   ___Submitted
   ___Withdrawn
   x__Rejected

10. Check the statuses in which referrals have the ability to be withdrawn:

   ___Draft
   x__Submitted
   ___Accepted
   ___Rejected

11. When searching for referrals, PLCOs can only search their own workload.

   a. True
   b. False

Lesson Five

1. You can find your withdrawn cases under the Draft tab.

   a. True
   b. False, withdrawn cases are displayed under the inactive tab.

2. What do all the inventory schedules assigned to a case need to have in common?

   a. Prime contract number and Prime CAGE
   b. 1st-tier and 2nd-tier subcontractors
   c. Location CAGE
   d. All of the above

3. What status does an inventory schedule need to be in to be assigned to a case?

   a. Draft
   b. Submitted
   c. Accepted
   d. Rejected

4. What is the standard format for a case number?

   a. Your Prime CAGE followed by a dash and the letter R, followed by a 5-digit sequence number.
   b. Your DoDAAC followed by a dash, a 3-digit sequence number, and the last digit of the current calendar year
   c. Your DoDAAC followed by a dash, a 3-digit sequence number, the last digit of the current calendar year, and the letter "R"
   d. A 3-digit sequence number and the last digit of the current calendar year followed by a dash and your DoDAAC

5. When searching for cases, only Administrators can search the work of any user.

   a. True
   b. False

6. Cases can be edited in all of the following statues EXCEPT

   a. Established
   b. Screening Complete
   c. Withdrawn
   d. Closed

7. What happens when an inventory schedule is detached from a case?

   a. It goes to Withdrawn status
   b. It goes to Accepted status
   c. It goes to Submitted status
   d. It goes to Disposition – Action Complete status

8. If you detach all of the inventory schedules from a case, the case will revert to Draft status.

   a. **True**
   b. False

9. If your case becomes overage, you will need to select an overage reason.

   a. True
   b. False

10. You can withdraw a case unless any item on it has a disposition code, requisition, or sale associated with it.

   a. **True**
   b. False

11. What happens to an inventory schedule when the case it is on is withdrawn?

   a. It goes to Withdrawn status
   b. It goes to Accepted status
   c. It goes to Submitted status
   d. It goes to Closed status

12. When a disposal code has been assigned to an item, the schedule gains Disposition – Action Pending status.

   a. True
   b. False

13. List the correct order for steps involved in issuing a final disposition code.

5 Issue a disposition code
2 Select a case from the workload
4 Select an item to disposition
1 Click the Cases link on the menu bar
6 Input shipping instructions
3 Click the disposition link

14. A group disposition allows you to apply one disposition code to a group of cases.

a. True
b. False, group dispositions allow you to apply one disposition code to a group of inventory schedules on the same case.

15. List the correct order for steps involved in issuing a removing a disposition code.

5 Reduce the disposition quantity
2 Select a case from the workload
4 Select an item to remove the disposition code
1 Click the Cases link on the menu bar
6 Click the Submit button
3 Click the disposition link

16. A disposal action can be marked complete once the required inventory on the disposition has been shipped.

a. True
b. False

17. List the correct order for steps involved in removing action complete from a disposition.

5 Click the Remove Action Complete button
2 Select a case from the workload
4 Select an item with a completed disposition
1 Click the Cases link on the menu bar
3 Click the disposition link

18. What needs to take place before a case can be closed?

a. All items must have a disposition code
b. All disposal actions must be marked complete
c. Inventory verification survey must be completed
d. A and B

19. List the correct order for steps involved in issuing one shipping address to multiple items in the case workload.

4 Click the Save button
2 Click the add shipping info link
1 Click the Cases link on the menu bar
3 Select affected items and enter shipping information

Lesson Six

1. Shipped requisitions appear under the Active tab.

a. True
b. False, shipped requisitions appear under the inactive tab.

2. Rejected requisitions appear under the Inactive tab.

a. True
b. False

3. Until when can the PLCO or Administrator make changes to the approval or rejection quantities?

a. The requisition is completed.
b. The final disposition code is issued.
c. The inventory has been shipped.
d. None of the above.

4. After you click the Completed button, what status will the requisition have?

a. Submitted
b. Completed
c. Shipping Instructions Issued
d. Shipped

5. Screeners can search for ANY inventory in PCARSS when searching for inventory to requisition.

a. True
b. False, Screeners cannot requisition items past their screening period (Screener rule 999 - No Screening).

6. PLCOs can only search in their own workloads when searching for inventory to requisition.

a. True
b. False

7. Check the statuses where PLCOs and Administrators have the ability to edit a requisition:

x__Draft
x__Submitted
___Shipping Instructions Issued
___Shipped
x__Cancelled
x__Rejected

8. Check the statuses where Screeners have the ability to edit a requisition:

x__Draft
___Submitted
___Shipping Instructions Issued
___Shipped
x__Cancelled
x__Rejected

9. Screeners can cancel their own requisitions.

a. True
b. False, a Screener can only submit a request to cancel a requisition. The PLCD will cancel the requisition on the Screener's behalf.

10. A PLCO is able to search for a requisition.

a. True
b. False

11. If you chose the DO – Donation disposition code, you will be required to select a school/organization for the donation.

a. **True**
b. False

Lesson Seven

1. The Active tab displays only your own work.

a. True
b. False

2. For Contractors, the sales workload contains the sales assigned to them the sales on the inventory in their workloads, and the sales assigned to their CAGE(s).

a. True
b. False

3. Once a sale has had the proceeds collected for all the lots, the sale will appear under which tab?

a. Active
b. Draft
c. Inactive
d. Completed

4. Only Administrators can search for sales.

a. True
b. False

5. Until what point can a PLCO edit a sale?

a. When all the lots on the sale have been awarded
b. When all bids on the sale have been completed
c. When proceeds have been collected for all the lots on the sale
d. When one lot on the sale has been awarded

6. What status does the sale gain if you delete all the bidders from a sale in All Bids Complete status?

   a. It goes to Pending status
   b. It goes to Draft status
   c. It goes to Closed status
   d. The status does not change

7. At what point does a sale gain Awarded status?

   a. When all the lots on the sale have been awarded
   b. When all bids on the sale have been completed
   c. When proceeds have been collected for all the lots on the sale
   d. When one lot on the sale has been awarded

8. Until what point can a PLCO revert a sale status back to pending?

   a. When all the lots on the sale have been awarded
   b. When all bids on the sale have been completed
   c. When proceeds have been collected for all the lots on the sale
   d. When one lot on the sale has been awarded

9. Check the steps you need to perform before you can delete a sale that is in All Bids Complete status.

   ___Remove all the bids
   x__Remove all the bidders
   ___Remove all the lots
   x__Cancel all awards that have been issued

Lesson Eight

1. PLCOs can perform a mass transfer of their own work.

   a. True
   b. False

2. PLCOs are limited to transferring their own cases.

   a. True
   b. False

3. Transferring a case will also transfer its associated inventory schedules, requisitions, and sales.

a. True
b. False

4. PLCOs are limited to transferring their own inventory schedules.

a. True
b. False

5. Inventory schedules can only be transferred if they are on a case.

a. True
b. False, inventory schedules can only be transferred if they are NOT on a case. If they are on a case, you need to transfer the case instead.

Module Three Keys: Using Pre-defined Reports

(Highlighted choice is the correct answer)

Lesson One

1. Once you have logged into eTools, the Reports Lists can be accessed by which of the following links?

a. My page
b. eTools
c. Application
d. None of the above

2. The file formats used to display reports are defined at:

a. **The bottom of the Report List page**
b. The top of the Report List page
c. The left side of the Report List page
d. The right side of the Report List page

3. To see data in a specific report format, you need to click the icon at the bottom of the Report List Page.

a. True
b. **False**

4. When viewing report in HTML format, you use which of the following link to go to the next page?

   a. Next
   b. Bottom
   c. **Page down**
   d. Page up

Lesson Two

1. To select a range of criteria (not multiple selection), which of the following key should be used?

   a. **Shift key**
   b. CTRL key
   c. Alt key
   d. Tab key

2. You need to click on the button next to the list box to:

   a. Select a range of filters
   b. Repopulate the list box
   c. Select all the criteria
   d. Select all the data

Module Four Keys: PCARSS CUBES

(Highlighted choice is the correct answer)

Lesson One

1. Which of the following is NOT a component of the cube?

   a. Cube view
   b. Dimensions folder
   c. Toolbar
   d. List box

2. The information displayed in the dimension folders is in the form of :

   a. A parallel
   b. A hierarchy
   c. A list box
   d. Pop-up menu

3. The dimensions folders is located at the:

a. Bottom of the cube view
b. Left of the cube view
c. Right of the cube view
d. Top of the cube view

The toolbar is used to manipulate how data are displayed.

a. **True**
b. False

Lesson Two

1. Filtering will limit the view of information within the cube and show only the information based on the selection you have made:

a. True
b. False

2. Which of the following is correct about Dimensions bar?

a. It can print data
b. It can view more data
c. It is a better way to display data
d. it is simply another way to filter through data

3. After a dimension is selected from the dimensions bar, the dimension will be highlighted in:

a. Red
b. Black
c. White
d. Blue

4. Drilling down means that you will go to a different category to see more information.

a. True
b. False

5. Which of the following is true about expanding?

a. expanding shows the dimension of higher level
b. expanding shows the dimension name of the higher level.
c. Expanding shows less data than drilling down
d. Expanding show more data than drilling down

6. Nesting displays one set of data as it relates to another set of data.

a. True
b. False

7. Which of the following is true about Tools on the tool bar?

a. Tools on the tool bar are used to apply a new dimension
b. Tools on the tool bar are used to add more data to the cube.
c. Tools on the tool bar are used to manipulate how data are displayed.
d. Tools on the tool bar are used to delete unwanted data.

Lesson Four

1. The four operation types are: Arithmetic, Percentage, Analytic, and Financial.

a. True
b. False

2. Which of the following is not true about ranking?

a. Ranking allows you to rank the data either in ascending or descending order
b. You can also limit the ranking to the criteria you set
c. You can also create your own rank name that you like
d. Ranking allows you to rank the data in only descending order

3. In the data cube, an exception means that the value in a data cell is either higher or lower than an expected standard.

a. True
b. False

4. Which of the following is true about custom subsets?

   a. **To make subset dimensions stand out from predefined dimensions, the systems place two small circles on the folder icon indicating it is a custom subset**
   b. The Custom Subsets tool allows you to create customized subsets of dimensions that can display more information
   c. To make subset dimensions stand out from predefined dimensions, the systems highlight the folder that contains a custom subset.

5. Which of the following is not true about Drill Through?

   a. Drill Through allows you to generate a detailed report of the selected dimensions
   b. Drill Through tool will generate a report of 'underneath' data that you would have to drill through the cube to look at
   c. **Drill through generates a report of what is shown on the screen**
   d. Drill through is not the same as drill down.

Module Five Keys: Ad Hoc Reports

1. Which of the following is a true statement about Ad hoc?

   a. *Ad hoc* is a Latin phrase which means "for other purpose".
   b. *Ad hoc* is a Latin phrase which means "for modification".
   c. *Ad hoc* is a Latin phrase which means "for adaptation".
   d. ***Ad hoc* is a Latin phrase which means "for this purpose".**

2. Which of the following is NOT a true statement about Ad hoc Report?

   a. An Ad Hoc report provides you with great flexibility to select the types of data to be shown
   b. An Ad Hoc report provides you with great flexibility to Change the display of selected data
   c. An Ad Hoc report provides you with great flexibility to Report the data in different format
   d. Only B and C are true statement.

3. Which of the following is NOT true about Ad Hoc Query?

   a. An ad hoc query is a query that you use to obtain information as the need arises
   b. An ad hoc query is a query that is predefined
   c. An ad hoc query is a query that is not routinely performed.
   d. An ad hoc query is also called a standard inquiry.