



DEPARTMENT OF THE AIR FORCE
Office of the Under Secretary
WASHINGTON DC

29 AUG 2003

MEMORANDUM FOR ALMAJCOM/LGC

SUBJECT: AFWAY Small Business Guidance (Re: Information Technology Purchasing--Use of AFWay (AF-CIO Policy Memorandum 03-12))

AFWay is now mandatory for purchases of desktop and notebook computers (see referenced policy). Throughout implementation of this policy it is our intent to foster small business participation in Air Force Information Technology (IT) procurements. To that end, we provide attached guidance (see Atch 1) for adding your MAJCOM-specific, small business contracts to AFWay. In addition, AFWay now includes a Request for Quote (RFQ) capability precluding the need for pre-established contracts when using AFWay to place orders. This RFQ capability allows Contract Officers to request quotes from local small businesses who may be able to fulfill your IT requirements but who do not have current contracts.

To access your local small business contracts or use the RFQ feature through AFWay, users must first register and equipment custodians must establish a workflow for processing orders (reference Atch 2, AFWay User's Guide). For assistance with registration or workflows, please contact the AFWay Program Office point of contact, Capt Cyril LeDoux (cyril.ledoux@gunter.af.mil) [334-416-2674 or DSN 596-2674]. If you have existing small business contracts that should be added to AFWay for FY03 purchases, contact Ms Rosa Shannon (rosa.shannon@gunter.af.mil) [334-416-5415 or DSN 596-5415] no later than 10 Sep 03.

We believe this interim guidance simplifies and facilitates local small business participation and we encourage your MAJCOM to use AFWay as a means to achieve its small business goals. Our points of contact for this policy are Ms Ann Hurley, AF-CIO/PT (ann.hurley@pentagon.af.mil) [703-601-8021; DSN 329-8021] or Lt Col (S) Tim Reed, SAF-AQCA (timothy.reed@pentagon.af.mil) [703-588-7023; DSN 425-7023].


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Attachments:

1. Guidance for Adding Contracts to AFWay
2. AFWay Users Guide

cc: EXCOM Members

ATTACHMENT 1

Guidance for Adding Contracts to AFWay

A. Small business contract vehicles must conform to the following criteria to be added to AFWay:

(1) Use standardized terms and conditions where possible; reference attached AFWay Users Guide or contact Ms Rosa Shannon (rosa.shannon@gunter.af.mil) [334-416-5415; DSN 596-5415] to obtain a template.

(a) Vendor must forward the AFWay surcharge check to Defense Finance and Accounting System (DFAS) monthly; see (2), below.

(b) Comply with Central Contractor Registration (CCR) and Delivery Order Status Report (DOSR) reporting requirements. Contract clauses are included in the template referenced at (1), above.

(2) Product prices must include the AFWay surcharge (currently 1.54% expected to decrease to 1.30% on 1 Oct 03). To facilitate collection and payment of the surcharge, HQ SSG will provide an account number prior to contract award (for assistance, contact Ms Shannon). The vendor must reference this account number when communicating with DFAS.

(3) Existing MAJCOM contracts/Blanket Purchase Agreements (BPAs) will be added to AFWay subject to their original terms and conditions. Newly issued contracts must limit ordering to the issuing MAJCOM (no Air Force-wide BPAs).

(4) Contracts must contain an approved product list that will become the AFWay list of orderable products.

(5) Products must comply with applicable Infostructure Technical Reference Model (i-TRM) and/or Joint Technical Architecture (JTA)-AF standards or be identified as non-compliant so the relevant waiver process can be initiated.

B. The issuing MAJCOM will award, manage, and administer all aspects of their small business vehicles to include initial market research to contract award, administration and close-out.

C. A draft of the proposed contract vehicle must be reviewed by HQ SSG/AQP before being issued. For assistance please contact Ms Shannon.

U.S. AIR FORCE



AFWay

SOFTWARE USERS GUIDE

May 2003

**HQ SSG/BICS
201 East Moore Drive
Maxwell AFB, Gunter Annex, AL 36114**

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Introduction

Welcome to AFWay!

AFWay enables you to order information technology (IT) hardware and software, and obtain the necessary approvals for your purchase while sitting at your desk. AFWay provides a secure, efficient and convenient online shopping experience. Everything you need is available, literally, at the click of a button.

This Software Users Guide is provided to assist you from registration to receipt of your purchase. If you require additional guidance or would like more indepth assistance, please contact the Field Assistance Branch (FAB) Team 5 at DSN 596-5771.

Browser Requirements

The web address for AFWay is <https://afway.af.mil/>. In order to ensure that AFWay loads and displays correctly, you should be aware of the following requirements/information:

1. Currently, Internet Explorer 5.01 (or later) is required. Netscape is not supported at this time.
2. You must have 128-bit encryption capable browser. You can update the encryption for Internet Explorer at the following URL:
<http://www.microsoft.com/windows/ie/downloads/recommended/128bit/default.asp>
3. The site is best viewed at a screen resolution of 800 x 600.

Welcome Screen

When you access AFWay, the first screen that you encounter is the welcome screen.

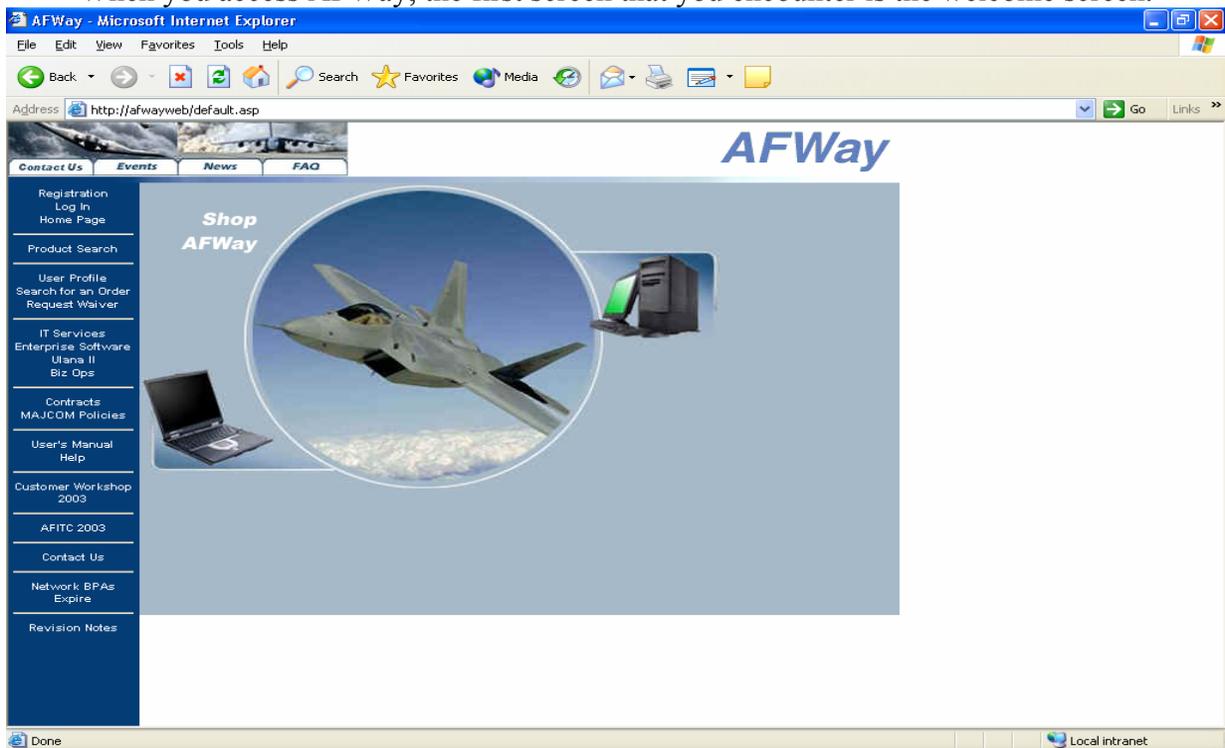


Figure 1. AFWay Welcome Screen

1. At the top you will notice four tabs. You do not need to be logged in to view these pages. These tabs will always be available/visible.

- Contact Us - This page identifies email and phone numbers for the key AFWay support individuals.
- Events - This page lists events of interest to AFWay users.
- News - This page lists the current AFWay news.
- FAQ - This page lists AFWay Frequently Asked Questions.

2. Along the left side of the screen you will see a menu bar:



Figure 2. AFWay Left Menu Bar

You must login in order to access the *Product Search*, *User Profile* and *Search for an Order* links. Selecting any of these links will take you to the Login Screen. Once you have logged in, the page you originally selected will be displayed. Customers can access the other links on this menu bar without being logged in. This menu bar will be available/visible throughout your buying experience. **NOTE:** Upon successful logon, the *Registration* link on the left menu bar will change to a *Log Out* link.

New Customer Registration

To register as a new customer, perform the following actions:

1. Press the *Registration* button on the left menu bar.
2. Fill in all required fields (required fields are identified with an “*”)
3. **NOTE:** If you select Branch: DEPT OF DEFENSE - AIR FORCE, three additional fields will appear (AF MAJCOM, DRA and Equipment Custodian’s Account Number).
 - 3.1 If you need help finding your Direct Reporting Activity (DRA) number, press the *Help finding your DRA* link to the right of the DRA field. A page showing “DRAs By Base” will appear. DRA’s are listed according to the base in alphabetical order. If your base has more than one DRA, please check for your MAJCOM and Organization. If your Organization has more than one DRA, verify with your Equipment Custodian as to which is your correct DRA. This information is taken directly from the IPMS database.
 - 3.2 To find your Equipment Custodian’s Account Number (ECAN), press the *Help finding your ECAN* link to the right of the ECAN field. A page named “Equipment Custodian’s Account Number Lookup” will appear. ECAN’s are listed alphabetically by organization. If unsure, please verify this information with your Equipment Custodian. **EVERYONE MUST IDENTIFY THE ECAN THIER EQUIPMENT IS TRACKED AGAINST** (this includes ECO’s).
4. The Password you select must include (at a minimum) one uppercase character, one lowercase character, one number and one special character, and be a minimum of 8 characters. This is the Air Force password policy (AFI 33-223).
5. Once you have filled in all the applicable fields, either press the *Submit* button to complete the process, or *Reset* button to clear the fields and start over.
6. A new page will be displayed if your registration contained any errors, simply press the *Back* button, correct the errors and press the *Submit* button.
7. If there were no errors, another screen will open welcoming you to AFWay and you can press the *Start Shopping* link to continue. Once you select *Start Shopping*, you will see the Product Search page. **NOTE: Once you have registered, your EC will receive an email requesting they add you to the approved purchasers list. Prior to receiving this approval you will be able to shop and create wishlists (which you can email to other registered individuals). However, you will not be able to complete a purchase before your EC has added you to the list. (You will not have an “Checkout” link).** The remainder of this manual is written with the assumption that the EC has approved the user to become an authorized purchaser.



- Home Page
- Registration
- Product Search
- User Profile
- Search for an Order
- IT Services
- Oracle Deal
- ESI
- ULANA II
- Biz Ops
- Contracts
- MAJCOM Policies
- User Manual
- Help
- Contact Us

New User Registration

[User Registration Help](#)

Register now to:

- Look for up-to-date product and pricing information on selected federal contracts.
- Select items to add to your own shopping baskets.
- Obtain official quotes online.
- Process orders electronically with your Government Credit Card.
- Process orders electronically via Funding Document.

* denotes mandatory field

* First Name

Middle Name

* Last Name

Rank

* E-mail Address

* Address1

Address2

* City

State
(Mandatory in U.S.)

* Zip

* Country

* Comm Phone

Comm Fax

DSN Phone

DSN Fax

*Agency

*AF MAJCOM

*Direct Reporting Activity
(Four Digit DRA#) [Help finding your DRA](#)

*Equipment Custodian's
Account Number [Help finding your ECAN](#)

*Authorization
 Customer
 Contractor
 Vendor

Login Information

When logging in to AFway you will use your email address in combination with a password. The password must be at least 8 characters and contain a lower case letter, an upper case letter, a number, and a special character. Your registration information can be changed at any time by clicking on the **Edit User Account** link which can be found on the User Profile page.

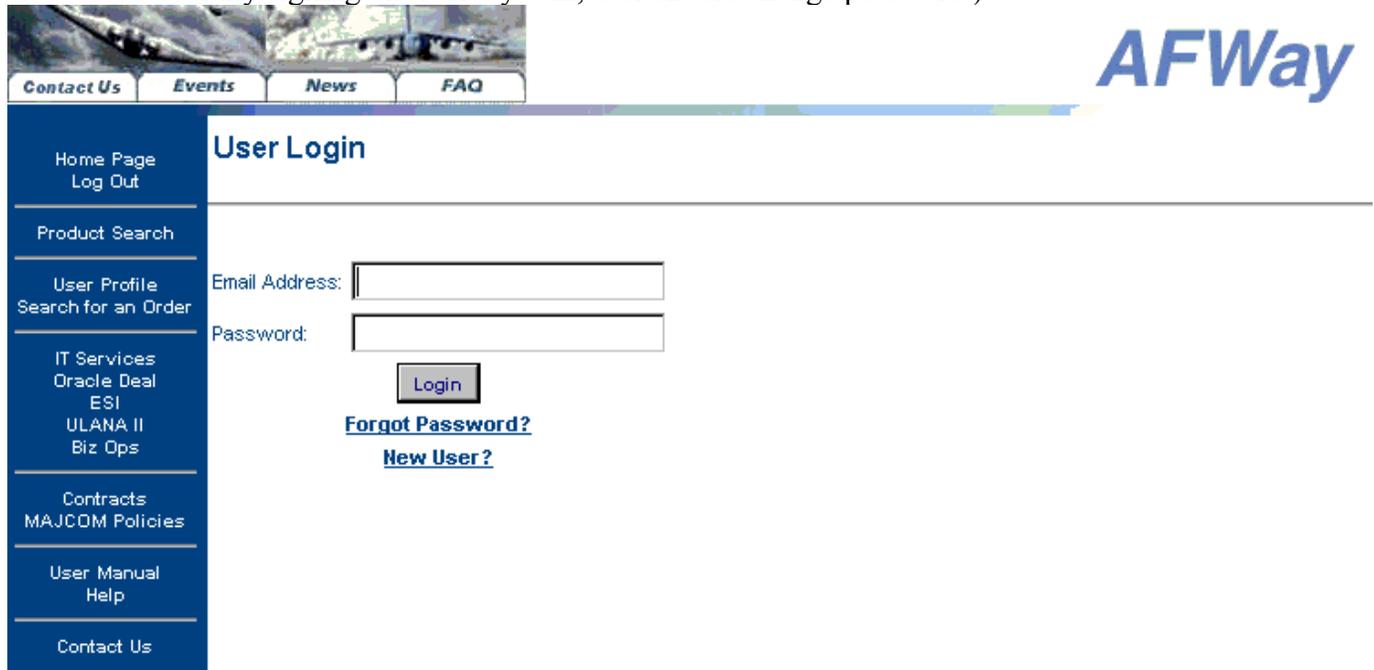
*Password

*Confirm Password

Figure 3. New User Registration

User Login

1. To login to AFWay, enter the User Name and Password you established during registration, and press the *Login* button. (**NOTE:** If you enter the incorrect User Name or Password 3 times, your account will be locked. At this point, the user should contact the Field Assistance Branch and your password will be automatically changed and new password sent to you via email. After successfully signing on to the system, user should change password.)



The screenshot shows the AFWay User Login page. At the top, there are navigation links: Contact Us, Events, News, and FAQ. The AFWay logo is in the top right corner. On the left, there is a vertical navigation menu with links: Home Page, Log Out, Product Search, User Profile, Search for an Order, IT Services, Oracle Deal, ESI, ULANA II, Biz Ops, Contracts, MAJCOM Policies, User Manual, Help, and Contact Us. The main content area is titled 'User Login' and contains the following elements: 'Email Address:' followed by an input field, 'Password:' followed by an input field, a 'Login' button, and two links: 'Forgot Password?' and 'New User?'.

Figure 4. – User Login Page

2. If you have forgotten your password, press the “*Forgot Your Password?*” link. This screen will be displayed:



The screenshot shows the AFWay 'Did you forget your password?' page. At the top, there are navigation links: Contact Us, Events, News, and FAQ. The AFWay logo is in the top right corner. On the left, there is a vertical navigation menu with links: Home Page, Registration, Product Search, User Profile, Search for an Order, IT Services, Oracle Deal, ESI, ULANA II, Biz Ops, Contracts, MAJCOM Policies, User Manual, Help, and Contact Us. The main content area is titled 'Did you forget your password?' and contains the following elements: instructions to 'Enter your email address in the text box below and click the "Email My Password" button. Your password will be emailed to you.', 'Email:' followed by an input field, and an 'Email My Password' button.

Figure 5. – Forgotten Password

3. Enter your User Name and press the “*E-mail My Password*” button. Your Password will be mailed to the E-mail address you provided during registration. (If you mistyped or entered an invalid E-mail address during registration, the email will be undeliverable).
4. If you have forgotten your User Name, please contact the FAB Team 5 at DSN596-5771.

User Profile Page

The User Profile page can be displayed by selecting the link in the menu bar on the left side of the screen. From this page you can:

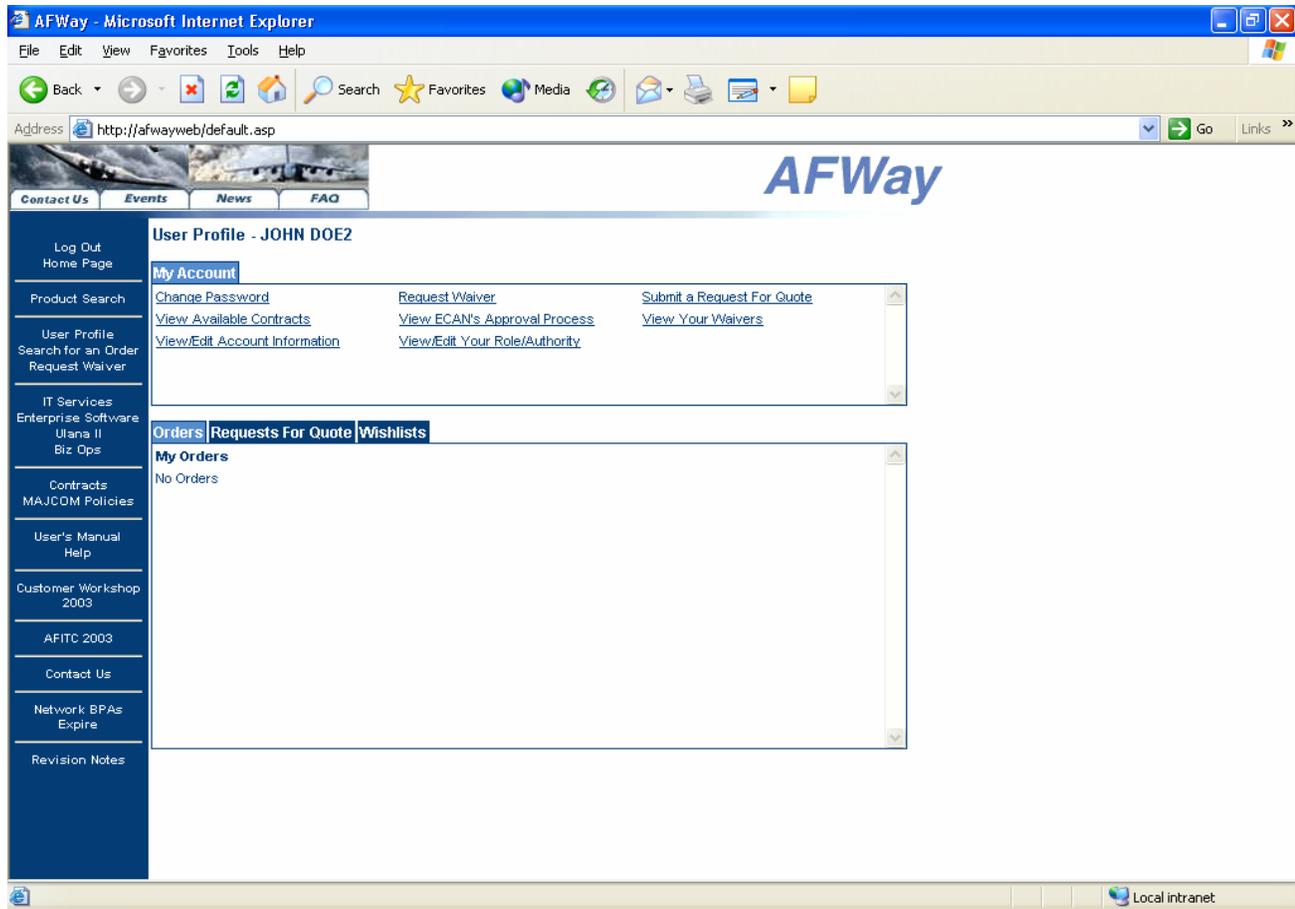


Figure 6. – User Profile Page

- *Change Password* - Opens a window that enables you to change your password.
- *View/Edit Account Information* - Opens a window that enables you to view and change your profile information.
- *View ECAN's Approval Process* – You can view your ECAN's Approval Process if one has been established.
- *View/Edit Your Role/Authority* – Allows you to view/edit your role/authority if applicable. You can change your role from Customer to Equipment Custodian (EC), Base Equipment Control Officer (BECO) or MAJCOM Equipment Control Officer (MECO). EC, BECO, and MECO roles are verified against IPMS before access is given. All other roles are assigned to users by an EC or ECO.

Searching

By selecting the “*Product Search*” link on the menu bar on the left side of the screen, customers can browse through the products currently available on the site. There are two methods for searching. You may “*Search by Category*” by searching for a particular type of item by selecting the Category and then the appropriate Subcategory (*Search by Subcategory*). Also, you may complete an “*Advanced Product Search*” where you can locate products by Product Category; Original Equipment Manufacturer, OEM Part Number, CIT-PAD Contract vehicle, Vendor Part Number, Product Description.

Searching For Configurable Items (Desktops/Laptops/Servers/Workstations)

While searching for configurable items (Desktops/Laptops/Servers/Workstations) you will be asked to select your desired configuration.

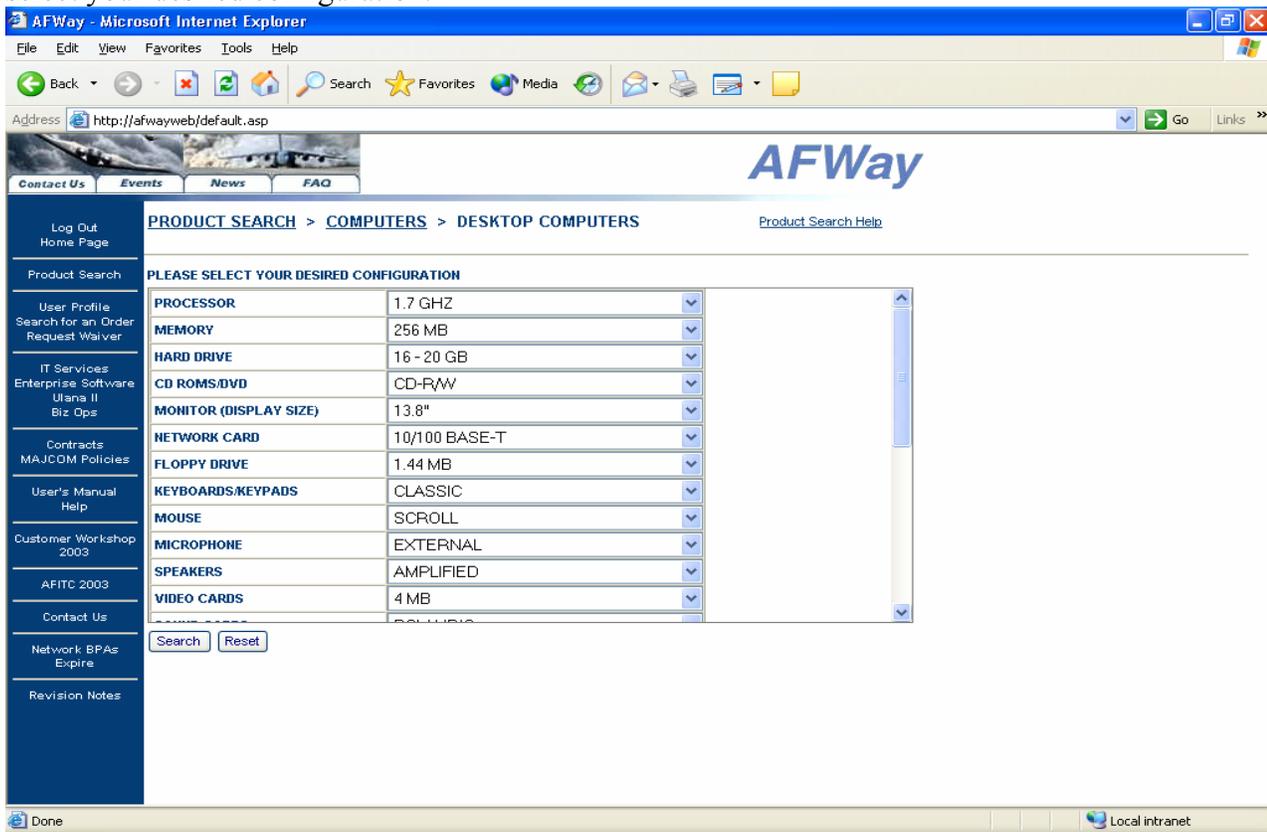


Figure 7. – Product Configuration Page

You must choose a “pricing type”. You can leave the default configuration and press the *Search* button or change any of the criteria to meet your needs. These will be your minimum requirements. If there are products that meet your minimum requirements they will then be displayed side-by-side for comparison. These items will be listed from left to right with lowest prices being on the left.

Request for Quote Process

Selecting the “*Request for Quote*” process allows the user to request quotes from vendors to solicit the best price for IT purchases.

RFQ Link

The RFQ process begins when a user clicks on the “Submit a Request For Quote” link, or performs a product search and instead of clicking the “Add to Cart” button, clicks the “Bulk Buy” button.

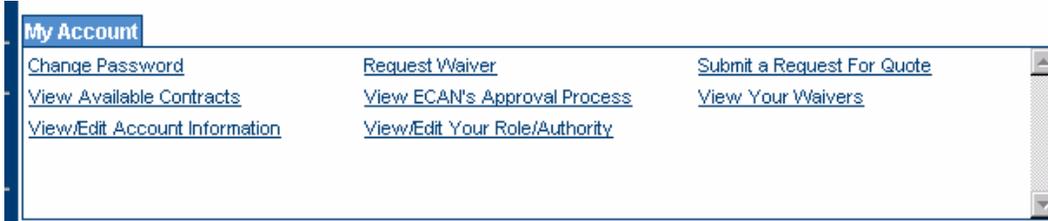


Figure 8. - RFQ Link

RFQ Page

The RFQ page is used to input all information that is required to submit a RFQ to the approval process. It allows users to add up to 5 attachments that in total are less than 6MB in size.

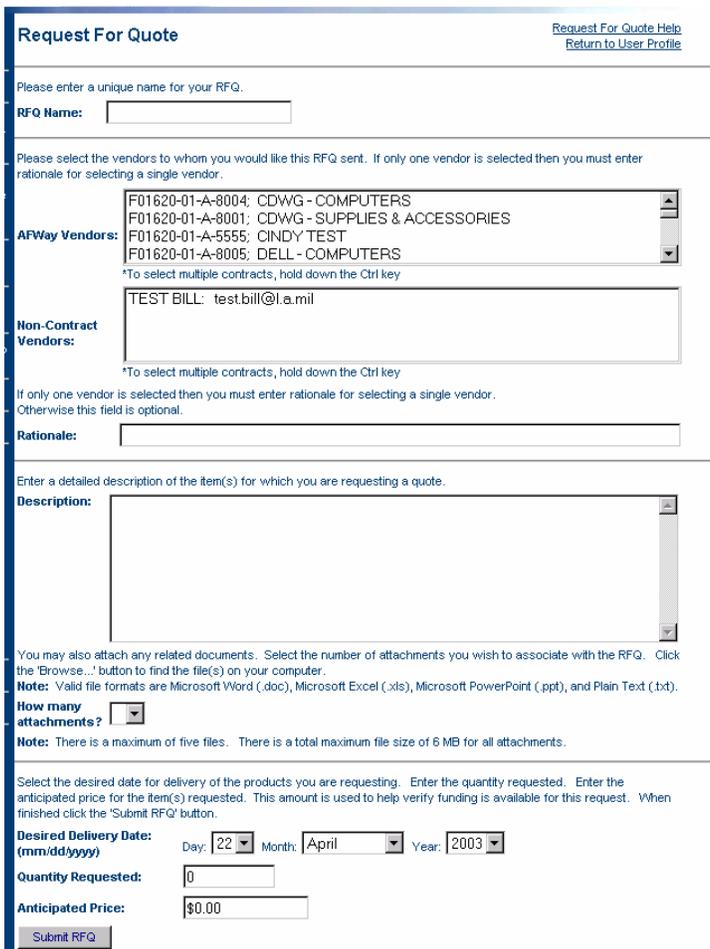
A screenshot of the 'Request For Quote' form. The form is titled 'Request For Quote' and includes a 'Request For Quote Help' and 'Return to User Profile' link. The form contains several sections: 'RFQ Name' (text input), 'AFWay Vendors' (list box with options: F01620-01-A-8004; CDWG - COMPUTERS, F01620-01-A-8001; CDWG - SUPPLIES & ACCESSORIES, F01620-01-A-5555; CINDY TEST, F01620-01-A-8005; DELL - COMPUTERS), 'Non-Contract Vendors' (text input with 'TEST BILL: test.bill@l.a.mil'), 'Rationale' (text input), 'Description' (text area), 'How many attachments?' (dropdown menu), 'Desired Delivery Date' (Day: 22, Month: April, Year: 2003), 'Quantity Requested' (text input with '0'), and 'Anticipated Price' (text input with '\$0.00'). A 'Submit RFQ' button is at the bottom.

Figure 9. - RFQ Page

RFQ Successfully Added Page

The RFQ Successfully Added Page opens after a user clicks the submit button on the RFQ page and all requirements on the RFQ page are met. Before the page is opened, the user must have met the following data requirements:

- Selected multiple vendors or entered justification for only selecting one vendor
- Entered the quantity requested
- Entered the anticipated price
- Selected a Desired Delivery Date that is later than the current date.
- Selected attachments that are in the format of Microsoft Word, Microsoft Excel, Microsoft Power Point, or Text.



Figure 10. - RFQ Successfully Added Page

RFQ Tab on User Profile Page

The RFQ Tab on the User Profile page allows the user to check the status of any RFQ they have submitted. Additionally, if the user is in the approval flow for an RFQ it will notify the user of any RFQs that are pending their approval, or have been approved but are still in the approval process.



Figure 11. - RFQ Tab

- If the vendor decides to submit a solution, the vendor enters the proposed product and price, then clicks the “Submit” button.
- The user then receives an e-mail notification and the RFQ Status is changed.
- The user can accept the vendor’s offer by clicking the “Add to Cart” button.
- If the user clicks the “Add to Cart” button then an order is created and routed through to the funding person in the user’s approval process.

Shopping

Shopping Carts

In order to complete an order on AFWay, items must first be placed in the current Shopping Cart and then purchased using the *Checkout* link. Once items have been placed in the current shopping cart, you have several options. You can *Save as a Wishlist*, *Checkout*, or *Close Cart*. Once the cart has been closed, you will view the following icon on your User Profile page:



You may view your current shopping cart at any time by pressing this icon.

Wishlists

Wishlists are shopping carts that have been saved without pricing information. You can save multiple wishlists for later processing. (An example would be at end-of-year you can prebuild wishlists for last minute processing). Once an item has been sent to a wishlist, you cannot change the configuration.

Working with Shopping Carts and Wishlists

1. To “add items to a shopping cart” and “save as a wishlist”:
 - 1.1 Press the *Add to Cart* button located next to the item you wish to add. At this time the item you selected was added to your current shopping cart. You can *Save as a Wishlist*, *Checkout* or *Close Cart*.
 - 1.2 To save the cart as a wishlist, press the *Save as a Wishlist* link and you will be prompted to either save as an “Existing Wishlist” or provide a “New Wishlist” name.

Wishlist

[Wishlist Help](#)

New Wishlist:

Figure 14. – Wishlist Naming

- 1.3 Once you supply a name, press the *Submit* button and a new page opens with your wishlist. At this point you have saved your wishlist. You can press *Close Wishlist* to continue shopping.
- 1.4 Your “wishlist” will now appear on your User Profile page.

2. To add items to a shopping cart and “**check out**”.

2.1 Press the *Add to Cart* button located next to the item(s) you wish to add. At this time the item you selected was added to your current shopping cart. You can *Save as a Wishlist*, *Checkout* or *Close Cart*.

2.2 To check out, press the *Check Out* link.

2.3 The Process Order page will appear (fig 8). Your EC’s default Mark For Address and Ship To Address will appear. You can also add additional Delivery Instructions that will be displayed to the vendor as a text message.



Figure 15. – Process Order Page

2.3.1 If you would like to assign multiple Mark For/Ship To addresses for orders with multiple items, press the *Multiple MarkFor ShipTo Addresses* button. You will then supply the email address of the recipient.

2.4 Once you press the *Next* button, you will receive the following message “Your order is pending approval through the base process defined by your base Equipment Control Officer. An e-mail has been sent to the first approval official. You will receive an email notification when the approval process has been completed or if your order is not approved.”

2.5 Your order will then be routed through the base approval process designed by the Base ECO.

2.6 **NOTE:** You can view your order at any time from the User Profile page. Just click on the order number and a new window should open with your order information as well as the approval process at the bottom.

- 2.7 If you are also in the approval chain, you will receive an email stating that you have an order pending review.
3. To add items to a shopping cart and “**sending wishlist to another user**” or “**deleting wishlist**”.
 - 3.1 Press the *Add to Cart* button located next to the item(s) you wish to add. At this time the item you selected was added to your current shopping cart. You can *Save as a Wishlist*, *Checkout* or *Close Cart*.
 - 3.2 Press the *Save as a Wishlist* link and you will be prompted to either save as an “Existing Wishlist” or provide a “New Wishlist” name.
 - 3.3 Once you supply a name, press the *Submit* button; a new page opens with your wishlist. At this point you have saved your wishlist.
 - 3.4 To send your wishlist to another user, press the *Send Wishlist to another user* link.
 - 3.5 Enter the E-mail address of the individual you wish to send the wishlist to and press the *Submit* button. The user must be registered on AFWay.
 - 3.6 Your wishlist will then be sent to the registered user you identified. This person can process the wishlist in the same manner as the original customer. (The wishlist will no longer appear on the original customers User Profile page)
 - 3.7 To delete the wishlist, press the *Delete Wishlist* link on the wishlist page.
4. To “**Order**” from a wishlist.
 - 4.1 Open the wishlist you are purchasing.
 - 4.2 Press the *Add to Cart* link on the right side of the item you would like to purchase. This adds the item to the current cart.
 - 4.3 Once you have added all of the items from your wishlist to your current shopping cart that you would like to purchase, press the *Checkout* link and continue from step 2.3 above.

Need Assistance?

There are several different areas of assistance that are available to the customer. If you need contact numbers you may press the *Contact Us* tab along the upper pane or contact the FAB Team 5 at DSN596-5771.

Help at any time

The *Help* link is available on the left menu bar at all times during your shopping experience.

Help during Product Search (et al.)

During Product Search as well as many other times, there may be a *Help* link shown on the upper right corner of the main pane. This should open to a page with a broad range of help categories available.

Appendix A: Equipment Custodian (EC)

Assigning yourself to the EC Role

After establishing a user account, choose the *View/Edit your Role/Authority* link on the User Profile Page. This allows you to view/edit your role/authority. You can change your role from Customer to EC. EC roles are verified against IPMS before access is granted. When you select the Equipment Custodian role, press the *Submit* button. The User Roles page appears requesting your DRA, ECAN, and IPMS PersonID. Once the *Submit* button is pressed, the individual is verified against IPMS data and if a match is made, the account will show on the User Roles page.

As an Equipment Custodian, you have several additional responsibilities that are addressed below.

EC User Profile Page

The User Profile page can be displayed by selecting the link in the menu bar on the left side of the screen. From this page you can:

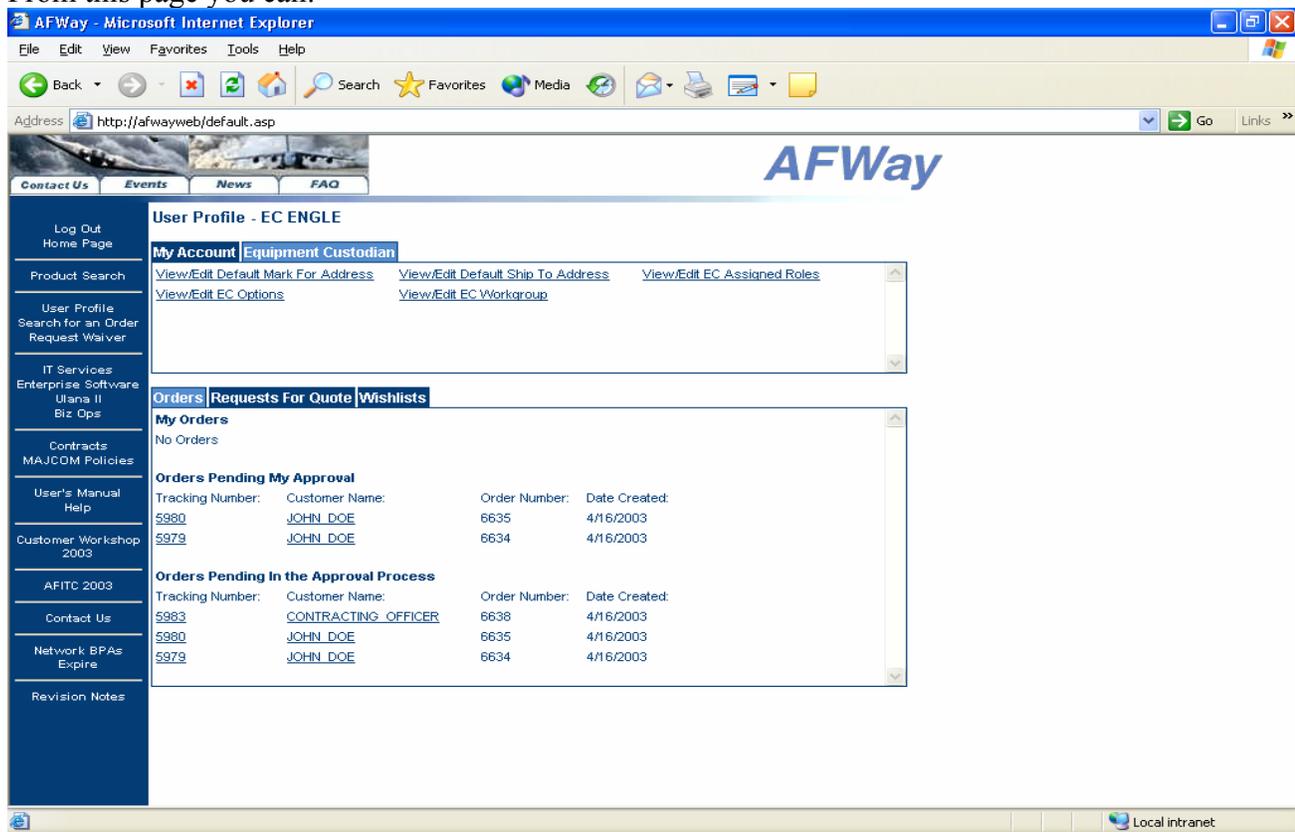


Figure 10. – EC User Profile Page

Additional Links for ECO:

- *View/Edit Default Mark For Address* - Opens a window where you can view/edit your “Default” Mark for Address. This address will be the address that all equipment ordered under your Equipment Account number will be “Marked For”.

- *View/Edit EC Assigned Roles* - Opens a window where you identify individuals assigned to different roles as defined by your BECO.
- *View/Edit Default Ship To Address* - Opens a window where you can view/edit your “Default” Ship To Address. This address will be the address where all equipment ordered under your Equipment Account number will be “Shipped To”.
- *View/Edit EC Options* – This option allows you to choose whether a technical workgroup manager is required to approve orders or not. If you choose yes, the Technical Workgroup Manager should be assigned under the *View/Edit EC Assigned Roles* link.
- *View/Edit EC Workgroup* – This is where you must Add or Remove individuals permissions to complete the order process in AFWay.

View/Edit Default Mark For Address

As an EC, you will define the Default Mark For Address that will appear on every order processed with your account number.

View/Edit EC Assigned Roles

When you access AFWay as an Equipment Custodian, you can view and assign individuals to the approval process roles of your account by pressing the *View/Edit EC Assigned Roles* link on your User Profile page. **NOTE:** Approving Officials are restricted from being Card Holders.

Assigning individuals to roles:

- Step 1. Press the *View/Edit EC Assigned Roles* link on the User Profile page.
- Step 2. You can assign individuals to the roles by entering the email address of the user who will approve or disapprove orders at that step. (**NOTE:** Only registered users can be assigned roles)
- Step 3. Press the *Add* button.

NOTE: The individual will automatically be assigned to the “Alternate” position. To assign them to the “Primary” position, press the *Primary* button. Also, you cannot delete the individual from the “Primary” position. To delete this person, you must first assign another individual to the “Primary”, which will relegate the original individual to the “Alternate” position. You can then delete the person from the “Alternate” position by pressing the *Delete* button.

NOTE: If you are assigned against multiple ECANs, this option must be set for each account.

View/Edit Default Ship To Address

As an EC, you will define the Default Ship To Address that will appear on every order processed with your account number. Normally, this address is the address where your BECO initially processes all incoming Information Technology (IT) equipment. Exception: If the BECO identifies a Default Ship To Address, and requests all shipments be shipped to that address, then the BECO address overrides the EC Default Ship To Address.

View/Edit EC Options

This option allows you to choose whether a technical workgroup manager is required to approve orders or not. If you choose yes, the Technical Workgroup Manager should be assigned under the *View/Edit EC Assigned Roles* link.

NOTE: If you are assigned against multiple ECANs, this option must be set for each account.

View/Edit EC Workgroup

Customers can register and view products in AFWay but cannot start an order until the EC approves them as a “User that has Permission to Order”. As an EC, when an individual registers using your EC account number, an email will be generated stating that an individual request being added to the “User that has Permission to Order” list. To add them, follow these steps:

Step 1. Press the *View/Edit EC Workgroup* link on the User Profile page.

Step 2. You can add individuals to the “User that has Permission to Order” list by pressing the *Add* button next to the individual you wish to give permissions to. You can later remove those permissions by pressing the *Remove* button.

EC's with Multiple Accounts

EC's can be assigned against multiple ECANs. If you are assigned against multiple accounts, press the *View/Edit Your Role/Authority* link on the User Profile page. You can request authorization for all ECAN's associated with your name in IPMS. You can also delete your association with ECAN's from this page.

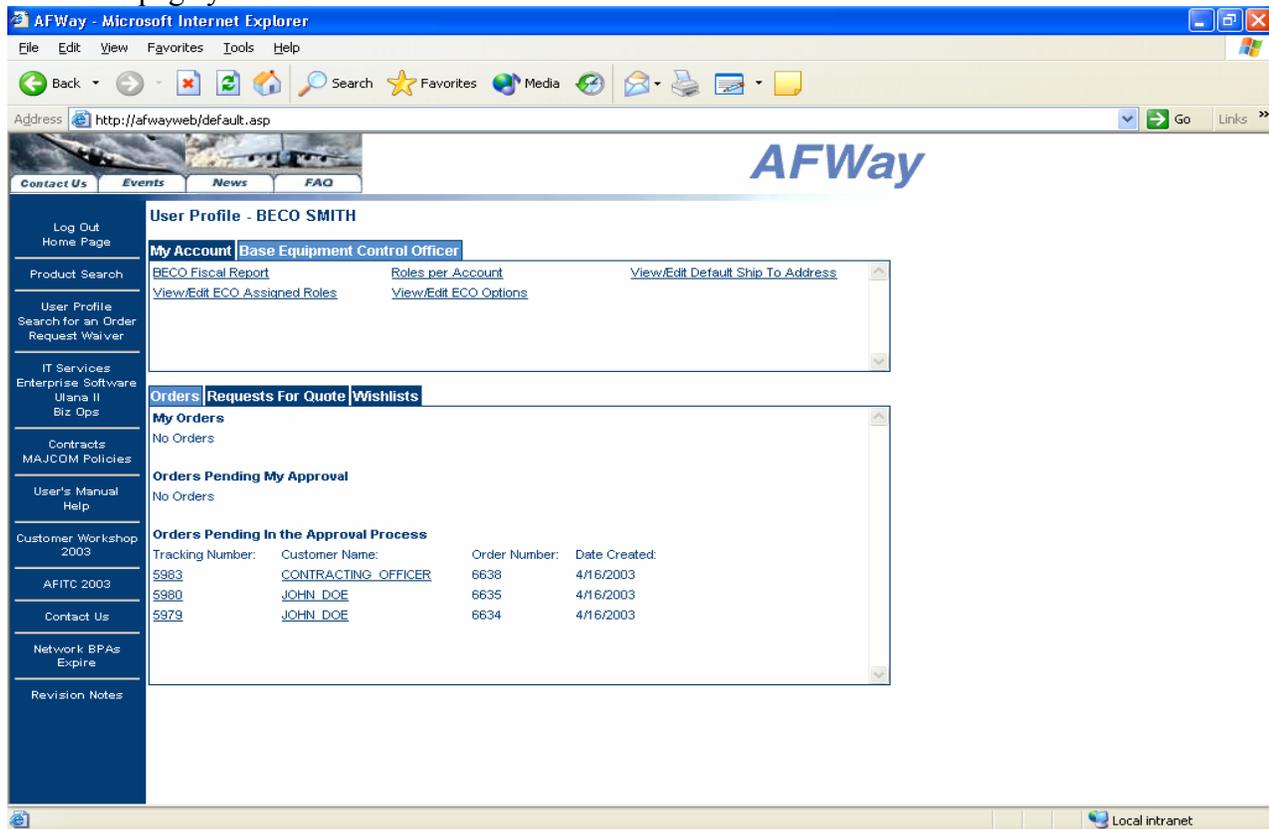
Appendix B: Base Equipment Control Officer (BECO)

Assigning yourself to the BECO Role

After establishing a user account, choose the *View/Edit your Role/Authority* link on the User Profile Page. This allows you to view/edit your role/authority. You can change your role from Customer to BECO. BECO roles are verified against IPMS before access is granted. When you select the Base Equipment Custodian role, press the *Submit* button. Once the *Submit* button is pressed, the individual is verified against IPMS data and if a match is made, the account will show on the User Roles page.

BECO User Profile Page

The User Profile page can be displayed by selecting the link in the menu bar on the left side of the screen. From this page you can:



The screenshot shows a web browser window titled "AFWay - Microsoft Internet Explorer" with the address "http://afwayweb/default.asp". The page content includes a navigation menu on the left, a header with "AFWay" logo, and a main content area titled "User Profile - BECO SMITH". The main content area has tabs for "My Account" and "Base Equipment Control Officer". Under "My Account", there are links for "BECO Fiscal Report", "Roles per Account", "View/Edit ECO Assigned Roles", and "View/Edit ECO Options". Under "Base Equipment Control Officer", there is a link for "View/Edit Default Ship To Address". Below these are sections for "Orders", "Requests For Quote", and "Wishlists". The "Orders" section is expanded, showing "My Orders" (No Orders), "Orders Pending My Approval" (No Orders), and "Orders Pending in the Approval Process". A table lists pending orders with columns for Tracking Number, Customer Name, Order Number, and Date Created.

Tracking Number:	Customer Name:	Order Number:	Date Created:
5983	CONTRACTING OFFICER	6638	4/16/2003
5980	JOHN DOE	6635	4/16/2003
5979	JOHN DOE	6634	4/16/2003

Figure 11. – BECO User Profile Page

Additional Links for BECO:

- *View/Edit ECO Options* – This page allows you to determine if you want all items purchased by accounts within your DRA to be shipped to you. If you select yes, the “default” Ship To address will become the “mandatory” Ship To address for all items purchased under your DRA. Also, here you determine if you (BECO) are included in the workflow process.
- *View/Edit ECO Assigned Roles* – Allows you to assign individuals to certain roles in the approval process. Individuals are assigned by entering the email address of the user you wish to approve or

disapprove at that step. BECO must assign the Contracting Officer, Base Government Card Holder and Base Network Review individuals.

- *ECO Fiscal Report* – This page allows you to define certain criteria and create fiscal reports.
- *View/Edit Default Ship To Address* - Opens a window where you can view/edit your “Default” Ship To Address. This address will be the address where all equipment ordered under your DRA number will be “Shipped To” if you have selected “yes” in the *View/Edit Base ECO Options*.

View/Edit ECO Options

This page allows you to determine if you want all items purchased by accounts within your DRA to be shipped to you. If you select yes, the “default” Ship To address will become the “mandatory” Ship To address for all items purchased under your DRA. If you select no, the items will be shipped to the EC’s “default” Ship To address. Also, here you determine if you (BECO) are included in the workflow process. If you select yes, the BECO will be an added step in the order approval process. If you select no, the BECO will not be added.

View/Edit ECO Assigned Roles

Allows you to assign individuals to certain roles in the approval process. Individuals are assigned by entering the email address of the user you wish to approve or disapprove at that step. Users must be registered to be able to be assigned to roles. Also, you must enter the email address as they have entered it into the registration process. The BECO must assign the Contracting Officer, Base Government Card Holder and Base Review individuals. **NOTE: If CIO standards have not been established and CIO approval is required, the Base Review position must be inputted immediately following the EC.** These positions can only be assigned by the BECO.

ECO Fiscal Report

You can view fiscal reports based on the following criteria:

ECAN
Order Status
Begin Date
End Date

You can select multiple ECANs and Order Status’s by holding the ‘CTRL’ key while selecting items. Results will be displayed which meet your criteria.

View/Edit Default Ship To Address

As a BECO, you can define a Default Ship To Address that will appear on every order processed within your DRA. Normally, this address is the address where your BECO initially processes all incoming Information Technology (IT) equipment. **NOTE: If the BECO identifies a Default Ship To Address, and requests all shipments be shipped to that address, then the BECO address overrides the EC Default Ship To Address.**

Appendix C: MAJCOM Equipment Control Officer (MECO)

Assigning yourself to the MECO Role

After establishing a user account, choose the *View/Edit your Role/Authority* link on the User Profile Page. This allows you to view/edit your role/authority. You can change your role from Customer to MECO. MECO roles are verified against IPMS before access is granted. When you select the MAJCOM Equipment Custodian role, press the *Submit* button. Once the *Submit* button is pressed, the individual is verified against IPMS data and if a match is made, the account will show on the User Roles page.

MECO User Profile Page

The User Profile page can be displayed by selecting the link in the menu bar on the left side of the screen. From this page you can:

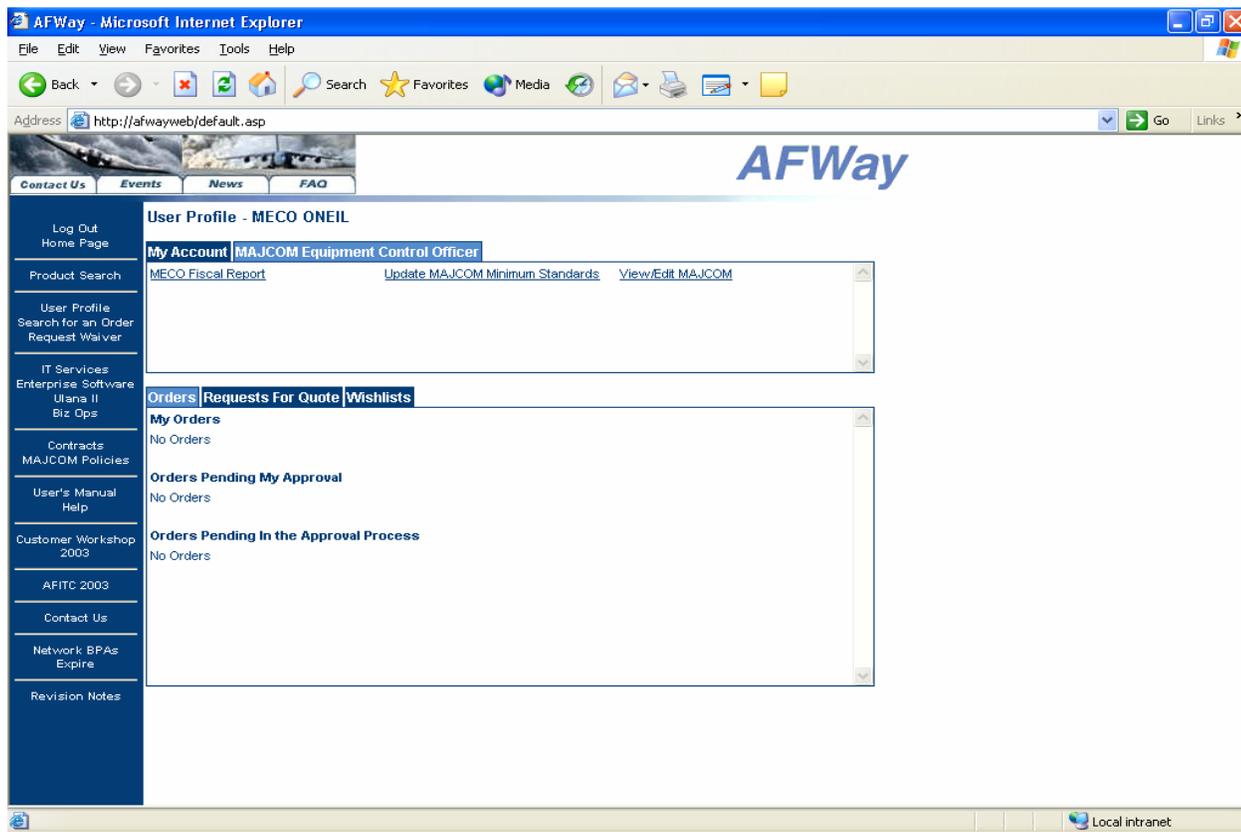


Figure 12. – MECO User Profile Page

Additional Links for MECO:

- *MECO Fiscal Report* – This page allows you to define certain criteria and create fiscal reports.
- *Update MAJCOM Minimum Standards*

MECO Fiscal Report

You can view fiscal reports based on the following criteria:

DRA
Order Status

Begin Date
End Date

You can select multiple DRAs and Order Status's by holding the 'CTRL' key while selecting items. Results will be displayed which meet your criteria.

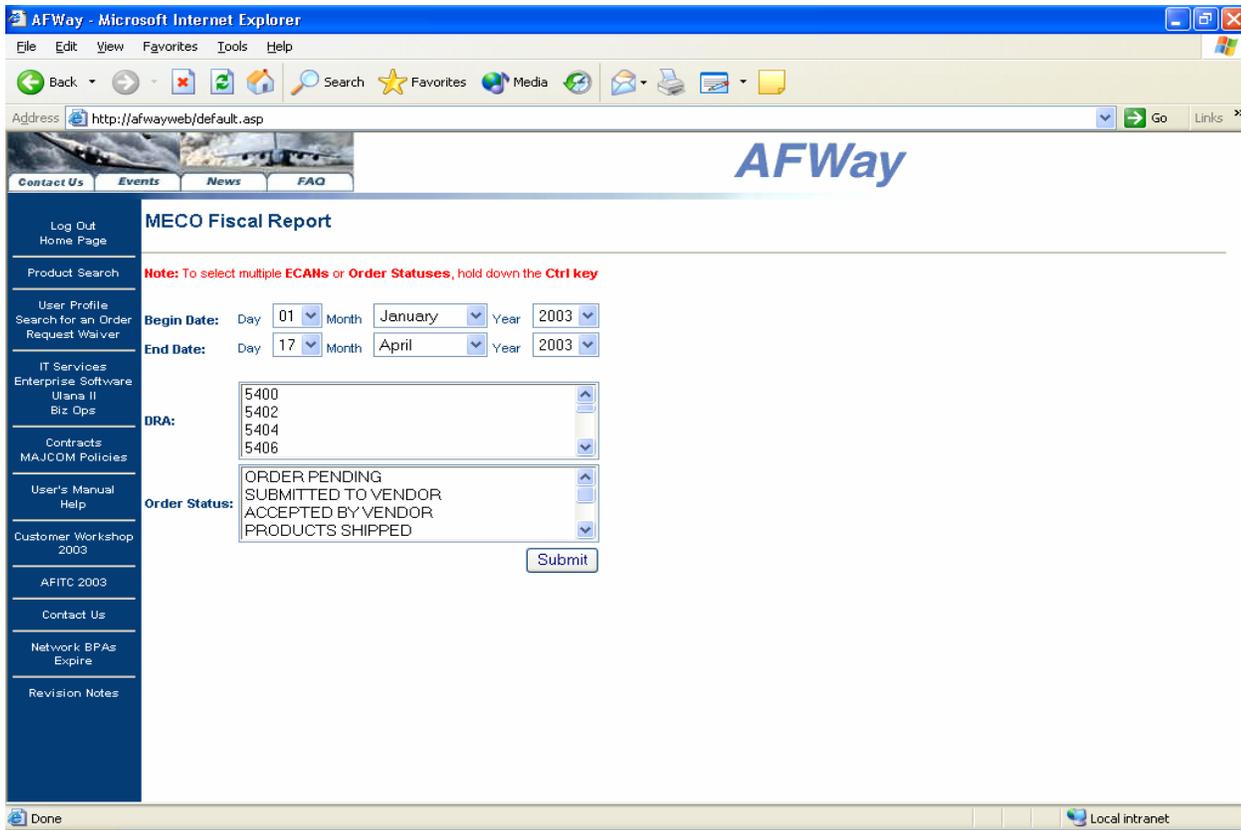


Figure 13. – MECO Fiscal Report Page

Update MAJCOM Minimum Standards

You can update your MAJCOM minimum standards by selecting the appropriate link. The following screen shot shows some of the available parameters you can define:

ACC Minimum Requirements [Back to User Profile](#)

COMPUTERS > DESKTOP COMPUTERS

Delete	CD ROMS/DVD	CD-R/W	Update	NONE
Delete	FLOPPY DRIVE	1.44 MB	Update	1.44 MB
Delete	HARD DRIVE	16 - 20 GB	Update	1 - 5 GB
Delete	KEYBOARDS/KEYPADS	CLASSIC	Update	CLASSIC
Delete	MEMORY	256 MB	Update	32 MB
Delete	MODEMS	NONE	Update	NONE
Delete	MONITOR (DISPLAY SIZE)	13.8"	Update	15.0" FLAT PANEL
Delete	MOUSE	SCROLL	Update	CLASSIC
Delete	NETWORK CARD	10/100 BASE-T	Update	10/100 BASE-T
Delete	PROCESSOR	1.4 GHZ	Update	400 MHZ
Delete	SOFTWARE - APPLICATION	BASIC PC-COE OFFICE 2000	Update	OFFICE 97
Delete	SOFTWARE - OPERATING SYSTEMS	PC-COE WINDOWS 2000	Update	WINDOWS 95
Delete	VIDEO CARDS	4 MB	Update	2 MB
Delete	WARRANTY	3 YEAR LIMITED	Update	1 YEAR

COMPUTERS > NOTEBOOK COMPUTERS

Delete	CD ROMS/DVD	CD-R/W	Update	CD-ROM
Delete	DESKTOP ADAPTER	NONE	Update	PORT REPLICATOR
Delete	HARD DRIVE	21 - 25 GB	Update	NONE

Figure 14. – Updating MAJCOM Minimum Standards

Appendix D: Additional Roles

Technical Work Group Manager (TWGM)

This step is optional in the approval process. If the EC activates the TWGM step, the TWGM will be placed into the approval process (Figure 12, Step 2) and will have the “first look” at all requirements submitted under the EC’s ECAN. The TWGM has the responsibility to review, “Approve” or “Disapprove” the requirement. The requirement will not continue through the process without the approval of the TWGM. If the TWGM disapproves the order, the order is sent back to the customer as a “Disapproved Order” and also as a wishlist. If the TWGM step is activated and the EC has not assigned a name to this role, your order will stop at this step.

Base Review

If CIO standards have not been established and CIO approval is required, then base review is required. The BECO has the responsibility to assign an individual to this role. This role is filled by someone who can evaluate the appropriateness of items being considered for inclusion onto the base architecture.

Example 1.

A customer orders a printer. Since the printer requires a standard and a MAJCOM standard has not been set in AFWay, the order will be sent to the Base Review step.

Example 2.

A customer orders a laptop computer. Since the laptop requires a standard and the MAJCOM standard has been set in AFWay, the order will not be sent to the Base Review step.

Example 3.

A customer orders a copy of Windows 2000. Since the software does not require a standard, the order will not be sent to the Base Review step.

The Base Review has the responsibility to review, “Approve” or “Disapprove” the requirement. If Base Review is required, the requirement will not continue through the process without the approval of the Base Review. If the Base Review disapproves the order, the order is sent back to the customer as a “Disapproved Order” and also as a wishlist. If the Base Review step is required and the BECO has not assigned a name to this role, your order will stop at this step.

Approving Official (AO)

The AO role is assigned by the EC. The person who can approve the expenditure of funds using the Organizational Purchase Card fills this role. The same individual who holds the Organizational Purchase Card cannot fill this role. All orders will be routed through the AO. The AO has the responsibility to review, “Approve” or “Disapprove” the order. The order will not continue through the process without the approval of the AO. Once the AO approves the order, they can choose to have it routed to the Organizational Purchase Card Holder or to the Resource Advisor (if the order is over \$25,000, it is automatically routed to the Resource Advisor). If the AO disapproves the order, the order is sent back to the customer as a “Disapproved Order” and also as a wishlist. If the EC has not assigned a name to this role, your order will stop at this step.

Organizational Purchase Card Holder (OPCH)

The OPCH role is assigned by the EC. The same individual who holds the AO role cannot fill this role. The OPCH has the responsibility to review, “Approve” or “Disapprove” the order. The order will not continue through the process without the approval of the OPCH. Once the OPCH approves the order, it will be sent directly to the vendor. If the OPCH disapproves the order, the order is sent back to the customer as a “Disapproved Order” and also as a wishlist. If the EC has not assigned a name to this role, your order will stop at this step.

The OPCH has the ability to create a credit card profile by pressing the “View/Edit Credit Card Information” link. Enter the required information and press the “Submit” button. The fund site information is not needed at this time. Once you process an order, you will assign the order against a credit card profile. You must then submit the fund site information. This information is required so that AFWay can track purchases down to the fund site account level.

Resource Advisor (RA)

The RA role is assigned by the EC. The RA has the responsibility to review, “Approve” or “Disapprove” any orders routed to this role by the AO. Once the order arrives at the RA, the order will not continue through the process without the approval of the RA. Once the RA approves the order, they can choose to have it routed to the Base Purchase Card Holder *or* to the Contracting Officer. If the RA disapproves the order, the order is sent back to the customer as a “Disapproved Order” and also as a wishlist. If the EC has not assigned a name to this role, your order will stop at this step.

Contracting Officer (CO)

The CO role is assigned by the BECO. The CO has the responsibility to review, “Approve” or “Disapprove” any orders routed to this role by the RA. The CO also has the ability to submit “Request For Quotes” (RFQ’s also known as **Bulk Buys**).

Once the order arrives at the CO, the order will not continue through the process without the approval of the CO. Once the CO approves the order, it will be sent directly to the vendor. If the CO disapproves the order, the order is sent back to the customer as a “Disapproved Order” and also as a wishlist. If the BECO has not assigned a name to this role, your order will stop at this step.

To submit a RFQ the CO will:

1. Press the “Submit a Request For Quote” link on the User Profile Page
 2. Give the RFQ a unique name
 3. Select Which Contracts you wish to have “bid” on your RFQ. Select only the contracts which may bid on your RFQ (i.e. Do not select a Printer BPA to bid on your Computer RFQ).
 4. Enter a Desired Delivery Date and Quantity
 5. Enter a detailed description of the item(s) for which you are requesting a quote. This is the information for which the vendors will base their quote. Press the “Submit To Vendor” button.
- Your unique RFQ name will now appear on your user profile page along with the Date of the RFQ, the Vendors whom you sent it to and the status of the RFQ.

Once you receive responses for your RFQ:

1. Press the RFQ unique name to review the responses from the vendors.
2. To “accept” an RFQ from a vendor, select the “Add Solution to Cart” link for that vendor.
3. Your shopping cart will be displayed with these items added to your cart. If you wish to purchase the items (with yourself as the customer), press the “Checkout” link. NOTE: This will treat the order as a ‘new’ order. It will then have to be sent through your (CO’s) approval process starting at the EC.

Or

Once you receive responses for your RFQ:

1. Press the RFQ unique name to review the responses from the vendors.
2. To “accept” an RFQ from a vendor, select the “Add Solution to Cart” link for that vendor.
3. Your shopping cart will be displayed with these items added to your cart. Press the “Save as a Wishlist” link. Give the wishlist a unique name and press the “Submit” button. You can then send the wishlist to the original customer so that they can process the order through *their* approval process.

Base Purchase Card Holder (BPCH)

The BPCH role is assigned by the BECO. The BPCH has the responsibility to review, “Approve” or “Disapprove” any orders routed to this role by the RA. Once the order arrives at the BPCH, the order will not continue through the process without the approval of the BPCH. Once the BPCH approves the order, it will be sent directly to the vendor. If the BPCH disapproves the order, the order is sent back to the customer as a “Disapproved Order” and also as a wishlist. If the BECO has not assigned a name to this role, your order will stop at this step.

Appendix E: AFWay Workflow Process Diagram

AFWAY Diagram Description

NOTE: At any point in the process if the order is disapproved, it will become a “Wishlist” on the original customers User Profile page.

Step 1:

Validated customer initiates an order.

Step 2:

TWGM (Technical Workgroup Manager) if assigned in the process, reviews and approves/disapproves the solution. The TWGM position in AFWay is assigned by the EC.

Step 3:

EC (Equipment Custodian) reviews and approves/disapproves the solution.

Step 4:

If CIO standards have not been established and CIO approval is required, then base review is required.

Step 4A

The Base Review individual reviews and approves/disapproves the solution. The Base Review position in AFWay is appointed by the BECO.

Step 5:

The BECO reviews and approves/disapproves the solution.

Step 6:

The AO (Approval Official) reviews and approves/disapproves the solution. Additionally, if the amount of the order is less than \$25,000 the AO determines if an order is to be paid by the OPCH (Organizational Purchase Card Holder) or the RA (Resource Advisor). If the amount of the order is greater than \$25,000 the order is automatically routed to the RA. **NOTE:** The AO cannot be the Organizational Purchase Card Holder. The AO position in AFWay is assigned by the EC.

Step 7A:

If the AO has determined that the purchase should be accomplished by the OPCH, the OPCH reviews and approves/disapproves the solution. If approval is granted, the OPCH enters IMPAC card information. The OPCH position in AFWay is assigned by the EC.

Step 7B:

If the order total is greater than \$25,000 or the AO requested the order be sent to the RA, the RA reviews and approves/disapproves the solution. Additionally, the RA determines if the order should be routed through the CO (Contracting Officer) or the BPCH (Base Purchase Card Holder). The RA position in AFWay is assigned by the EC.

Step 8A:

AFWay will notify the CO in the customer's workflow that they have an order pending their action. The CO will not take action on the order at this point. After reviewing the customer's requirement, and receiving a certified AF Form 9, the CO creates a SF1449. Upon completion of the SF1449, the CO will return to AFWay, and add the following information to the order:

1. Line of accounting/fund cite (taken from the certified AF Form 9)
2. Delivery Order Number from the SF1449 they just created

The CO position in AFWay is assigned by the BECO.

Step 8B:

The BPCH reviews and approves/disapproves the solution. If approval is granted, the BPCH enters IMPAC card information. The BPCH position in AFWay is assigned by the BECO.

Step 9:

The Vendor(s) receives, reviews and completes the order.

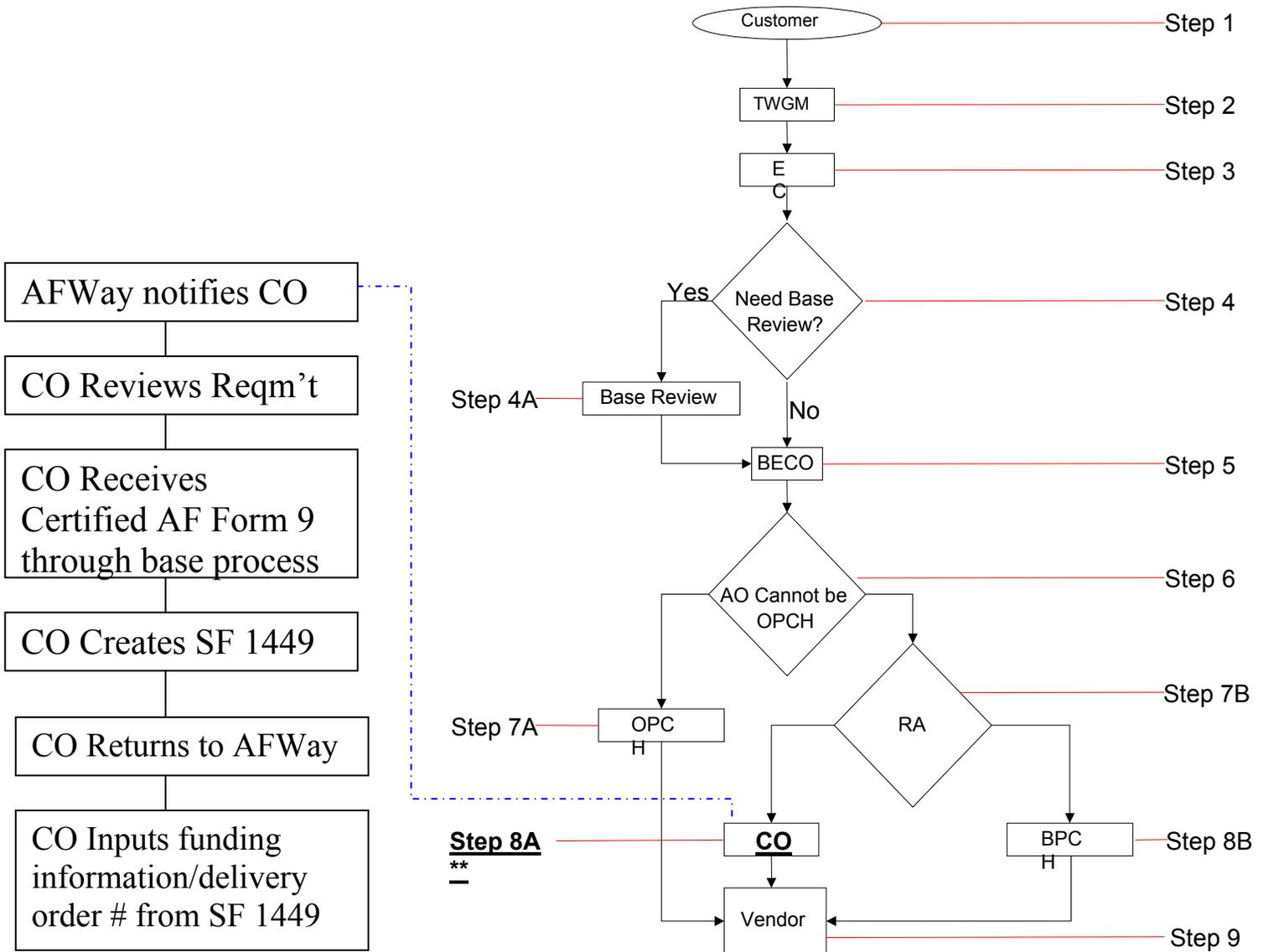


Figure 15. – AFWay Workflow Process Diagram

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