Commerce Business Systems (CBS)

Achieving Excellence in Financial Management

NOAA

C.Award

Exercises

for

FY 2015 Training

Version 1.1.1

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Changes/Revisions Record

This is a living document that is changed as required to reflect system, operational, or organizational changes. Modifications made to this document are recorded in the Changes/Revisions Record below. This record shall be maintained throughout the life of the document.

Version Number	Date	Description of Change/Revision	Changes Made by Name/Title/ Organization
V1.0	10/24/14	New FY 2015 Training Exercises	E.Cobbs/FSD CSB – Training
V1.1	1/23/14	Updated the exercises with more information	E.Cobbs/FSD CSB – Training
V1.1.1	4/13/14	Updated due to changes made to the system	E.Cobbs/FSD CSB – Training

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Table of Contents

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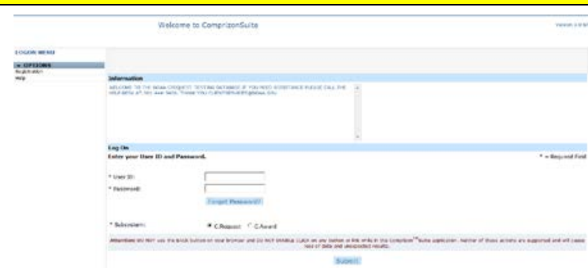
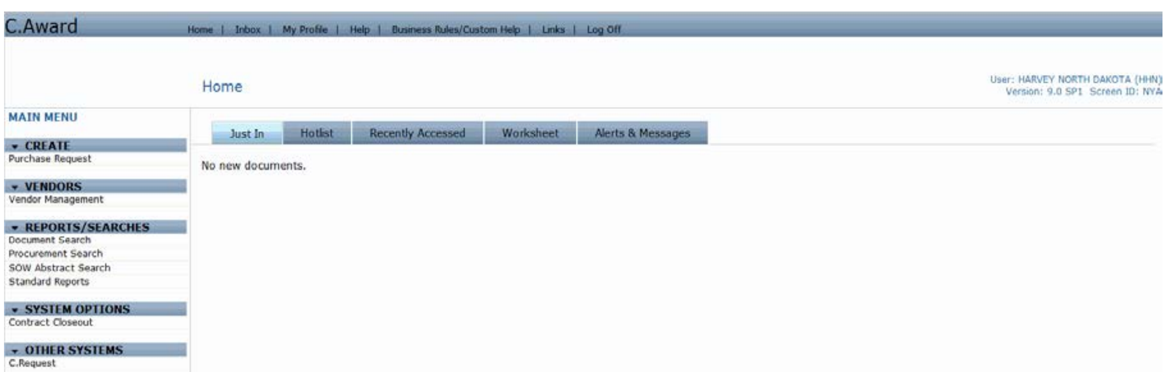
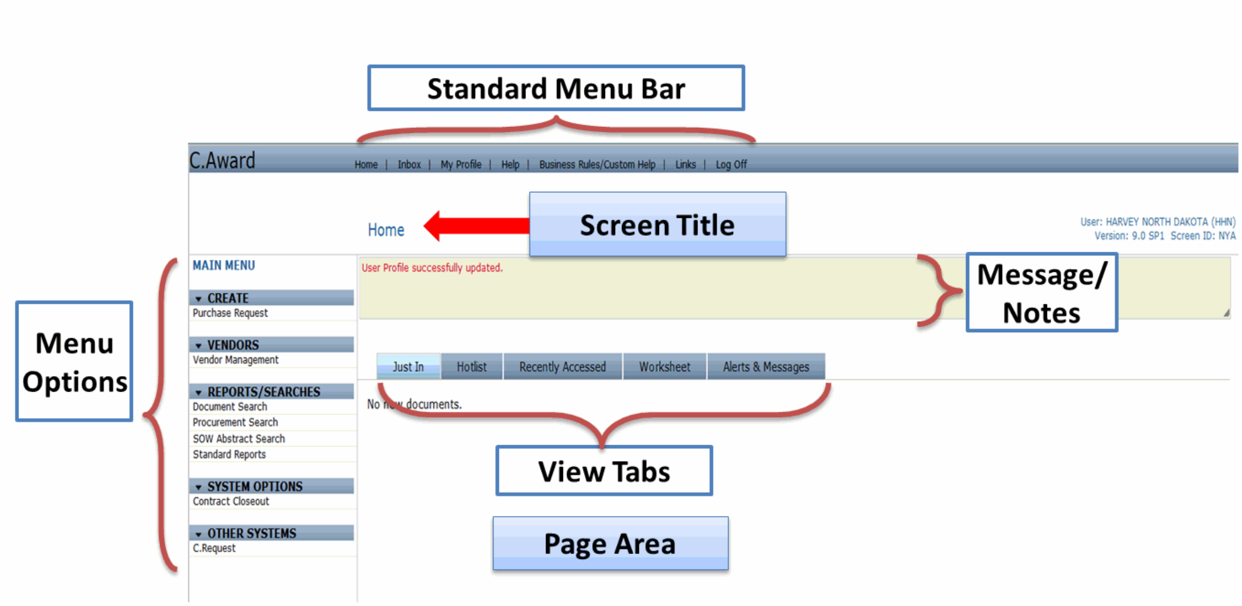
Exercise #1: Login to C.Award

Objectives:
- Successfully Login to C.Award
- Access C.Award Home Page
- Understand the Navigation Terms

Instructions: Execute the following steps:

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>➢ Open Internet Explorer
➢ Go to the URL provided to you by the instructor</td></tr>
<tr><td></td><td>Note: NOAA's Production's URL is:
https://crequestnoaa.eas.commerce.gov/noaa/servlet/Comprizon</td></tr>
<tr><td>2</td><td>On the Login Screen
➢ Enter your username
➢ Enter temporary password
➢ Click radio button C.Award
➢ Click on Submit
</td></tr>
<tr><td>3</td><td>The Home screen appears

</td></tr>
<tr><td></td><td>Note: Should you forget to click the C.Award radio button, you will be taken into C.Request if you have access. To get to C.Award, just click that menu option at the bottom of the screen. If you do not have access, you will still be at the Login screen.</td></tr>
</table>

Navigation Terms

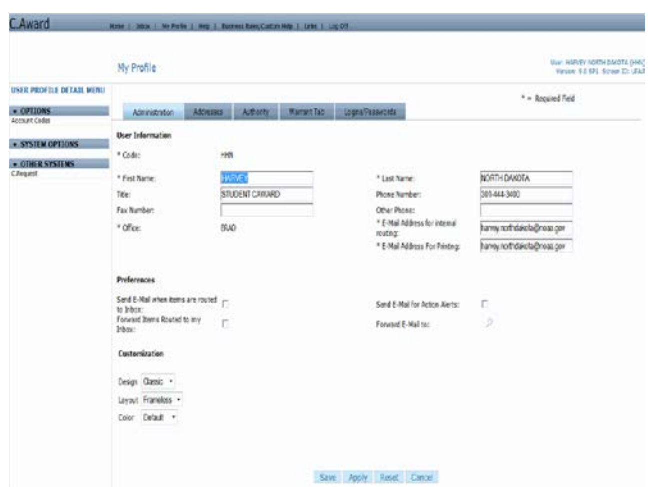


Exercise #2: Navigate to My Profile and Change Information

Objectives:
- Navigate to my profile
- Add your email address
- Change your password
- Change your signature PIN

Instructions: Execute the following steps:

You have just received access to C.Award. The first time you log into the system, you will have to be careful you log into the correct system as the system defaults to C.Request. This means you will have to change the radio button before pressing ENTER. You will then be able to verify and update fields on your profile. My Profile is where you can change your password and signature PINs as well as view your supervisors and see your account information.

Step	Action
1	From the **Home** screen ➢ Click ***My Profile*** menu option on the *Standard Menu Bar*
2	The **Verify User** screen appears ➢ Enter your **temporary password** ➢ Click *Continue* 
3	The **My Profile** screen appears. Under the *Administration* view tab ➢ Enter your **email address** ➢ Check the box for emails to be sent when items sent to inbox ➢ Check the box for sending emails for action items ➢ Click the *Addresses* view tab 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>

Notes: *In production, you would only be verifying the information was correct in the fields. These fields are populated by the information provided by the users when signing up for access to C.Suite*

Under the preferences section, a Contracting Specialist would only check the box for action items.

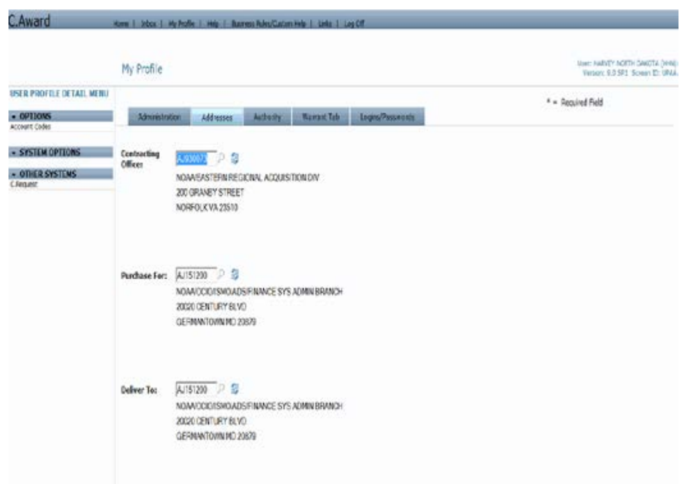
This would then have the system sending you emails when things need to be done or have been done (i.e. whom it was sent to for approval, final approval, rejected or accepted by CFS, etc).

A Reviewing/Approving Official (i.e. Contracting Officer) would want to have the checkbox checked when items are sent to their inbox. This would send emails when something is awaiting their review/approval.

</td></tr>
<tr><td>3a</td><td>

Under the *Addresses* view tab

- Verify or add addresses
- Click the *Authority* view tab

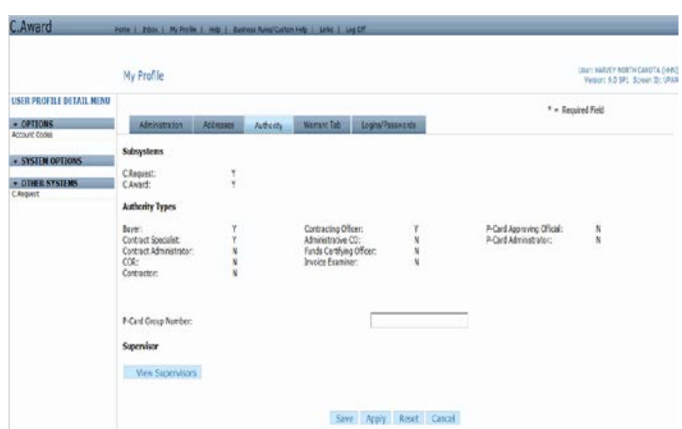


Note: *In production, the first time you access, these fields will be blank. You do have the capability to add your addresses in these fields. However, they will not populate in the CR automatically, the addresses on the PR come from the Requisition.*

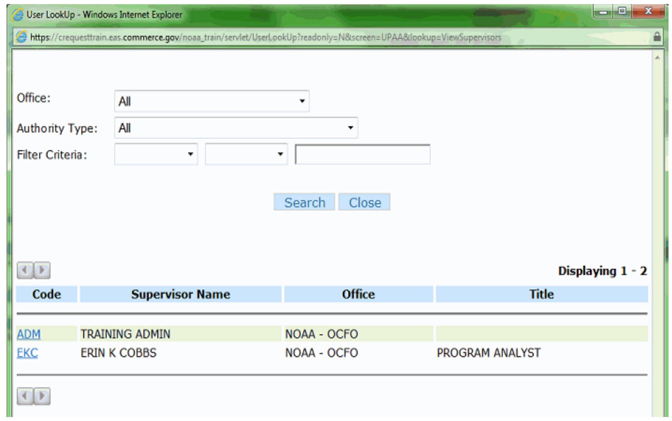
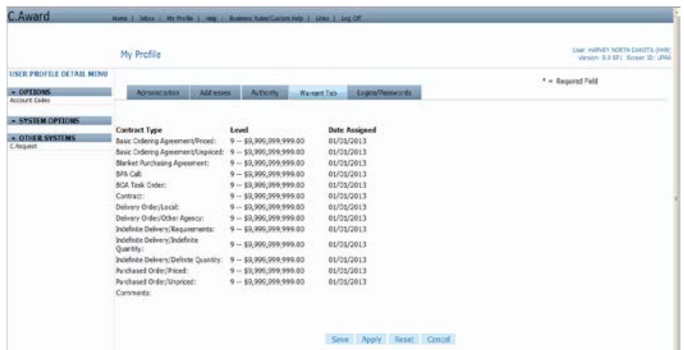
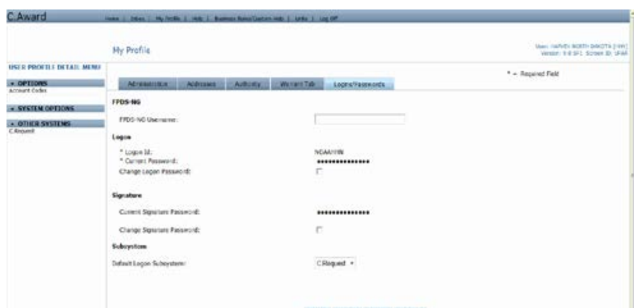
</td></tr>
<tr><td>3b</td><td>

Under the *Authority* view tab

- View the Systems and Roles you have access to
- Click on *Supervisors* link
- When new window opens up, click *Search*



</td></tr>
</table>

Step	Action	
3c	The *User Lookup* window will then appear with those individuals that are listed in the system as your supervisor. ➢ Close out this window when finished. ➢ Click on the *Warrants* view tab	
3d	Under the *Warrants* view tab ➢ View warrant information (if any) ➢ Click the *Logins/Passwords* view tab	
3e	Under the *Logins/Passwords* view tab ➢ Check the box **Change Logon Password** ➢ Check the box **Change Signature Password** ➢ Enter & Confirm **New Password** ➢ Enter & Confirm **New Signature PIN** ➢ Click *Save*	
	Notes: ✓ *The FPDS-NG field should be filled in with your login information (email).* o *For training purposes this is left blank.* ✓ *Clicking Apply will save the information but keep you on the same screen.* ✓ *Clicking Save will save the information but leave the screen.*	
4	The **Home** screen appears	

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Exercise #3: Open Purchase Request (PR) - Return

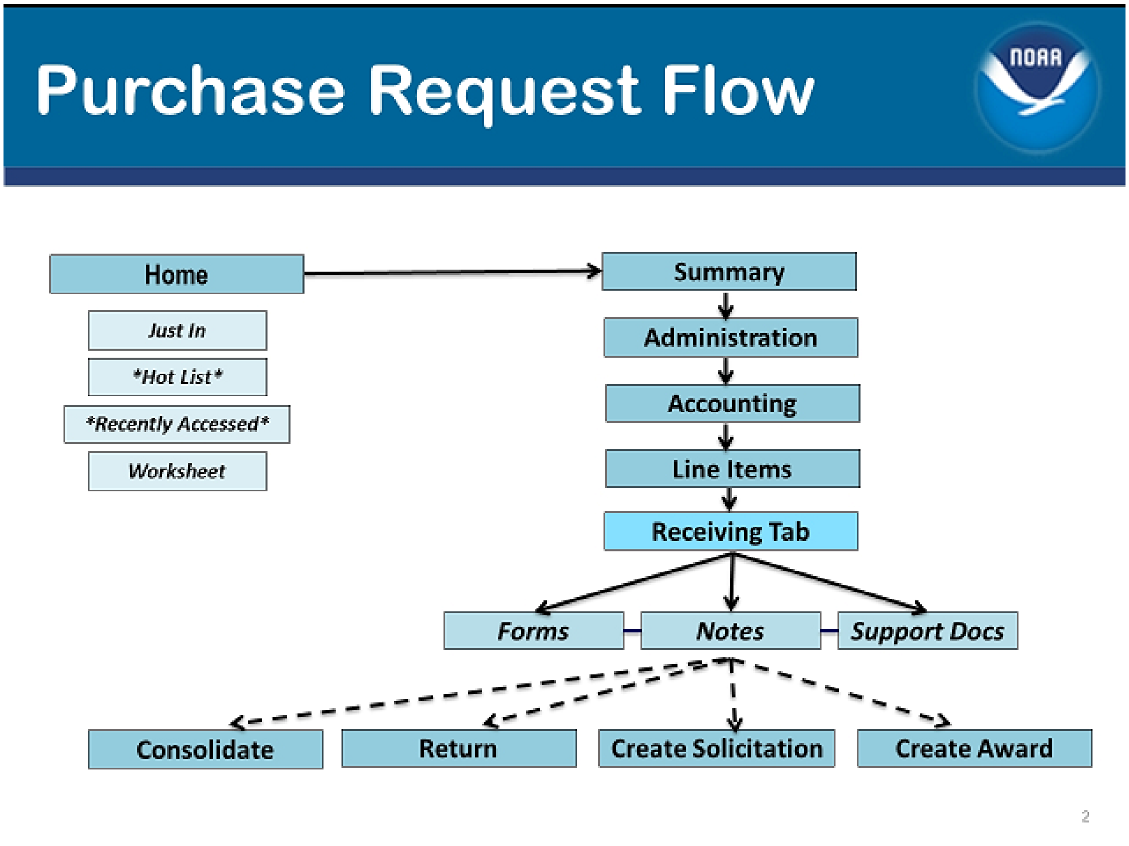
Objectives:

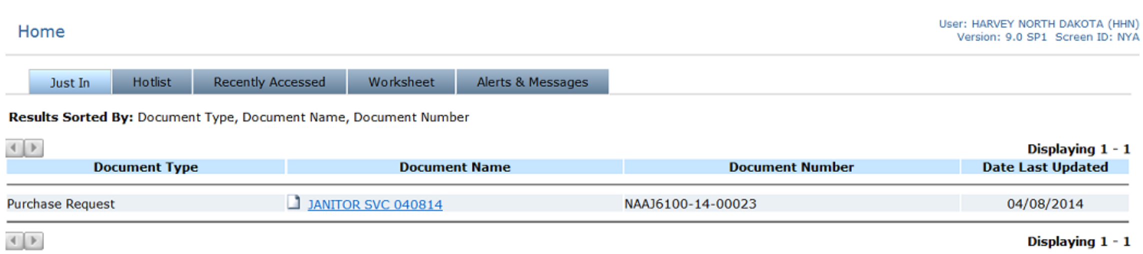
- Navigate through C.Award
- Open PR
- Understand the pieces of PR to review
- Follow flow chart
- Understand how to return a PR

Instructions: Execute the following steps:

Notes: All PR's must be reviewed in full, prior to taking ANY action on them. It is up to the discretion of the Contracting Specialist working with the PR as to whether or not to return it back to the requesting office. The policy is however, to have the requesting office submit another PR to combine with the initial one, once it is past a certain point in the system, like the PR has already been sent out for a solicitation and the initial amount of the PR is not enough. It would be easier to consolidate a new PR with the additional amount rather than cancelling the solicitation and sending PR back to get additional funding.

A Purchase Request has been assigned to you. You will find it in your *Just In* tab on the **Home** screen. You will need to review all the pieces of it, prior to taking any action. Follow the areas located on the flow chart.



Step	Action
1	From the **Home** screen *Just In* view tab ➢ Click *PR#*  ***Notes:*** ✓ *Remember first time something is assigned to you, it will appear in the Just In view tab.* ✓ *If it has already been opened, you will need to get it from your Recently Accessed or Worksheet view tabs.*

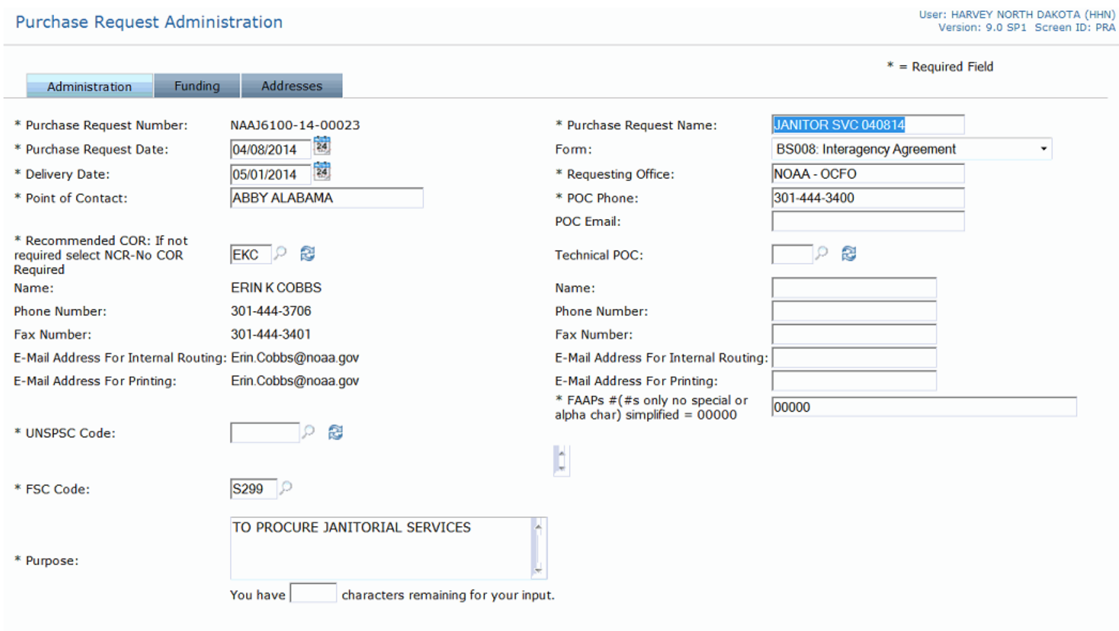
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>2</td><td>The Purchase Request Summary screen appears:

</td></tr>
<tr><td>2a</td><td>From this screen you can tell at a high level the information about the request. However, due to the nature of the system, you will need to go into each area and review the data.

➢ Click on Administration menu option</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>

The **Purchase Request Administration** screen appears:



</td></tr>
<tr><td>3a</td><td>

You will need to review each field on each tab of this screen. This is to ensure that all of the fields have been filled out properly. (i.e. FAAPs#, UNSPSC Code, etc)

Once finished reviewing:

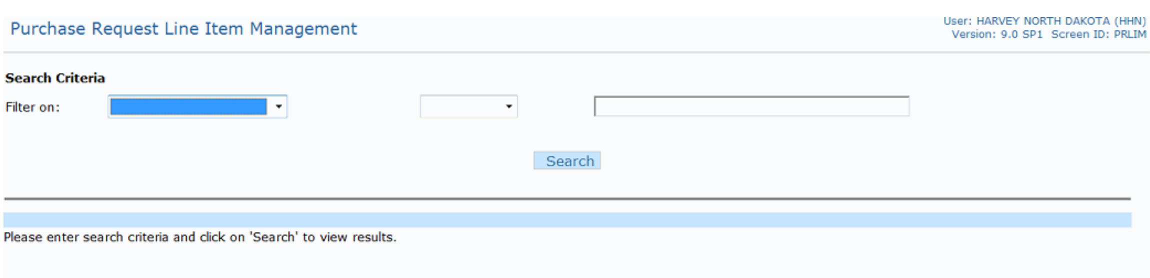
- Click on *Line Items* menu option

</td></tr>
<tr><td></td><td>

Note: *UNSPSC codes that end in zeros, more than likely will be deleted soon.*

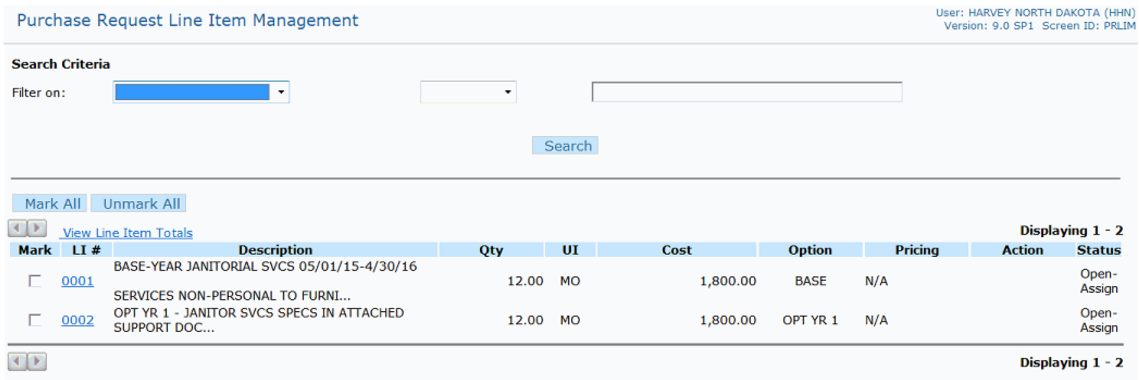
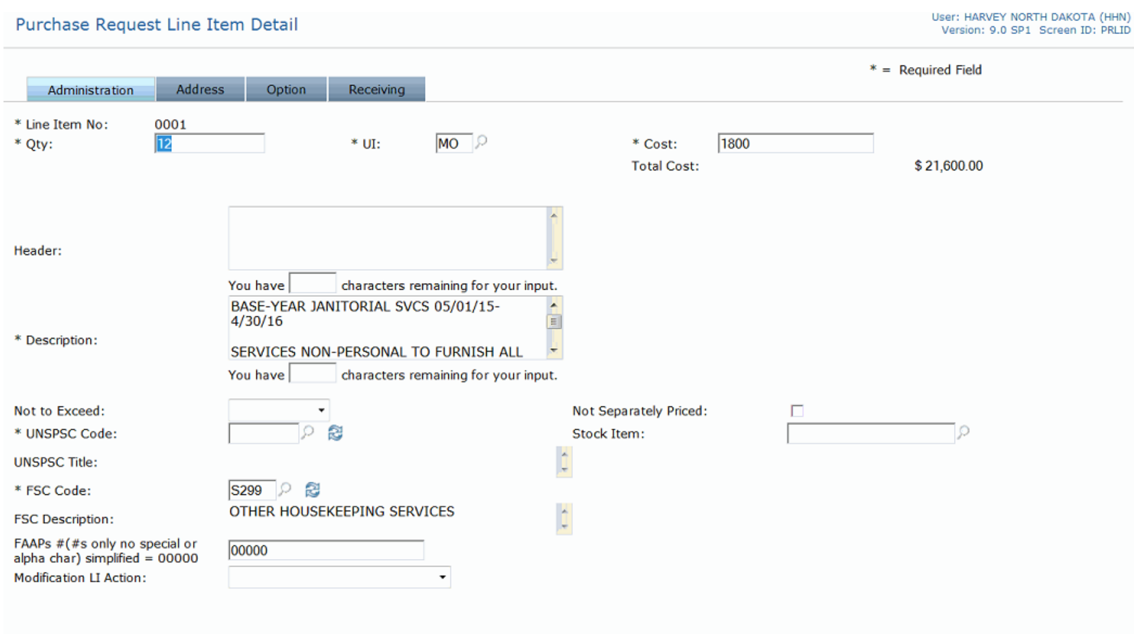
</td></tr>
<tr><td>4</td><td>

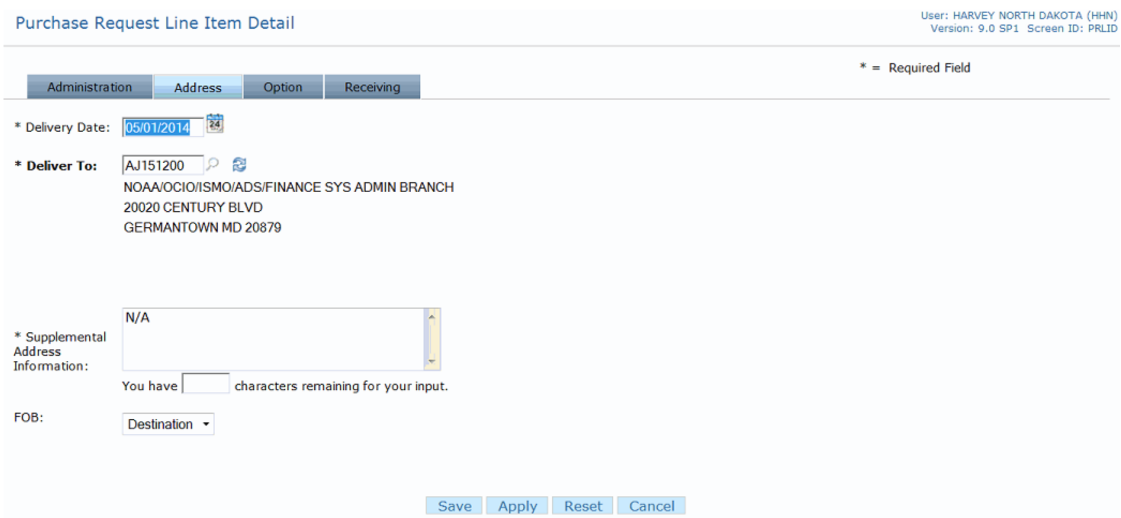
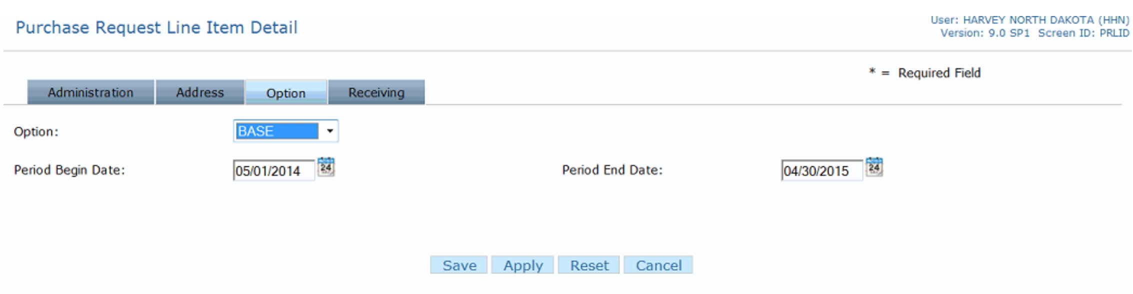
The **Purchase Request Line Item Management** screen appears:



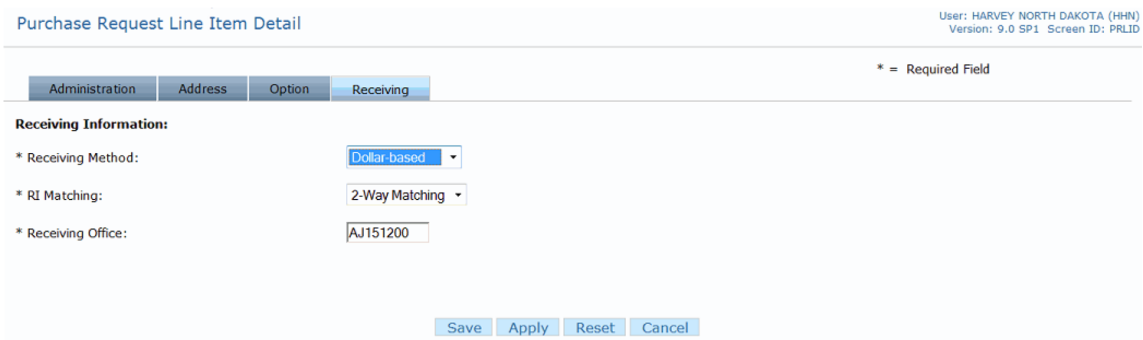
- Click *Search*

</td></tr>
</table>

Step	Action
4a	The line items will appear:  ➢ Click the first *Line Item #*
4b	The **Purchase Request Line Item Detail** screen *Administration* tab appears:  ➢ Click on *Address* view tab
	Note: *You must review all fields on all tabs of the line item.*

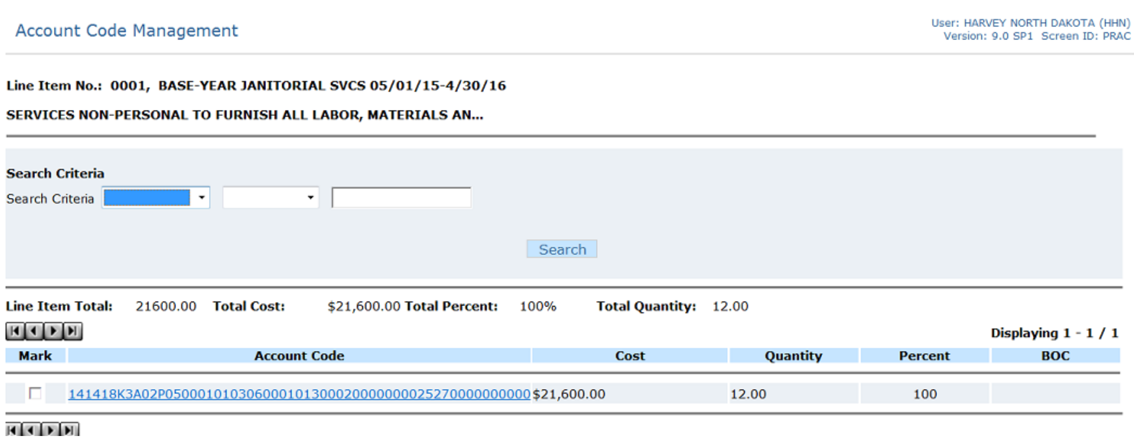
Step	Action
4c	The **Purchase Request Line Item Detail** screen *Address* tab appears:  ➢ Click on *Option* view tab
4d	The **Purchase Request Line Item Detail** screen *Option* tab appears:  ➢ Click on *Receiving* view tab
	Note: *If this is for a contract, this should show an option and the dates associated with it.*

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td rowspan="2">4e</td><td>The Purchase Request Line Item Detail screen Receiving tab appears:



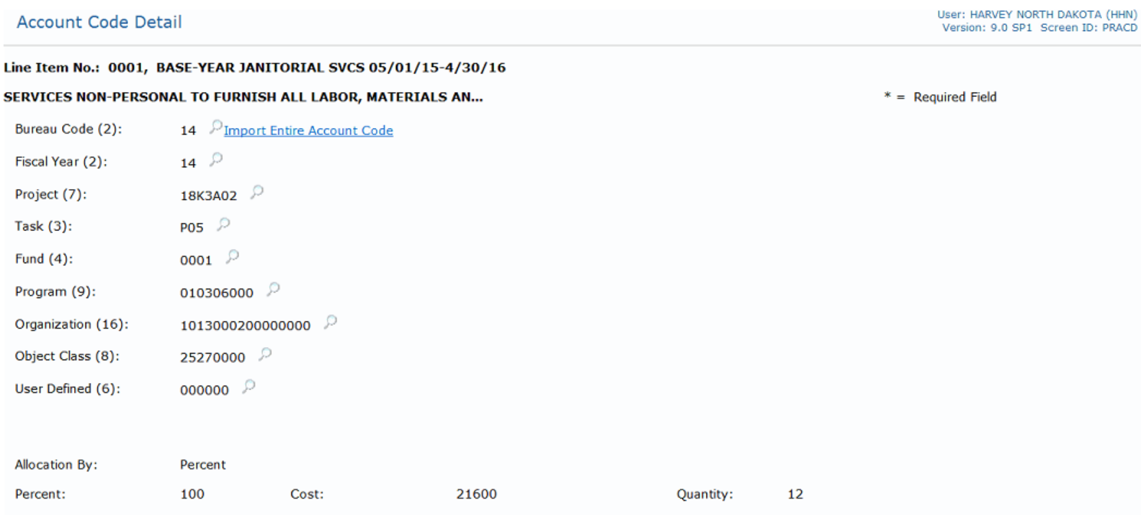
➢ Click Apply
➢ Click on Accounting menu option</td></tr>
<tr><td>Note: This tab must be clicked on, viewed and saved in order for the obligation to work.

Use Apply to save the data, in order to view the accounting information for the line.</td></tr>
<tr><td>4f</td><td>The Account Code Management screen appears:



➢ Click the ACCS you wish to view</td></tr>
</table>

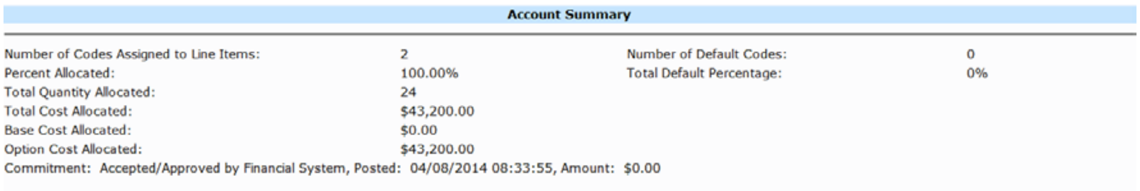
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4g</td><td>The Account Code Detail screen appears:

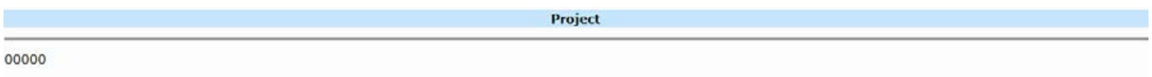

</td></tr>
<tr><td>4g1</td><td>You should make sure the Fiscal Year (FY) is correct for the dates this will take place along with the FY on the document. You should verify that the correct Object Class code is used for what they are trying to purchase. You can go to http://www.corporateservices.noaa.gov/finance/objectclasses.html to get a listing. It’s also important to see how the ACCS was allocated. Especially if numbers have to change on the Award. If it was set up by percent, you probably won’t have to change anything, but if it’s by cost or quantity, you will probably have to.

When finished reviewing:
➢ Click on Line Items menu option
➢ Finish reviewing the other line(s) and accounting

When finished:
➢ Click on Summary menu option</td></tr>
<tr><td>5</td><td>You would also make sure to look at any notes, forms and support documents. All accessible from the Purchase Request Summary screen. It is from the Support Documents that you can download them in order to attach any of them to the award.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>In your review of this particular PR, you notice a few things, which can be seen on the Purchase Request Summary screen:

You notice that for whatever reason, the money is showing up on the option rather than the base. This is not a modification to do the option; it is the PR to set up a new contract.


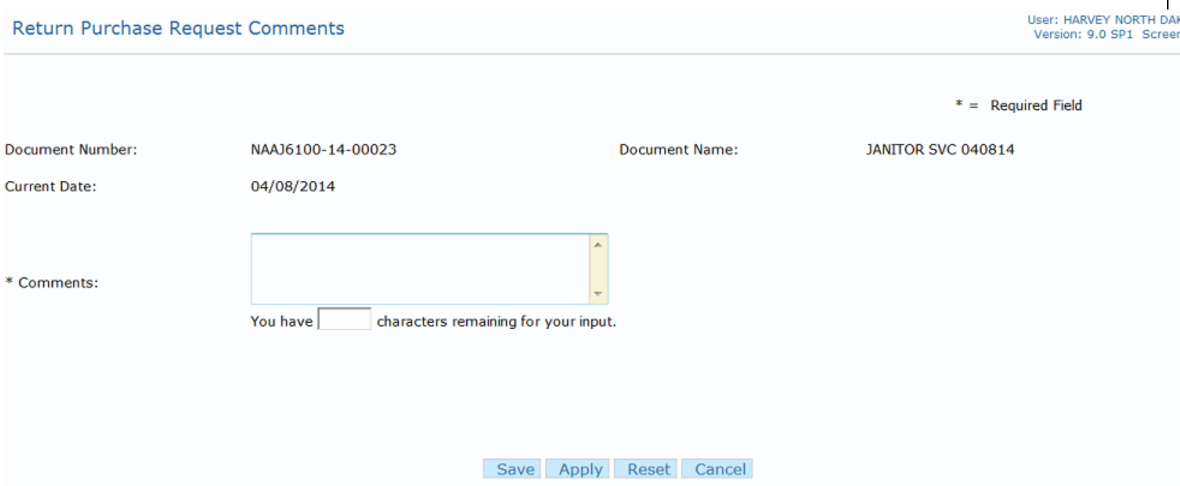
The next thing you see is that the project on the summary screen (and you noticed this on the Administration/Line Item Detail screen that the FAAPs number is showing the zeroes. Since this is a contract for services, more than likely there is a FAAPs number that should be in there. You also saw on the line that the UNSPSC Code was blank as well.


Because of these things, you will need to return the PR back to the requester.</td></tr>
<tr><td>7</td><td>From the Purchase Request Summary screen:

➢ Click on Return Purchase Request menu option</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>

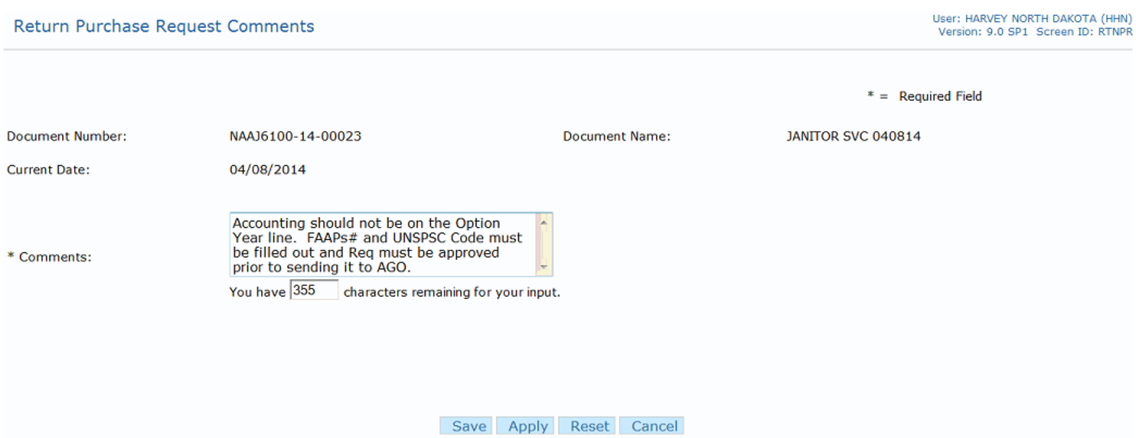
The **Return Purchase Request Comments** screen appears:



Before you can send it back to the requisitioner, you must first add comments as to why it's being returned.

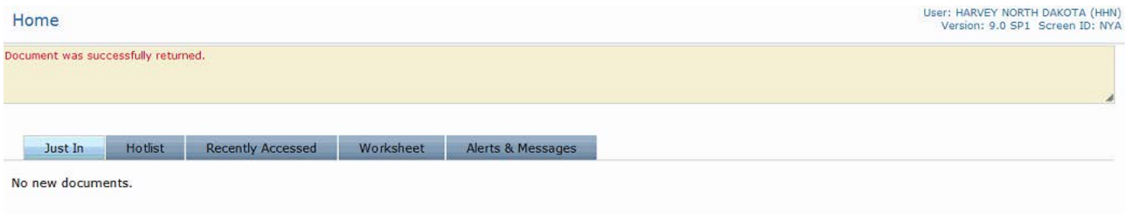
- Click in the *Comments* field
- Enter **reason for returning**

</td></tr>
<tr><td>8a</td><td>



- Click *Save*

</td></tr>
</table>

Step	Action
9	The **Home** screen will appear and have a message at the bottom of the screen stating the PR has been successfully returned. 

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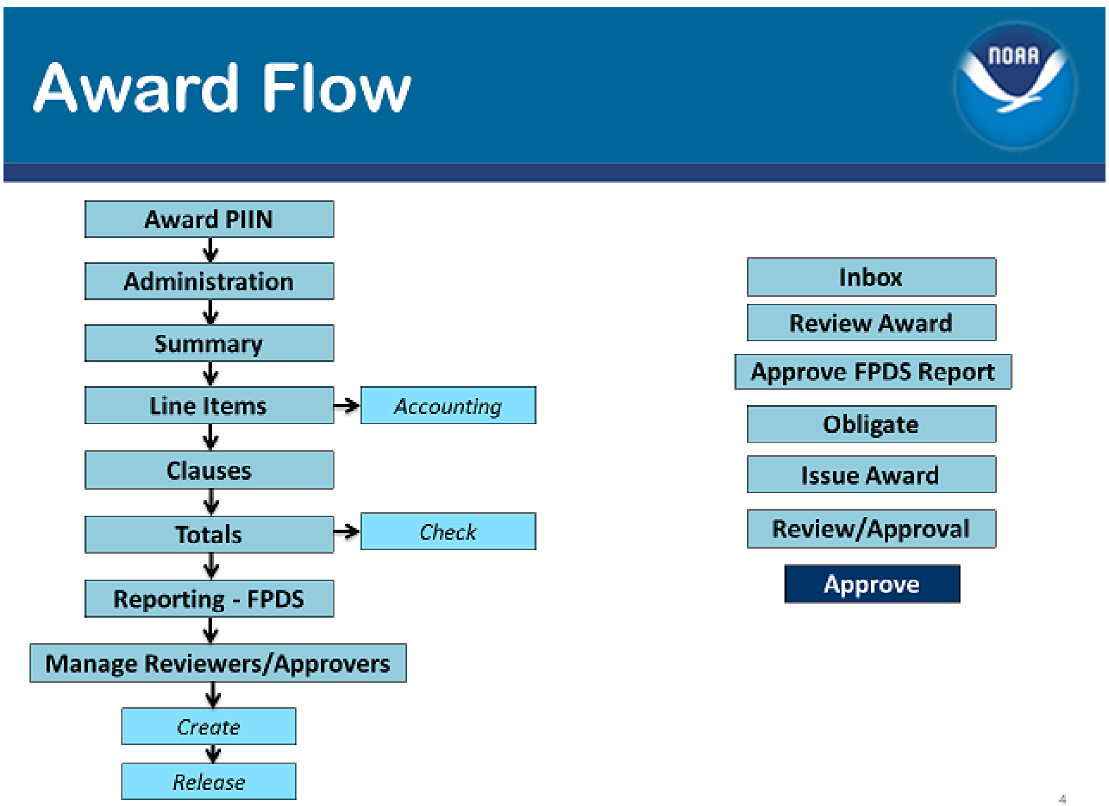
Exercise #4: Create a Basic Award (No solicitation needed)

Objectives:

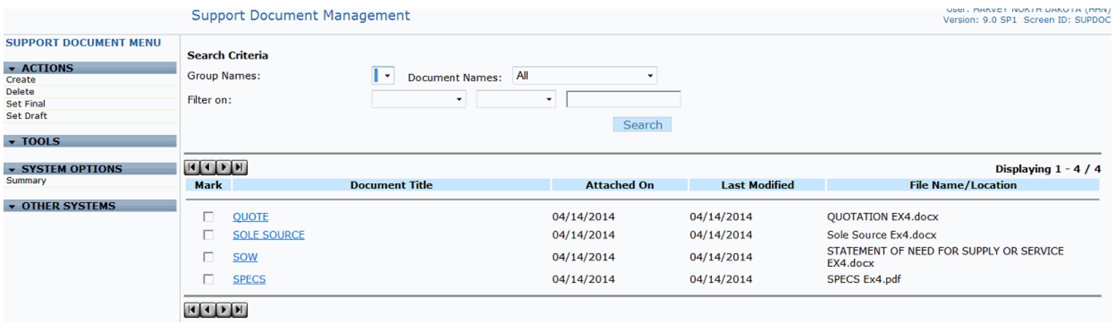
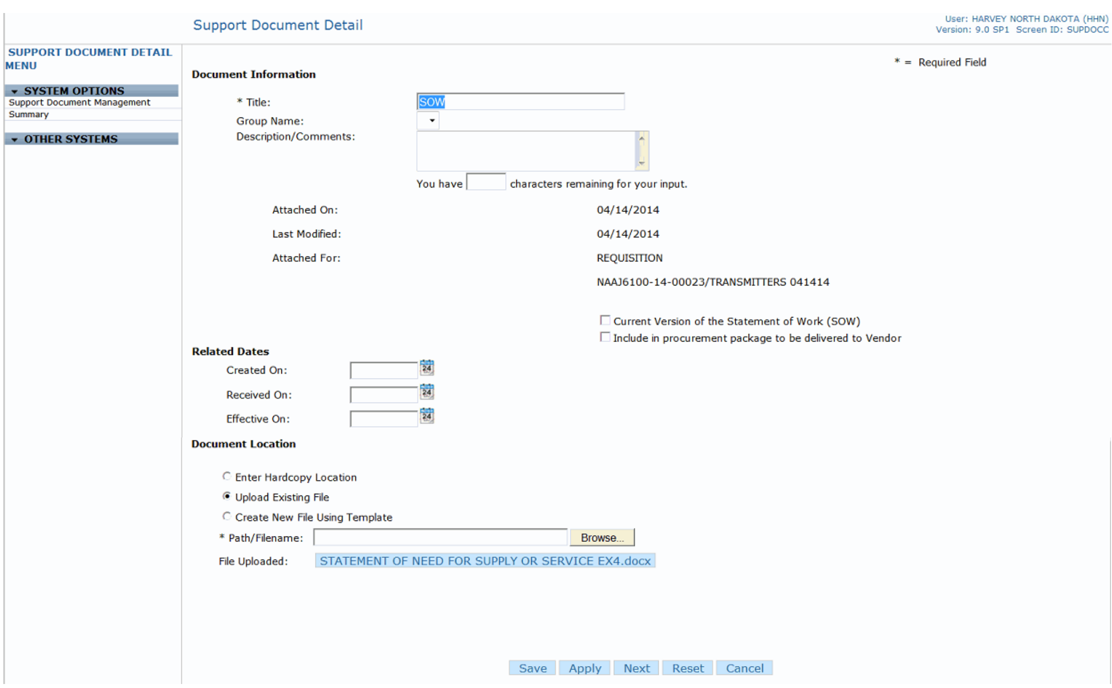
- Navigate through C.Award
- Create an Award from a Purchase Request
- Follow flow chart

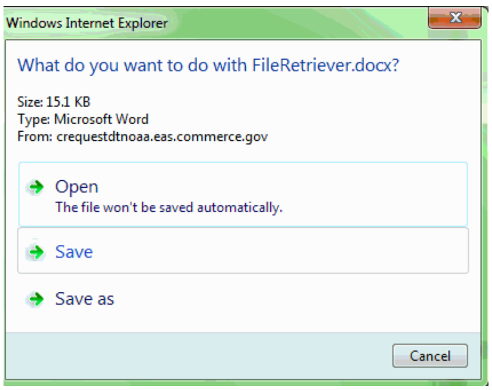
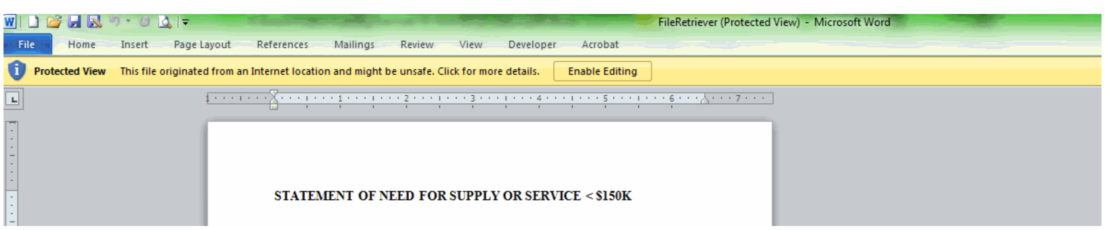
Instructions: Execute the following steps:

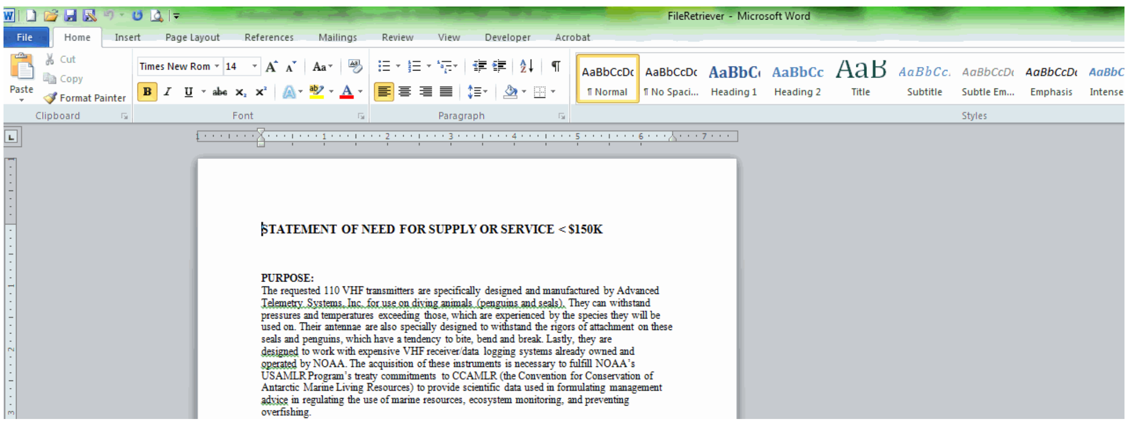
Notes: You have received a Purchase Request. You will need to review the PR prior to making the award. Once cleared, you will use the following steps in creating the award.

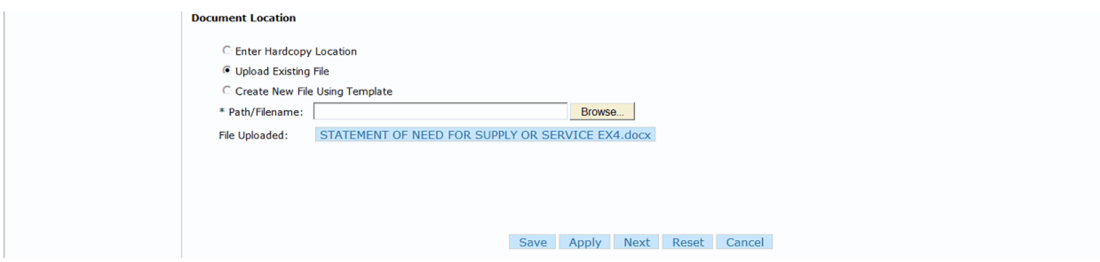
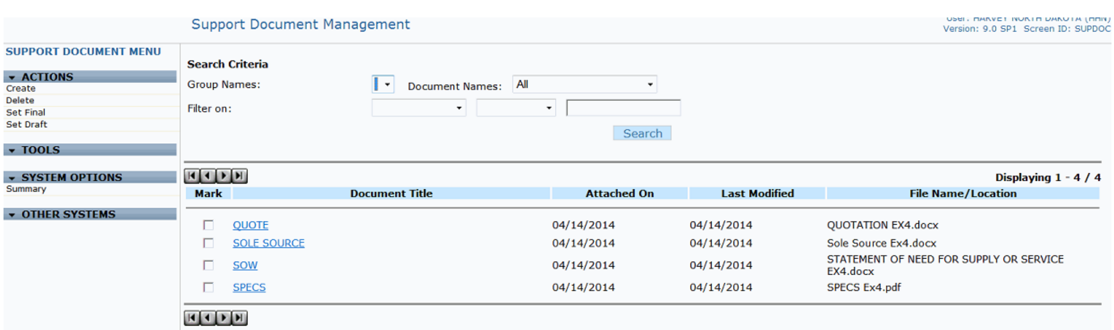


Step	Action
1	From the **Home** screen *Just In* view tab ➢ Click *PR#* ➢ Review the PR in its entirety

Step	Action
1a	If the PR looks good, then you will need to: ➢ Click on *Support Documents* menu option
1a1	The **Support Document Management** screen appears. If there are support documents attached, they will show up when you come to this screen.  To open up a document in order to save it, click on the link of the one you want to open. For this example, Click on *SOW*.
1a2	The **Support Document Detail** screen appears. You may have to scroll to get to the bottom of the screen. 

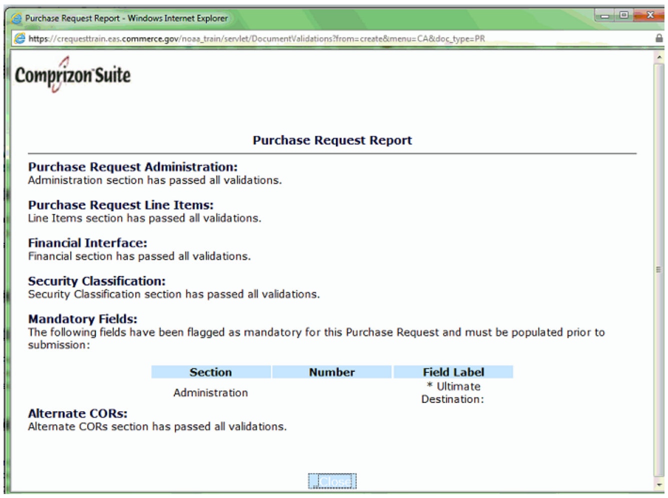
Step	Action
1a21	At the bottom of the screen is the file you will want to click on to open: 
1a3	Once clicked, there will be a pop-up window that appears.  ➢ Click on *Save*
1a4	At the bottom of the browser window this prompt should appear after finished downloading.  ➢ Click *Open*
1a5	This particular document is a Word document, so by clicking open, Word will open with the document, but you will need to click on the *Enable Editing* button. 

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1a6</td><td>The document then editable as well as able to be saved to the document location you wish to save to.


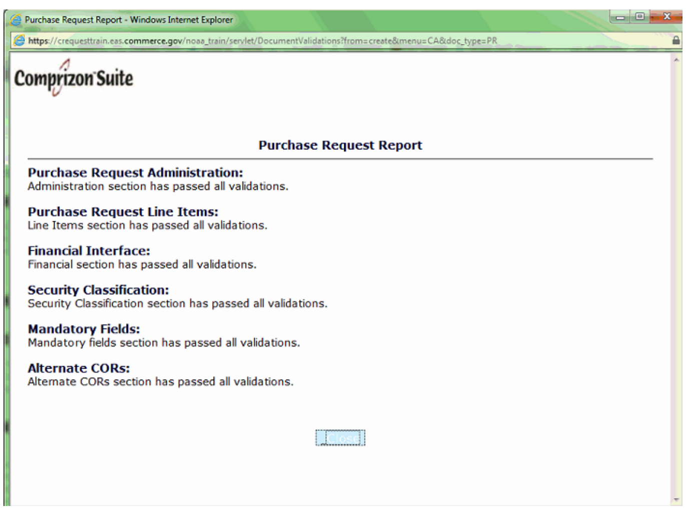
➢ Open up C.Award again</td></tr>
<tr><td>1a7</td><td>At the bottom of the screen, just click Cancel

</td></tr>
<tr><td>1a8</td><td>The Support Document Management screen appears again.


Save any other necessary documents. When finished click on Summary menu option.</td></tr>
<tr><td>2</td><td>From the Purchase Request Summary screen:
➢ Click on Create Award menu option</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>
The Purchase Request Report pop-up window will appear. If anything doesn't pass validation, you will receive something like this:



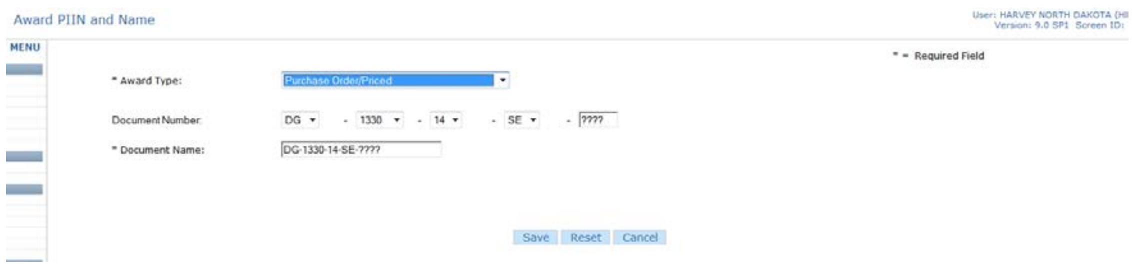
If it passes, it might appear briefly looking like this:



You'll want to close it out to do so:

Maximize the minimized window
Click Close

</td></tr>
</table>

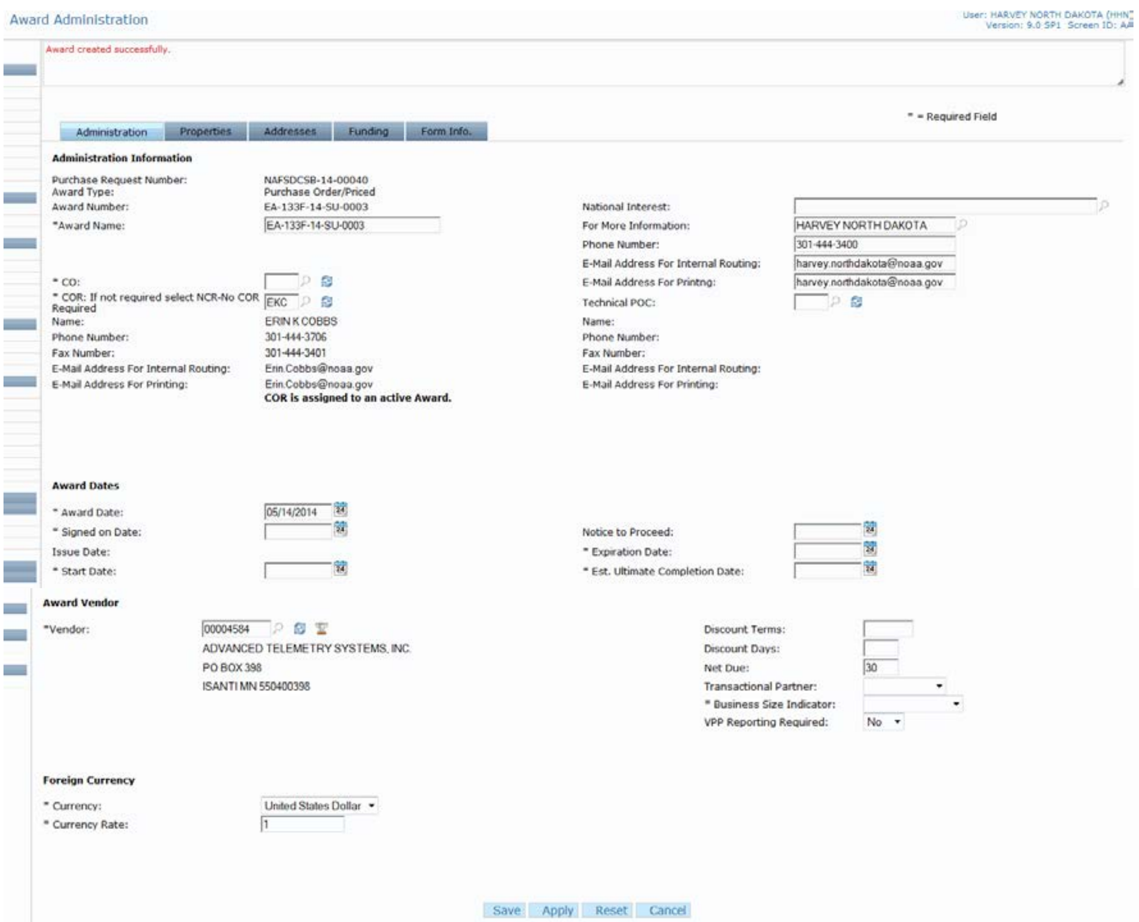
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>The Award PIIN and Name screen appears:

</td></tr>
<tr><td>4a</td><td>The Award Types are:

Basic Ordering Agreement/Priced (BOA)
Basic Ordering Agreement/UnPriced Blanket Purchasing Agreement (BPA)
BPA Call
BOA Task Order
Contract
Delivery Order/Other Agency
Delivery Order/Local
Indefinite Delivery Contract/Requirements
Indefinite Delivery Contract/Indefinite Quantity
Indefinite Delivery Contract/Definite Quantity
Purchase Order/Priced
Purchase Order/UnPriced
</td></tr>
<tr><td rowspan="2">4b</td><td>There are 5 fields for Document Number:

1st Field - AGO Office
2nd Field - Line Office
3rd Field - Fiscal Year
4th Field - Contract Type
5th Field - Sequential Number
</td></tr>
<tr><td>Note: To view updated Offices and Contract Types, go:

https://sites.google.com/a/noaa.gov/acquisition-services/home/c-suite/c-suite-guides

Click on Choosing the Award PIIN.</td></tr>
</table>

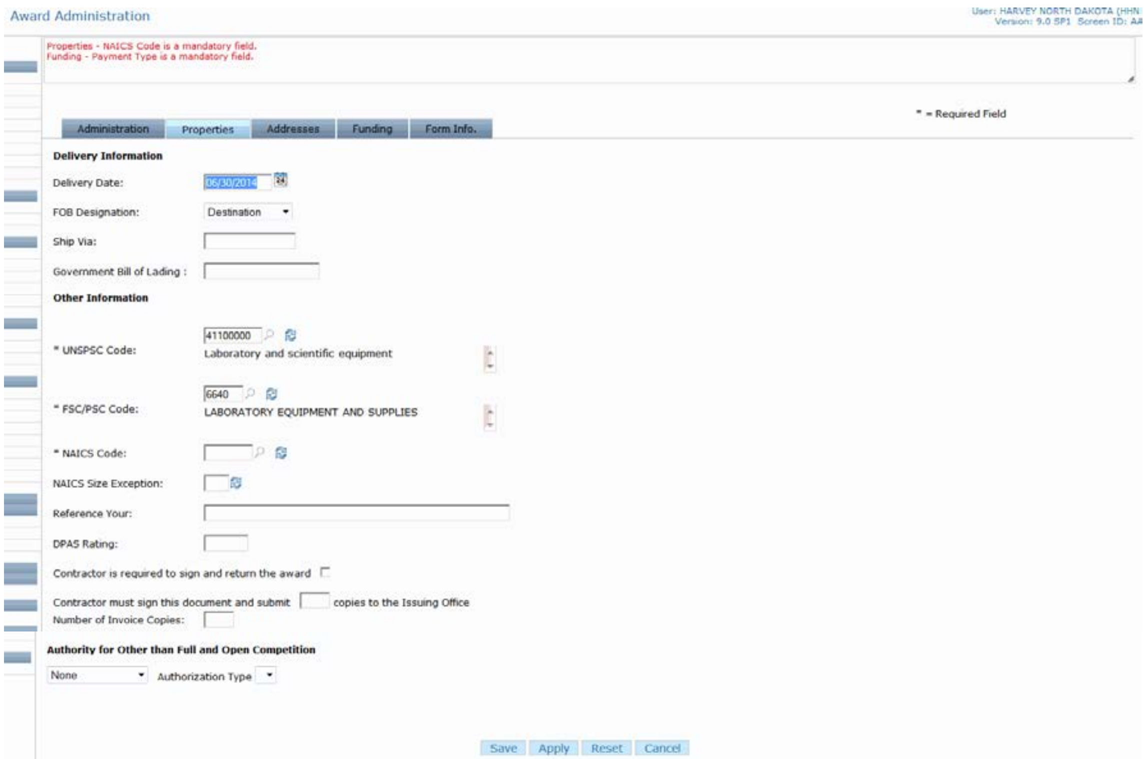
Step	Action
5	➢ Select the **Contract type** (i.e. Purchase Order Priced) ➢ Select the **Award Number** (i.e. EA-133F-14-SU-????) ➢ Type in **Award Name** (i.e. Transmitters {date}) ➢ Click *Save*
6	The **Award Administration** screen *Administration* tab appears: 

<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td>6a</td><td colspan="2">On the *Administration* tab fill out the following fields:

➢ Enter **CO** (i.e. EBC)
➢ Change **Award Date** (Defaults to current date)
➢ Enter **Signed On Date**
➢ Enter **Start Date**
➢ Enter **Expiration Date**
➢ Enter **Est. Ultimate Completion Date**
➢ Enter **Vendor**
➢ Enter **Net Due**
➢ Enter **Business Size Indicator**
➢ Click *Apply*
➢ Click the *Properties* view tab</td></tr>
<tr><td rowspan="7">6a1</td><td>**Date Field**</td><td>**Description**</td></tr>
<tr><td>*Award Date*</td><td>Defaults to the date the award document is created. Prior to obligation and signature, this date should reflect the actual date of award and can be changed prior to obligation.</td></tr>
<tr><td>*Signed on Date*</td><td>In most cases is generally be the same date as the award date.</td></tr>
<tr><td>*Start Date*</td><td>May be different then the award date but should be consistent with your agreement with the Contractor.</td></tr>
<tr><td>*Notice To Proceed Date*</td><td>Is not required. Use of this date field depends on the type of award. If the date of performance shall begin at a later date than the actual award date, then the Notice to Proceed Date should be entered.</td></tr>
<tr><td>*Expiration Date*</td><td>It is critical for reporting purposes that the actual date the contract expires as agreed with the Contractor be entered in this field.</td></tr>
<tr><td>*Est. Ultimate Completion Date*</td><td>This date field represents the date in which all deliveries and payments should have been made.</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>

The **Award Administration** screen *Properties* tab appears:



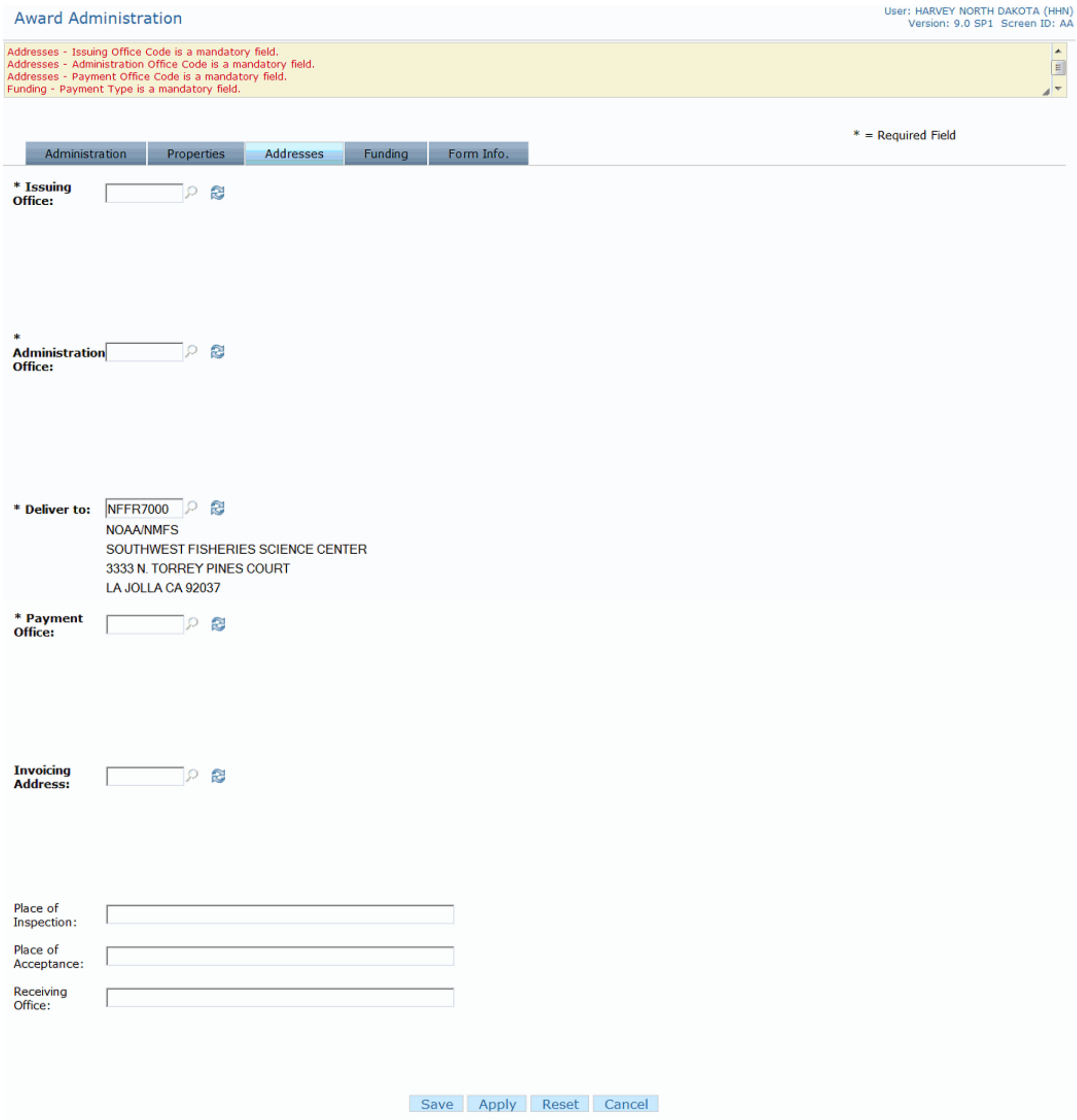
</td></tr>
<tr><td>7a</td><td>

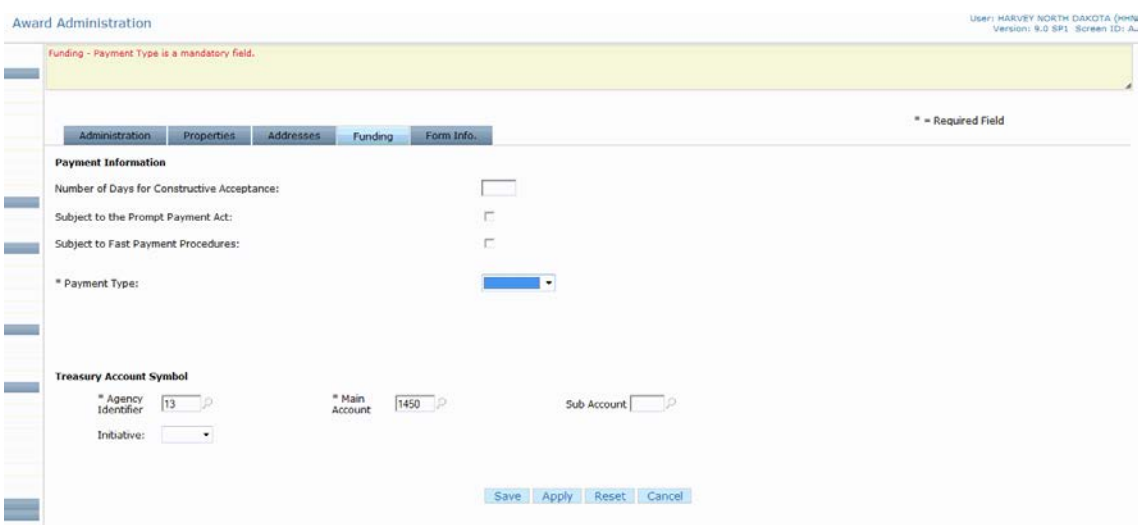
- Change **Delivery Date**
- Change **FOB Designation** (if needed)
- Enter **Ship Via:**
- Enter **NAICS Code**
- Enter **Reference Your** (i.e. Quote)
- Check **Contractor required to sign** checkbox
- Enter **# of copies to Issuing Office** (i.e. 3)
- Enter **# of Invoice Copies** (i.e. 3)
- Click *Apply*
- Click the *Addresses* view tab

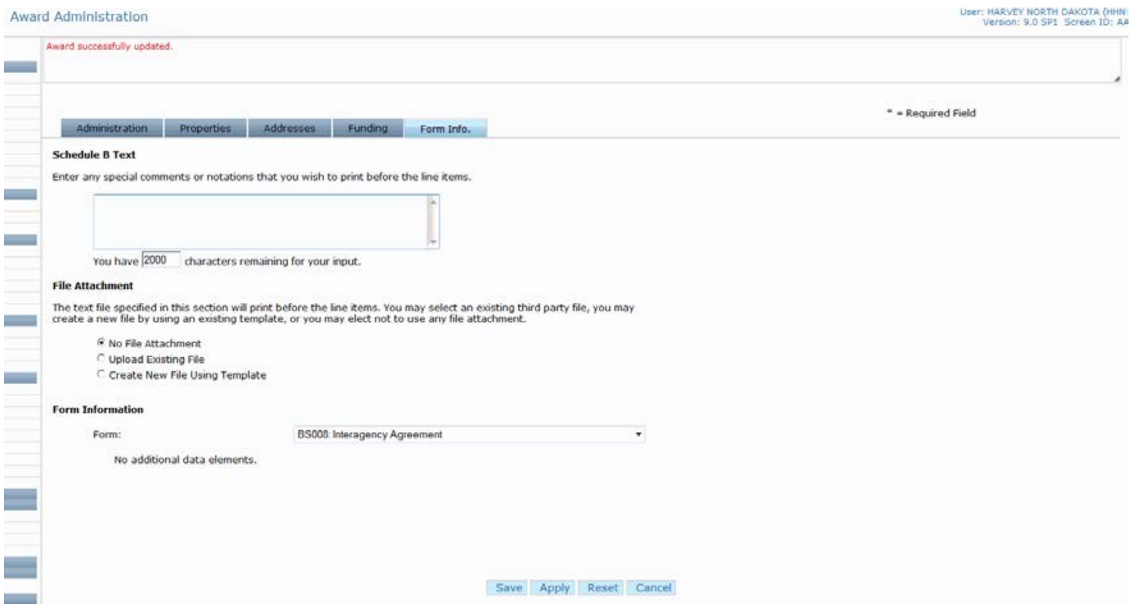
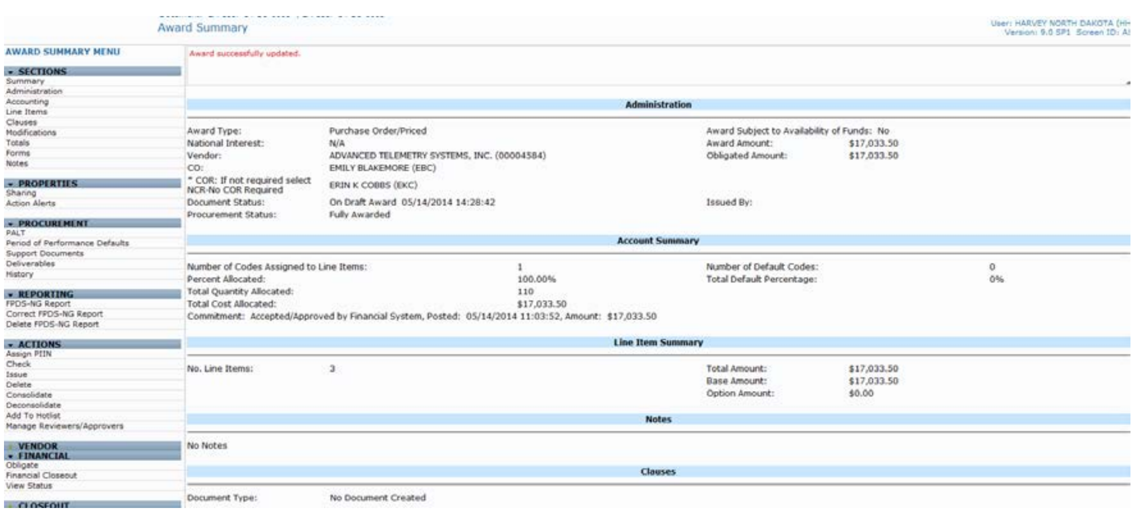
</td></tr>
</table>

Step	Action
	Notes: ✓ *Delivery Date automatically populates from the PR. You should change it to the date when all line items to this award are to be fulfilled.* ✓ *Freight on Board (FOB) – Destination is where the contractor is responsible for the shipping until it gets to the destination. Origin is where we would be taking responsibility of shipping the merchandise to us.* ✓ *NAICS codes and exceptions can be found: https://www.census.gov/eos/www/naics/*

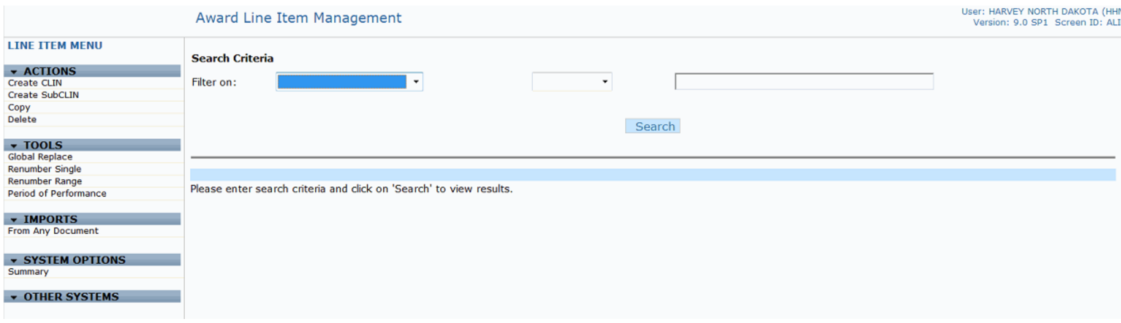
Step	Action
8	The **Award Administration** screen *Addresses* tab appears:



Step	Action
8a	If not added or needs to be changed: ➢ Enter **Issuing Office** code ➢ Enter **Administration Office** code ➢ Verify **Deliver To** code ➢ Verify **Payment Office** code ➢ Enter **Invoicing Address** code ➢ Enter **Place of Inspection** (if necessary) ➢ Enter **Place of Acceptance** (if necessary) ➢ Enter **Receiving Office** (if necessary) ➢ Click *Apply* ➢ Click the *Funding* view tab
9	The **Award Administration** screen *Funding* tab appears: 
9a	➢ Enter **# of days** for Constructive Acceptance ➢ Check **Subject to Prompt Pay** checkbox ➢ Select **Payment Type** (i.e. EFT) ➢ **Treasury Account Symbol** defaults from PR. ➢ Click *Apply* ➢ Click the *Form Info* view tab ***Note:*** *Failure to use anything but EFT for the payment type will result in errors when validating using check.*

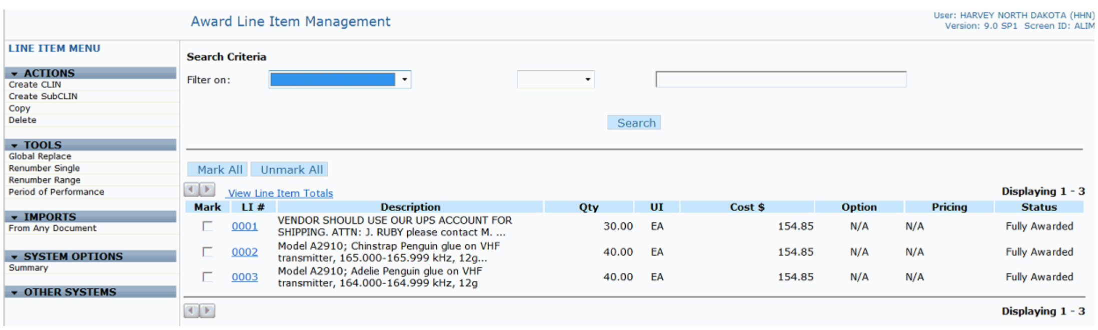
Step	Action
10	The **Award Administration** screen *Form Info.* tab appears: 
10a	➢ Enter **Schedule B text** (if needed) ➢ Attach a **file** (if needed) ➢ Choose the **form**: (i.e. OF347) ➢ Click *Save*
11	The **Award Summary** screen appears:  ➢ Click on *Line Items* menu option

Step	Action
12	The **Award Line Item Management** screen appears:



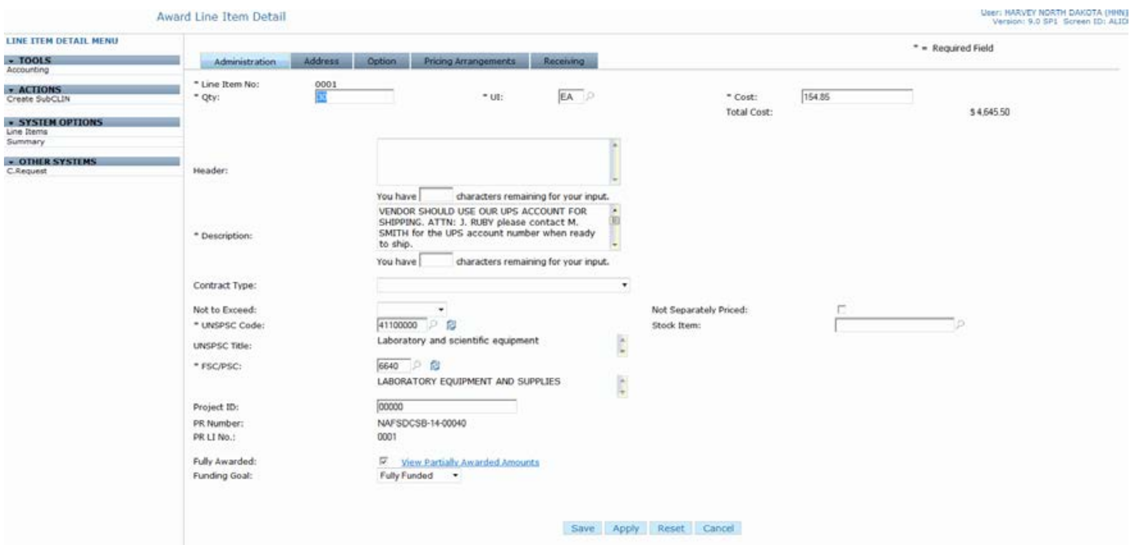
➢ Click *Search*

Step	Action
12a	The Line Items associated to the Award will appear:



➢ To review a line, click on the *Line #*

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>13</td><td>The Award Line Item Detail screen Administration view tab will appear:



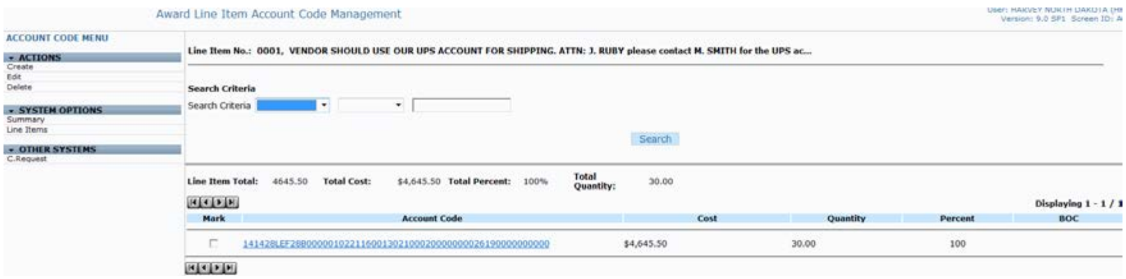
➢ Enter any Cost changes (if necessary)
➢ Select the Contract Type</td></tr>
<tr><td></td><td>Notes: It is here where you would change the dollar value if it the negotiated price was different than what the PR had. If it's less than what was brought over, you would just change the amount. If it's more, then you would have to make sure another PR was sent to you for the additional amount and consolidate to the award. Regardless, anytime you are changing the cost, you need to look at the accounting.</td></tr>
<tr><td>13a</td><td>Contract Types:

Firm-Fixed-Price
Fixed-Price Incentive (Firm Target)
Cost
Fixed-Price with Economic Price Adjustment
Fixed-Price with Prospective Price Redetermination
Fixed-Ceiling-Price with Retroactive Price Redetermination
Fixed-Price with Level of Effort
Cost-Plus-Award-Fee
Cost-Plus-Fixed-Fee
Labor-Hour
Cost-Sharing
Fixed-Price with Award Fee
Cost-Plus-Incentive-Fee
Fixed-Price Incentive (Successive Target)
Time and Material</td></tr>
</table>

Step	Action
	Notes: ✓ *The Contract Type selection should be based on the decision made during the procurement planning. FAR part 16 can be utilized as can contacting your Contracting Officer.* ✓ *For training purposes, this will be left blank.*
13a1	➤ Click on the *Address* view tab
13b	The **Award Line Item Detail** screen *Address* view tab will appear:  ➤ Click on the *Receiving* view tab
13b	The **Award Line Item Detail** screen *Receiving* view tab will appear:  ➤ Click on *Accounting* menu option

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td rowspan="2">14</td><td>

The **Award Line Item Management** screen appears:



The account codes associated to this line you're reviewing appears.

</td></tr>
<tr><td>

***Notes:** It's important to see how the accounting was put into the system, especially if you are changing costs on the line item. If the PR had the accounting as a percentage, if you changed costs, the new amount should automatically be updated here. If, it's not, that means the PR had it as cost and/or quantity. You will then need to edit the accounting to change it to the correct amount.*

</td></tr>
<tr><td>14a</td><td>

To view the pieces of the accounting, click on the *Account Code:*

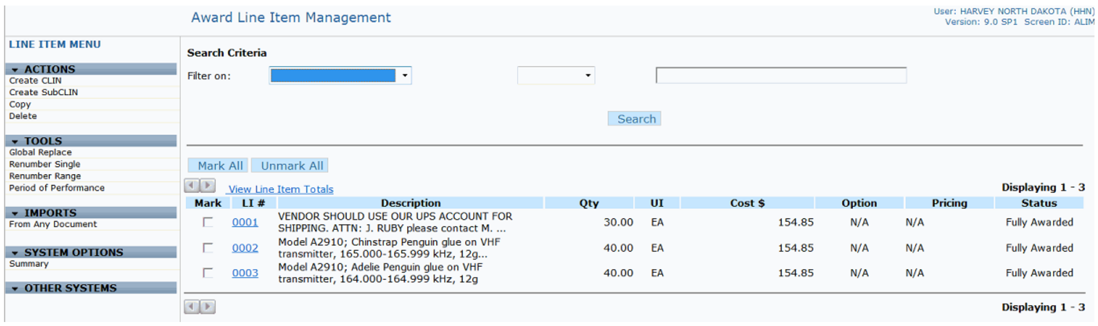
The screen will change to show you the individual pieces as well as how it was allocated: percent, cost or quantity.

- When finished reviewing, Click on *Line Items* menu option

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>15</td><td>

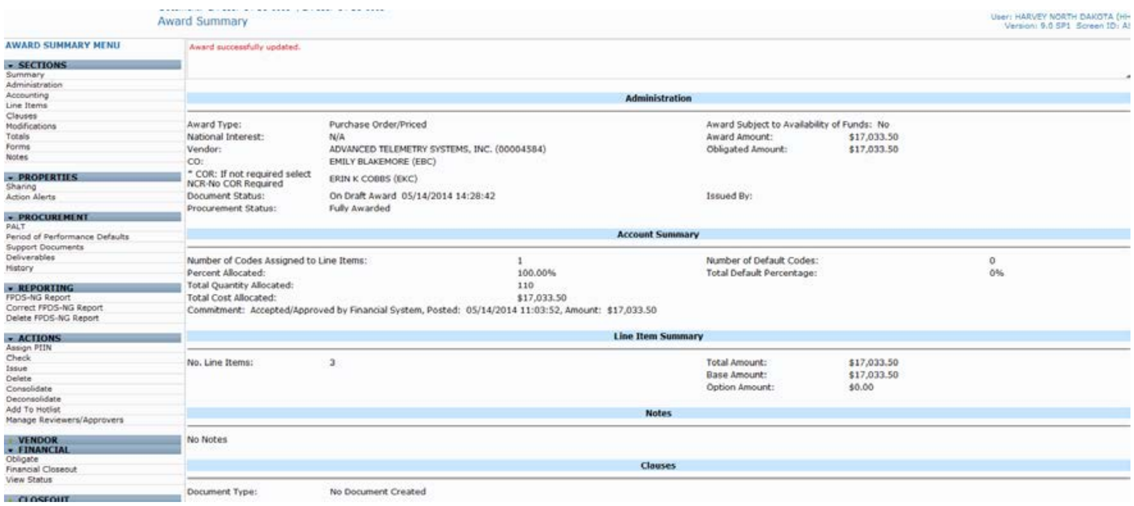
The **Award Line Item Management** screen will appear:



- Review the rest of the line items and accounting for each
- When finished Click on *Summary* menu option

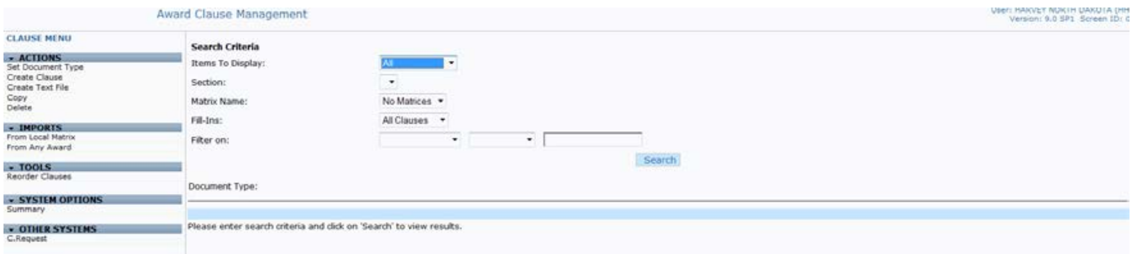
</td></tr>
<tr><td>16</td><td>

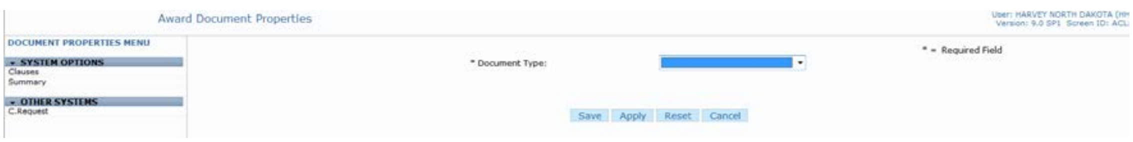
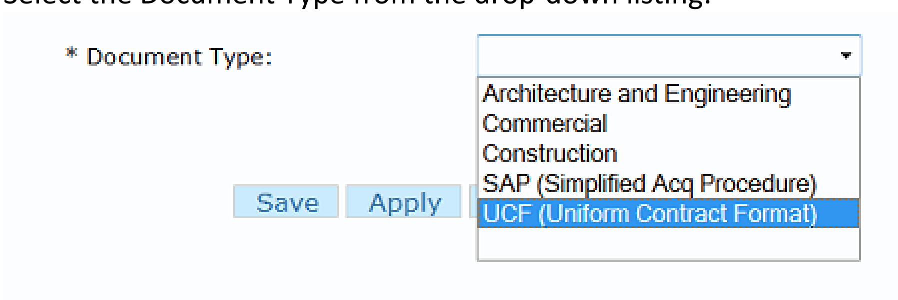
The **Award Summary** screen appears:



- Click on *Clauses* menu option

</td></tr>
</table>

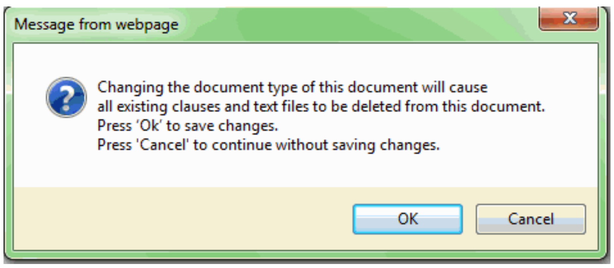
<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td>17</td><td colspan="2">The Award Clause Management screen appears:


➢ Click on Set Document Type menu option</td></tr>
<tr><td>18</td><td colspan="2">The Award Document Properties screen appears:

</td></tr>
<tr><td>19</td><td colspan="2">Select the Document Type from the drop-down listing:


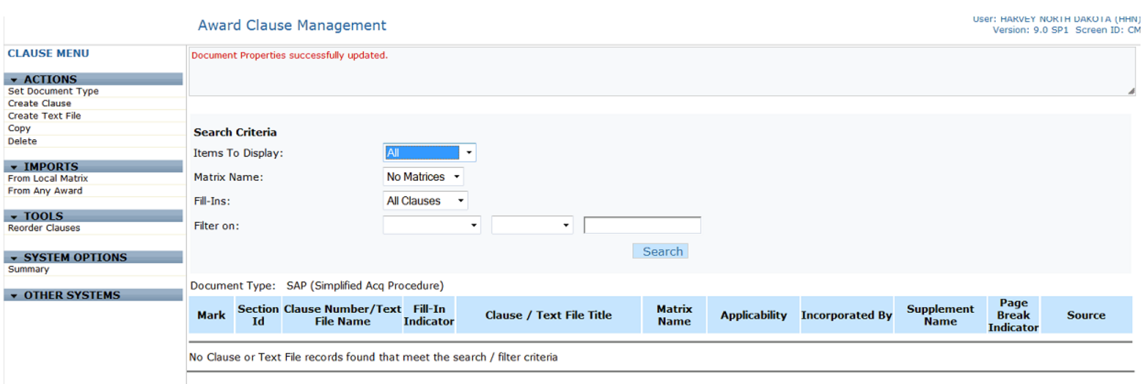
➢ Click Save</td></tr>
<tr><td rowspan="5">19a</td><td>Document Type</td><td>Description</td></tr>
<tr><td>Architecture and Engineering</td><td>This type utilizes a special solicitation for which provided and requests from bidders information which is unique to these types of contracts. The form and format is different significantly different than a standard UCF type format for a general contract.</td></tr>
<tr><td>Commercial</td><td>This type is not structured like the UCF is and is simpler in its style and of course the types of clauses used.</td></tr>
<tr><td>Construction</td><td>This type is structured to deal with the unique nature of construction contracts.</td></tr>
<tr><td>SAP (Simplified Acq Procedure)</td><td>This type is used for purchases under simplified acquisition procedures FAR Part 13. A RFQ is selected when doing these which is an SF-18.</td></tr>
</table>

<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td></td><td>UCF (Uniform Contract Format)</td><td>The use of a uniform contract format (UCF) facilitates preparation of the solicitation and contract as well as reference to, and use of, those documents by offerors, contractors, and contract administrators. The UCF does not have to be used for:

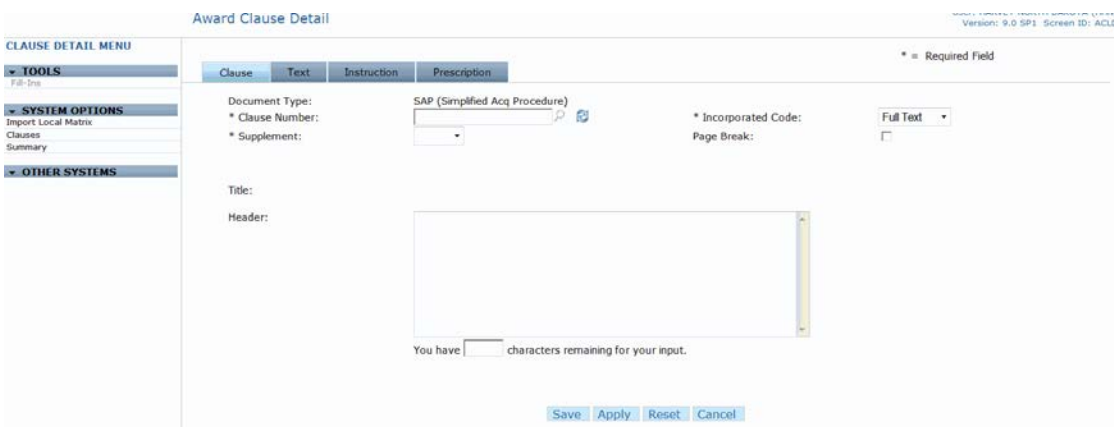
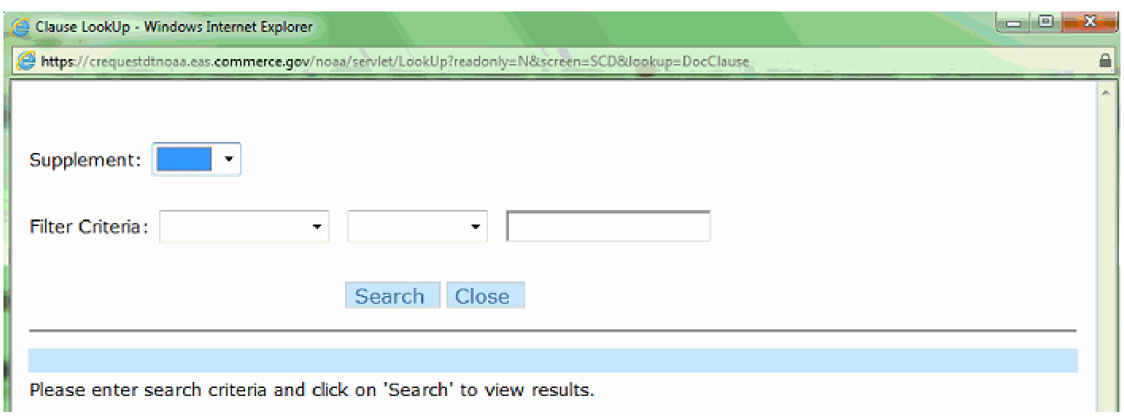
Construction and architect-engineering contracts
Subsistence contracts
Supplies and service contracts requiring special contract formats prescribed elsewhere in FAR 15 that are inconsistent with the uniform format
Letter requests for proposals
Contracts exempted by the agency head or designee
</td></tr>
<tr><td>19b</td><td colspan="2">A pop up window will appear after saving.



➢ Click OK</td></tr>
<tr><td></td><td colspan="2">Note: Make sure you are aware of the document type you are going to select here. As the prompt states, if you change it after adding clauses, all previous clauses will be deleted and you will have to add them back again.</td></tr>
<tr><td>20</td><td colspan="2">The Award Clause Management screen appears:

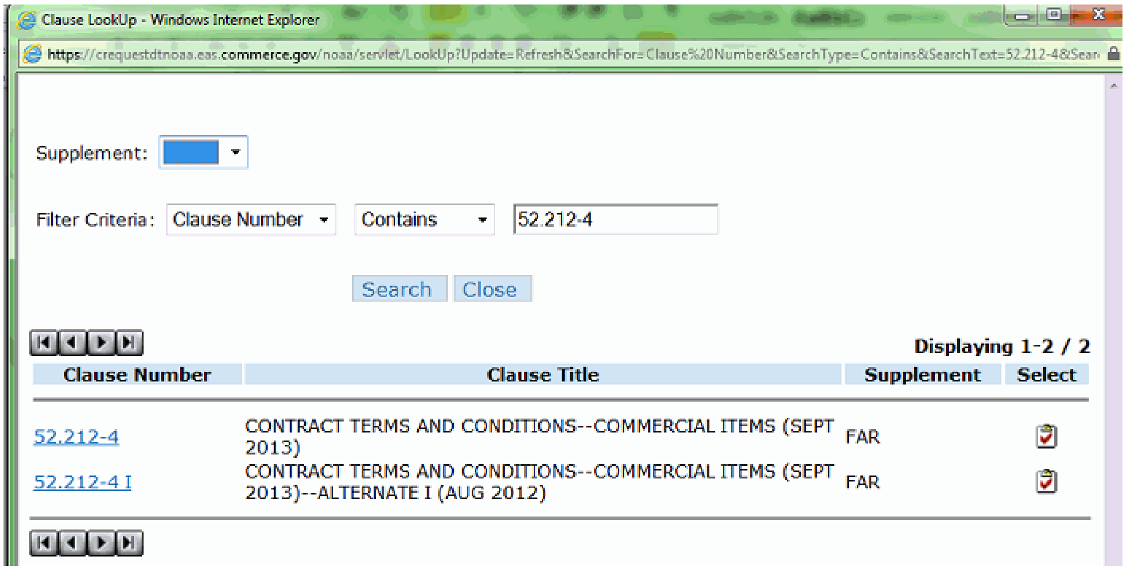


➢ Click on Create Clause menu option</td></tr>
</table>

Step	Action
	***Notes:** Since a solicitation was not done for this particular acquisition, no clauses were created and moved over when creating the award. Because of this, you will need to create the clauses that are meant for this award.*
21	The **Award Clause Detail** screen appears:  ➢ Click on the *Lookup Icon* for the **Clause Number**
21b	The **Clause LookUp** pop up window will appear:  ➢ Select the Supplement (if known) (i.e. leave blank) ➢ Select Filter Criteria field #1 **Clause Number** ➢ Select Filter Criteria field #2 **Contains** ➢ Enter the **Clause #** in Filter Criteria field #3 (i.e. 52.212-4) ➢ Click *Search*

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>21c</td><td>

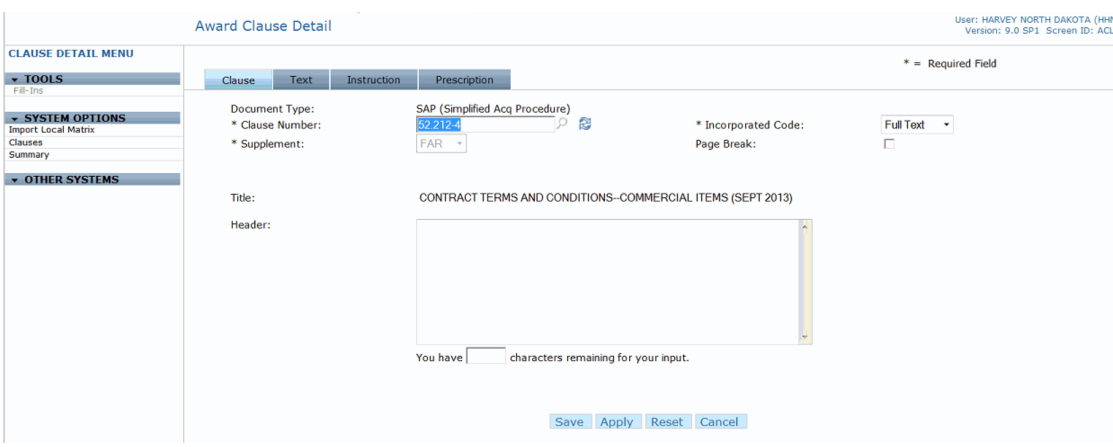
The **Clause LookUp** pop up window will appear with results:



- Click the *Select* icon of the clause you wish to choose (i.e. 52.212-4)

</td></tr>
<tr><td>21d</td><td>

The **Award Clause Detail** screen appears filled in:

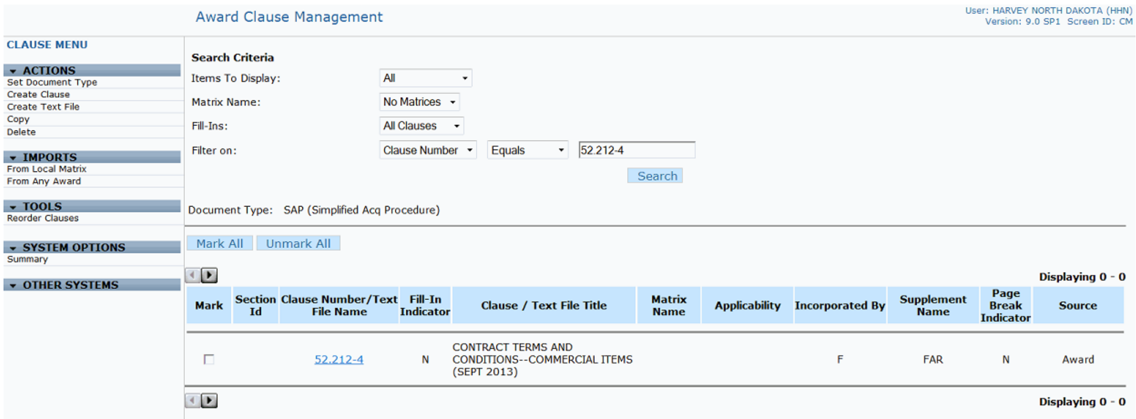
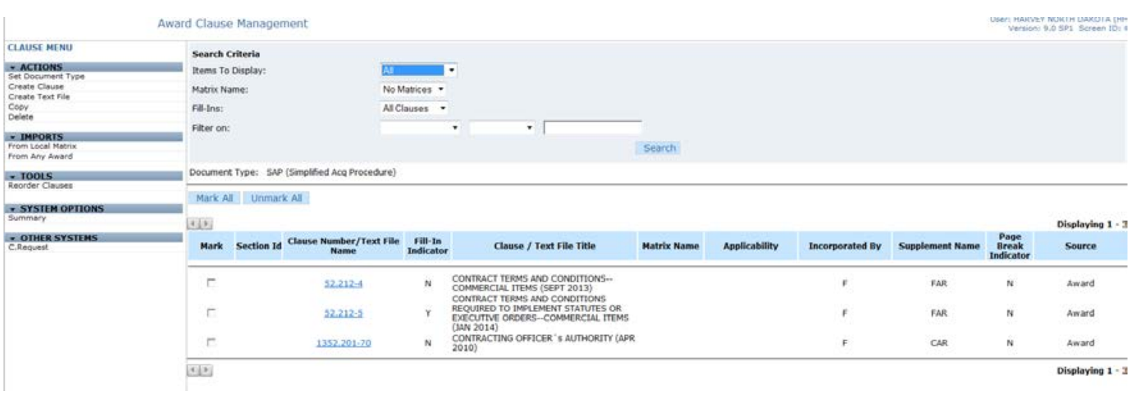


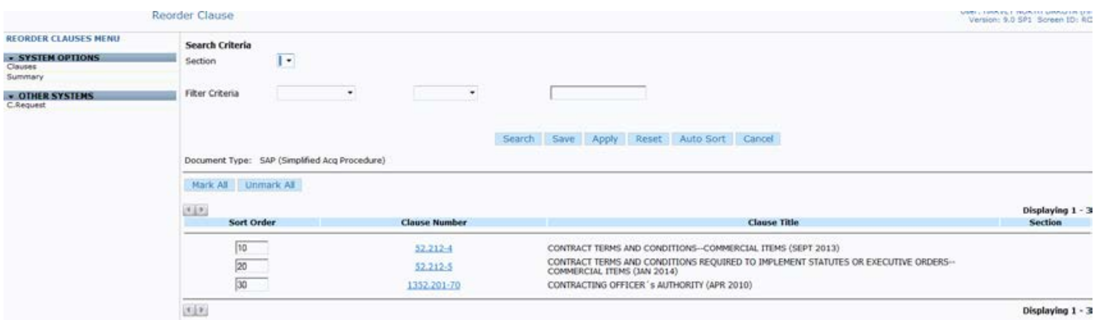
- Click *Save*

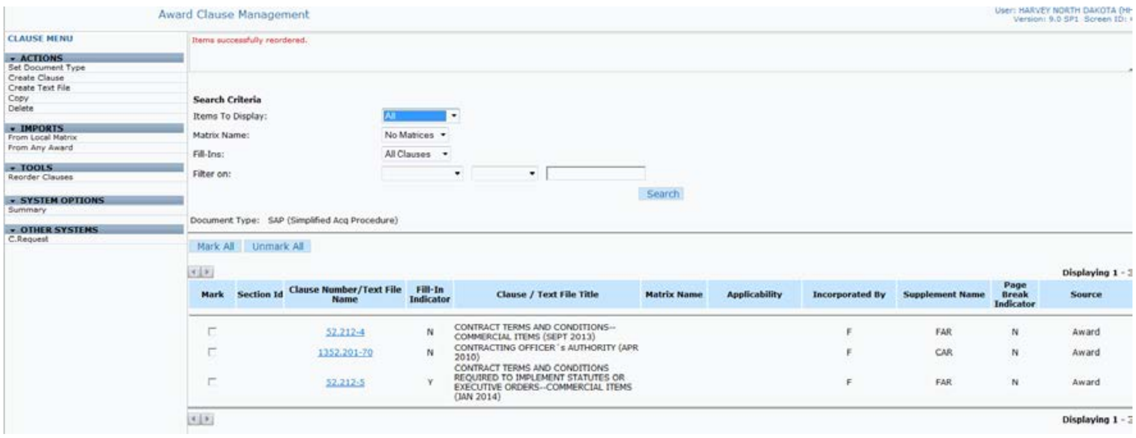
</td></tr>
<tr><td></td><td>

Notes: *There is a clause matrix that can be found in the FAR 52.301 which can be found here:* *https://www.acquisition.gov/far/current/html/52_301Matrix.html*

</td></tr>
</table>

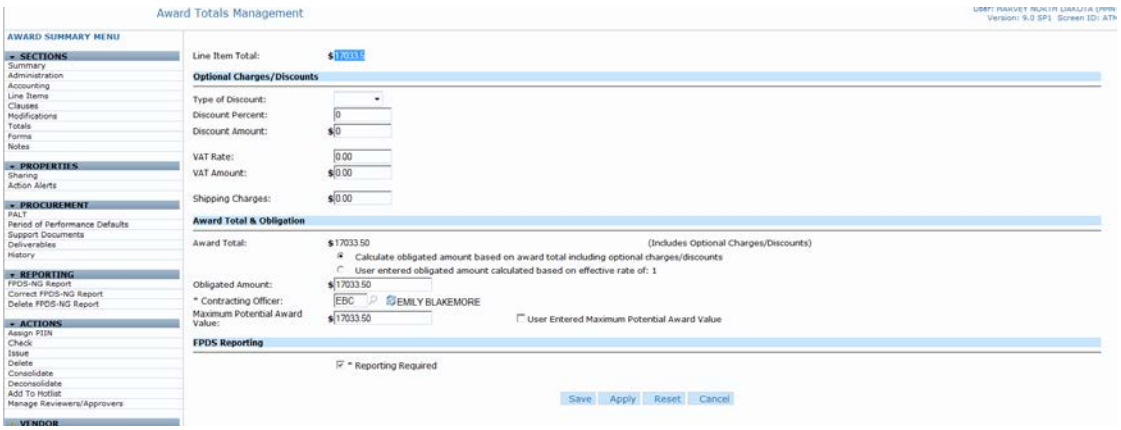
Step	Action
21e	The **Award Clause Management** screen appears with the new clause listed:  ➢ Using the process above enter the rest of the clauses: ✓ 1352.201-70 CAR ✓ 52.212-5 FAR ➢ Clear out the Filter On fields (i.e. making them blank) ➢ Click *Search*
21f	The **Award Clause Management** screen appears with the clauses that had been added:  If the clauses are not in the order you entered them, you can reorder them. You do this by clicking on *Reorder Clauses* menu option.

Step	Action
22	The **Reorder Clause** screen appears:  ➢ Click *Search*
22a	The **Reorder Clause** screen appears with the clauses listed:  Using the multiples of 10 – change the order so that the following clauses are listed in this order: ✓ 52.212-4 ✓ 1352.201-70 ✓ 52.212-5
22b	 ➢ When finished changing them around, click *Save*.

Step	Action
22c	The **Award Clause Management** screen appears with your clauses now in the order you wanted:  ➢ Click on *Summary* menu option
23	The **Award Summary** screen appears:  ➢ Click on *Totals* menu option

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>24</td><td>

The **Award Totals Management** screen appears:



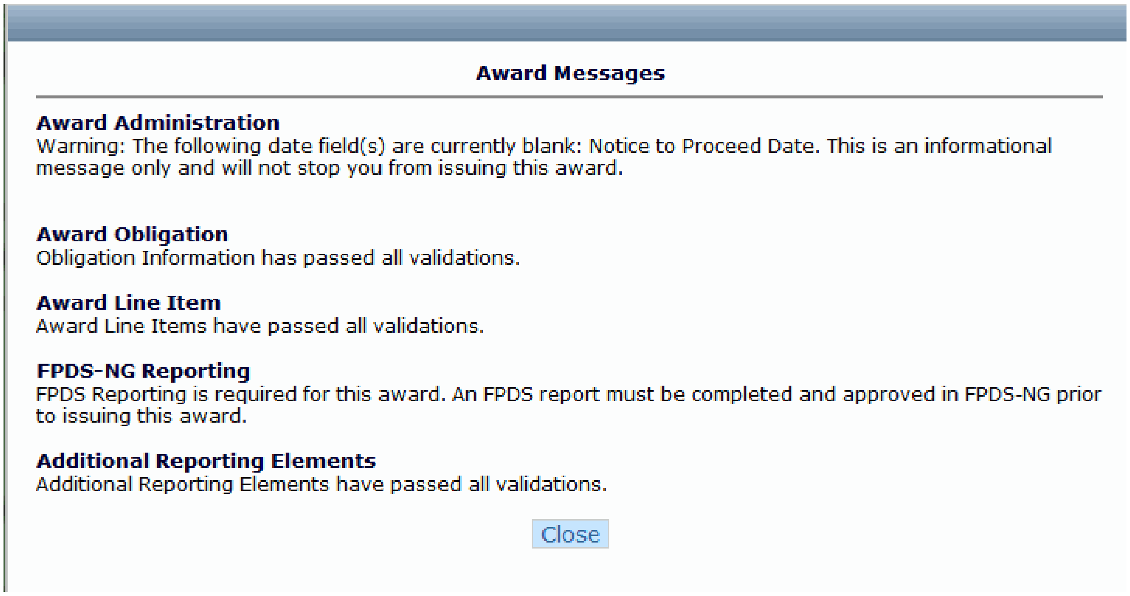
- Validate the Award Totals
- **Uncheck** the FPDS Reporting **(for training purposes)**
- Click *Save*
- Click on *Check* menu option

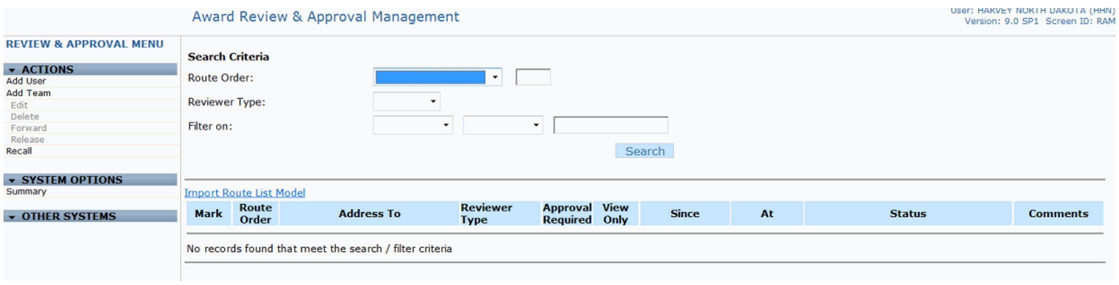
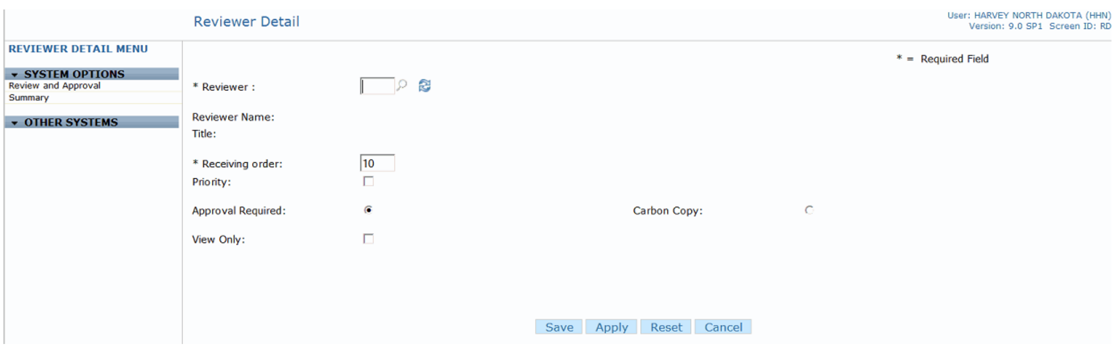
</td></tr>
<tr><td></td><td>

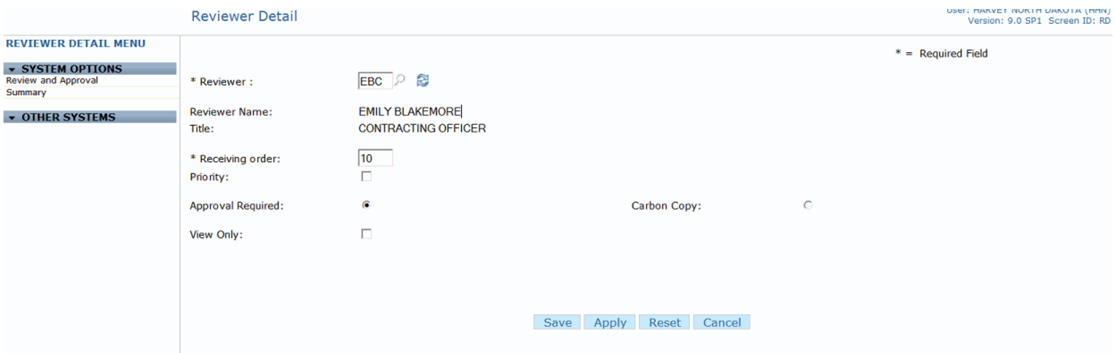
Notes:

- ✓ FPDS Reporting Required checkbox in production is a mandatory field and won't be able to be unselected.
- ✓ Users are not to ever utilize the optional charges/discounts area of the Award Totals Management screen. Entering any information in this area, will cause issues on close out process when dealing with the Core Financial System (CFS).

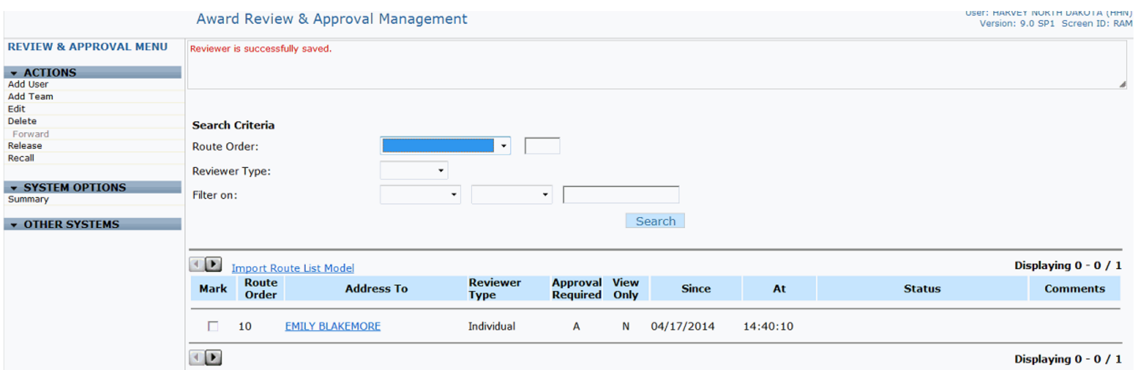
</td></tr>
</table>

Step	Action
25	A pop-up window will appear:  ➢ Look to see if there are any errors, if not, then continue ➢ Click *Close*
	Notes: ✓ This will not show CFS obligation errors, just C.Suite. ✓ This process is good to perform prior to doing FPDS reporting. This is to help minimize the need to delete the FPDS report to fix errors. ✓ The screenshot is just to show you an example of something that would need to be fixed before continuing the process.
26	The next step is to set up your routing list. To do that, click on *Manage Reviewers/Approvers* menu option

Step	Action
27	The **Award Review & Approval Management** screen appears. It is here where you will set up the routing your document will go through.  ➢ Click on *Add User* menu option
27a	The **Reviewer Detail** screen appears. It is here where you will be entering your information pertaining on how your requisition will route through the system.  ➢ Enter the **Reviewer Code** (i.e. choose your Training ID Code – EBC) ➢ Leave the **Receiving Order** the number it is ➢ Make sure **Approval Required** radio button is selected
	Notes: ✓ *If entering the code, make sure to click the Refresh Icon to make sure you have the correct person entered in the field.* ✓ *The system automatically creates each "receiving order" number in increments of 10.* ✓ *Usually the approver is the Contracting Officer*

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>27b</td><td>


➢ Click *Save*
</td></tr>
<tr><td>27c</td><td>
The Requisition Review & Approval Management screen appears with your approver showing.



➢ Click on *Release* menu option
</td></tr>
<tr><td></td><td>
Notes:

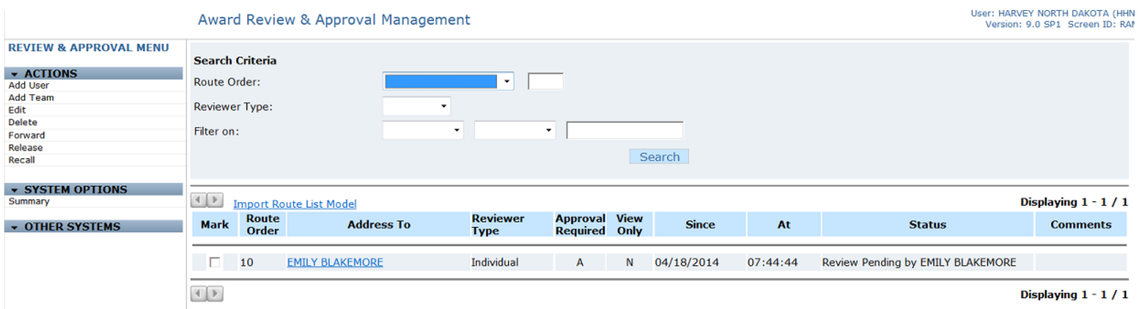
✓ Code under Approval Requested:
A = Approval Required
C = Carbon Copy

✓ Codes under View Only:
Y = Yes, Read Only Access
N = No, Full Read/Write Access

✓ In order for the requisition to be sent to the people listed, Release must be clicked.
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>27d</td><td>

The **Requisition Review & Approval Management** screen will then show the date/time and status of the review.



At this point, following the flow chart, your approver must complete the process.

- Click **Home** from the *Standard Menu Bar*

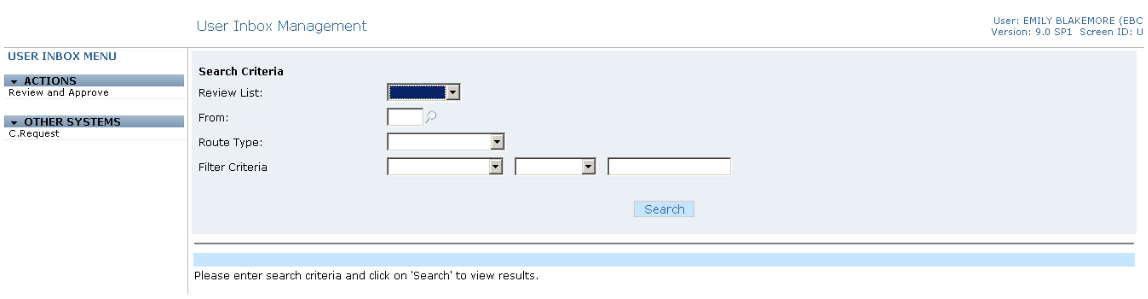
</td></tr>
<tr><td colspan="2">

DEMONSTRATION OF APPROVAL PROCESS BY CONTRACTING OFFICER

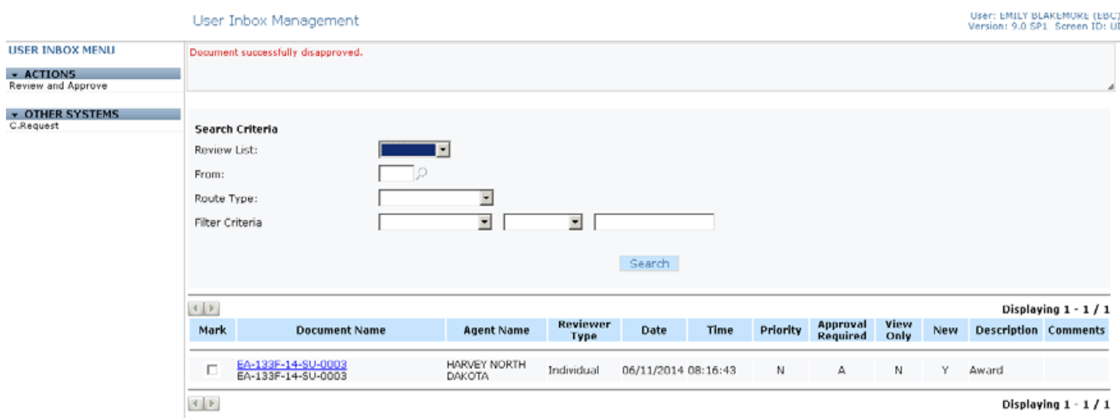
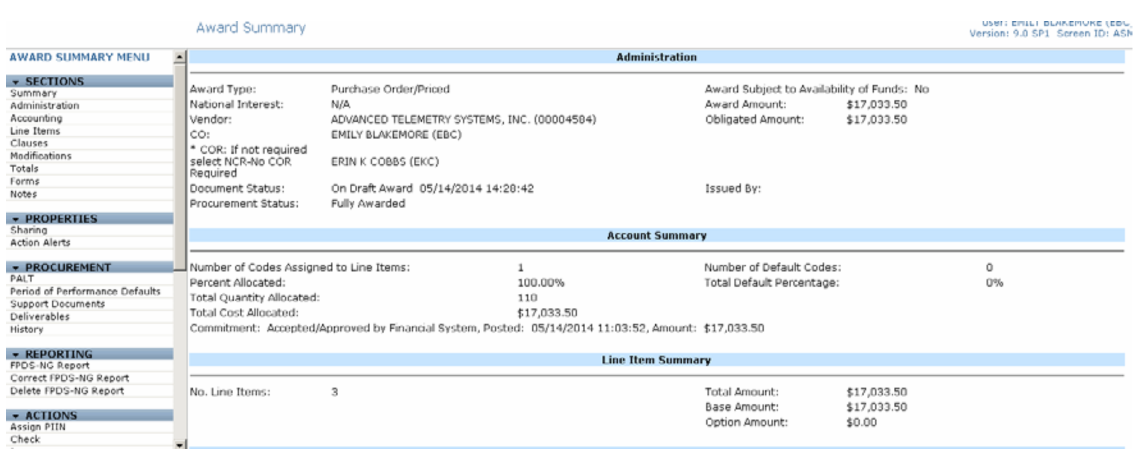
</td></tr>
<tr><td>D1</td><td>

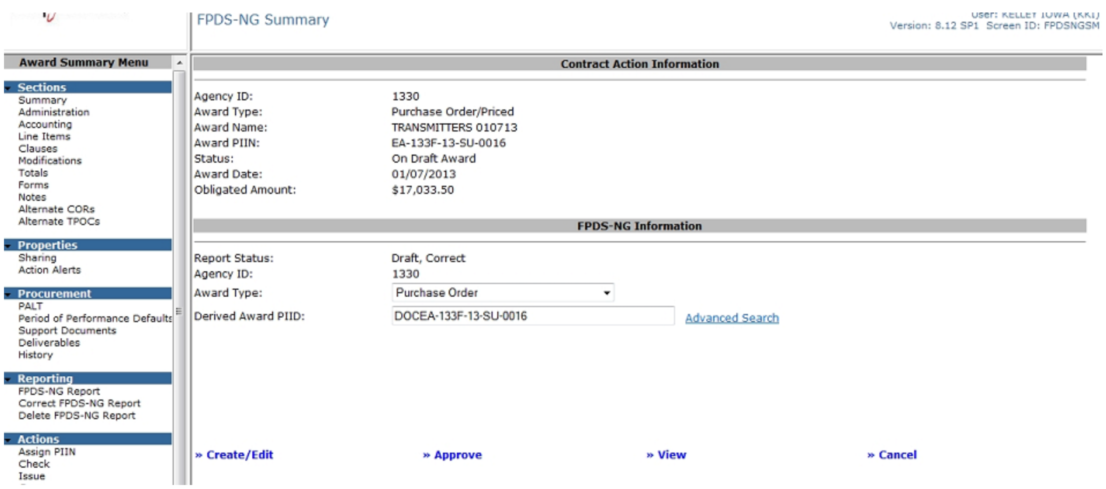
The approver, if profile had it enabled, would be emailed letting them know they had a document to approve. Otherwise, they would log into the system and from the **Home** screen do the following:

- Click **Inbox** from the *Standard Menu Bar*
- Click *Search*



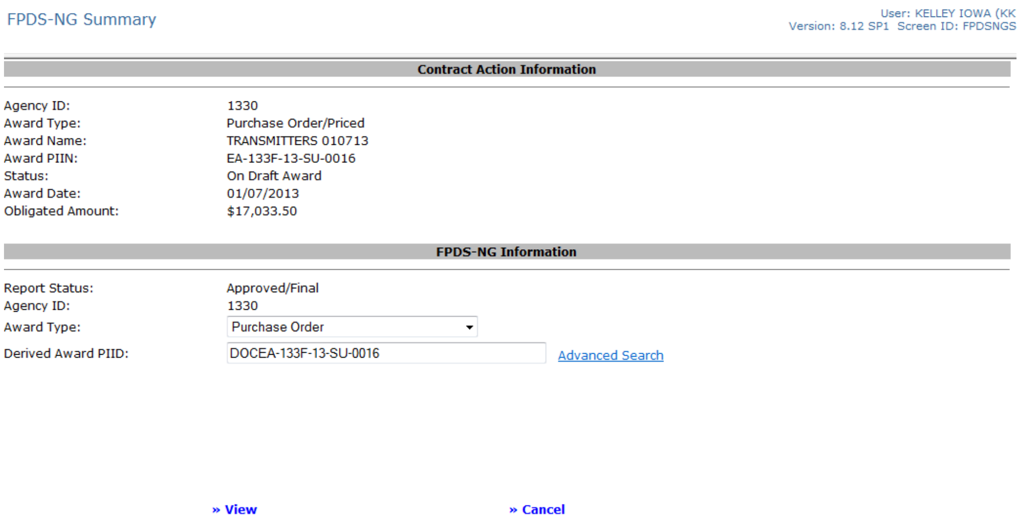
</td></tr>
</table>

Step	Action
D2	The **User Inbox Management** screen appears with all documents awaiting approval:  ➢ Click on the *Document Name*
	Notes: *It's important for the approver to go into the document, in order to review it and approve the FPDS report, as well as obligate and issue it prior to approving it. Once the document is approved they will no longer have access to it.*
D3	The **Award Summary** screen appears.  The approver should be looking at the administration, line items, accounting, clauses, and support documents prior to doing anything. If they have a paper copy, they should verify it has the same information. Once they have decided everything looks alright, they should: ➢ Click on *FPDS-NG Report* menu option

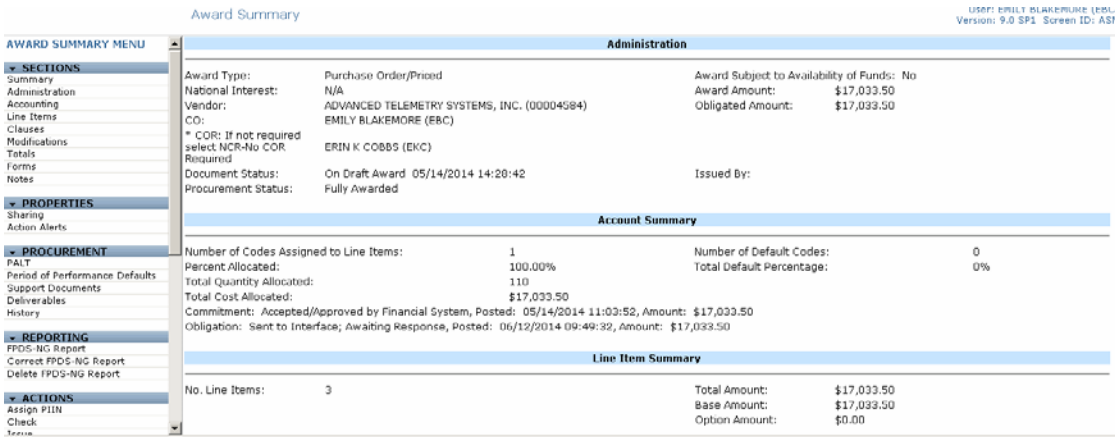
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>D4</td><td>The FPDS-NG Summary screen appears.


The approver should be looking at the status where it says Draft, Correct. If they don't see that, they should disapprove the document back to the Contracting Specialist. Or they may choose to edit the report themselves. They should probably take a look by viewing it prior to approving it, to make sure all details of the report are correct.

➢ Once that is done, click on Approve</td></tr>
</table>

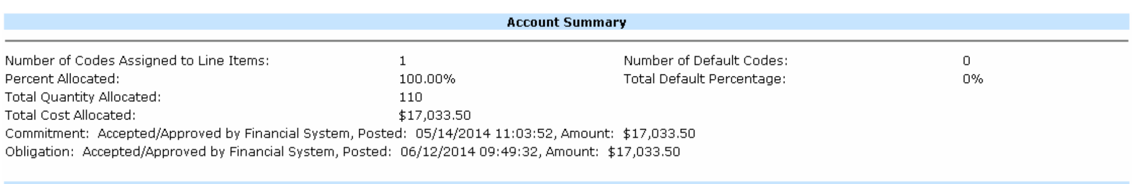
Step	Action
D5	The screen will refresh with the Report Status showing Approved/Final.  The FPDS steps for training purposes are not done. ➢ Click on *Obligate* menu options
D6	The **Financial Interface Validation** screen appears. If there are no C.Suite issues, you should get the message “The document has passed all validations.”  ➢ Click on *Save and Post*

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>D7</td><td>
The Award Summary screen appears with the obligation showing “Sent to Interface”



Notes:

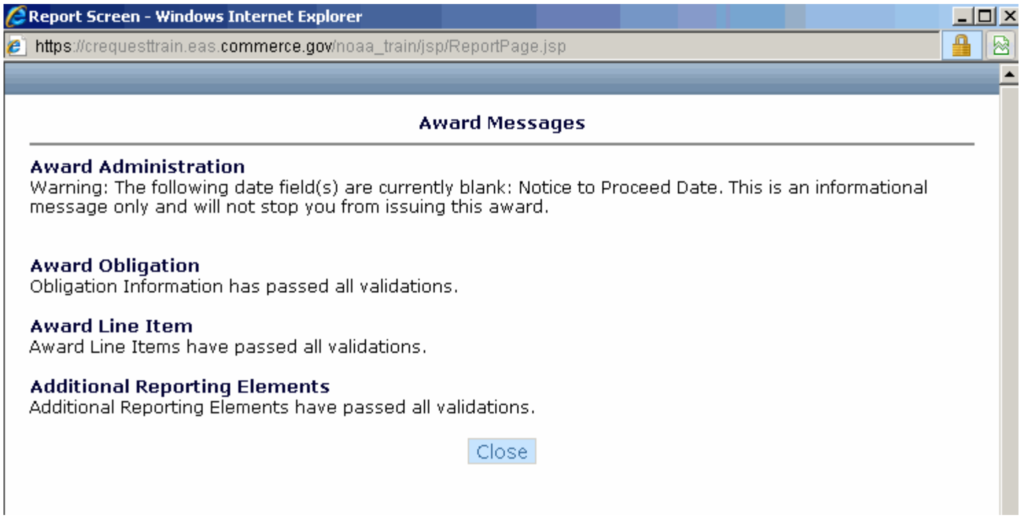
- ✓ *To “refresh” the screen to see if it comes back as Approved or Rejected, click the Summary menu option OR View Status.*
- ✓ *If rejected, click on View Status then Message to find out the error.*
</td></tr>
<tr><td>D8</td><td>
When it’s approved, you will see that message under the *View Status* screen or on the Summary.



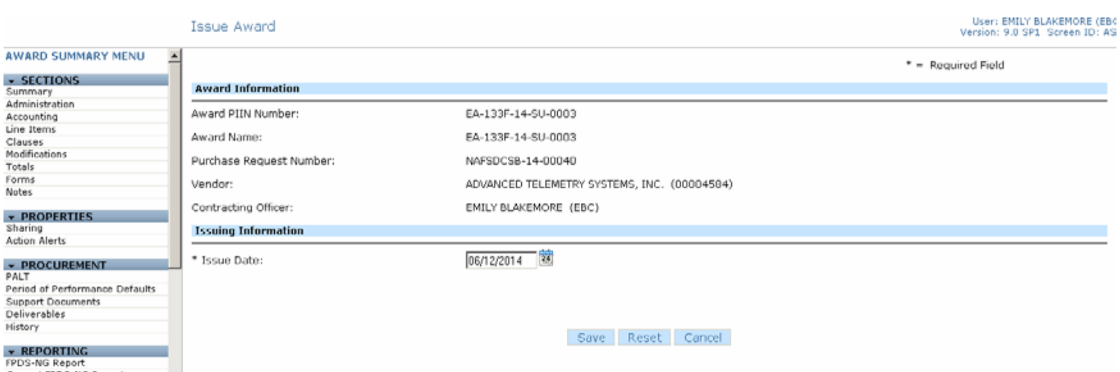
</td></tr>
<tr><td>D9</td><td>
Once CFS has accepted the obligation, the next step is to issue the award.

➢ Click on *Issue* menu options
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>D10</td><td>A pop-up window will appear showing you if it has passed all validations:



➢ Click *Close*</td></tr>
<tr><td>D11</td><td>The Issue Award screen appears:



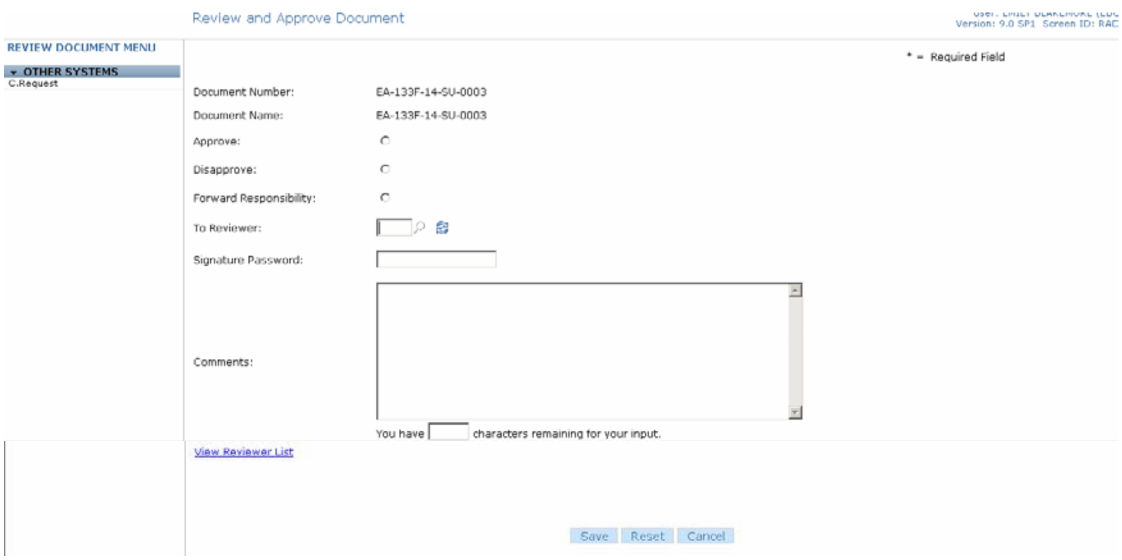
Here is where you will either take the current system date, or change it to a future date. You cannot back date it. Once you've decided which date to use:

➢ Click *Save*</td></tr>
<tr><td>D12</td><td>The Award Summary screen will appear with the following message:


</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>D13</td><td>The next step is to do the final approval. From the Award Summary screen:

➢ Click on Review and Approve menu option</td></tr>
<tr><td rowspan="2">D14</td><td>The Review and Approve Document screen appears:

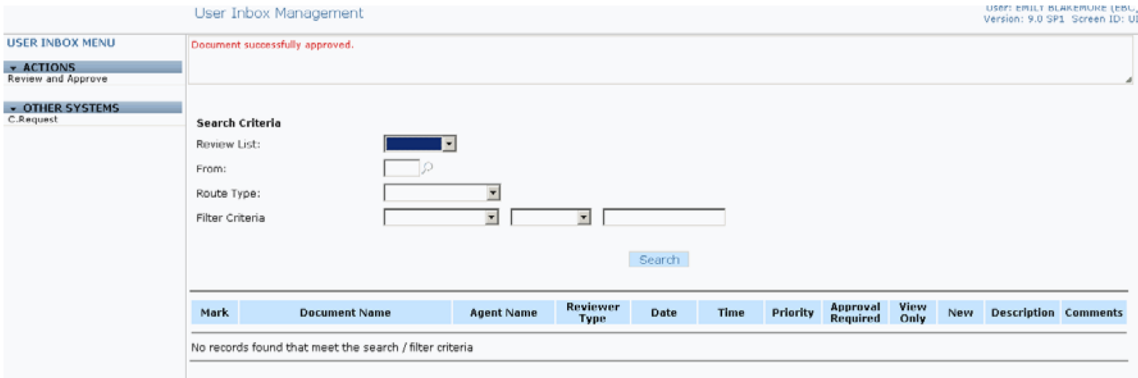


➢ Check the Approve radio button
➢ Enter your Signature Password
➢ Enter any Comments
➢ Click Save</td></tr>
<tr><td>Notes:

✓ If as an approving official, you were to disapprove the document, make sure to enter comments as to why it's being disapproved.

✓ If as an approving official, you needed someone else to review/approve, you would click the radio button Forward Responsibility and enter the code of the person in the To Review field.

✓ To view the whole routing list, click on View Reviewer List link on the screen.</td></tr>
</table>

Step	Action
D15	The **User Inbox Management** screen appears:  From here, you would either Logout of C.Suite, or click the next one to approve.

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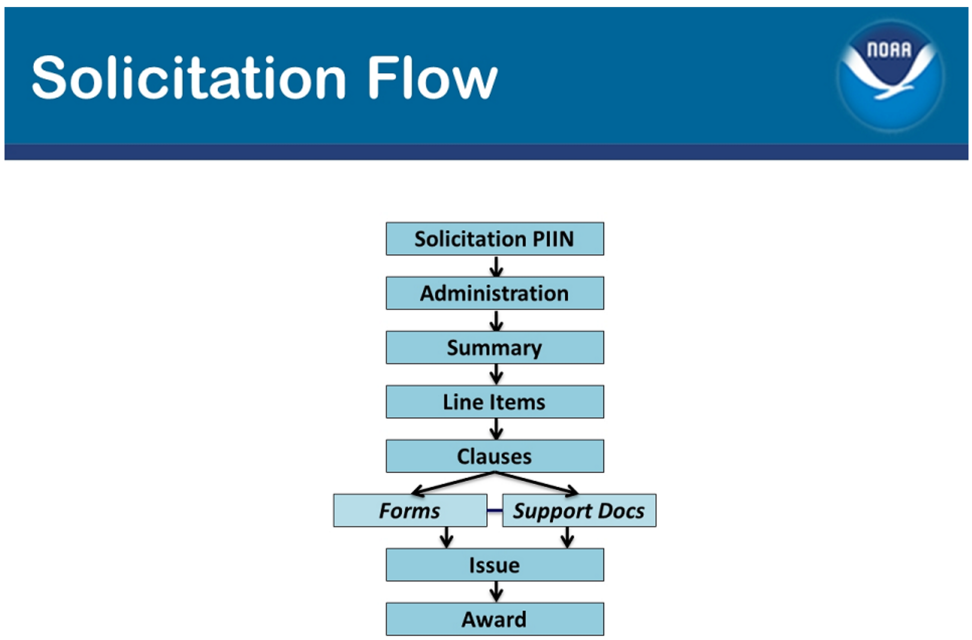
Exercise #5: Create an Award (with a solicitation)

Objectives:

- Navigate through C.Award
- Create a solicitation prior to creating the award
- Understand solicitations
- Follow flow chart

Instructions: Execute the following steps:

Notes:

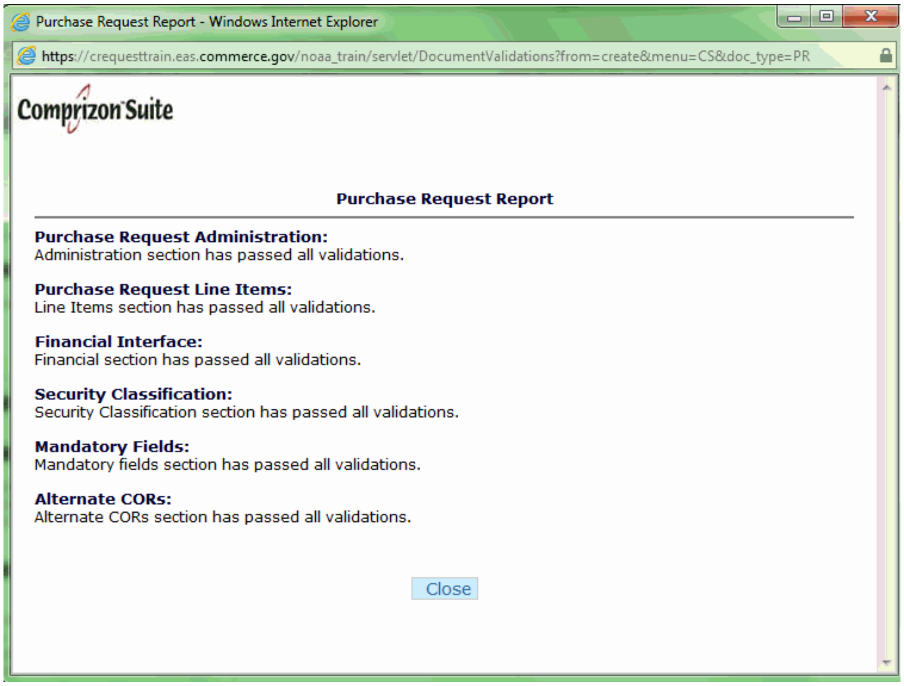


You have received a purchase request that will need a solicitation prior to creating an award.

Step	Action
1	From the **Home** screen *Just In* view tab ➢ Click *PR#* ➢ Review the PR in its entirety ➢ If the PR looks good, then you will need to save the Support Documents if any.
2	From the **Purchase Request Summary** screen: ➢ Click on *Create Solicitation* menu option

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>

The **Purchase Request Report** pop-up window will appear.



- Click *Close*

</td></tr>
<tr><td>4</td><td>

The **Solicitation PIIN and Name** screen appears

</td></tr>
<tr><td>4a</td><td>

There are 5 fields for Document Number:

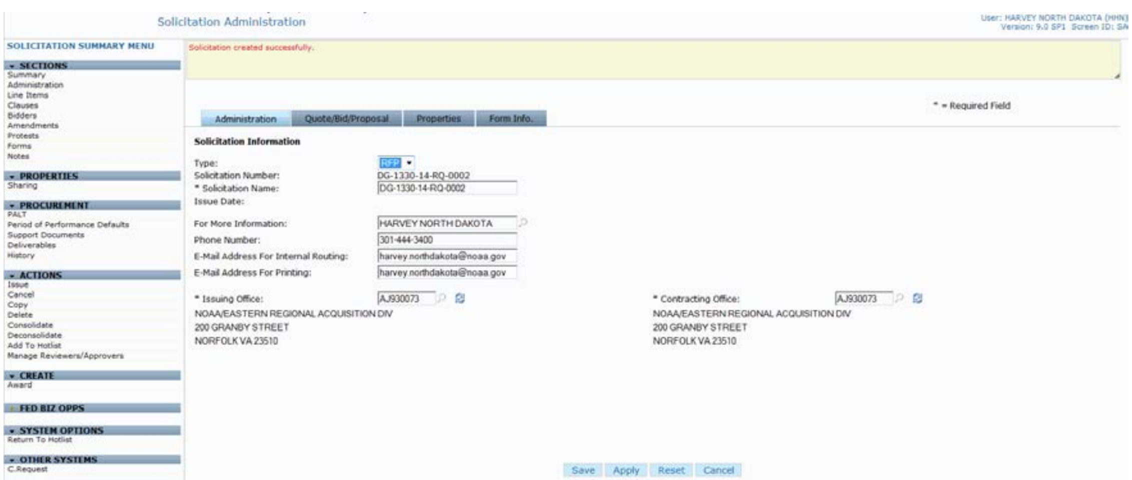
- 1st Field - **AGO Office**
- 2nd Field - **Line Office**
- 3rd Field – **Solicitation Type**
- 4th Field - **Fiscal Year**
- 5th Field - **Sequential Number**

</td></tr>
</table>

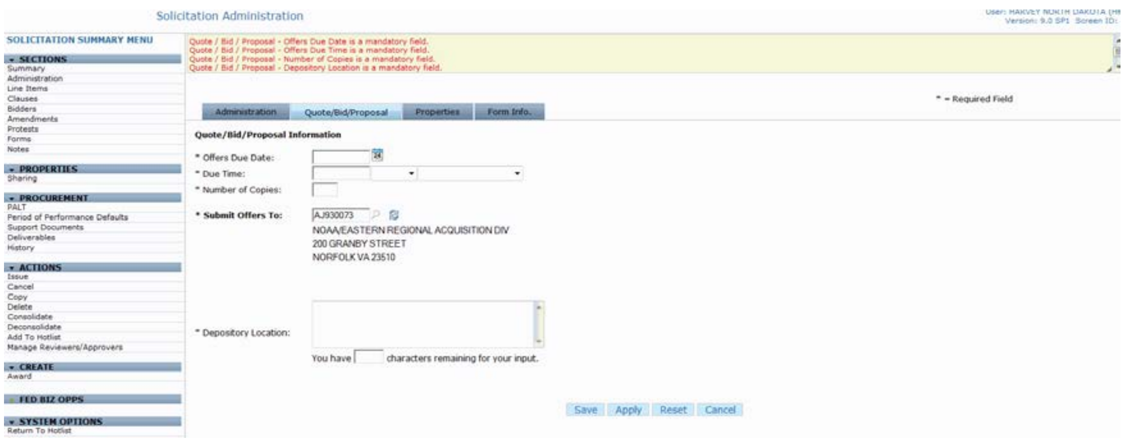
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4a1</td><td>The first two fields are the same as they were in the previous exercise and should automatically default based on your profile.

The Fiscal Year will automatically default to the current one. The Sequential Number will generate a system generated number after saving this information.</td></tr>
<tr><td>4a2</td><td>The Solicitation Types are:

• RB – Sealed Bids
• RI – Request for Information
• RP – Request for Proposals
• RQ – Request for Quotes
• RS – Combined Synopsis - Solicitation</td></tr>
<tr><td>4b</td><td>➢ Select the Solicitation Type (i.e. RQ) in the PIIN Number
➢ Click Save</td></tr>
<tr><td>5</td><td>The Solicitation Administration screen Administration tab appears:

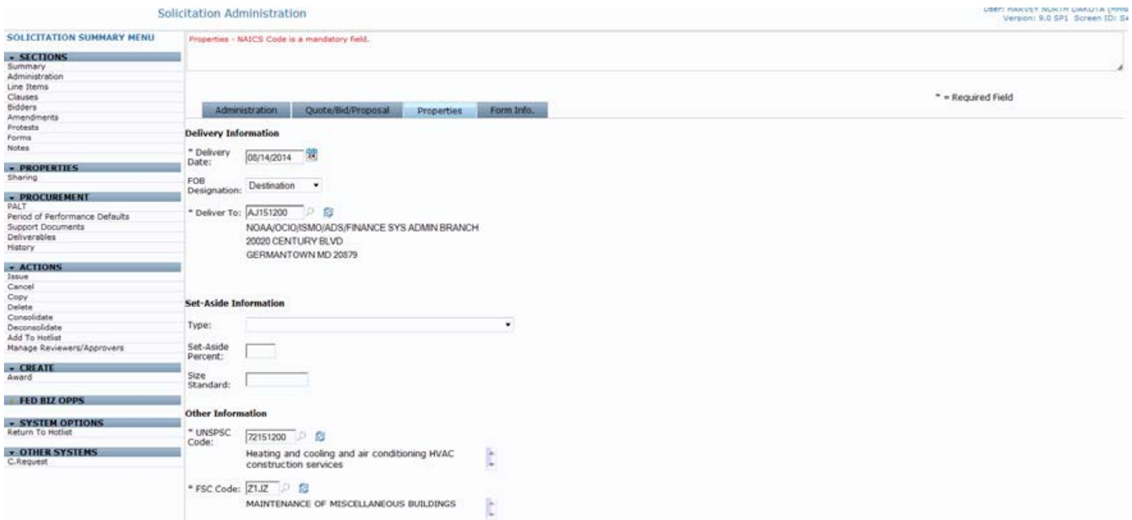


➢ Enter the Issuing Office (i.e. same as Contracting Office)
➢ Click Apply</td></tr>
</table>

Step	Action
5a	The **Solicitation Administration** screen *Quote/Bid/Proposal* tab appears:  ➢ Enter the **Offers Due Date** (i.e. current date) ➢ Enter the **Offers Due Time** (i.e. 12:00 PM Eastern) ➢ Enter the **Number of Copies** (i.e. 1) ➢ Enter the **Submit Offers to** (i.e. AJ900024) ➢ Enter the **Depository Location** (i.e. Please submit your quotes electronically by email or fax to the following: email – yourname@test.noaa.gov Fax – 301-444-3401) ➢ Click *Apply*

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5b</td><td>

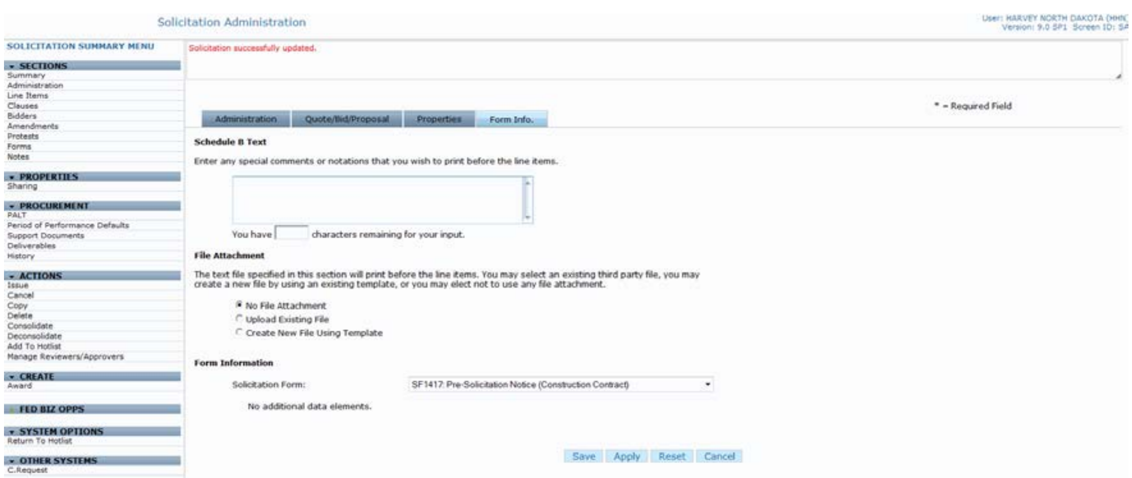
The **Solicitation Administration** screen *Properties* tab appears:



- ➢ Enter the **NAICS Code** (i.e. 333415)
- ➢ Click *Apply*
- ➢ Click on the *Form Info.* view tab

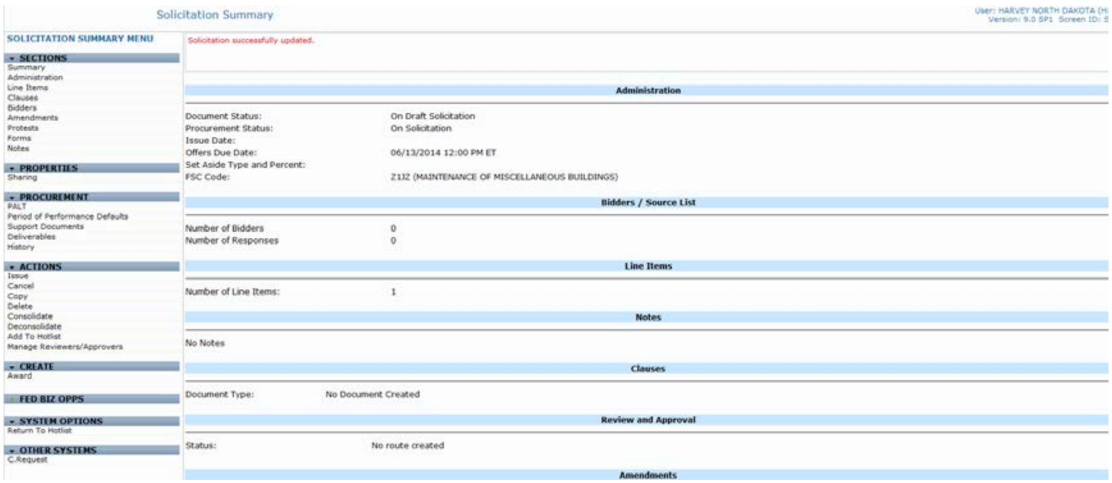
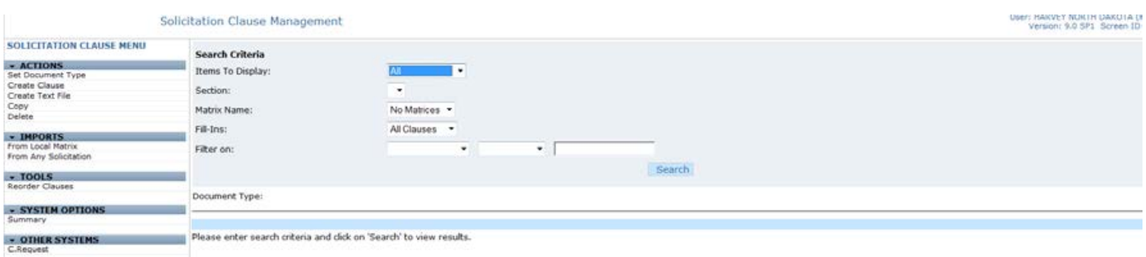
</td></tr>
<tr><td>5c</td><td>

The **Solicitation Administration** screen *Form Info.* tab appears:



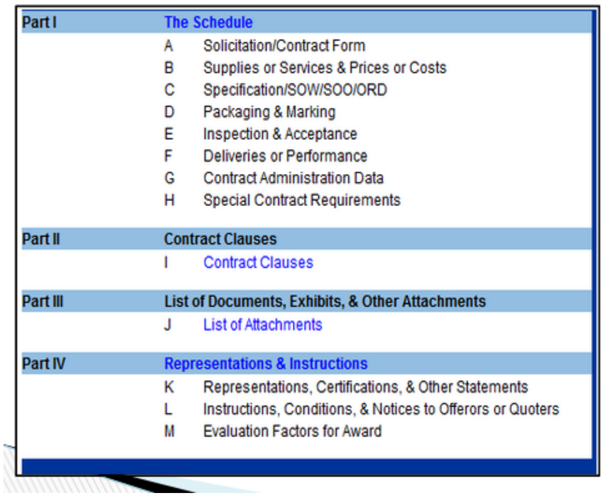
- ➢ Select the **Solicitation Form** (i.e. SF1449)
- ➢ Click *Save*

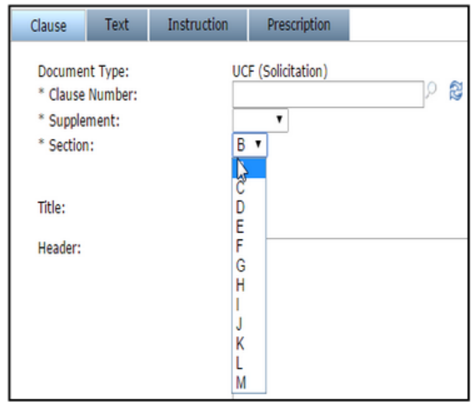
</td></tr>
</table>

Step	Action
6	The **Solicitation Summary** screen appears:  ➢ Click on *Line Items* menu option
7	➢ Search on the Line Items and validate the information for each line ➢ Click on *Summary* menu option
8	The **Solicitation Summary** screen appears: ➢ Click on the *Clauses* menu option
9	The **Solicitation Clause Management** screen appears:  ➢ Click on *Set Document Type* menu option

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td></td><td>

***Note:** Three types of solicitations require the clauses and text files to be created and designated to appear in specific sections of the solicitation document. These are: Architecture and Engineering (UCF), UCF, and Construction. UCF will actually ask you to enter the section it's supposed to be in.*



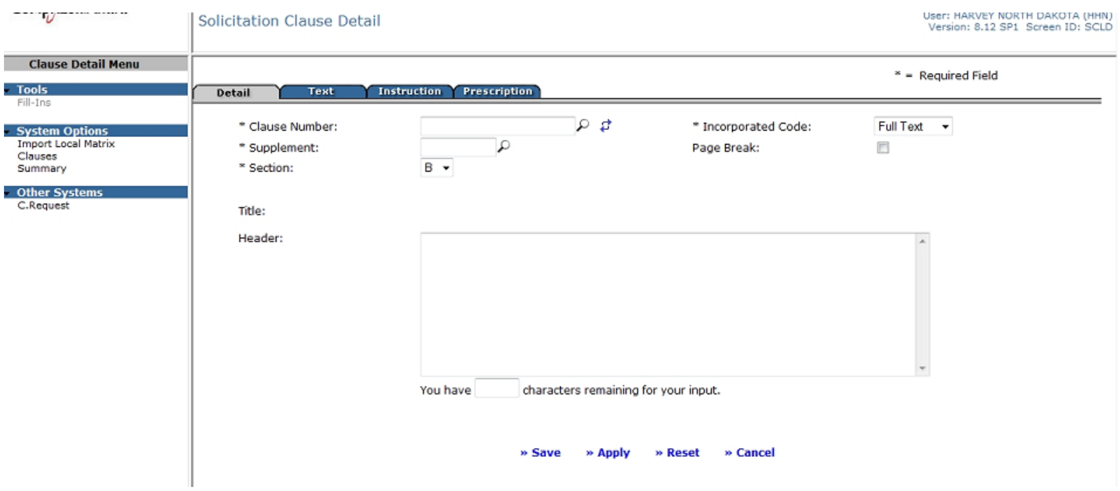


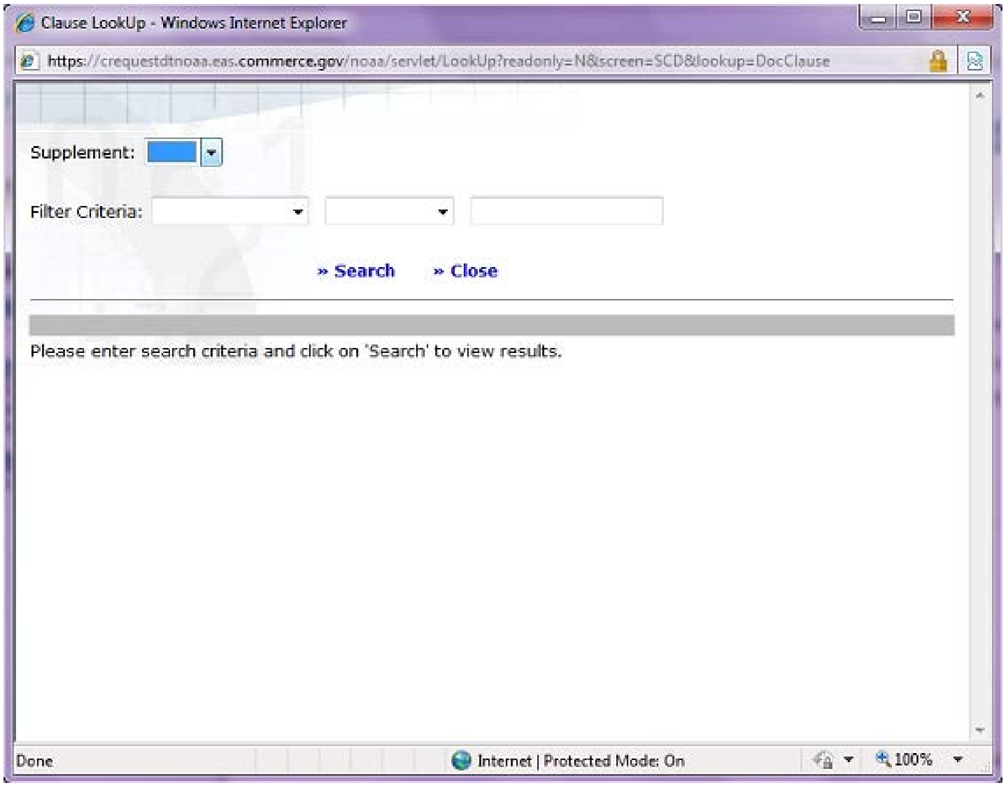
</td></tr>
<tr><td>9a</td><td>

The **Award Document Properties** screen appears.

- Select the Document Type from the drop-down listing (e.g. UCF)
- Click *Save*
- Click on *Create Clause* menu option

</td></tr>
</table>

Step	Action
10	The **Solicitation Clause Detail** screen appears:  Fields here can be entered manually or you can use the Lookup icon for the **Clause Number** field. We’re going to click the icon.

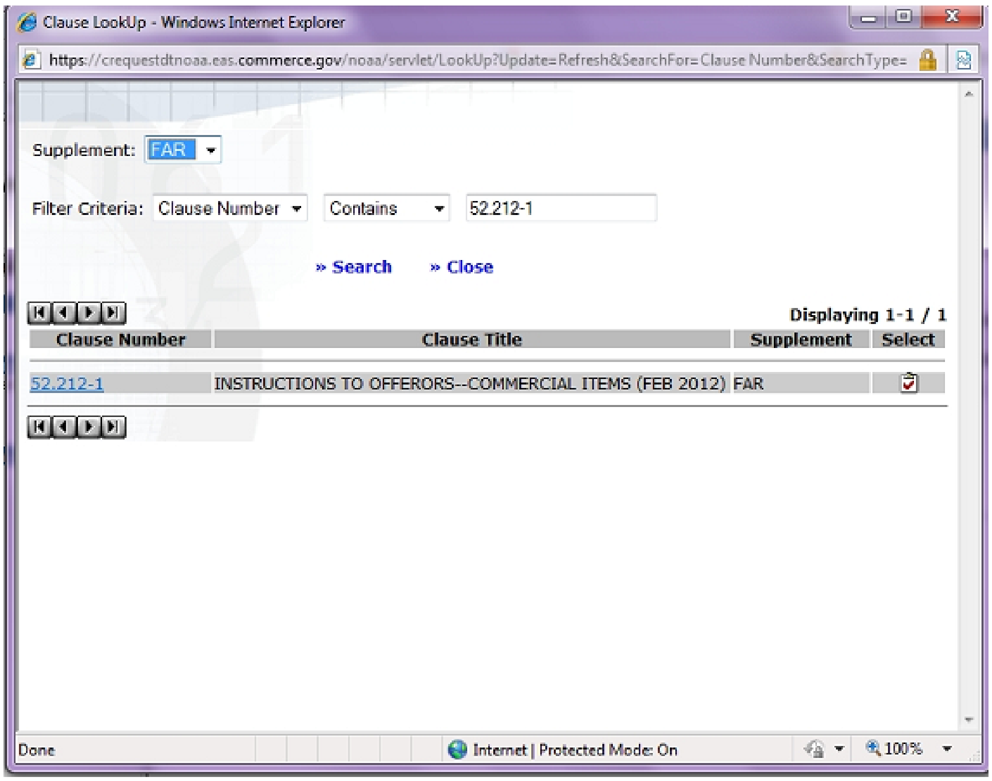
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9b</td><td>The Clause Lookup pop-up appears:


Using the drop-down arrows select:

➢ Supplement (i.e. FAR)
➢ Filter Criteria #1 (i.e. Clause Number)
➢ Filter Criteria #2 (i.e. Contains)
➢ Enter Filter Criteria #3 field (i.e. 52.212-1)
➢ Click Search</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9c</td><td>

The **Clause LookUp** pop-up window will now have all results listed that match the criteria:



➢ Click the *Select* icon of the number you want

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9d</td><td>

The **Solicitation Clause Detail** screen appears with the fields filled out:

- Select the **Section** (i.e. L)
- Click *Save*

</td></tr>
<tr><td></td><td>

Note: *The system will put the clause in the correct section based upon the document type.*

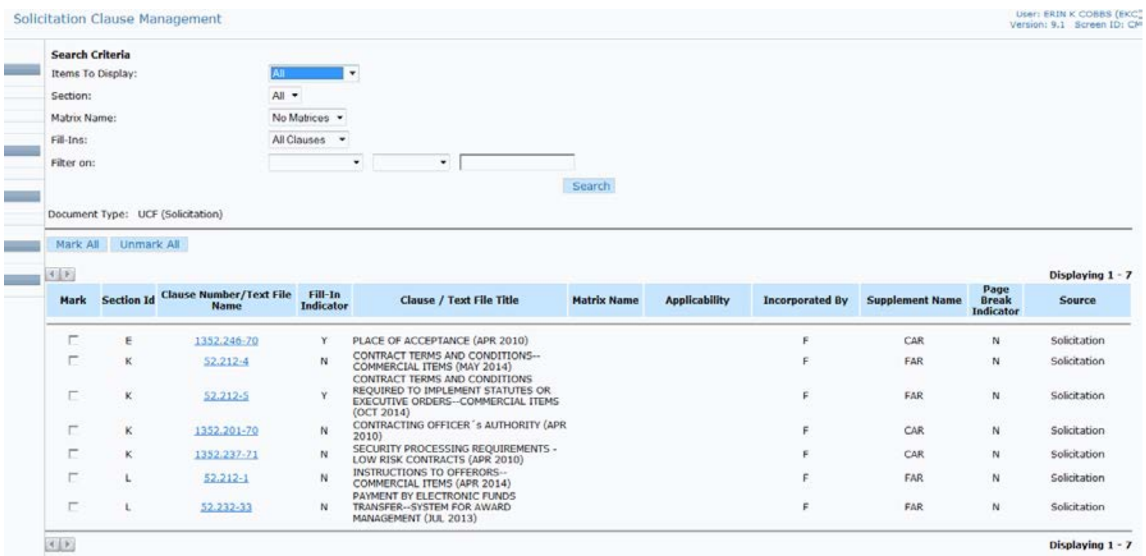
</td></tr>
<tr><td>9e</td><td>

The **Solicitation Clause Management** screen appears with the new clause added:

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9e1</td><td>Using the above steps on adding a new clause, add the following as well:

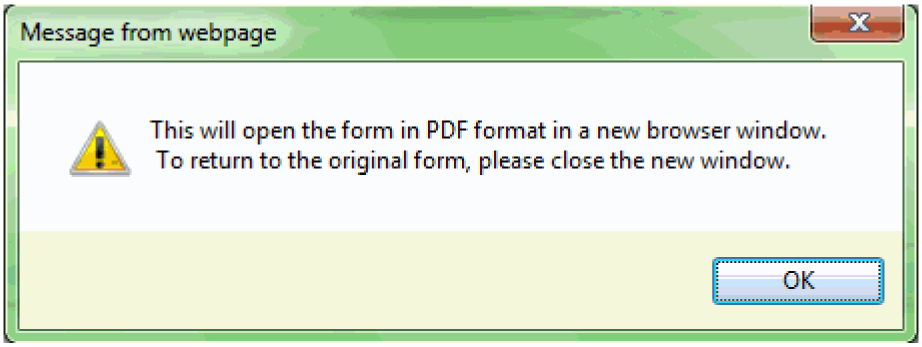
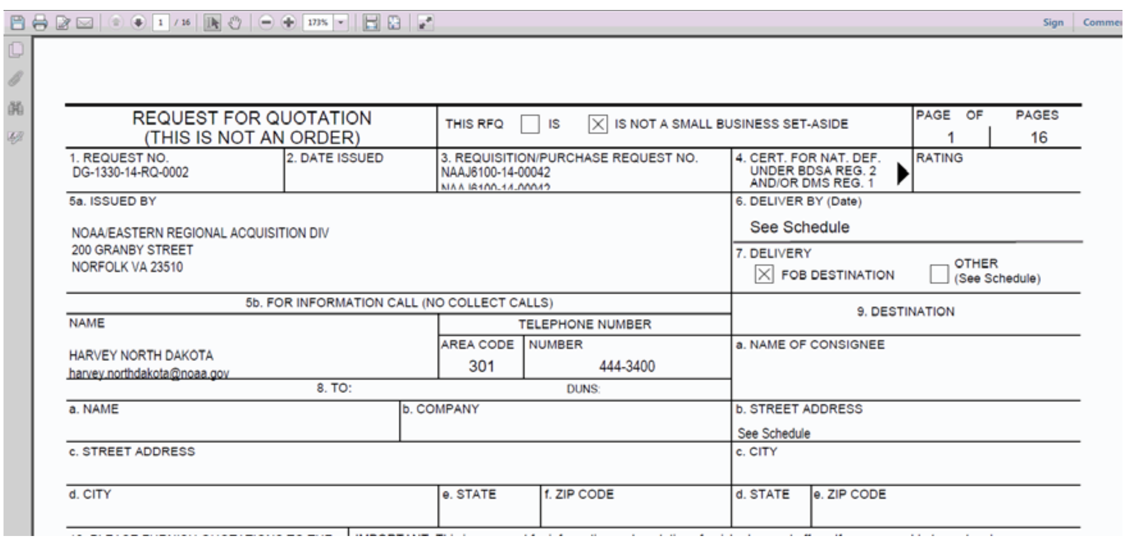
✓ FAR 52.212-4 (K)
✓ FAR 52.212-5 (K)
✓ CAR 1352.246-70 (E)
✓ CAR 1352.201-70 (K)
✓ CAR 1352.237-71 (K)
✓ FAR 52.232-33 (L)</td></tr>
<tr><td>9f</td><td>When finished adding all clauses, the screen will appear with them listed:


Solicitation Clause Management
User: ERIN K COBBS (EKC
Version: 9.1 Screen ID: CM
Search Criteria
Items To Display: All
Section: All
Matrix Name: No Matrices
Fill-Ins: All Clauses
Filter on:
Search
Document Type: UCF (Solicitation)
Mark All Unmark All
Displaying 1 - 7
<table>
<tr><th>Mark</th><th>Section Id</th><th>Clause Number/Text File Name</th><th>Fill-In Indicator</th><th>Clause / Text File Title</th><th>Matrix Name</th><th>Applicability</th><th>Incorporated By</th><th>Supplement Name</th><th>Page Break Indicator</th><th>Source</th></tr>
<tr><td></td><td>E</td><td>1352.246-70</td><td>Y</td><td>PLACE OF ACCEPTANCE (APR 2010)</td><td></td><td></td><td>F</td><td>CAR</td><td>N</td><td>Solicitation</td></tr>
<tr><td></td><td>K</td><td>52.212-4</td><td>N</td><td>CONTRACT TERMS AND CONDITIONS--COMMERCIAL ITEMS (MAY 2014)</td><td></td><td></td><td>F</td><td>FAR</td><td>N</td><td>Solicitation</td></tr>
<tr><td></td><td>K</td><td>52.212-5</td><td>Y</td><td>CONTRACT TERMS AND CONDITIONS REQUIRED TO IMPLEMENT STATUTES OR EXECUTIVE ORDERS--COMMERCIAL ITEMS (OCT 2014)</td><td></td><td></td><td>F</td><td>FAR</td><td>N</td><td>Solicitation</td></tr>
<tr><td></td><td>K</td><td>1352.201-70</td><td>N</td><td>CONTRACTING OFFICER´s AUTHORITY (APR 2010)</td><td></td><td></td><td>F</td><td>CAR</td><td>N</td><td>Solicitation</td></tr>
<tr><td></td><td>K</td><td>1352.237-71</td><td>N</td><td>SECURITY PROCESSING REQUIREMENTS - LOW RISK CONTRACTS (APR 2010)</td><td></td><td></td><td>F</td><td>CAR</td><td>N</td><td>Solicitation</td></tr>
<tr><td></td><td>L</td><td>52.212-1</td><td>N</td><td>INSTRUCTIONS TO OFFERORS--COMMERCIAL ITEMS (APR 2014)</td><td></td><td></td><td>F</td><td>FAR</td><td>N</td><td>Solicitation</td></tr>
<tr><td></td><td>L</td><td>52.232-33</td><td>N</td><td>PAYMENT BY ELECTRONIC FUNDS TRANSFER--SYSTEM FOR AWARD MANAGEMENT (JUL 2013)</td><td></td><td></td><td>F</td><td>FAR</td><td>N</td><td>Solicitation</td></tr>
</table>
Displaying 1 - 7

➢ Click on Summary menu option

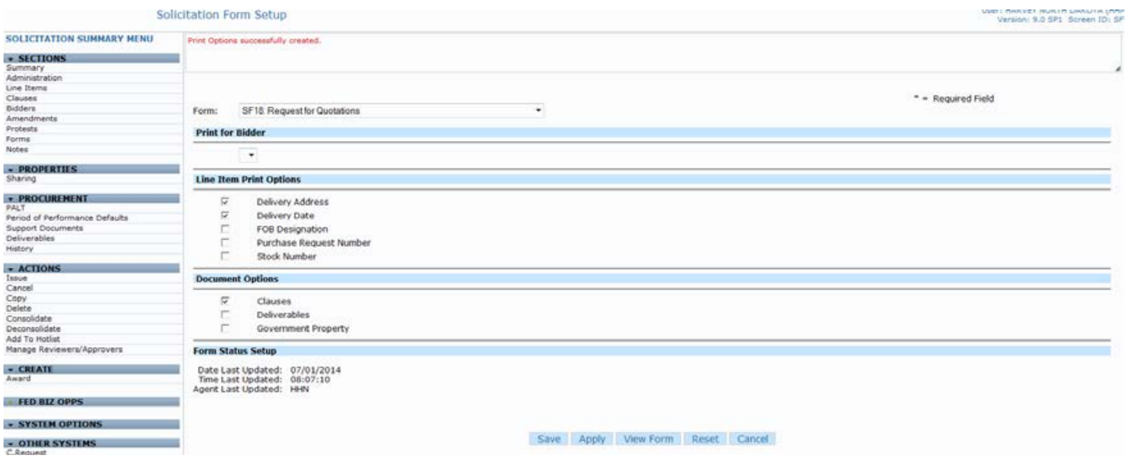
Note: If the clauses are not in the order you need them to be, you can use the Reorder Clauses menu option.</td></tr>
</table>

Step	Action
10	The **Solicitation Summary** screen appears:  ➢ Click on *Forms* menu option
11	The **Solicitation Form Setup** screen appears:  ➢ Click the checkboxes for those items you wish to show on the solicitation ➢ Click *Apply* ➢ Click *View Form*

Step	Action
11a	A window prompt will appear:  ➢ Click *OK*
11b	A new window will open, which you may need to maximize that will contain your Solicitation Form. Review the forum in its completion prior to using the Adobe icons to save or print your solicitation form.  ➢ Close out the new window using the red "X" icon in the upper right corner.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>11c</td><td>

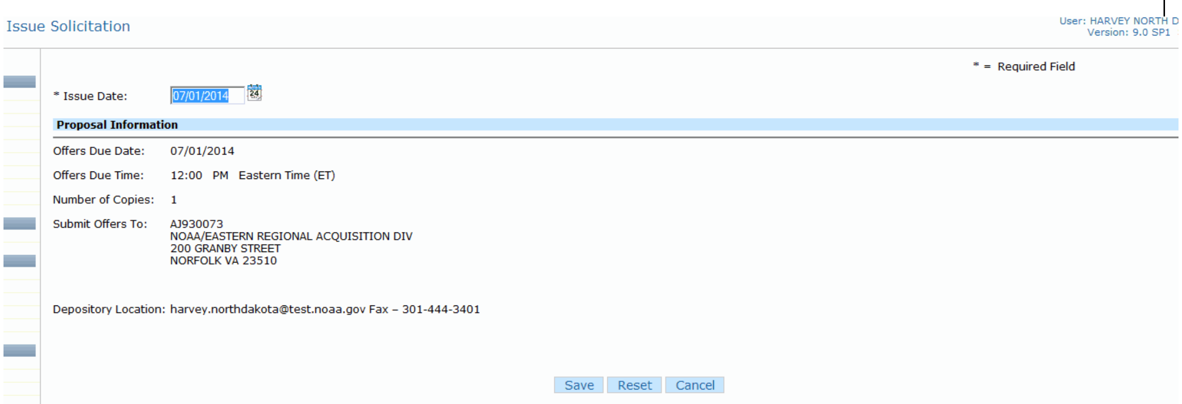
The **Solicitation Form Setup** page will show with our applied changes:



- ➢ Click on *Issue* menu option

</td></tr>
<tr><td>12</td><td>

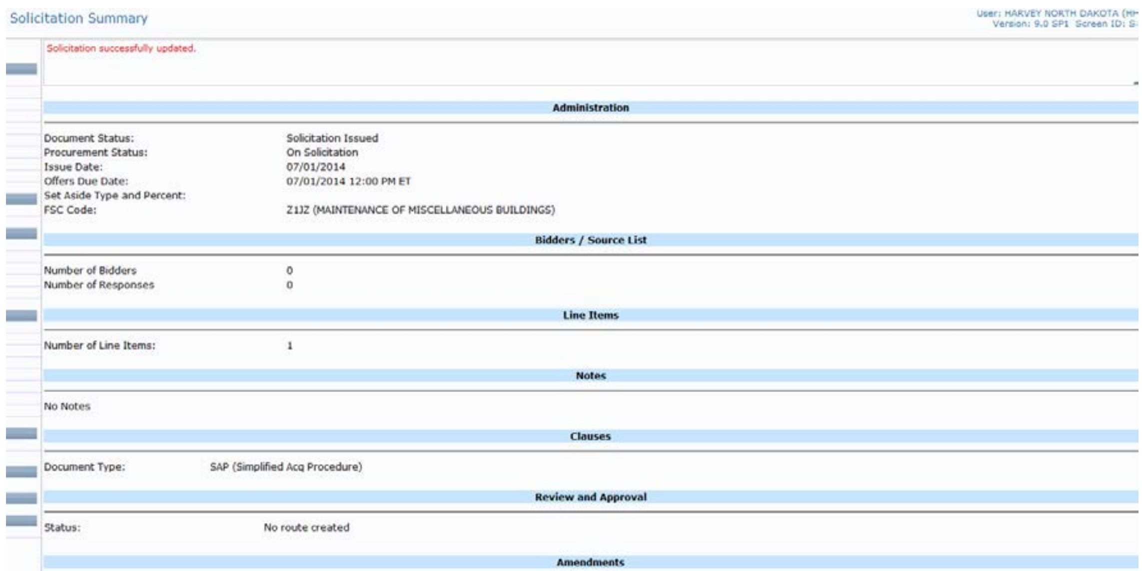
The **Issue Solicitation** screen appears:



- ➢ Either Accept the Issue Date or change it to a different one.
- ➢ Click *Save*

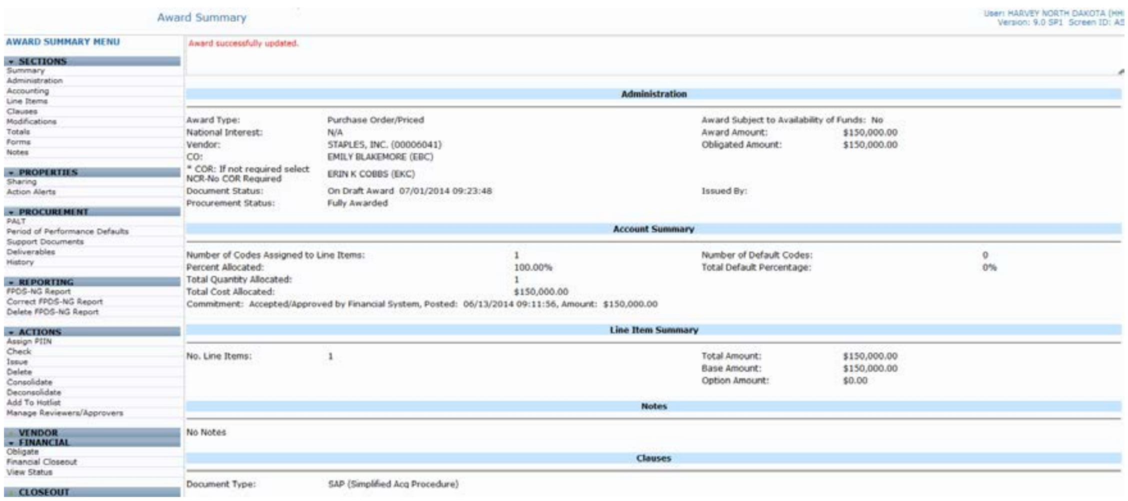
Note: *The Issue Date field will automatically populate with the current system date. This field can be changed. However, it should not be after the Offers Due Date.*

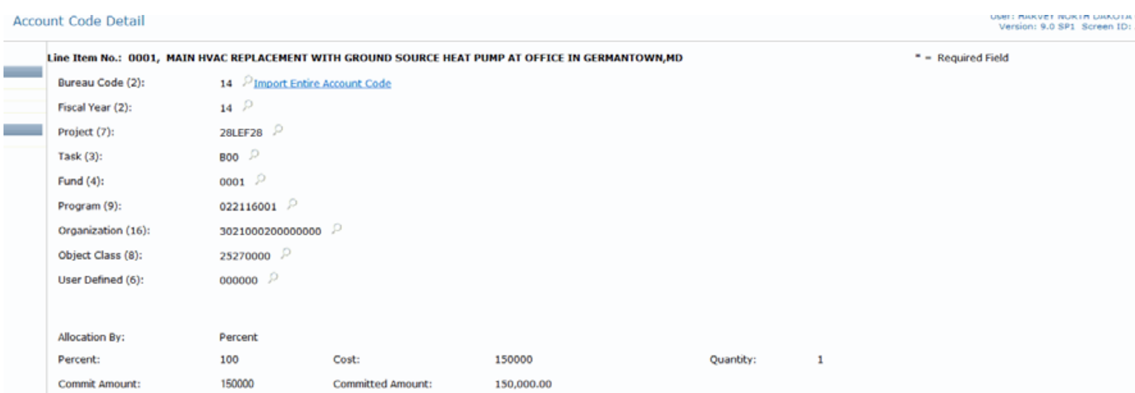
</td></tr>
</table>

Step	Action
13	The **Solicitation Summary** screen appears with the Document Status now stating Solicitation Issued:  Here you would click on *Home* in the Standard Menu Bar to work on another document as you would be issuing the solicitation and waiting for the bids to come in and selection of the vendor.
14	**For purposes of TRAINING ONLY**, we are going to assume we have received the bids and have selected a vendor. So from here, we are able to Create an Award. 
15	The **Award PIIN and Name** screen appears: ➢ Select the **Contract type** (i.e. Purchase Order Priced) ➢ Select the **Award Number** (i.e. EA-133F-1#-SE-????) ➢ Type in **Award Name** (i.e. HVAC {date}) ➢ Click *Save*

Step	Action
16	The **Award Administration** screen *Administration* tab appears for you to fill out the following fields: ➢ Enter **CO** (i.e. EBC) ➢ Change **Award Date** (Defaults to current date) ➢ Enter **Signed On Date** (i.e. 2 days from current date) ➢ Enter **Start Date** (i.e. 2 days from current date) ➢ Enter **Expiration Date** (i.e. 30 days from current date) ➢ Enter **Est. Ultimate Completion Date** (i.e. 30 days from current date) ➢ Enter **Vendor** (i.e. 00011805) ➢ Enter **Net Due** (i.e. 30) ➢ Enter **Business Size Indicator** (i.e. Small) ➢ Click *Apply* ➢ Click the *Properties* view tab
16a	The **Award Administration** screen *Properties* tab appears for you to fill out the following fields: ➢ Change **Delivery Date** (i.e. 4 days from current date) ➢ Change **FOB Designation** (if needed) ➢ Enter **Ship Via:** ➢ Enter **NAICS Code** (i.e. 333145) ➢ Enter **Reference Your** (i.e. Quote) ➢ Check **Contractor required to sign** checkbox ➢ Enter **# of copies to Issuing Office** (i.e. 3) ➢ Enter **# of Invoice Copies** (i.e. 3) ➢ Click *Apply* ➢ Click the *Addresses* view tab

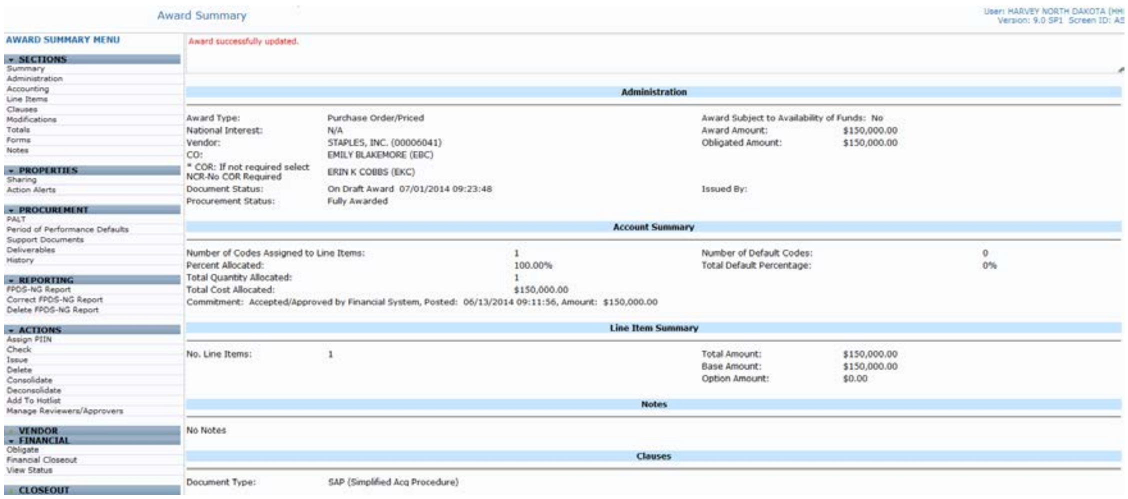
Step	Action
16b	The **Award Administration** screen *Addresses* tab appears for you to fill out the following fields: ➢ Enter **Issuing Office** code ➢ Enter **Administration Office** code ➢ Verify **Deliver To** code ➢ Verify **Payment Office** code ➢ Enter **Invoicing Address** code ➢ Enter **Place of Inspection** (if necessary) ➢ Enter **Place of Acceptance** (if necessary) ➢ Enter **Receiving Office** (if necessary) ➢ Click *Apply* ➢ Click the *Funding* view tab
16c	The **Award Administration** screen *Funding* tab appears: ➢ Enter **# of days** for Constructive Acceptance (i.e. 007) ➢ Check **Subject to Prompt Pay** checkbox ➢ Select **Payment Type** (i.e. EFT) ➢ **Treasury Account Symbol** defaults from PR. ➢ Click *Apply* ➢ Click the *Form Info* view tab
16d	The **Award Administration** screen *Form Info* tab appears: ➢ Choose **Form** (i.e. OF347 Order for Supplies/Services) ➢ Click *Save*

Step	Action
17	The **Award Summary** screen appears:  ➢ Click *Line Items* menu option
18	The **Award Line Item Management** screen appears: ➢ Click *Search*
19	The Line Items associated to the Award will appear: ➢ To review a line, click on the *Line #*
19a	The **Award Line Item Detail** screen *Administration* view tab will appear: ➢ Enter any **Cost** changes (if necessary) ➢ Select the **Contract Type** (i.e. Firm-Fixed Price)
	Notes: *It is here where you would change the dollar value if it the solicitation price was different than what the PR had. If it's less than what was brought over, you would just change the amount. If it's more, then you would have to make sure another PR was sent to you for the additional amount and consolidate to the award. Regardless, anytime you are changing the cost, you need to look at the accounting.*
19b	The **Award Line Item Detail** screen *Address* view tab will appear: ➢ Review the information on the screen, make any necessary changes ➢ Click on the *Receiving* view tab

Step	Action
19c	The **Award Line Item Detail** screen *Receiving* view tab will appear: ➢ Review the information on the screen, make any necessary changes ➢ Click *Apply* ➢ Click on *Accounting* menu option
20	The **Award Line Item Management** screen appears: ➢ The account codes associated to this line you're reviewing appears.
	Notes: *It's important to see how the accounting was put into the system, especially if you are changing costs on the line item. If the PR had the accounting as a percentage, if you changed costs, the new amount should automatically be updated here. If, it's not, that means the PR had it as cost and/or quantity. You will then need to edit the accounting to change it to the correct amount.*
20a	To view the pieces of the accounting, click on the *Account Code*  The screen will change to show you the individual pieces as well as how it was allocated: percent, cost or quantity. ➢ When finished reviewing, Click on *Line Items* menu option
20b	The **Award Line Item Management** screen will appear: ➢ Review the rest of the line items and accounting for each ➢ When finished Click on *Summary* menu option

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>21</td><td>

The **Award Summary** screen appears:



- Click on *Clauses* menu option

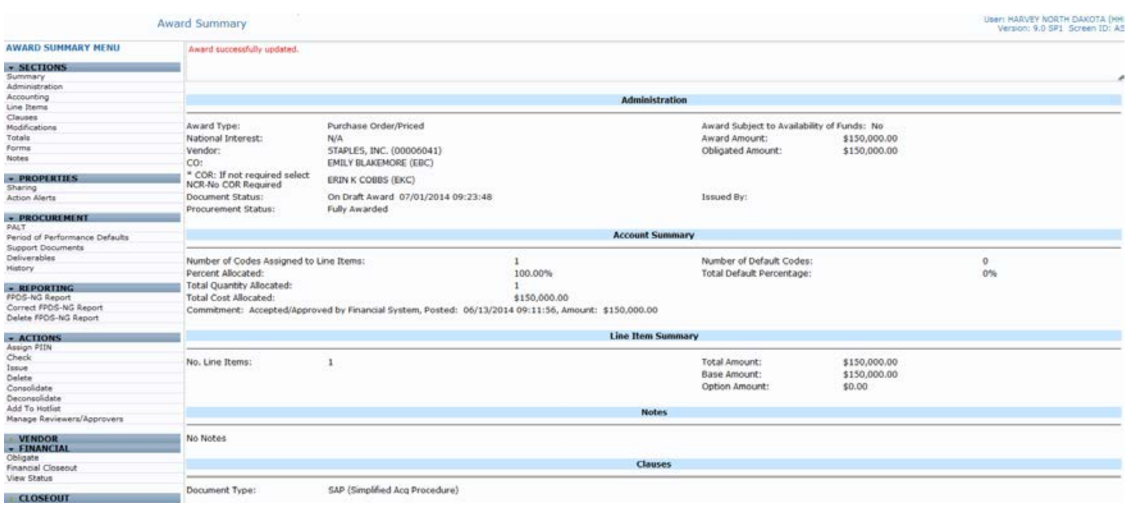
</td></tr>
<tr><td>22</td><td>

The **Award Clause Management** screen appears:

- Click *Search*
- Verify the Clauses came over from the solicitation
- Add additional clauses if needed
- When finished click *Save*

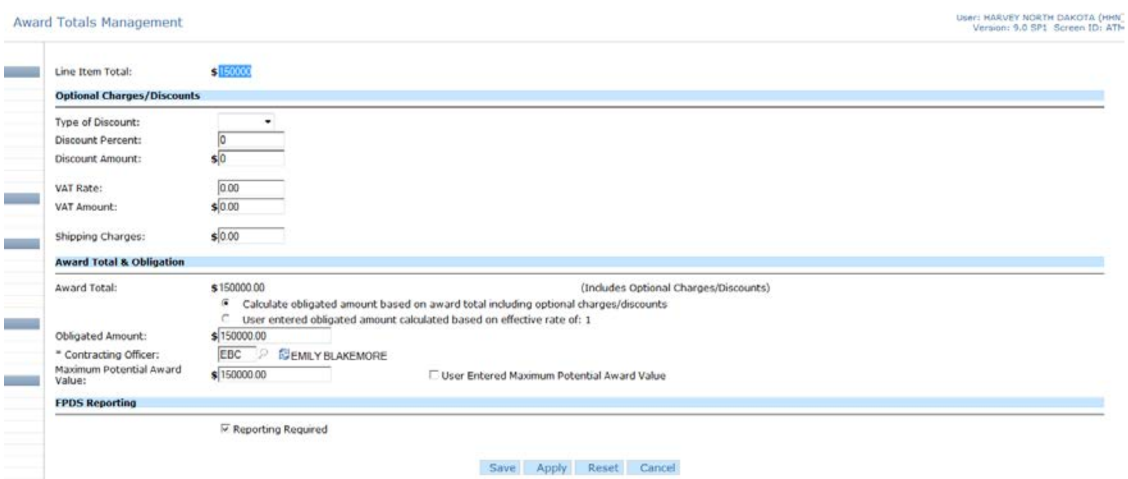
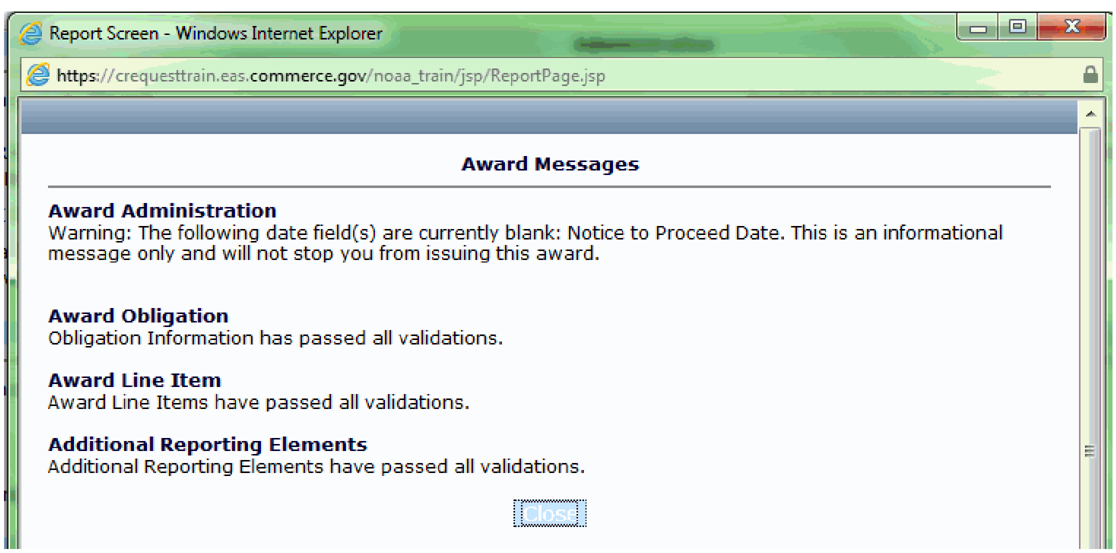
</td></tr>
<tr><td>23</td><td>

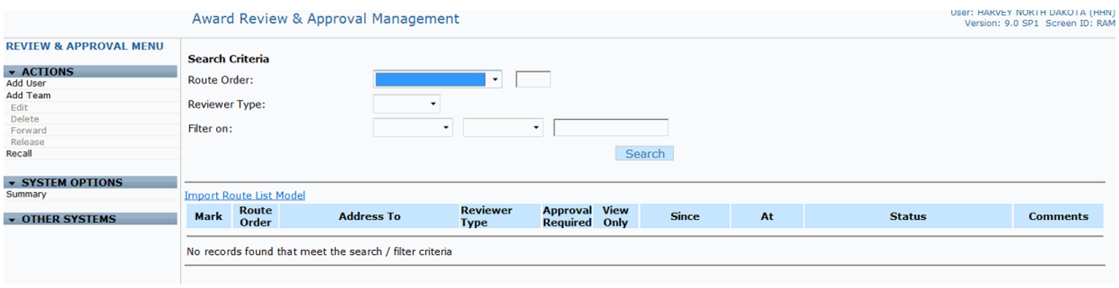
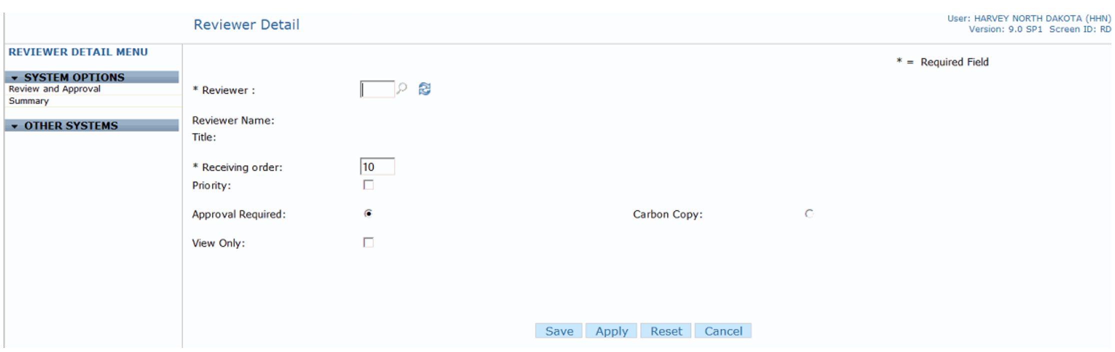
The **Award Summary** screen appears:

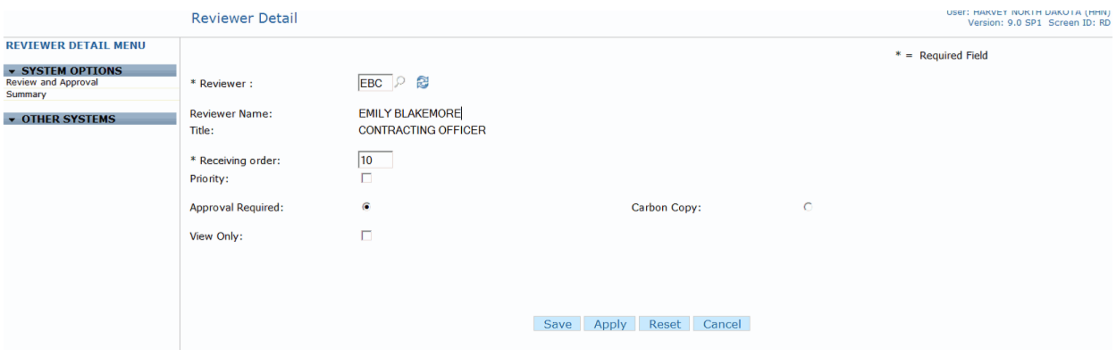
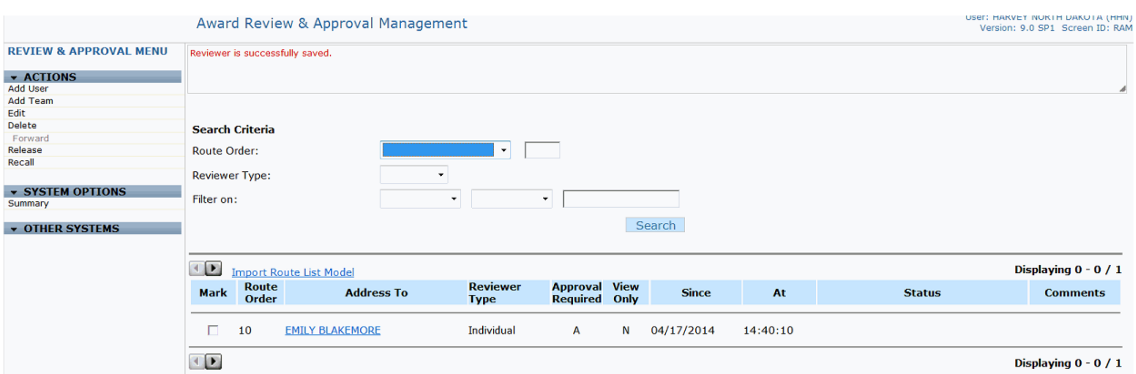


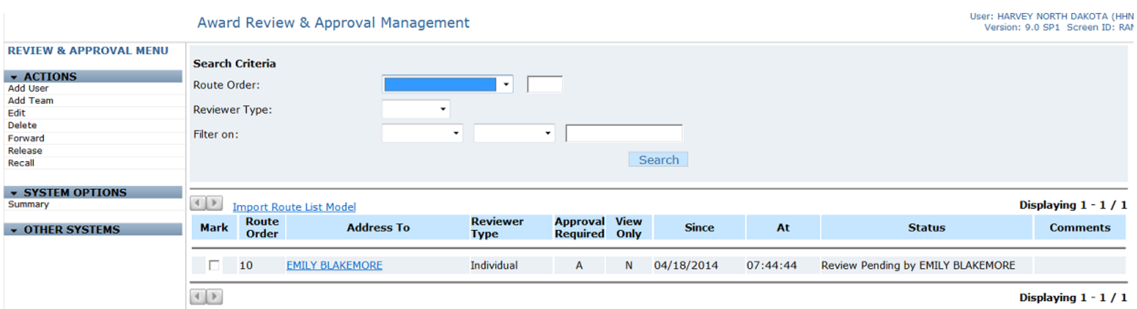
- Click on *Totals* menu option

</td></tr>
</table>

Step	Action
24	The **Award Totals Management** screen appears:  ➢ Validate the Award Totals ➢ **Uncheck** the FPDS Reporting **(for training purposes)** ➢ Click *Save*
25	The **Award Summary** screen appears: ➢ Click on the menu option *Check*
26	A pop-up window will appear:  ➢ Look to see if there are any errors, if not, then continue ➢ Click *Close*

Step	Action
	Notes: ✓ This will not show CFS obligation errors, just C.Suite. ✓ This process is good to perform prior to doing FPDS reporting. This is to help minimize the need to delete the FPDS report to fix errors. ✓ Warnings will still allow you to proceed.
27	The next step is to set up your routing list. To do that, Click on *Manage Reviewers/Approvers* menu option
28	The **Award Review & Approval Management** screen appears. It is here where you will set up the routing your document will go through.  ➢ Click on *Add User* menu option
28a	The **Reviewer Detail** screen appears. It is here where you will be entering your information pertaining on how your document will route through the system.  ➢ Enter the **Reviewer Code** (i.e. choose your Training ID Code – EBC) ➢ Leave the **Receiving Order** the number it is ➢ Make sure **Approval Required** radio button is selected

Step	Action
	Notes: ✓ *If entering the code, make sure to click the Refresh Icon to make sure you have the correct person entered in the field.* ✓ *The system automatically creates each "receiving order" number in increments of 10.* ✓ *Usually the approver is the Contracting Officer*
28b	 ➢ Click *Save*
28c	The **Award Review & Approval Management** screen appears with your approver showing.  ➢ Click on *Release* menu options

Step	Action
	Notes: ✓ *Code under Approval Requested:* *A = Approval Required* *C = Carbon Copy* ✓ *Codes under View Only:* *Y = Yes, Read Only Access* *N = No, Full Read/Write Access* ✓ *In order for the document to be sent to the people listed, Release must be clicked.*
28d	The **Award Review & Approval Management** screen will then show the date/time and status of the review.  At this point, following the flow chart, your approver must complete the process. ➢ Click **Home** from the *Standard Menu Bar*
29	The Approver would then go through the steps of Reviewing the Award, Reviewing/Approving the FPDS Report, Obligate the Award, Issue the Award and Approve it.

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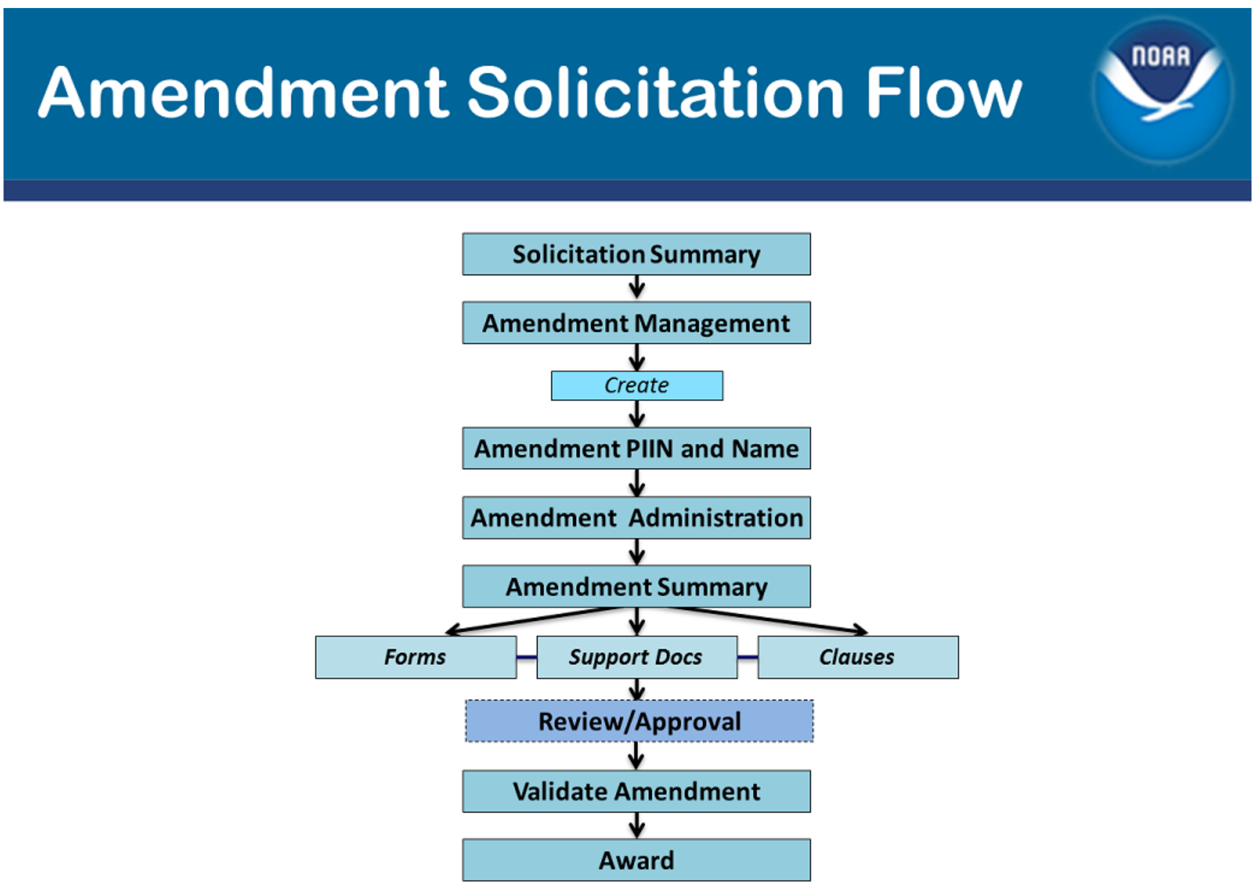
Exercise #6: Create an Amendment on a Solicitation

Objectives:
- Navigate through C.Award
- Create an amendment on a solicitation
- Follow flow chart

Instructions: Execute the following steps:

Amendments can happen for various reasons: Adding clauses required by law after issuing solicitation, extending the time to respond, correcting/amending statement of work, technical specifications, or you can amend to cancel the solicitation.

For this example, the date for the original solicitation is coming up and a few of the people bidding needed an additional day. You're going to follow the flow chart to amend the solicitation to update the return date of the bids.



<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From the Hotlist or the Worksheet, find your solicitation that needs to be amended and click to open it.</td></tr>
<tr><td>2</td><td>

The **Solicitation Summary** screen appears.

- Click on *Amendments* menu option

</td></tr>
<tr><td>3</td><td>

The **Amendment Management** screen appears.

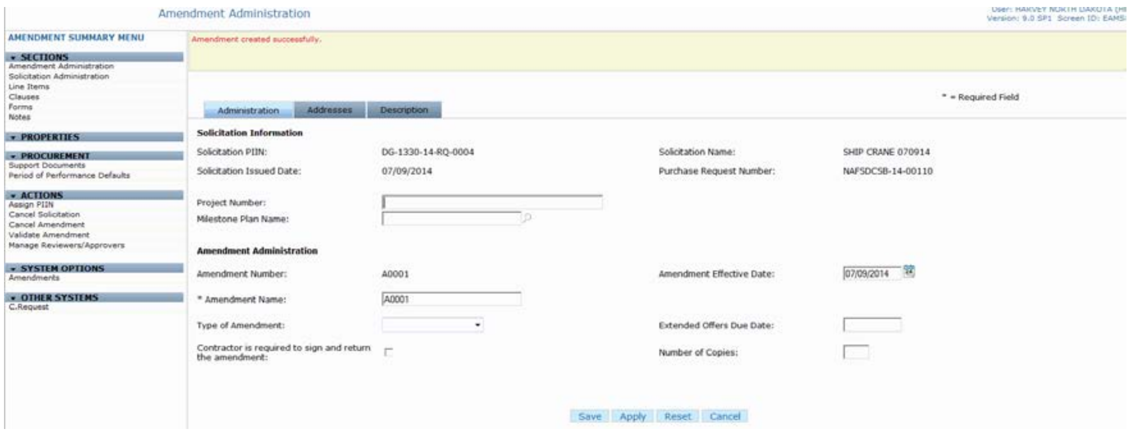
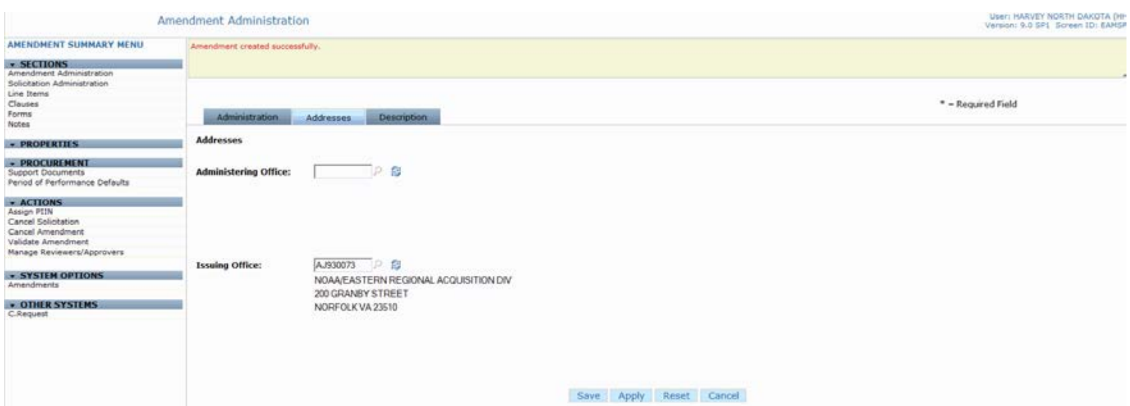
- Click on *Create* menu option

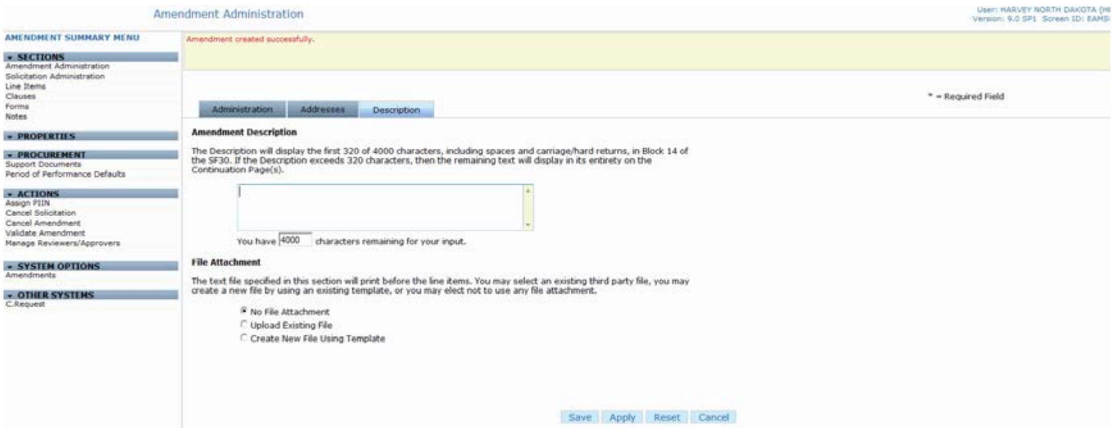
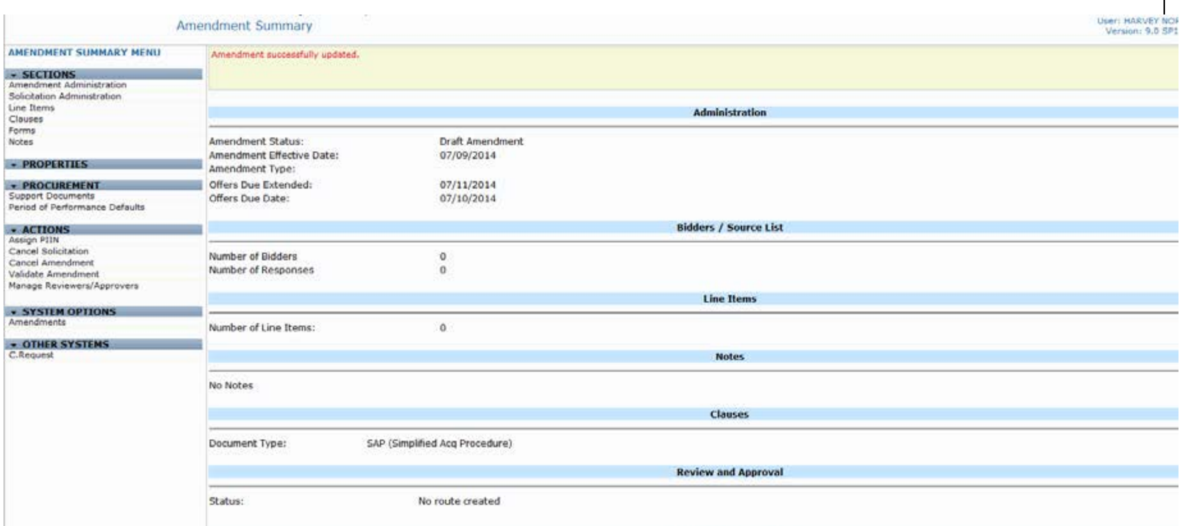
</td></tr>
<tr><td>4</td><td>

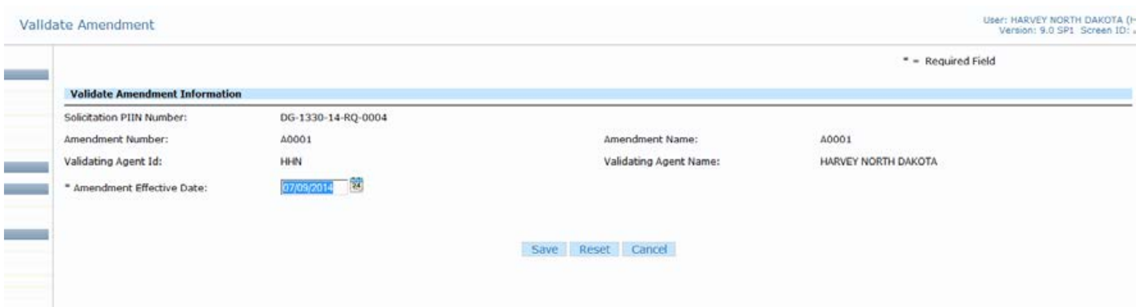
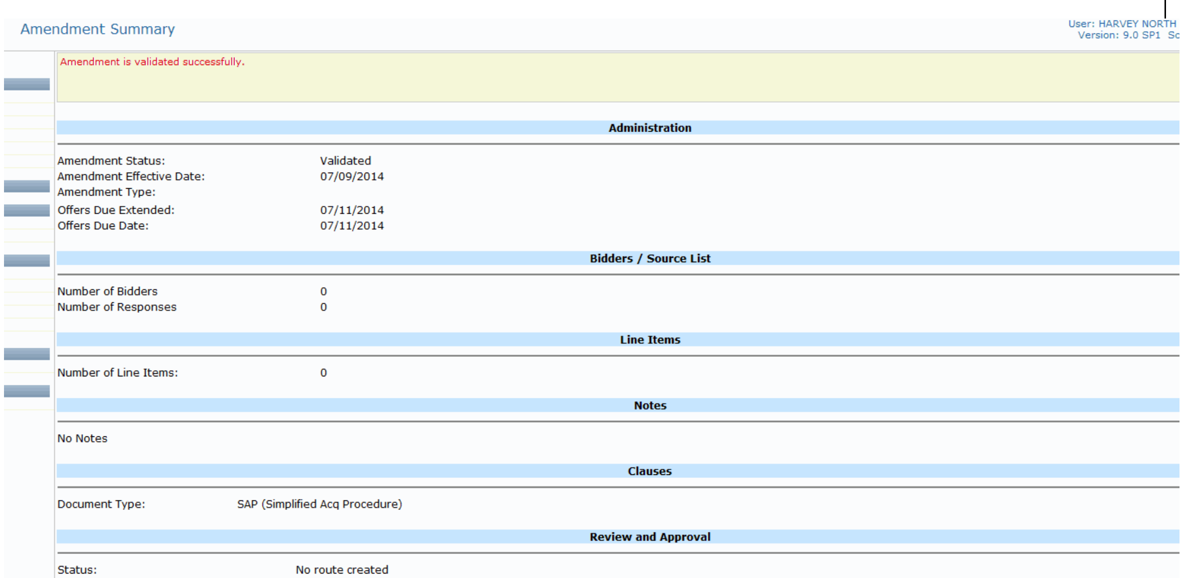
The **Amendment PIIN and Name** screen appears.

- Enter the **Document Number** (i.e. A0001 –Amendment 1, A0002 – Amendment 2)
- Enter the **Document Name** (if you want it to be different from the Number)
- Click *Save*

</td></tr>
</table>

Step	Action
	Note: *The Document Name will automatically populate with the Document Number.*
5	The **Amendment Administration** screen appears on the *Administration* view tab.  ➢ Enter the **Type of Amendment** (i.e. Offers Due Extended) ➢ **Check** whether contractor is required to sign and return the amendment ➢ Enter the **number of Copies** (i.e. 1) ➢ Enter the **Extended Offers Due Date** (i.e. the next day) ➢ Click on *Addresses* view tab
6	The **Amendment Administration** screen appears on the *Addresses* view tab.  ➢ Add/Change any **Office Codes**. (i.e. copy issuing address and add it to Administering Office.) ➢ Click on *Description* view tab

Step	Action
7	The **Amendment Administration** screen appears on the *Description* view tab.  ➢ Enter the description if needed ➢ Click *Save*
8	The **Amendment Summary** screen appears.  ➢ Click on *Validate* menu option

Step	Action
9	The **Validate Amendment** screen appears.  ➢ Verify the information is correct on screen ➢ Change the **Amendment Effective Date** if needed (i.e. it will default to current date) ➢ Click *Save*
10	The **Amendment Summary** screen appears. 
11	➢ Click on *Forms* menu option ➢ Follow the procedures for printing out the amendment and send to the bidding companies. ➢ When bidding is complete, come back to this solicitation and follow the process for creating an award.

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Exercise #7: Consolidate PRs before Awarding

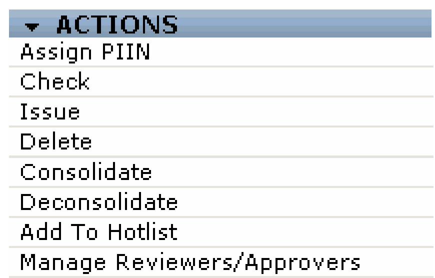
Objectives:
- Navigate through C.Award
- Understand how to consolidate a PR for additional funds on an award

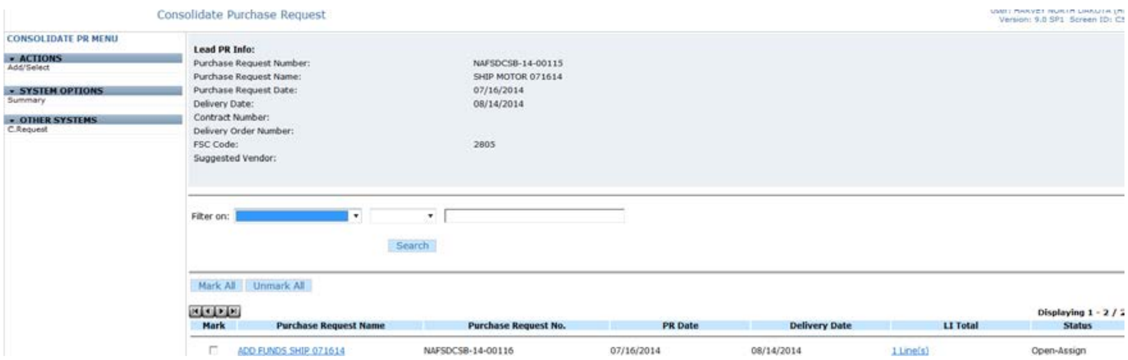
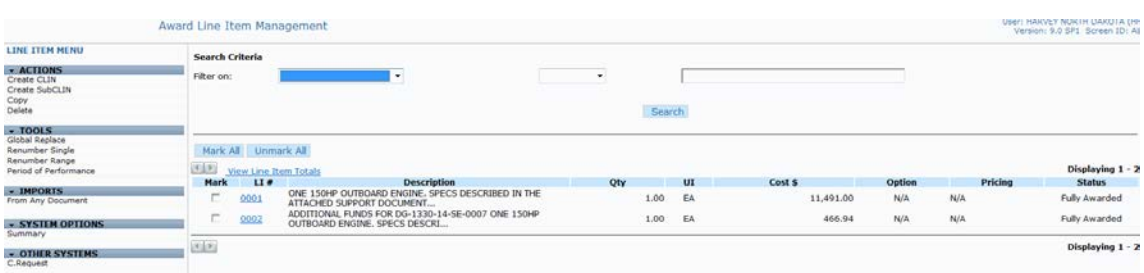
Instructions: Execute the following steps:

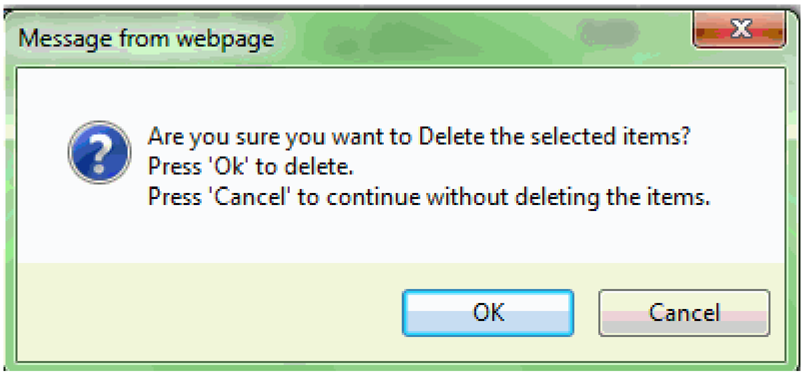
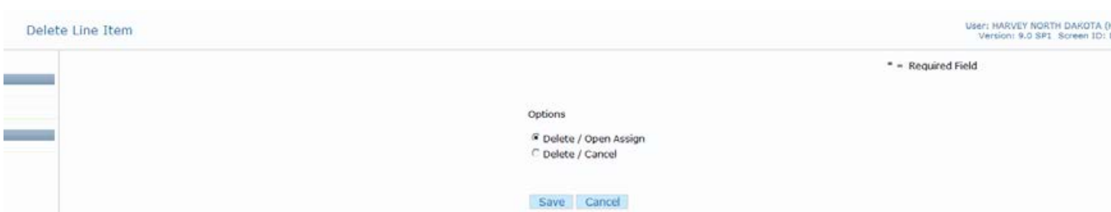
A solicitation has been sent out and come back with the lowest bid of being approximately $500 more than what the original PR had. You speak to the office requesting the product and they are fine paying the extra money. So you ask that they send you a new purchase request for the additional funds.

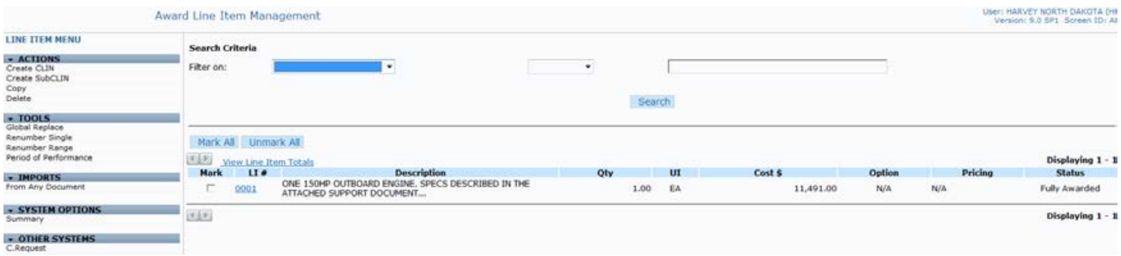
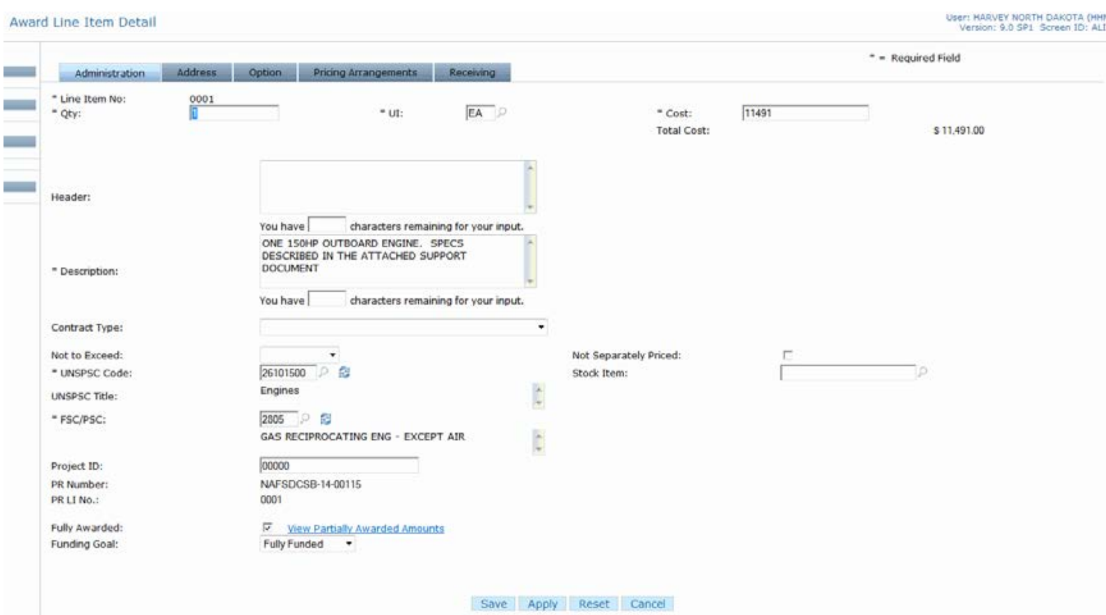
<table>
<tr><th>Step</th><th colspan="2">Action</th></tr>
<tr><td>1</td><td colspan="2">You receive the PR for the additional funds. Do the following:

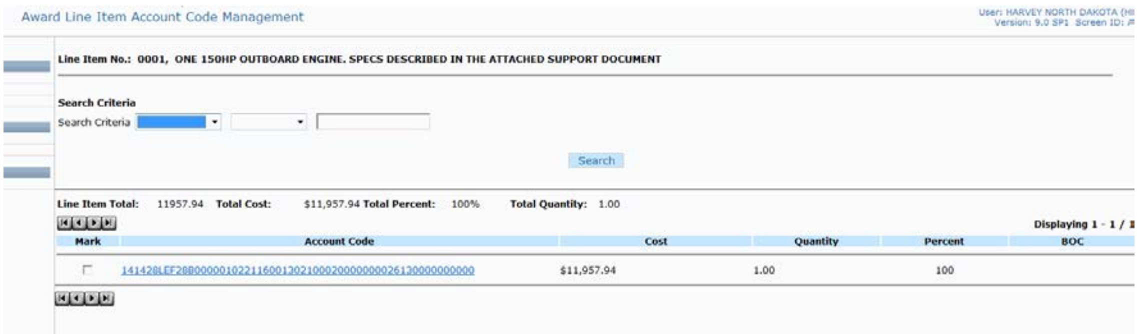
➢ Create the Award from the Solicitation
➢ Fill out all part of the Administration screen</td></tr>
<tr><td>2</td><td>On the Award Summary screen:

➢ Click on Consolidate menu option</td><td>
</td></tr>
</table>

Step	Action
3	The **Consolidate Purchase Request** screen appears:  All Open PRs will show on this screen. Once you find the one you want do the following: ➢ Check the checkbox in front of the PR you want to consolidate ➢ Click on *Add/Select* menu options The following message will show: PR ADD FUNDS SHIP 071614 successfully consolidated. ➢ Click on *Summary* menu options
4	The **Award Summary** screen appears. ➢ Click on *Line Items* menu options
5	The **Award Line Item Management** screen appears. ➢ Click on *Search*
6	The Original and consolidated lines appear: 

Step	Action
	Note: *The system will automatically re-number the new lines being consolidated onto the lead PR.*
7	➢ Check the **Checkbox** for the “new” CLIN (i.e. 0002) ➢ Click on *Delete* menu options A pop up window will appear:  ➢ Click *OK*
8	The **Delete Options** screen will appear:  ➢ Select **Delete/Cancel** ➢ Click *Save*

Step	Action
9	The **Award Line Management** screen will appear and the original line will now be showing.  ➢ Click on the *Line Number* to edit (i.e. 0001)
10	The **Award Line Detail** screen appears.  ➢ Edit the **Cost** to match the original and consolidated line costs (i.e. 11,957.94) ➢ Click *Apply* ➢ Click on *Accounting* menu options

Step	Action
11	The **Award Line Item Account Code Management** screen appears.  ➢ Verify the accounting costs have changed ➢ Click on *Summary* menu options
12	You would then finish the awarding process: ➢ Clauses (if needed) ➢ Totals ➢ Check ➢ FPDS Reporting ➢ Manage Reviewers & Approvers ➢ Release it to the CO to finish the process.

Consolidations should be done at the PR level or the Award level. If doing a modification to an award, then you should consolidate at the PR level PRIOR to doing the modification.

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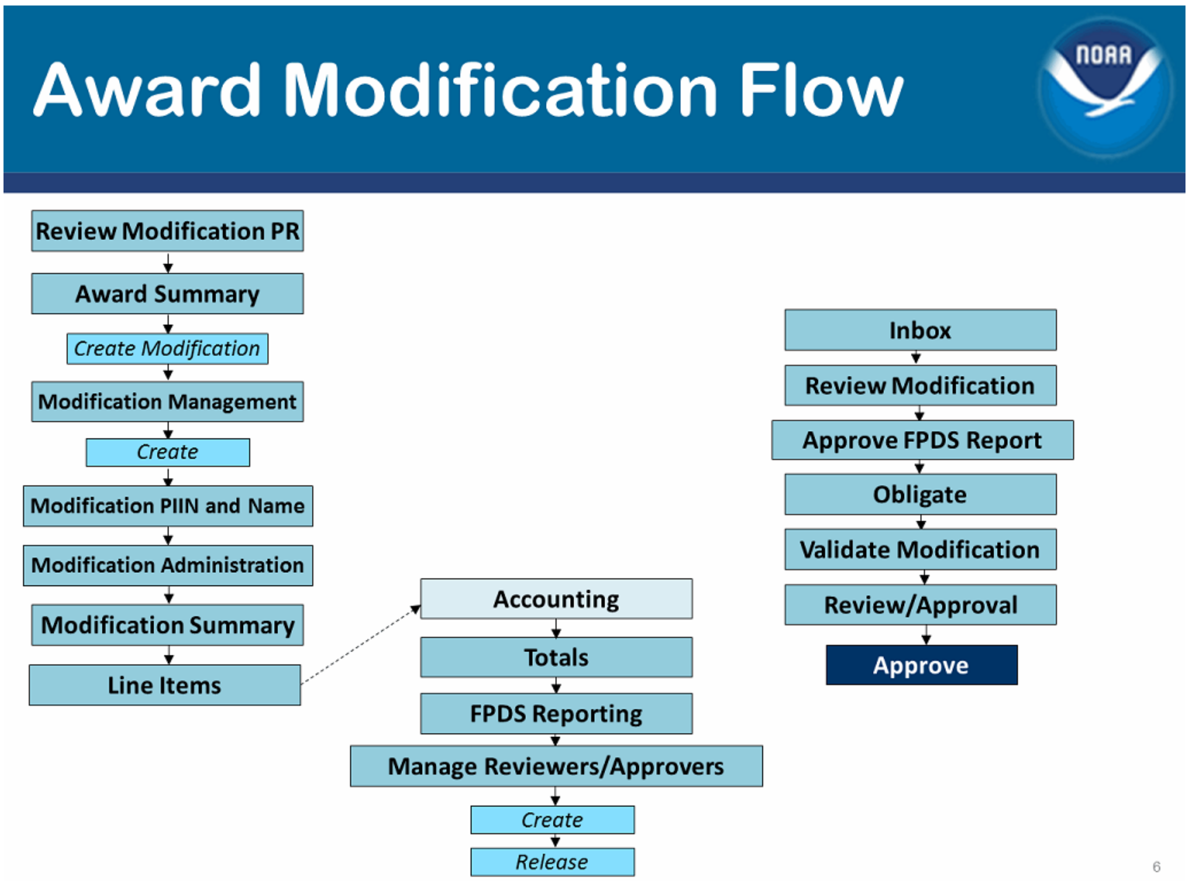
Exercise #8: Create an Award Modification – De-obligation

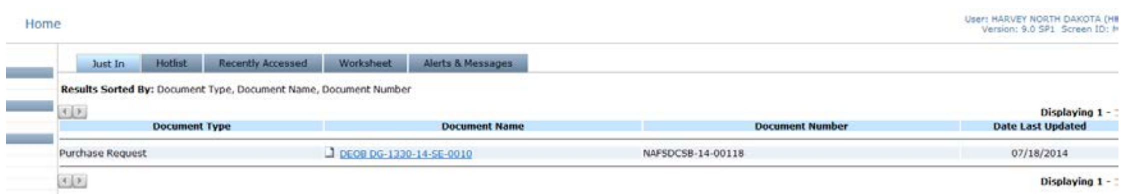
Objectives:

- Navigate through C.Award
- Understand how to do an award modification to de-obligate remaining funds
- Follow the flow chart

Instructions: Execute the following steps:

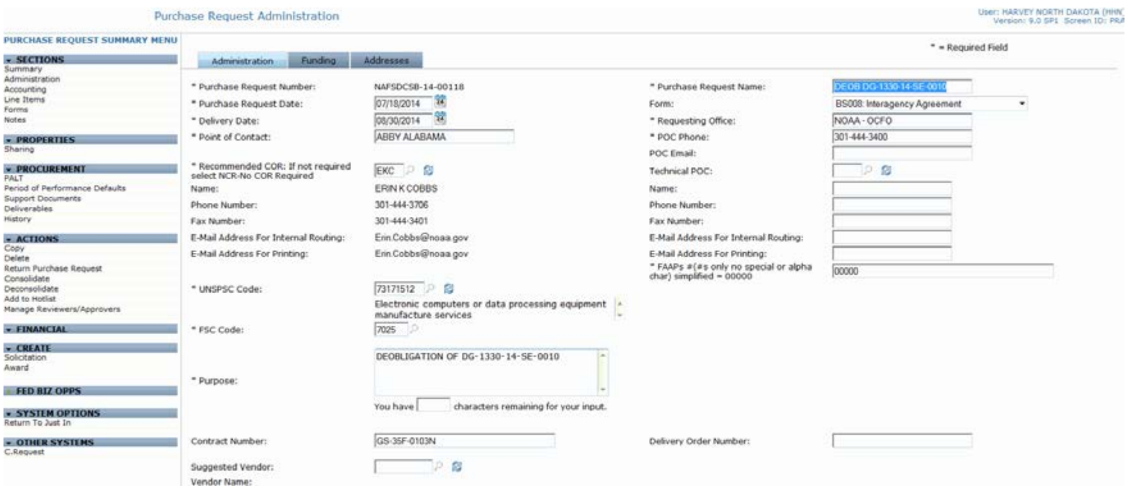


You receive a zero dollar PR. It appears that this is de-obligation. Follow the below steps to create a modification to an award to de-obligate the remaining funds.

Step	Action
1	Log into C.Award. You should see on the Home screen, *Just In* tab, the new PR for De-obligating.  ➢ Click on the *Document Name*
2	The **Purchase Request Summary** screen appears:  ➢ Click on *Administration* menu option

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>

The **Purchase Request Administration** screen appears.



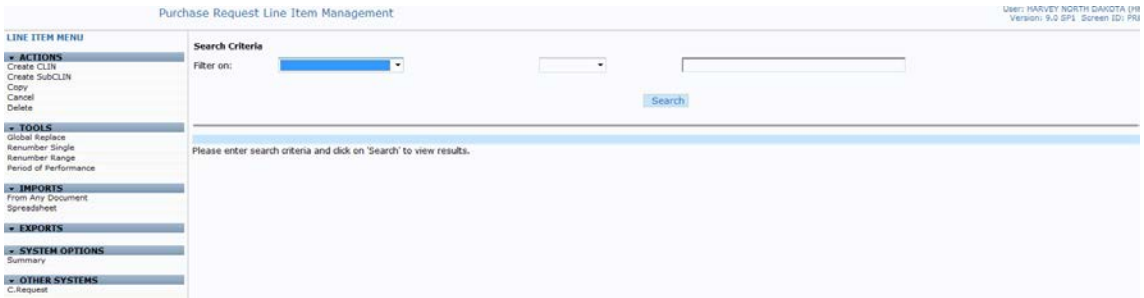
- Review the information on this screen and every tab. Make changes where you need to (i.e. UNSPSC Code).
- Click *Save*

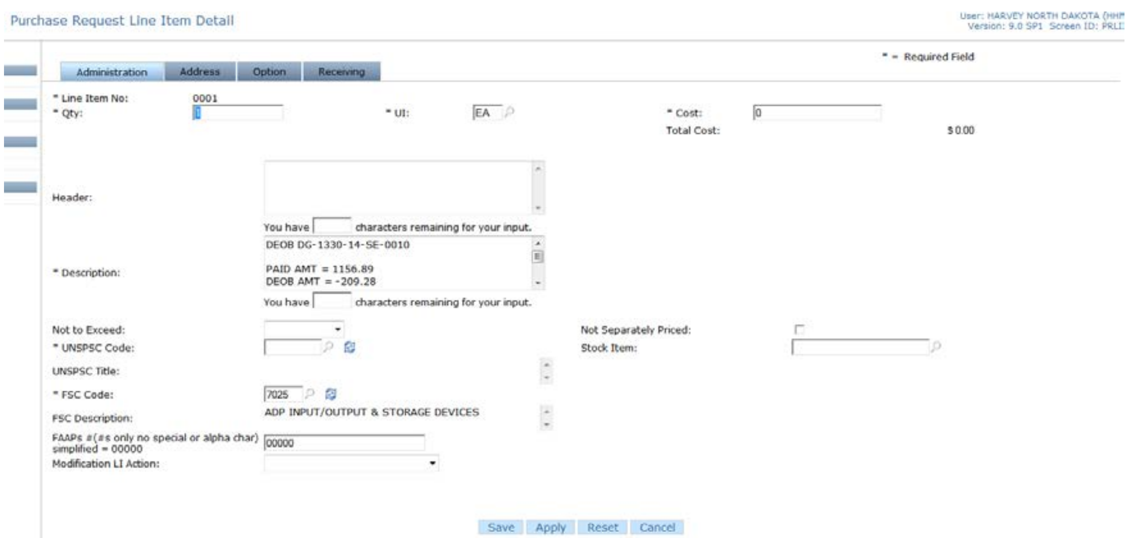
</td></tr>
<tr><td>4</td><td>

From the **Purchase Request Summary** screen:

- Click *Line Items* menu option

</td></tr>
</table>

Step	Action
5	The **Purchase Request Line Item Management** screen appears.  ➢ Click *Search*  ➢ Line items appear ➢ Click on the *Line Item*

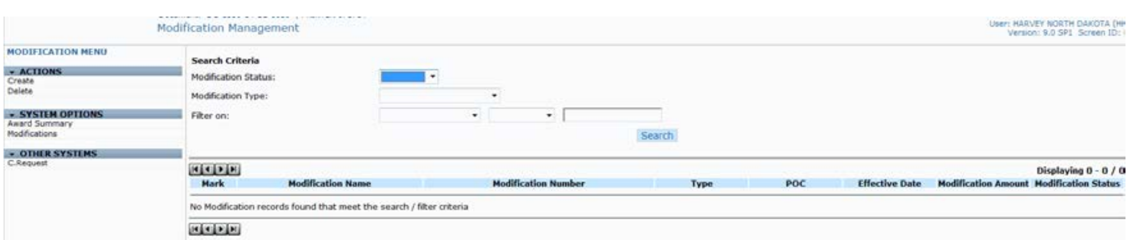
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>The Purchase Request Line Item Detail screen appears.


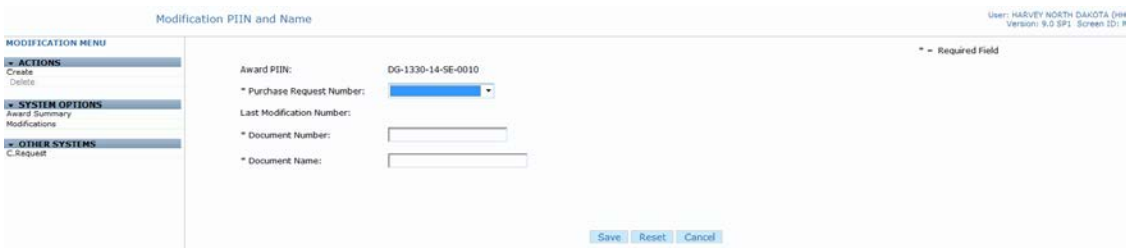
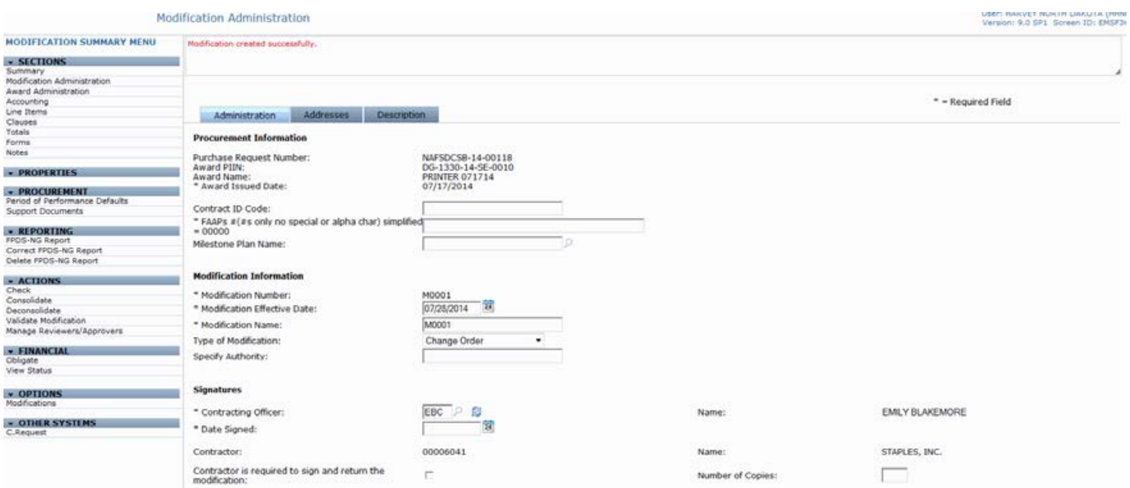
➢ Review the information on this screen and every tab. Make changes where you need to (i.e. Modification LI Action).
➢ Make note of the de-obligation amount and the paid amount.
➢ Open the Receiving Tab
➢ Click Save</td></tr>
<tr><td>7</td><td>The Purchase Request Line Item Management screen appears with a message that the line has been successfully updated.

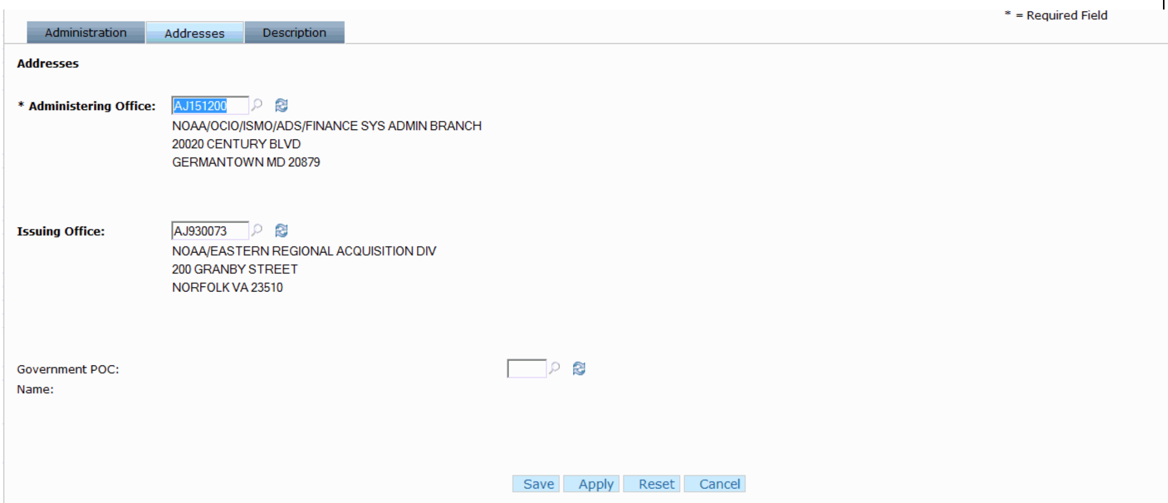
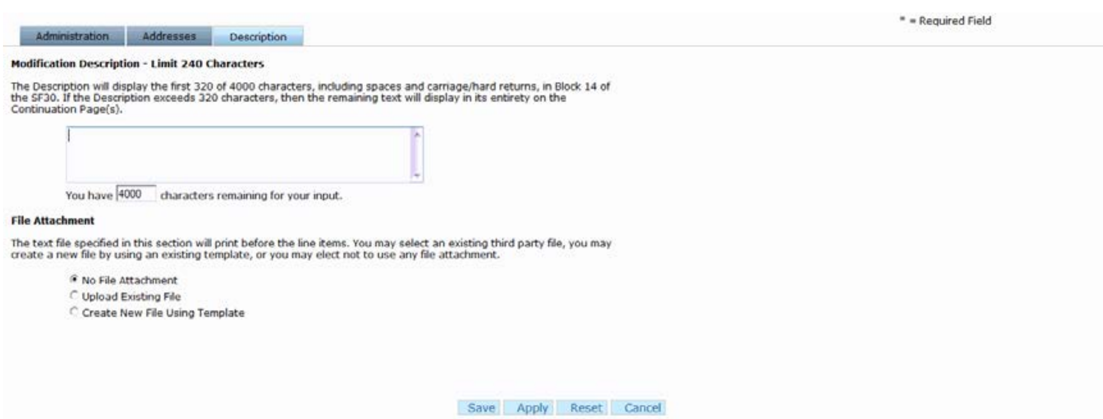
➢ Review any other line items
➢ Click Summary menu option</td></tr>
<tr><td>8</td><td>The Purchase Request Summary screen appears.

➢ Save any support documents
➢ Make note of the PR #
➢ Click Home</td></tr>
<tr><td>9</td><td>Open up the award that needs to be de-obligated. This can be done from the following view tabs:

➢ Hotlist
➢ Recently Accessed
➢ Worksheet</td></tr>
</table>

Step	Action
10	The **Award Summary** screen appears:  ➢ Verify you have the correct award ➢ Click on *Modifications* menu option
11	The **Modification Management** screen appears:  ➢ Click on *Create* menu option

Step	Action
12	The **Modification PIIN and Name** screen appears:  ➢ Using the drop-down listing, choose the **PR#** ➢ Enter the **Document Number** (i.e. M0001) ➢ Change the **Document Name** if needed ➢ Click *Save*
13	The **Modification Administration** screen appears:  ➢ Enter the **FAAPs#** (i.e. 00000) ➢ Enter the **Date Signed** (i.e. current date) ➢ Enter **Specify Authority** ➢ Enter **Contractor is required to sign and return the modification** ➢ Enter **Nbr of Copies** ➢ Enter **Novation** ➢ Click the *Address* view tab

Step	Action
13a	The *Address* view tab appears:  ➢ Enter **Government POC** ➢ Click the *refresh* icon ➢ Click the *Description* view tab
13b	The *Description* view tab appears:  ➢ Enter a **description** (i.e. M0001 IS HEREBY ISSUED TO DE-OBLIGATE REMAINING FUNDS ON THE AWARD) ➢ Click *Save*

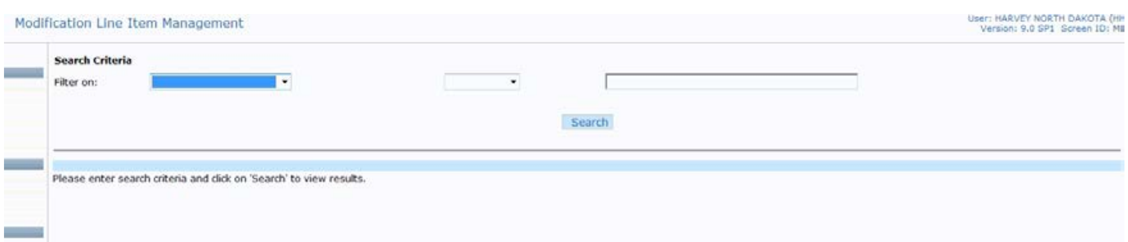
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>14</td><td>

The **Modification Summary** screen appears with a message that the modification was successfully updated.

➢ Click on *Line Items* menu option

</td></tr>
<tr><td>15</td><td>

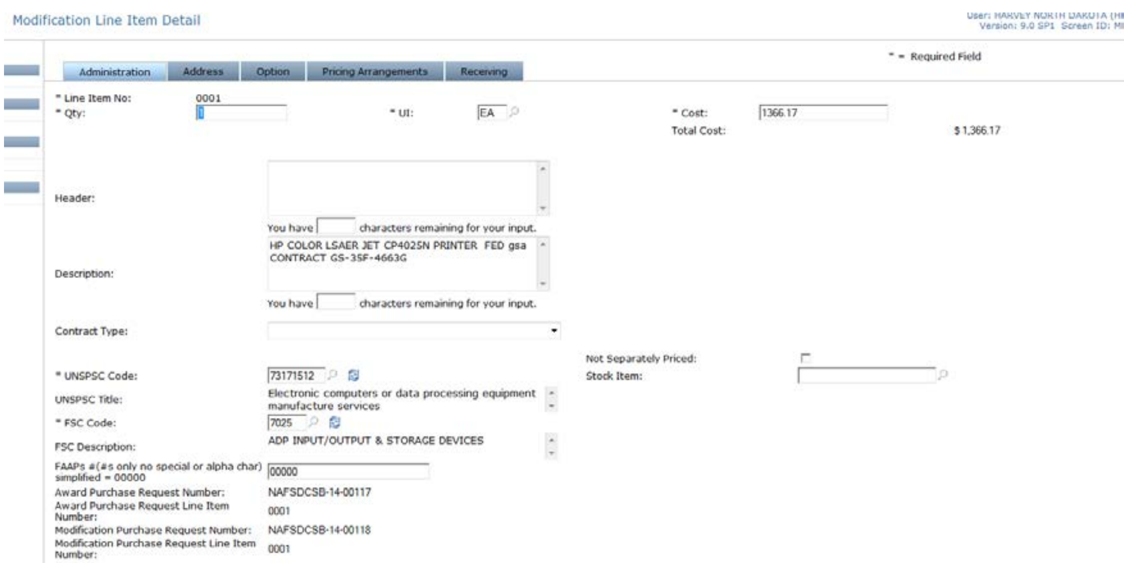
The **Modification Line Item Management** screen appears:



➢ Click *Search*

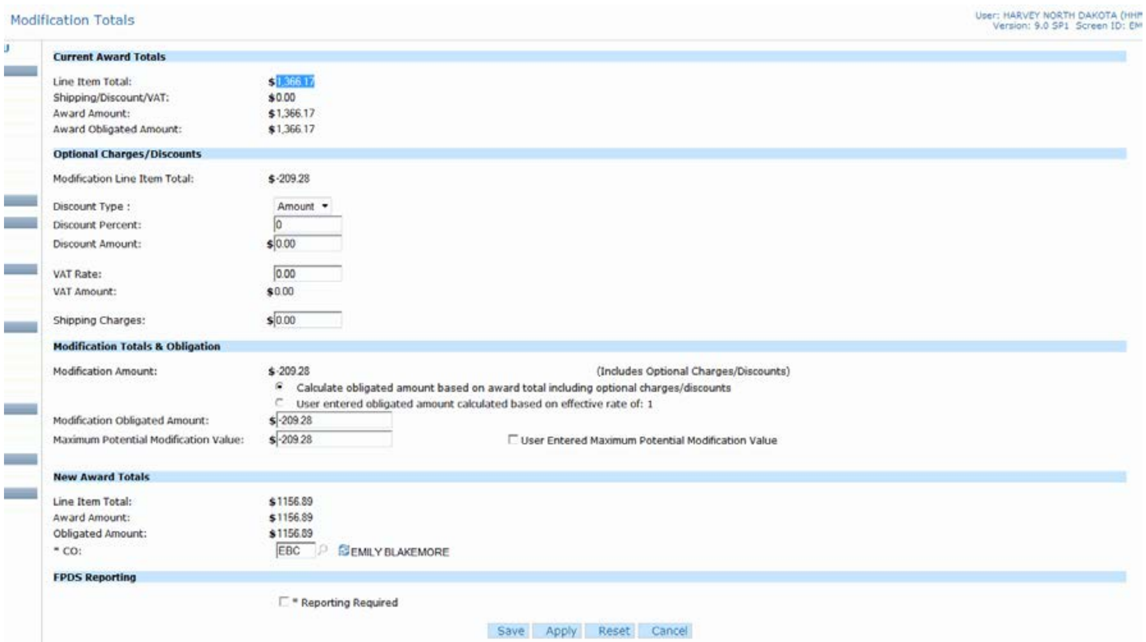
➢ Click the *Line Item*

</td></tr>
</table>

Step	Action
16	The **Modification Line Item Detail** appears with the original award line item displayed.  ➢ Change the **Cost** to the amount paid (i.e. 1156.89) ➢ Click *Apply* ➢ Click on *Accounting* menu option
17	The **Modification Account Code Management** screen appears:  ➢ Verify the Total Cost changed ➢ If the Total Cost didn't change, edit the accounting to reflect the new cost and save ➢ Click on *Summary* menu option
	Note: *If the Total Cost did not change to the new Line Item Cost then more than likely the accounting was set up with something other than percent.*
18	The **Modification Summary** screen appears: ➢ Click on *Totals* menu option

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>19</td><td>

The **Modification Totals** screen appears:



- Verify the **Modification Line Item Total** equals the de-obligation amount (i.e. 209.28)
- Click on *Manage Reviewers/Approvers* menu option

</td></tr>
<tr><td></td><td>

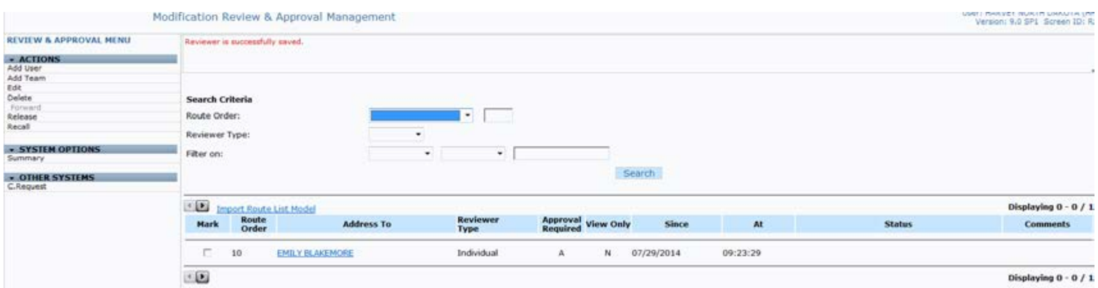
Note: *For training purposes the FPDS Reporting checkbox is unchecked. The next step would be to update the FPDS report, but because training does not have an FPDS instance, we're going to skip that part.*

</td></tr>
<tr><td>20</td><td>

The **Modification Review & Approval Management** screen appears:

- Click on *Add User* menu option

</td></tr>
</table>

Step	Action
21	The **Reviewer Detail** screen appears:  ➤ Enter the **Reviewer** (i.e. EBC) ➤ Click *Save*
22	The **Modification Review & Approval Management** screen appears with the approver listed:  ➤ Click on *Release* menu options  The status should now say Review Pending ➤ Click **Home**
	Note: *At this point as a CS, the job is done. The CO will then review the modification and either disapprove or approve it.*

Exercise #9: Create an Award Modification – Adding Money & Changing ACCS

Objectives:

- Navigate through C.Award
- Create an Award Modification
- Understand what the PR needs to contain
- Learn how to modify accounting
- Follow flow chart

Instructions: Execute the following steps:

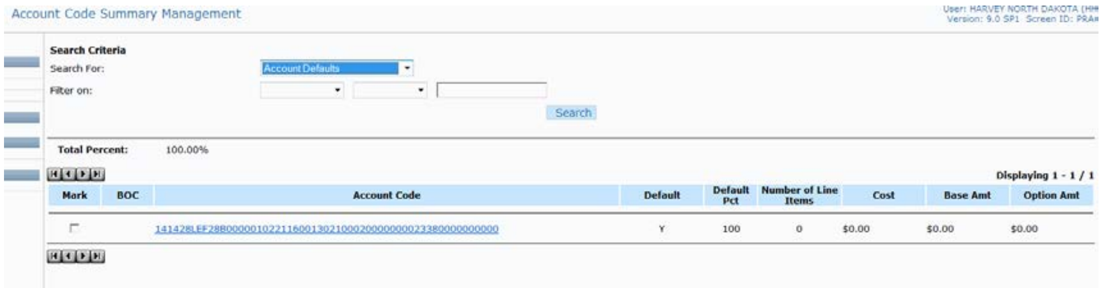
An Award that has already been obligated and issued needs a modification. This modification is changing the ACCS associated to the original lines and adds an additional line that will add money to the award.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From your Just In view tab

➢ Click the PR#</td></tr>
<tr><td>2</td><td>The Purchase Request Summary screen appears:

➢ Click on Accounting menu option</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>
The **Account Code Summary Management** screen appears:



- Take note of the accounting used
- Click on *Summary* menu option
</td></tr>
<tr><td>4</td><td>
The **Purchase Request Summary** screen appears:

- Click on *Line Items* menu option
</td></tr>
<tr><td>5</td><td>
The **Purchase Request Line Item Management** screen appears:

- Click *Search*
- Click on *Line Item*
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>

The **Purchase Request Line Item Detail** screen appears:

- Review the Administration Tab
- Verify the Modification LI Action field (i.e. Change Award Line Item)
- Make any necessary changes
- Click *Apply*
- Click on *Accounting* menu option

</td></tr>
<tr><td>7</td><td>

The **Account Code Management** screen appears:

- Take note of the accounting *(should be the new accounting)*
- Click on *Line Items* menu option

</td></tr>
<tr><td>8</td><td>

The **Purchase Request Line Item Management** screen appears:

- Review the rest of the line items
- Click on *Summary* menu option

</td></tr>
<tr><td>9</td><td>

The **Purchase Request Summary** screen appears:

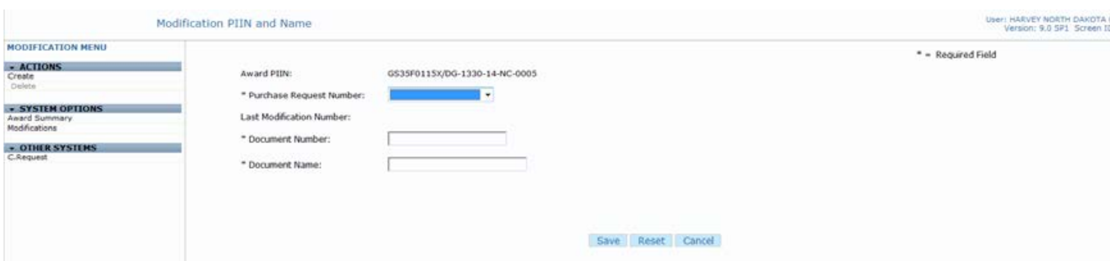
- Click on **Home**

</td></tr>
<tr><td>10</td><td>

From the **Home** screen open up the award using one of the following view tabs:

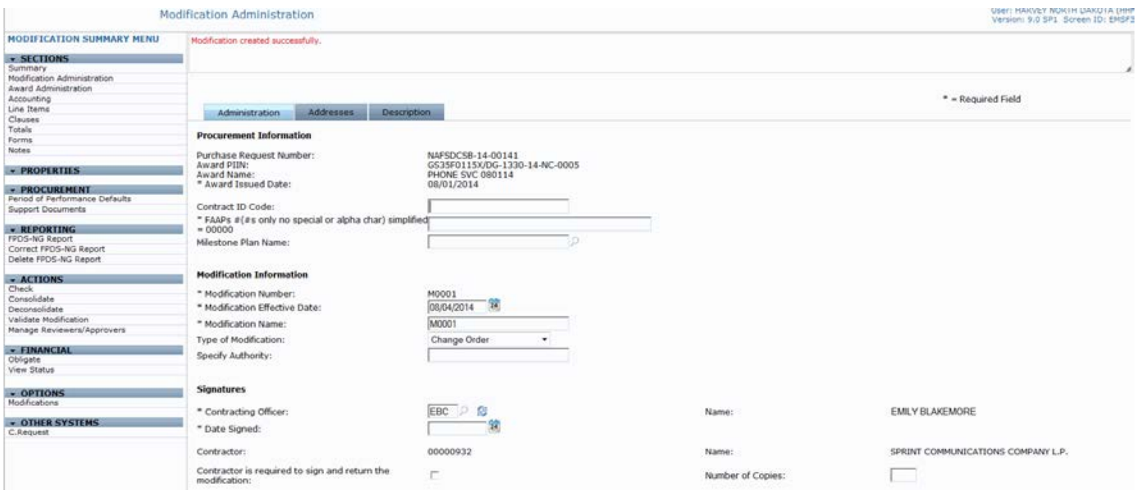
- Hotlist
- Recently Accessed
- Worksheet

</td></tr>
</table>

Step	Action
11	From the **Award Summary** screen: ➢ Click on *Modifications* menu option
12	The **Modification Management** screen appears:  ➢ Click on *Create* menu option
13	The **Modification PIIN and Name** screen appears:  ➢ Using the drop-down listing choose the **PR #** ➢ Enter the **Document Number** (i.e M0001 – 1st modification) ➢ Enter the **Document Name** (should automatically populate to the Document Number) ➢ Click *Save*

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>14</td><td>

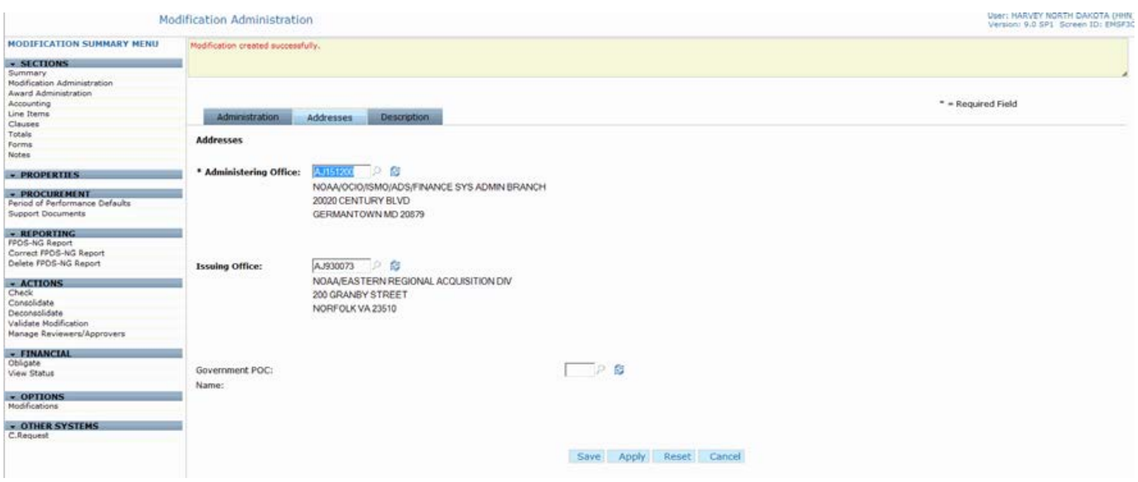
The **Modification Administration** screen *Administration* view tab appears:



- Enter **FAAPS#** (i.e. 00000)
- Enter the **Date Signed** (i.e current date)
- Click *Addresses* view tab

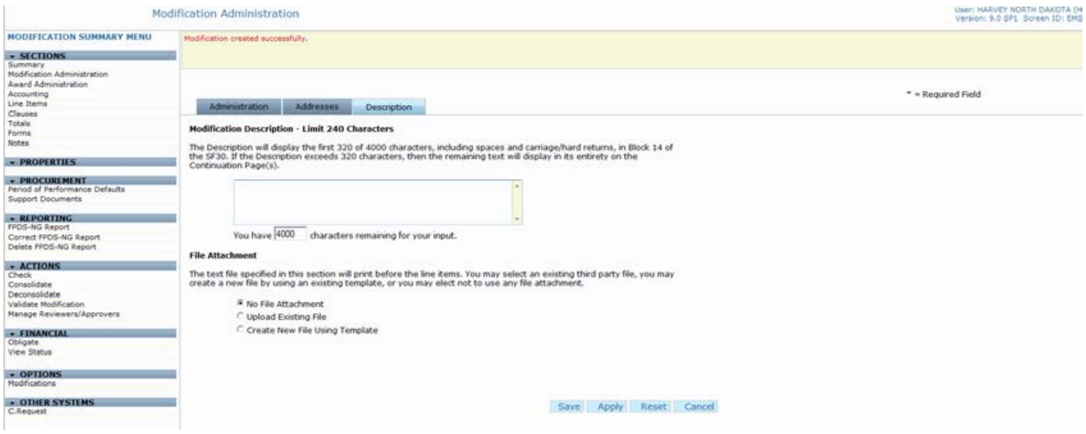
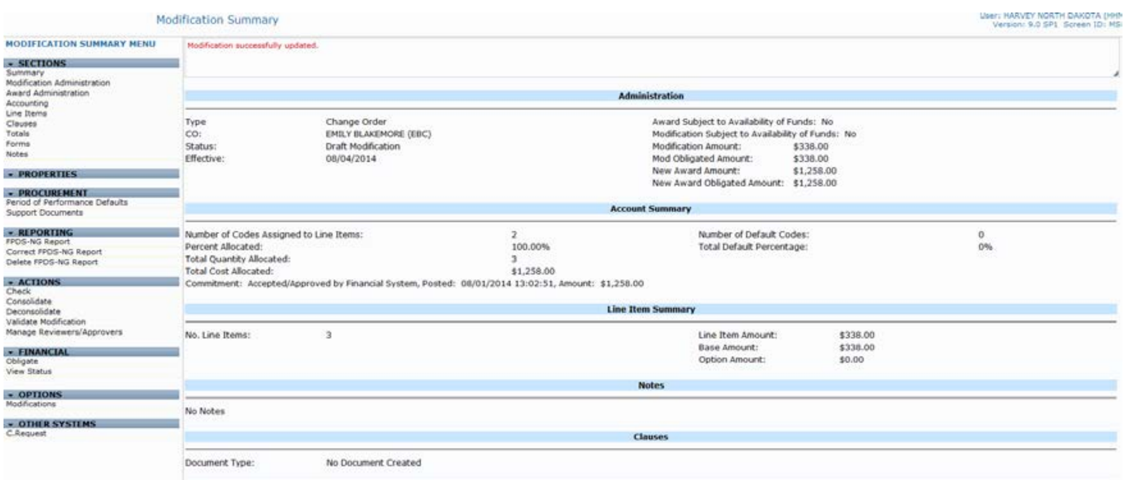
</td></tr>
<tr><td>15</td><td>

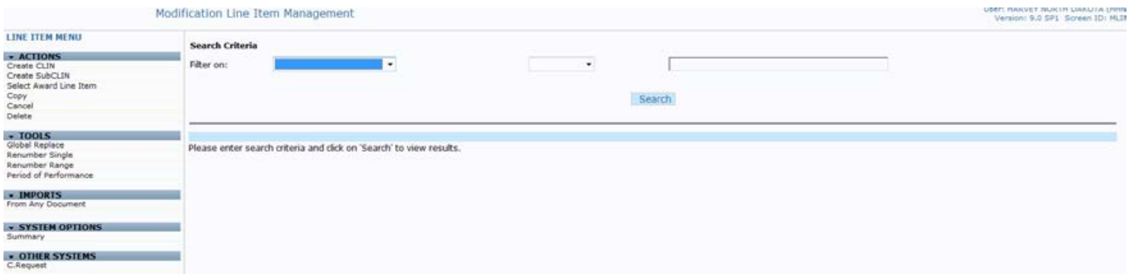
The *Address* view tab appears:

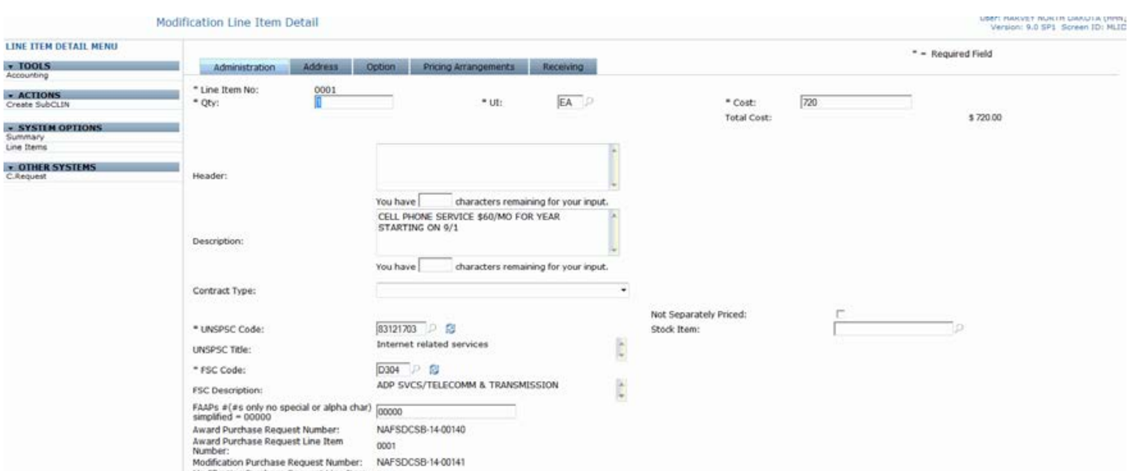


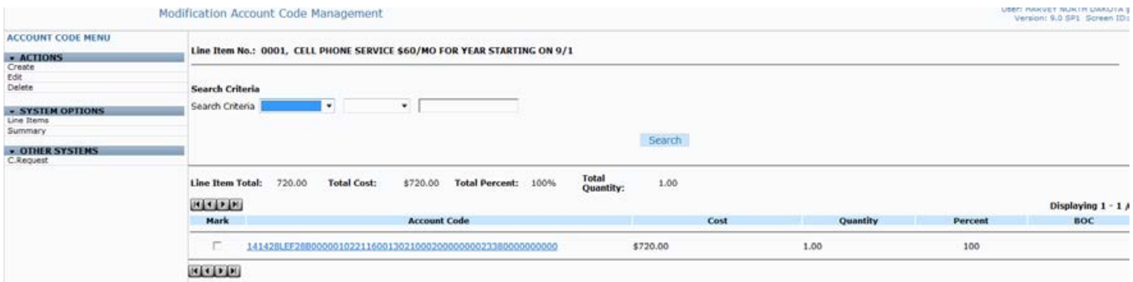
- Enter the **Government POC** (i.e. your Training User ID in capital letters)
- Click *Description* view tab

</td></tr>
</table>

Step	Action
16	The *Description* view tab appears:  ➢ Enter the **Description** of the modification (i.e. Lines 1-2 ACCS being changed, adding a new Line 3) ➢ Click *Save*
17	The **Modification Summary** screen appears:  ➢ Click *Add to Hotlist* menu option ➢ Click *Line Items* menu option

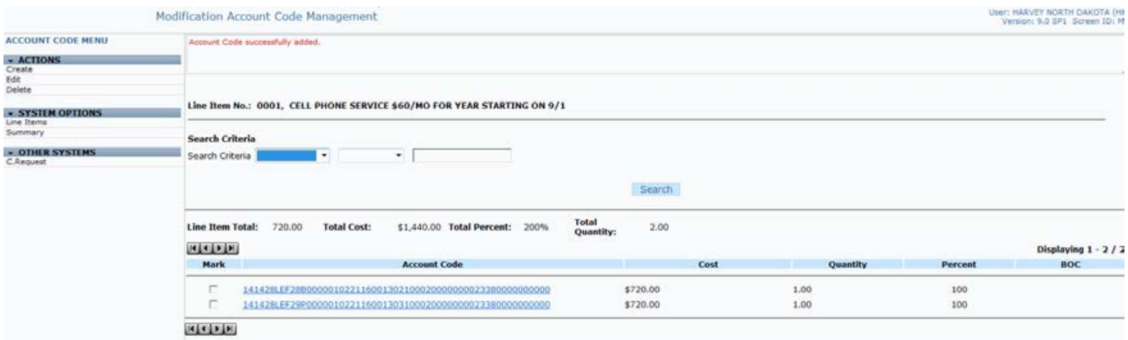
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>18</td><td>The Modification Line Item Management screen appears:

➢ Click Search

➢ Click on the Line Item Number (i.e. 0001)</td></tr>
<tr><td>19</td><td>The Modification Line Item Number screen appears:

➢ Click on Accounting menu option</td></tr>
</table>

Step	Action
20	The **Modification Account Code Management** screen appears:  ➢ Click on *Create* menu option
	Note: *Because you're pulling the line from the original award, you will see the accounting that was on it originally. You will need to add the new one associated to the change PR and delete the original if it's to replace it.*
21	The **Modification Account Code Detail** screen appears:  ➢ Add the new **accounting code** ➢ Change the Allocation By field to **Percent** ➢ Put percent at **100** ➢ Click *Save*
	Note: *You should always add the new accounting the way it was presented on the modification PR.*

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>22</td><td>

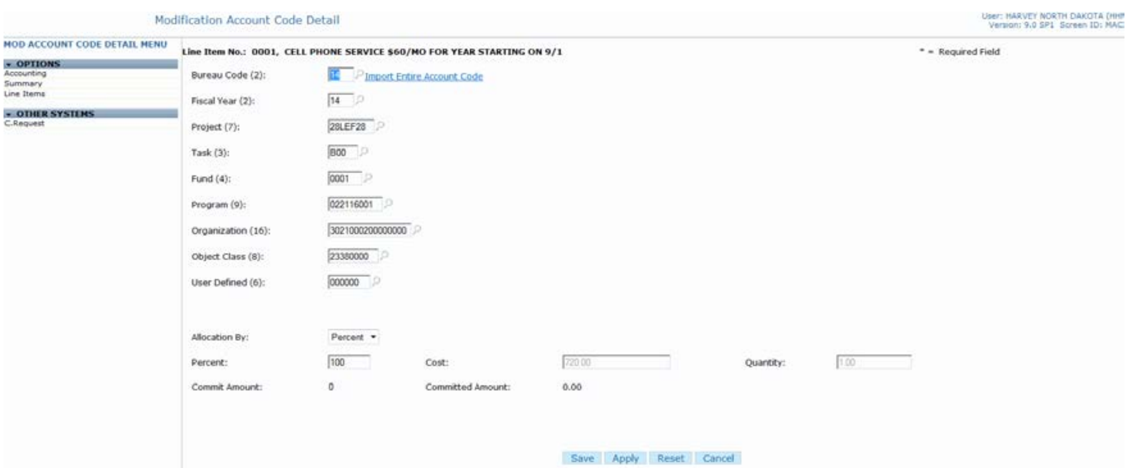
The **Modification Account Code Management** screen appears with two accounting strings now showing:



- Check the checkbox of the original accounting string
- Click on *Edit* menu option

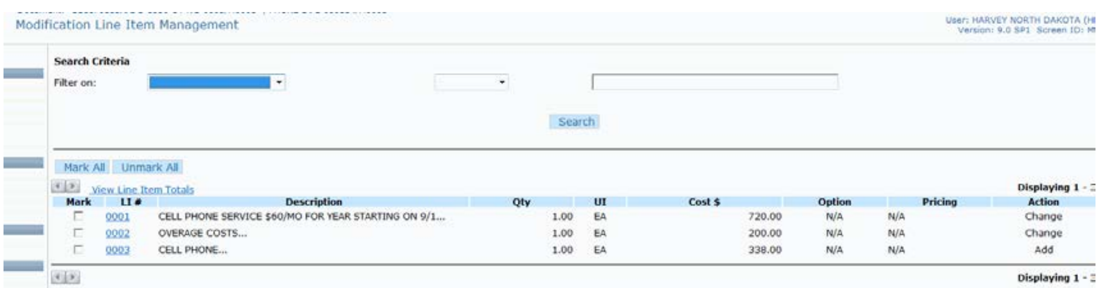
</td></tr>
<tr><td>23</td><td>

The **Modification Account Code Detail** screen appears:



- Put percent at **0**
- Click *Save*

</td></tr>
</table>

Step	Action
24	The **Modification Account Code Management** screen appears with two accounting strings now showing one being at zero:  ➢ Click on *Line Items* menu option
25	The **Modification Line Item Management** screen appears:  ➢ Repeat the accounting code change process for the other line ➢ Click *Summary* menu option

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>26</td><td>

The **Modification Summary** screen appears:

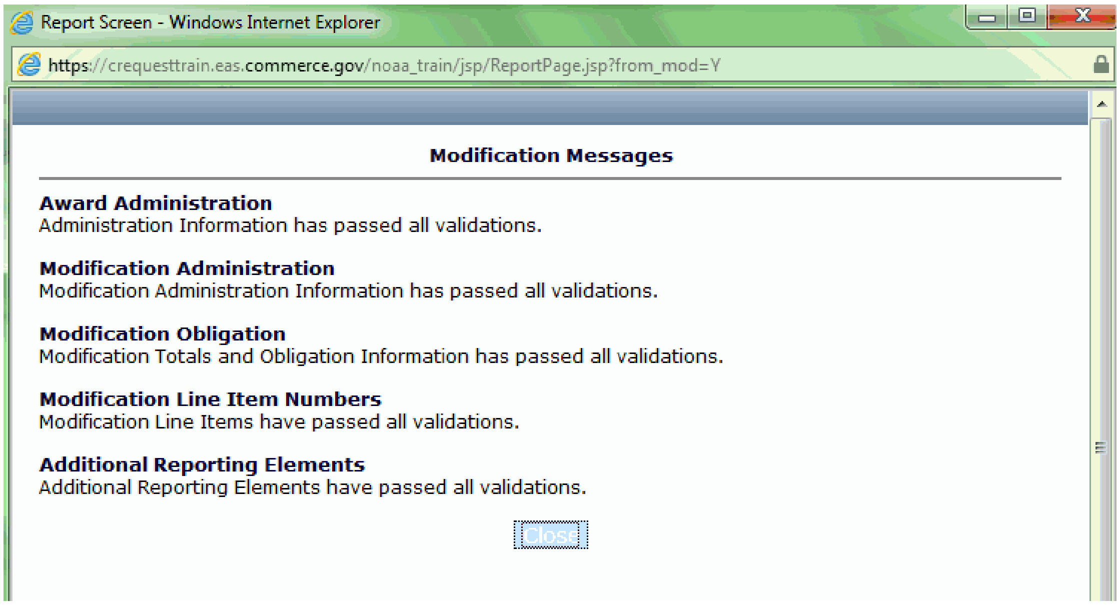
➢ Click on *Totals* menu option

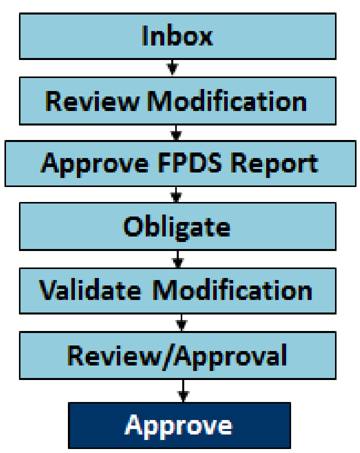
</td></tr>
<tr><td>27</td><td>

The **Modification Totals** screen appears:

➢ Review the information on this screen *(i.e. modification amount should be the new additional line amount)*
➢ Click on *Check* menu option

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>28</td><td>A pop-up screen will appear:


If everything passes all validation finish the process:
➢ FPDS Reporting (not necessary for training purposes)
➢ Manage Reviewers/Approvers
➢ Release to Approver</td></tr>
<tr><td>29</td><td>The Approver would follow the following steps for the modification:

</td></tr>
</table>

Exercise #10: Create Award Modification – Option Periods

Objectives:

- Navigate through C.Award
- Create an Award Modification
- How to modify an award for an option period
- Follow flow chart

Instructions: Execute the following steps:

You've received a PR to modify an award that is going to exercise an option period.

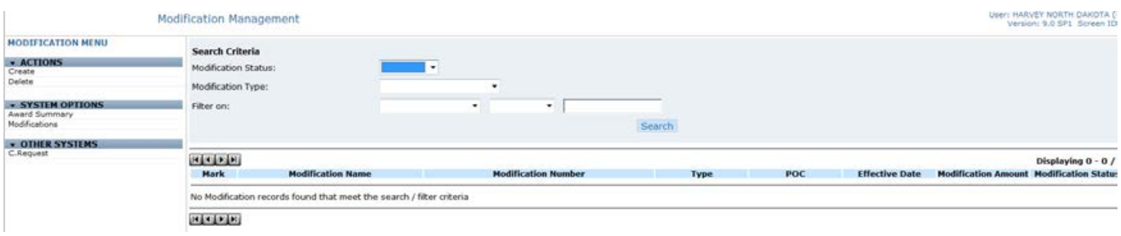
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From your Just In view tab

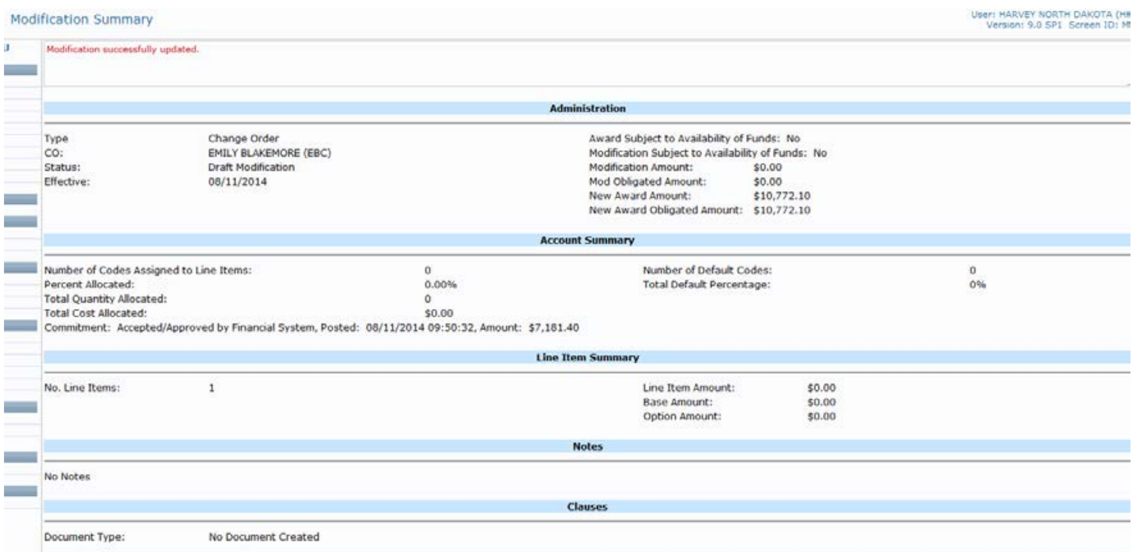
➢ Click the PR#</td></tr>
<tr><td>2</td><td>The Purchase Request Summary screen appears:

➢ Review the PR (e.g. Receiving Tab, LI Modification Action, accounting, etc)
➢ Once finished, close out the PR

Note: For option years, you would want to make sure on the original award that the option years have no accounting associated to them. For the modification to exercise an option year, you will want to make sure the current accounting is on it.</td></tr>
<tr><td>3</td><td>From the Home screen open up the award using one of the following view tabs:

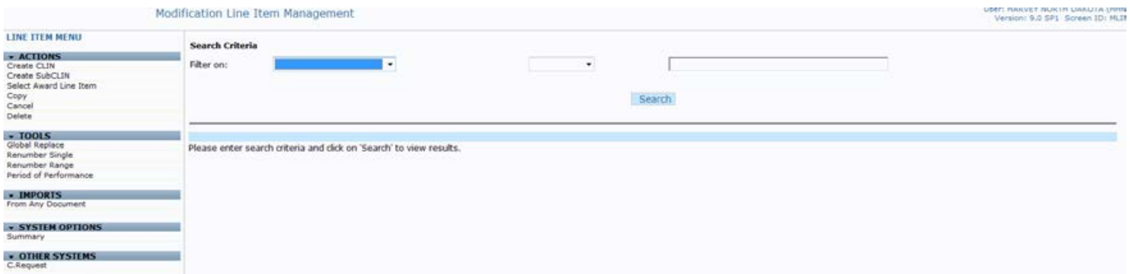
➢ Hotlist
➢ Recently Accessed
➢ Worksheet</td></tr>
</table>

Step	Action
4	From the **Award Summary** screen: ➢ Click on *Modifications* menu option
5	The **Modification Management** screen appears:  ➢ Click on *Create* menu option
6	The **Modification PIIN and Name** screen appears:  ➢ Using the drop-down listing choose the **PR #** ➢ Enter the **Document Number** (i.e M0001 – 1st modification) ➢ Enter the **Document Name** (should automatically populate to the Document Number) ➢ Click *Save*
7	The **Modification Administration** screen *Administration* view tab appears: ➢ Enter **FAAPS#** (i.e. 00000) ➢ Enter the **Date Signed** (i.e current date) ➢ Click *Addresses* view tab
8	The *Address* view tab appears: ➢ Enter the **Government POC** (i.e. your Training User ID in capital letters) ➢ Click *Description* view tab

Step	Action
9	The *Description* view tab appears: ➢ Enter the **Description** of the modification (i.e. Exercising Option Period – Line 2) ➢ Click *Save*
10	The **Modification Summary** screen appears:  ➢ Click *Line Items* menu option

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>11</td><td>

The **Modification Line Item Management** screen appears:

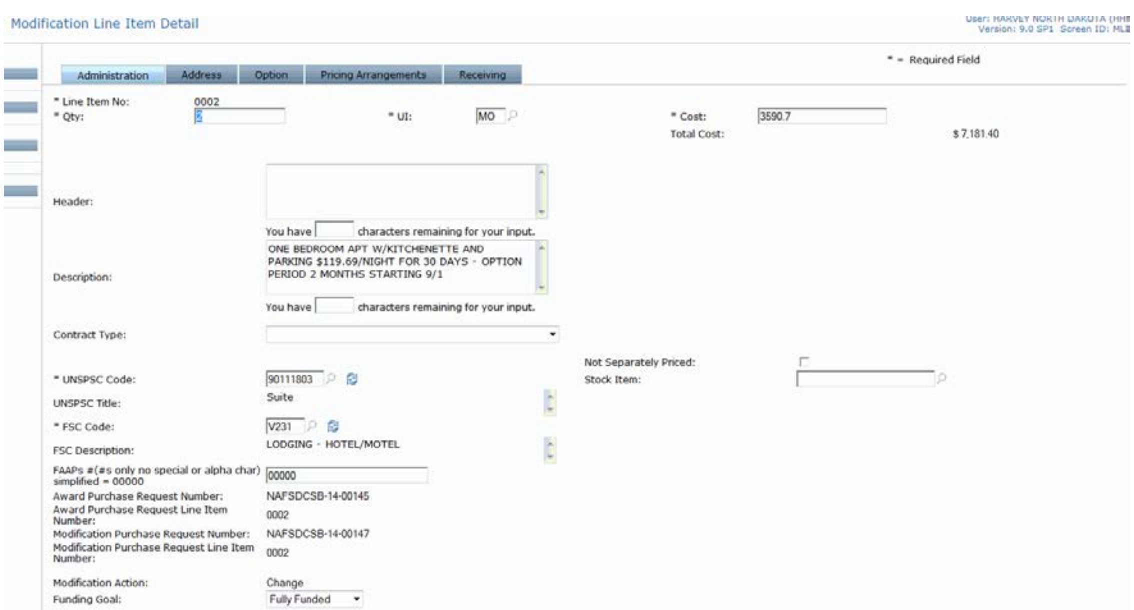


➢ Click *Search*

➢ Click on the *Line Item Number* (i.e. 0002)

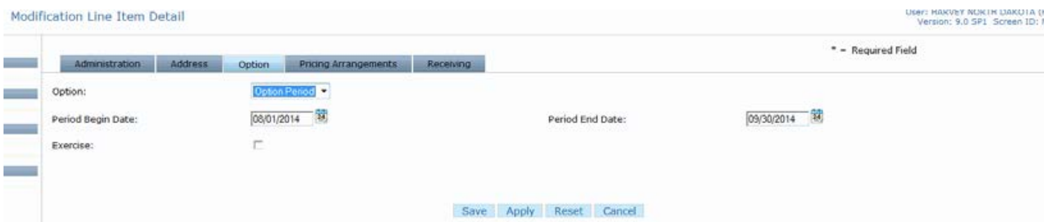
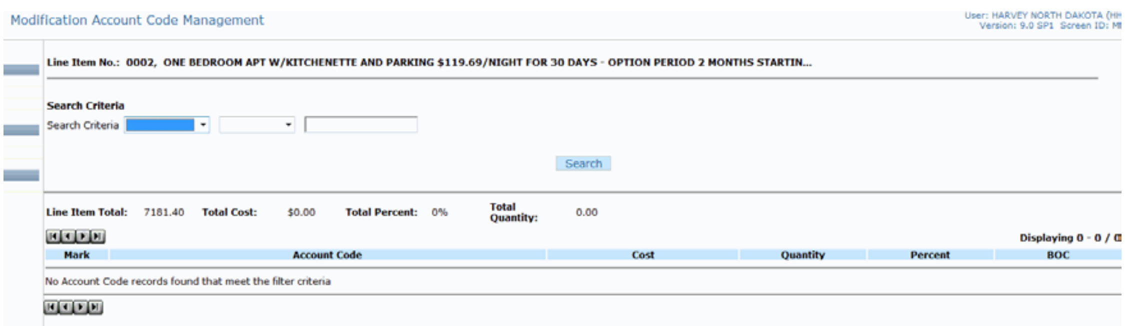
</td></tr>
<tr><td>12</td><td>

The **Modification Line Item Number** screen appears:



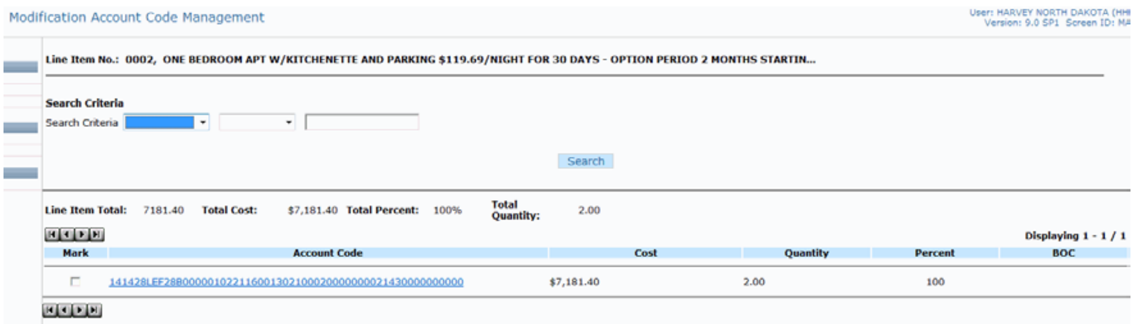
➢ Click on *Option* view tab

</td></tr>
</table>

Step	Action
13	The **Modification Line Item Detail** screen *Option* view tab appears:  ➢ Check the **Exercise** checkbox ➢ Click *Apply* ➢ Click on *Accounting* menu option
14	The **Modification Account Code Management** screen appears:  ➢ Click on *Create* menu option
	Note: *Because you're pulling the line from the original award, you will see the accounting that was on it originally, in this case no accounting because it was the option line. You will need to add the new one associated to the change PR.*
15	The **Modification Account Code Detail** screen appears: ➢ Add the new **accounting code** ➢ Change the Allocation By field to **Percent** ➢ Put percent at **100** ➢ Click *Save*
	Note: *You should always add the new accounting the way it was presented on the modification PR.*

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>16</td><td>

The **Modification Account Code Management** screen appears with the accounting strings now showing:



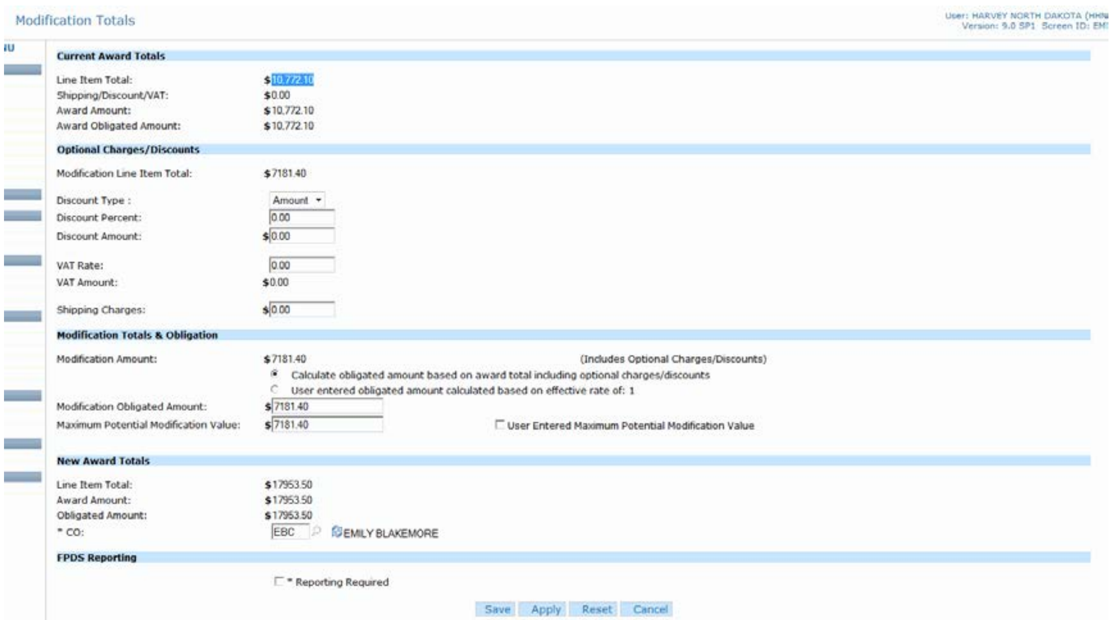
➢ Click *Summary* menu option

</td></tr>
<tr><td>17</td><td>

The **Modification Summary** screen appears:

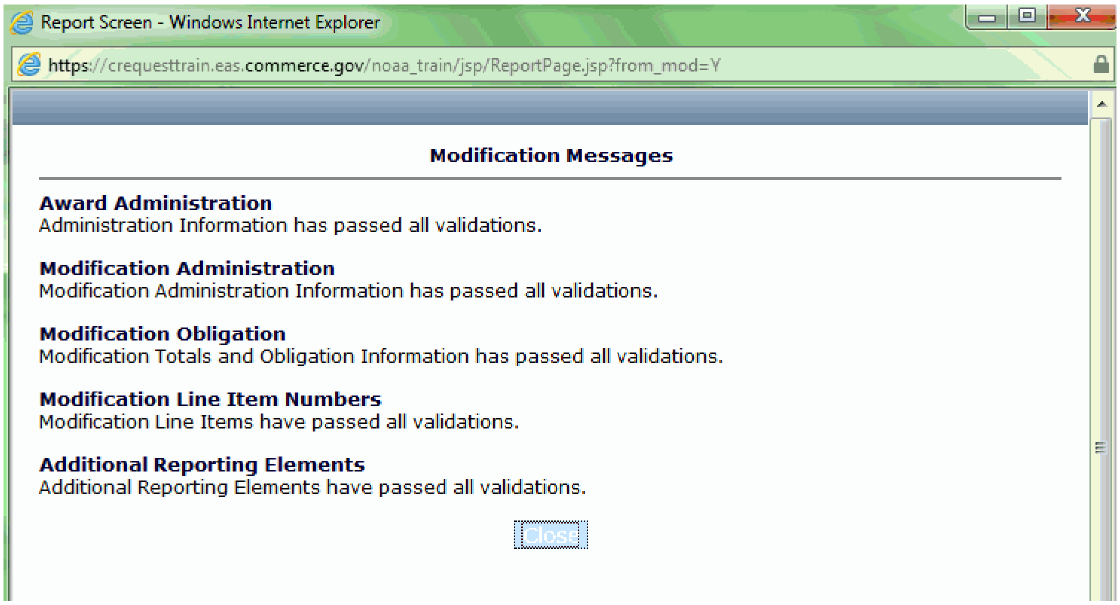
➢ Click on *Totals* menu option

</td></tr>
</table>

Step	Action
18	The **Modification Totals** screen appears:  ➢ Verify the Current, Modification and New Award Totals ➢ Click *Cancel* ➢ Click on *Check* menu option

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>19</td><td>

A pop-up screen will appear:

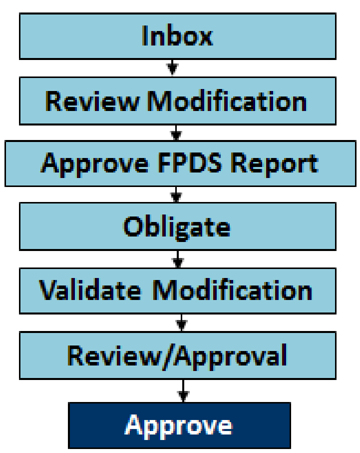


If everything passes all validation finish the process:

- FPDS Reporting (not necessary for training purposes)
- Manage Reviewers/Approvers
- Release to Approver

</td></tr>
<tr><td>20</td><td>

The Approver would follow the following steps for the modification:



</td></tr>
</table>

Exercise #11: Create Award Modification – Cancelling a Line Item on an Award

Objectives:

- Navigate through C.Award
- Create an Award Modification
- How to modify an award to cancel a line item (cancel/cancel)
- How to modify an award to cancel a line item to reuse (cancel/open)
- Follow flow chart

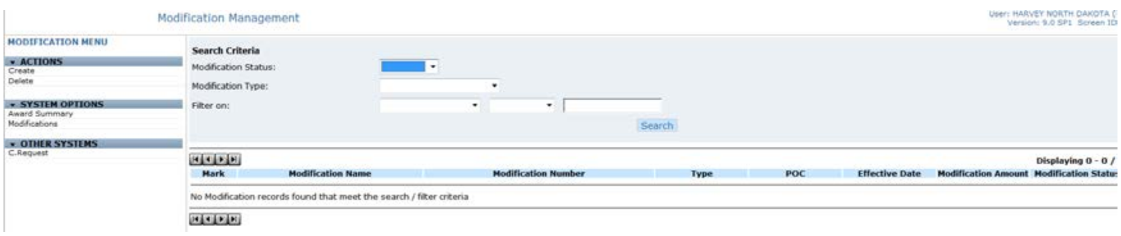
Instructions: Execute the following steps:

You've received a PR to modify an award to cancel out one of the line items not to be used again. One Line to be used on a different award.

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>1</td><td>From your Just In view tab

➢ Click the PR#</td></tr>
<tr><td>2</td><td>The Purchase Request Summary screen appears:

➢ Review the PR (e.g. Receiving Tab, LI Modification Action, accounting, etc)
➢ Once finished, close out the PR</td></tr>
<tr><td></td><td>Note: For this training example, you will want to make sure CLIN 0005 has Modification LI Action of Cancel/Open and CLIN 0006 has Modification LI Action of Cancel/Cancel</td></tr>
</table>

Step	Action
3	From the **Home** screen open up the award using one of the following view tabs: ➢ Hotlist ➢ Recently Accessed ➢ Worksheet
4	From the **Award Summary** screen: ➢ Click on *Modifications* menu option
5	The **Modification Management** screen appears:  ➢ Click on *Create* menu option
6	The **Modification PIIN and Name** screen appears:  ➢ Using the drop-down listing choose the **PR #** ➢ Enter the **Document Number** (i.e M0001 – 1st modification) ➢ Enter the **Document Name** (should automatically populate to the Document Number) ➢ Click *Save*
7	The **Modification Administration** screen *Administration* view tab appears: ➢ Enter **FAAPS#** (i.e. 00000) ➢ Enter the **Date Signed** (i.e current date) ➢ Click *Addresses* view tab

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>

The *Address* view tab appears:

- Enter the **Government POC** (i.e. your Training User ID in capital letters)
- Click *Description* view tab

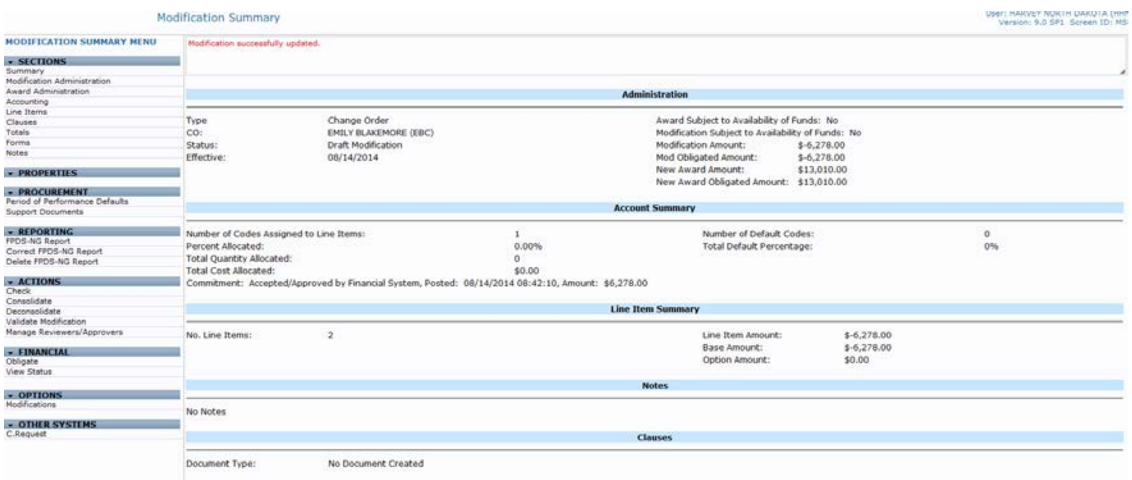
</td></tr>
<tr><td>9</td><td>

The *Description* view tab appears:

- Enter the **Description** of the modification (i.e. Cancel/Open Line 5, Cancel/Cancel Line 6)
- Click *Save*

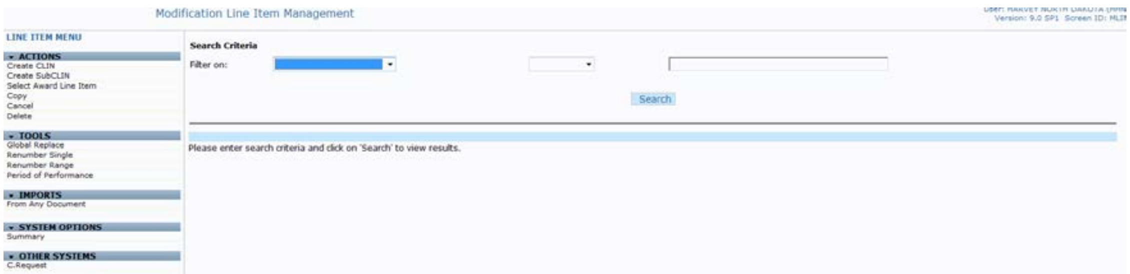
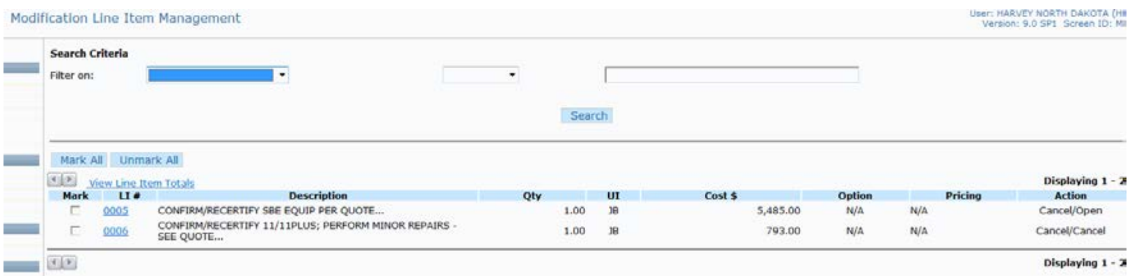
</td></tr>
<tr><td>10</td><td>

The **Modification Summary** screen appears:



- Click *Line Items* menu option

</td></tr>
</table>

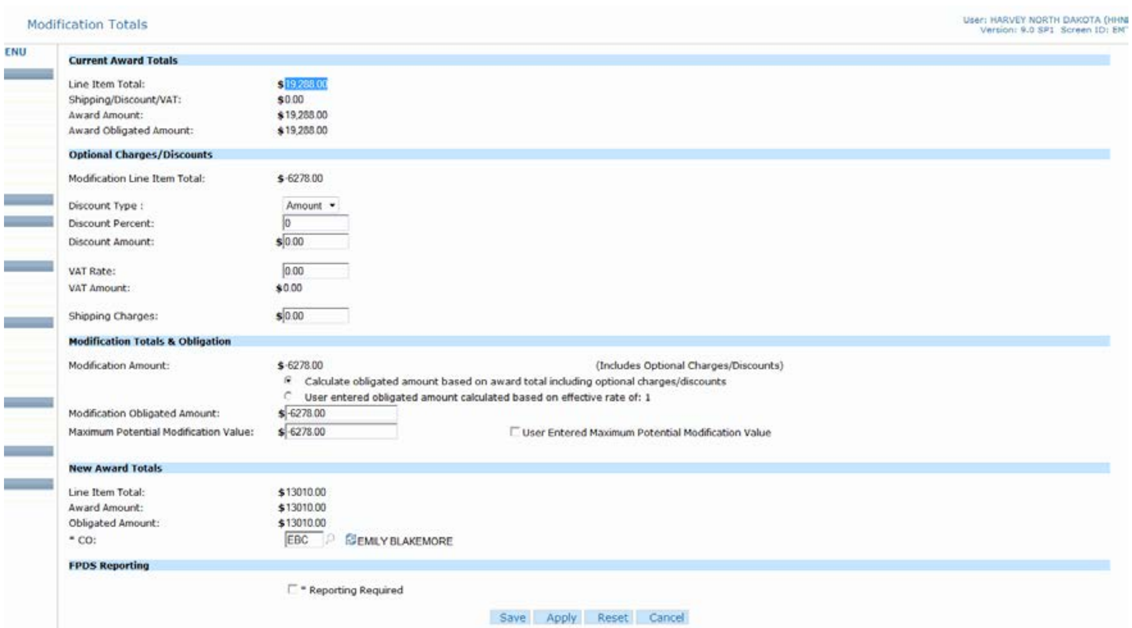
Step	Action
11	The **Modification Line Item Management** screen appears:  ➢ Click *Search*  ➢ Make sure the Action shows Cancel/Open and Cancel/Cancel and that the costs are correct. ➢ Click on *Summary* menu option
	Note: *If you were to open the lines, you wouldn't be able to edit them because of the cancel status. Cancel status can only be used on lines where the full amount is still obligated and have no invoices against them. If they did, you'd have to do a de-obligation of the remaining funds rather than a cancel.*

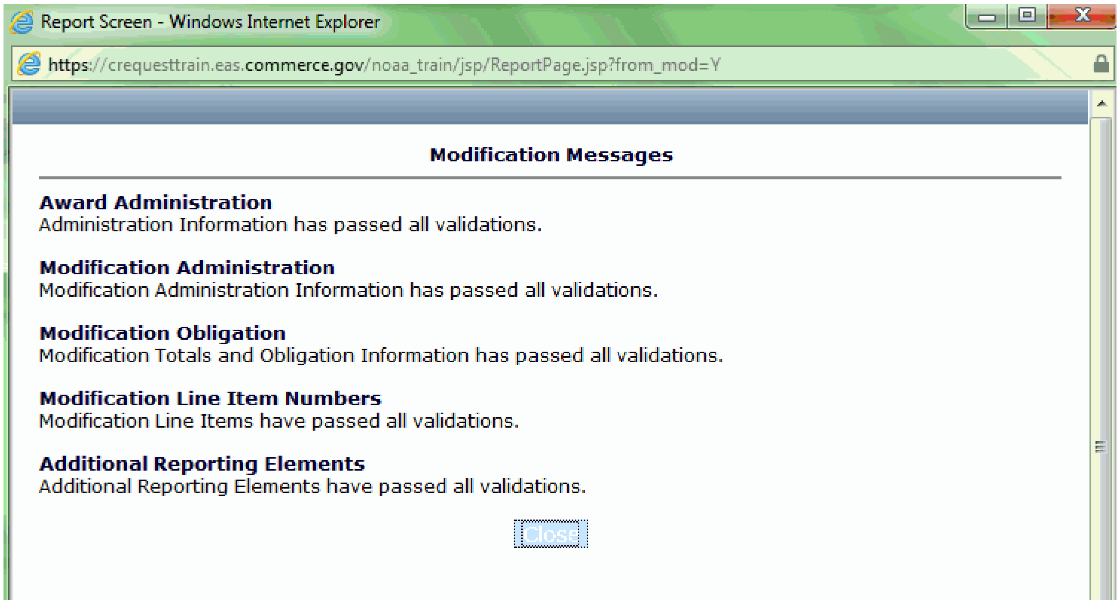
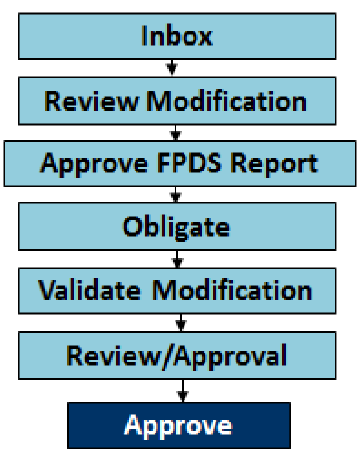
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>12</td><td>

The **Modification Summary** screen appears:

- Click on *Totals* menu option

</td></tr>
</table>

Step	Action
13	The **Modification Totals** screen appears:  You should see the current total up at the top. The modification total is toward the middle and you should see it as a negative number. The bottom total is where the new award total will be after the cancellation of these lines. ➢ Click *Save* ➢ Click on *Check* menu option

Step	Action
14	A pop-up screen will appear:  If everything passes all validation finish the process: ➢ FPDS Reporting (not necessary for training purposes) ➢ Manage Reviewers/Approvers ➢ Release to Approver
15	The Approver would follow the following steps for the modification: 

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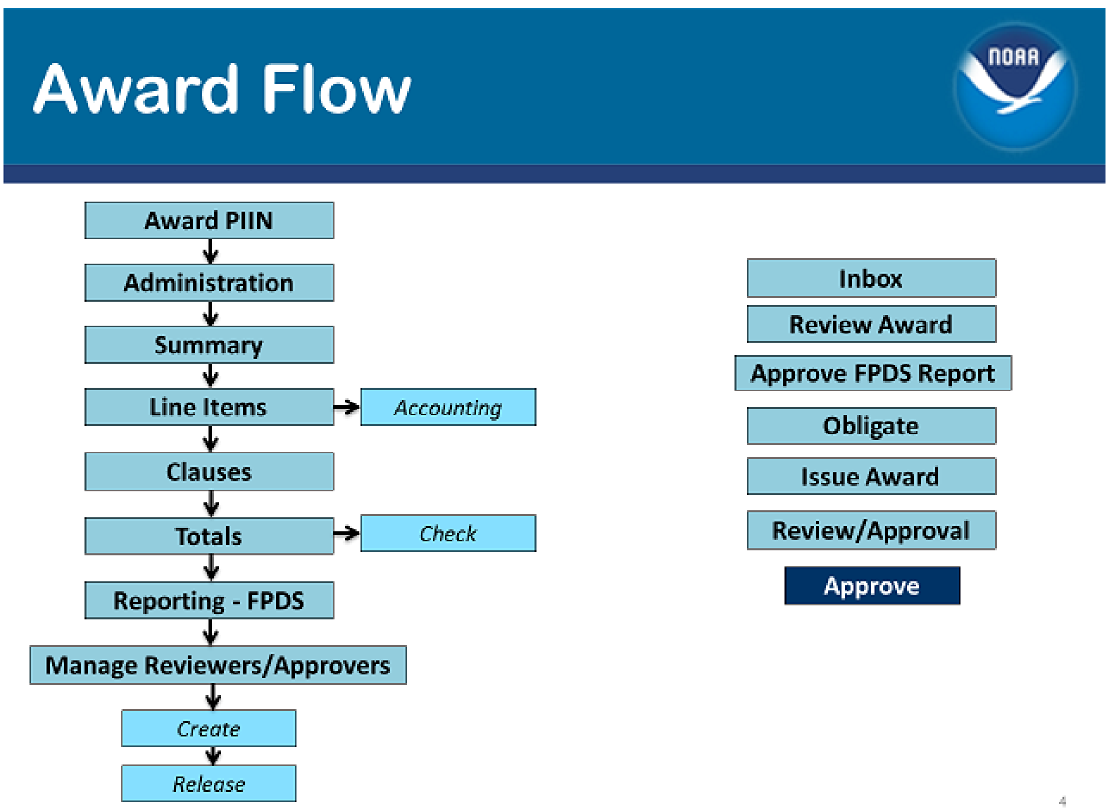
Exercise #12: Create a Blanket Award

Objectives:
- Navigate through C.Award
- Create an Award from a Purchase Request
- Follow flow chart

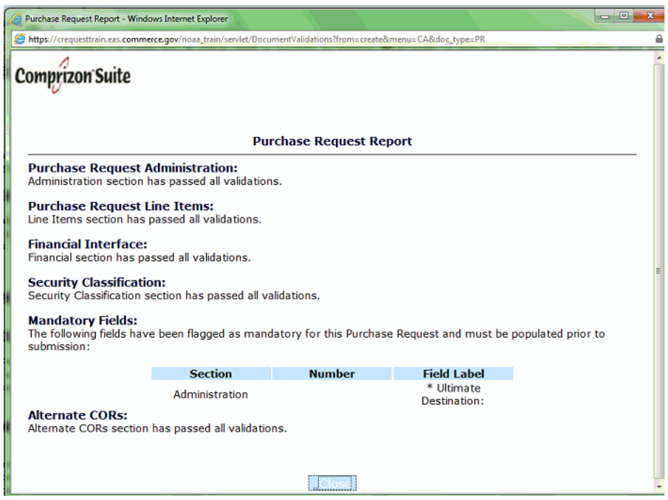
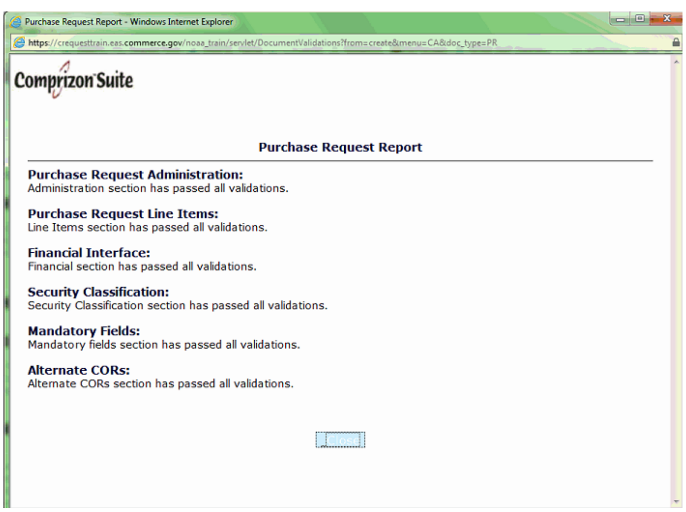
Instructions: Execute the following steps:

Notes: You need to set up a blanket award for establish a multi-year contract to provide shoreline mapping services. A blanket award should be for $0. You will set it up with the minimum award total that task/delivery order along with the minimum and maximum quantity.



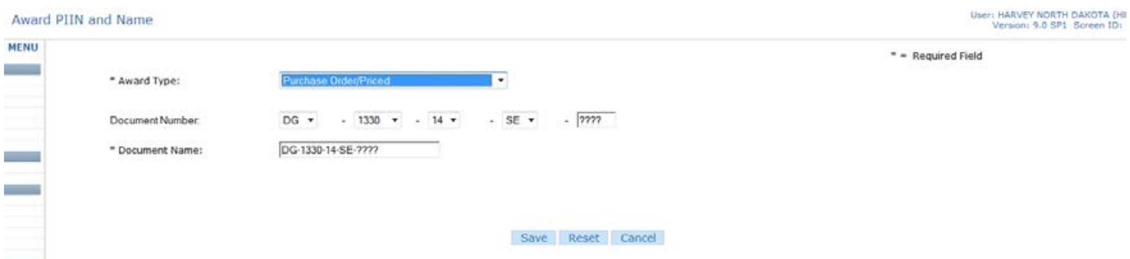
NOTE: For this training example, we will be skipping the solicitation & clauses.

Step	Action
1	From the **Home** screen *Just In* view tab ➢ Click *PR#* ➢ Review the PR in its entirety

Step	Action
1a	If the PR looks good, then you will need to: ➢ Click on *Create Award* menu option
2	The **Purchase Request Report** pop-up window will appear. If anything doesn't pass validation, you will receive something like this:  If it passes, it might appear briefly looking like this:  You'll want to close it out to do so: ➢ Maximize the minimized window ➢ Click *Close*

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>

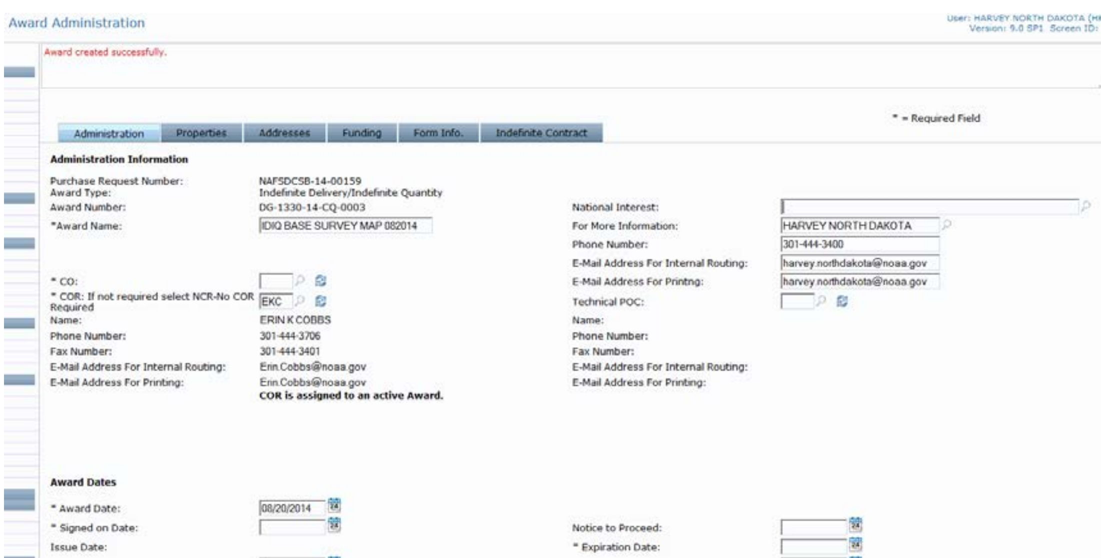
The **Award PIIN and Name** screen appears:



- Select the **Contract type** (i.e. Indefinite Delivery/Indefinite Quantity)
- Select the **Award Number** (i.e. SG-1330-14-CQ-????)
- Type in **Award Name** (i.e. IDIQ BASE SURVEY MAP{date})
- Click *Save*

</td></tr>
<tr><td>4</td><td>

The **Award Administration** screen *Administration* tab appears:

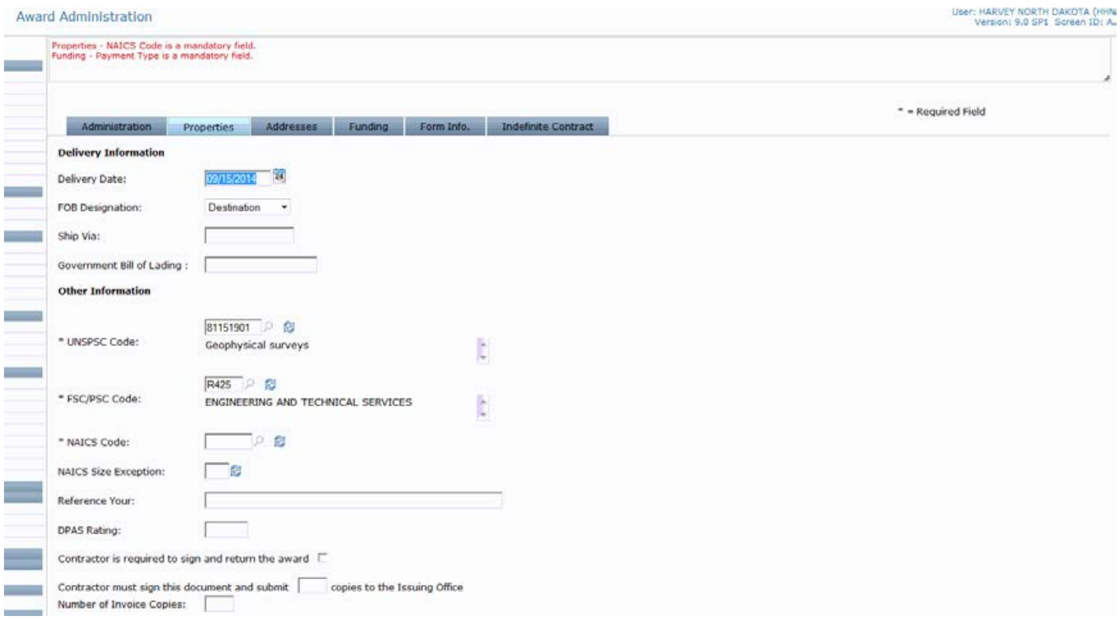


- Enter **CO** (i.e. EBC)
- Change **Award Date** (Defaults to current date)
- Enter **Signed On Date**
- Enter **Start Date**
- Enter **Expiration Date**
- Enter **Est. Ultimate Completion Date**
- Enter **Vendor**
- Enter **Business Size Indicator**
- Click *Apply*

</td></tr>
</table>

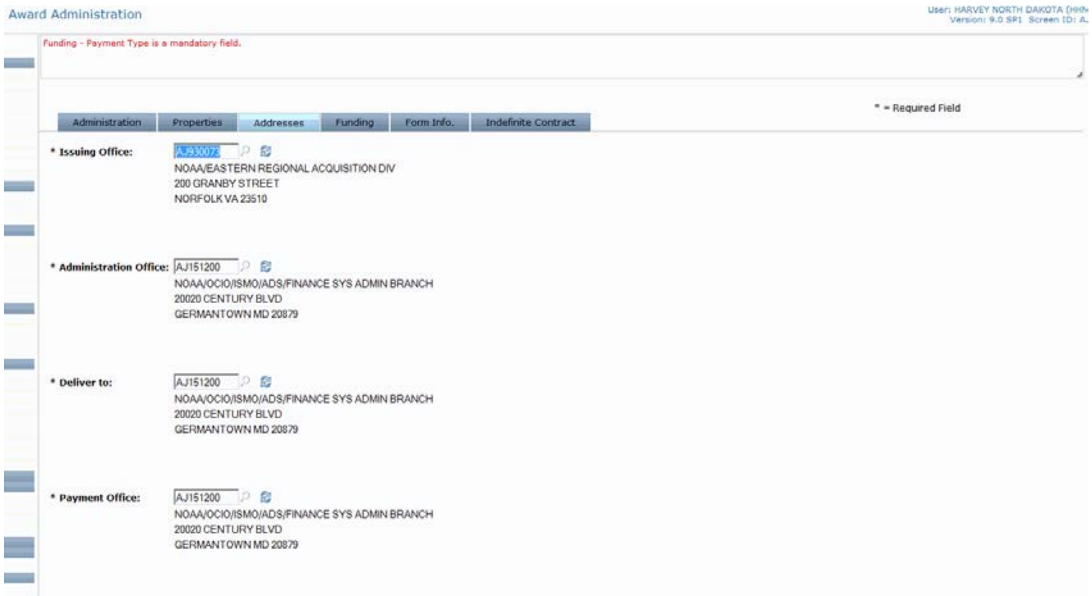
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>5</td><td>

The **Award Administration** screen *Properties* tab appears:



- Change **Delivery Date** (If needed)
- Change **FOB Designation** (if needed)
- Enter **Ship Via:** (if needed)
- Enter **NAICS Code** (i.e. Geographical Surveying)
- Enter **Reference Your** (i.e. Quote)
- Check **Contractor required to sign** checkbox
- Enter **# of copies to Issuing Office** (i.e. 3)
- Enter **# of Invoice Copies** (i.e. 3)
- Click *Apply*
- Click the *Addresses* view tab

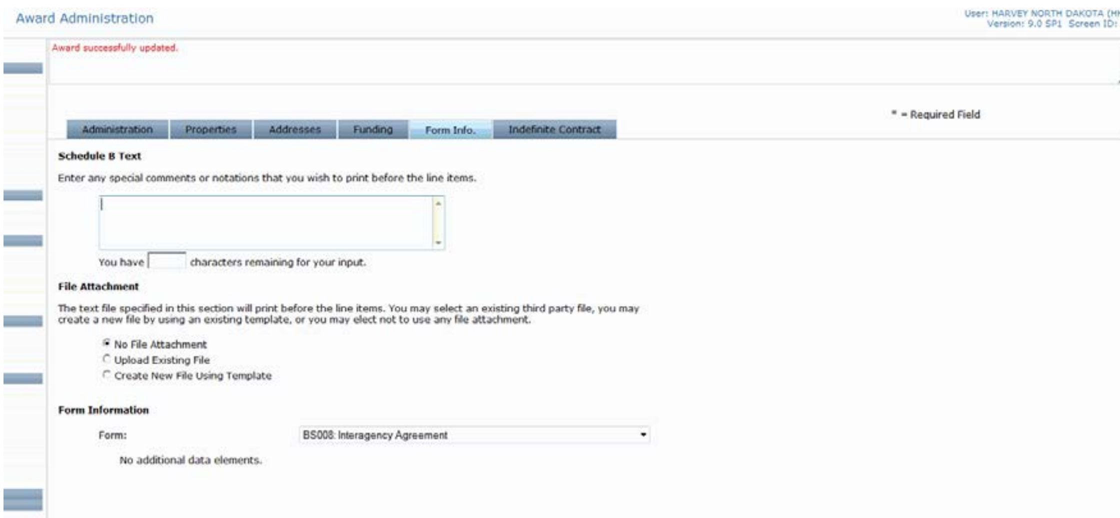
</td></tr>
</table>

Step	Action
6	The **Award Administration** screen *Addresses* tab appears:  If not added or needs to be changed: ➢ Enter **Issuing Office** code ➢ Enter **Administration Office** code ➢ Verify **Deliver To** code ➢ Verify **Payment Office** code ➢ Enter **Invoicing Address** code ➢ Enter **Place of Inspection** (if necessary) ➢ Enter **Place of Acceptance** (if necessary) ➢ Enter **Receiving Office** (if necessary) ➢ Click *Apply* ➢ Click the *Funding* view tab

Step	Action
7	The **Award Administration** screen *Funding* tab appears:  ➢ Enter **# of days** for Constructive Acceptance ➢ Check **Subject to Prompt Pay** checkbox ➢ Select **Payment Type** (i.e. EFT) ➢ **Treasury Account Symbol** defaults from PR. ➢ Click *Apply* ➢ Click the *Form Info* view tab

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>8</td><td>

The **Award Administration** screen *Form Info.* tab appears:



- Enter **Schedule B text** (if needed)
- Attach a **file** (if needed)
- Choose the **form**: (i.e. SF1449)
- Click *Apply*
- Click *Indefinite Contract* view tab

</td></tr>
<tr><td>9</td><td>

The **Award Administration** screen *Indefinite Contract* tab appears:

- Enter **Minimum Award Total** per Delivery Order (i.e. 100)
- Click *Save*

</td></tr>
</table>

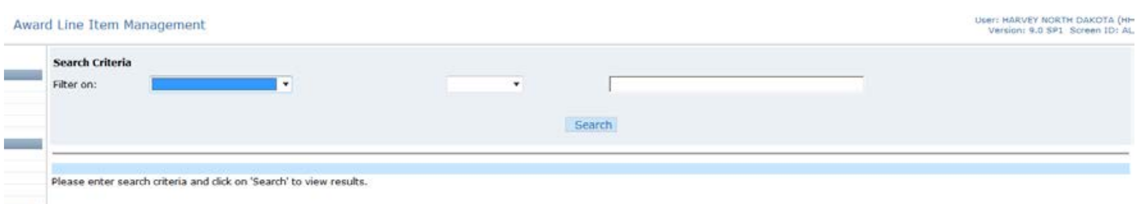
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>10</td><td>

The **Award Summary** screen appears:

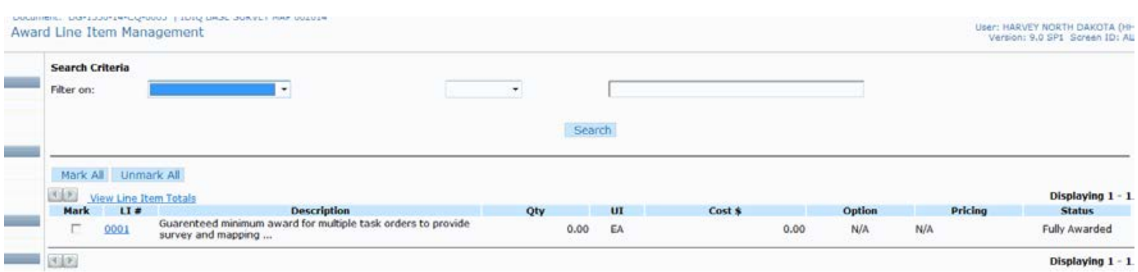
➢ Click on *Line Items* menu option

</td></tr>
<tr><td>11</td><td>

The **Award Line Item Management** screen appears:



➢ Click on *Search*

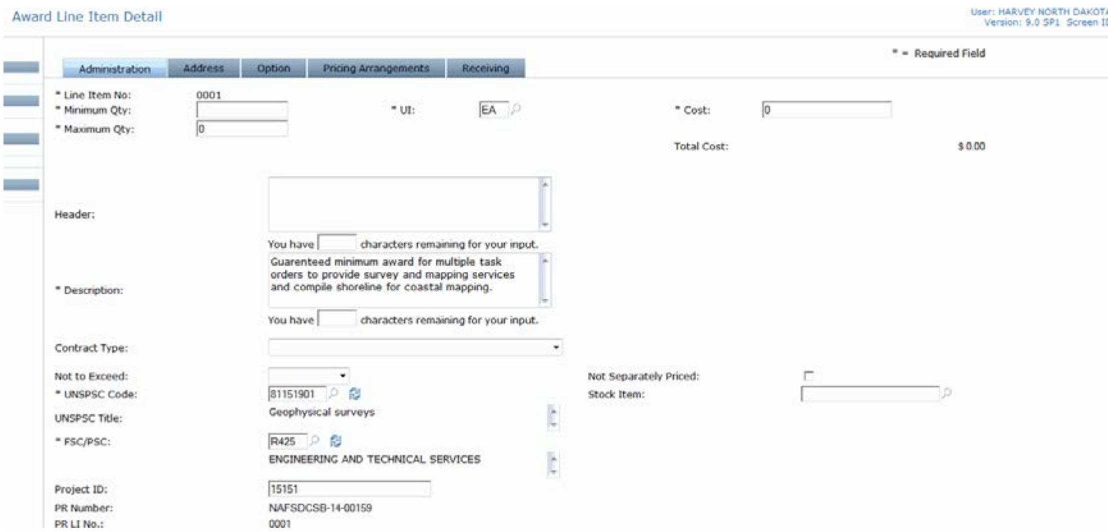


➢ Click on *Line Number* (i.e. 0001)

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>12</td><td>

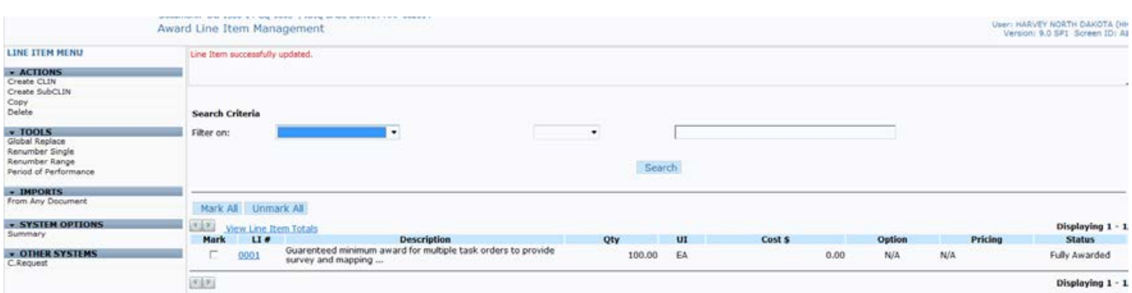
The **Award Line Item Detail** screen appears:



- Enter **Minimum Qty** (i.e. 0)
- Enter **Maximum Qty** (i.e. 100)
- Click *Save*

</td></tr>
<tr><td>13</td><td>

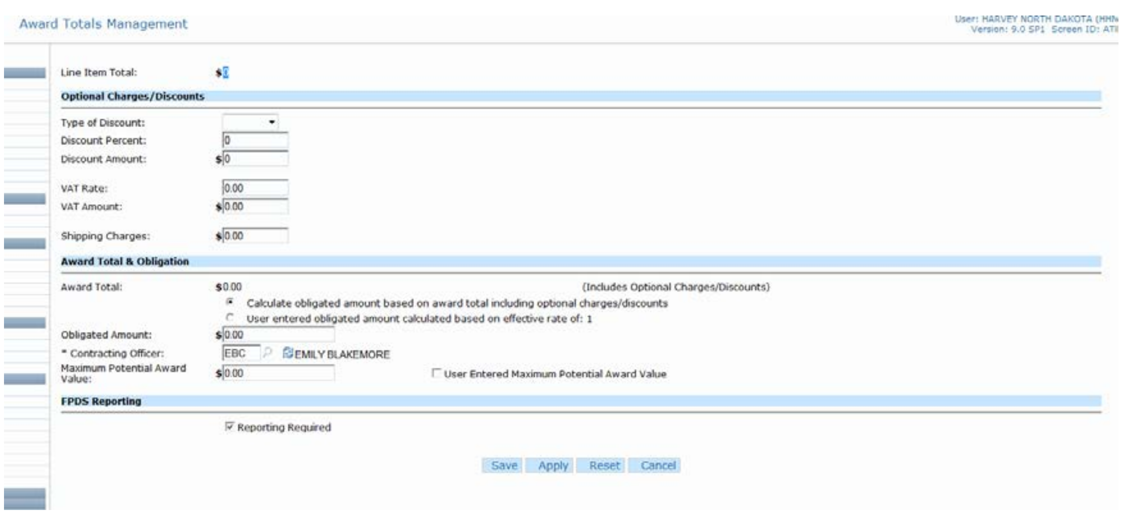
The **Award Line Item Management** screen appears:



- Click on *Summary* menu option

</td></tr>
</table>

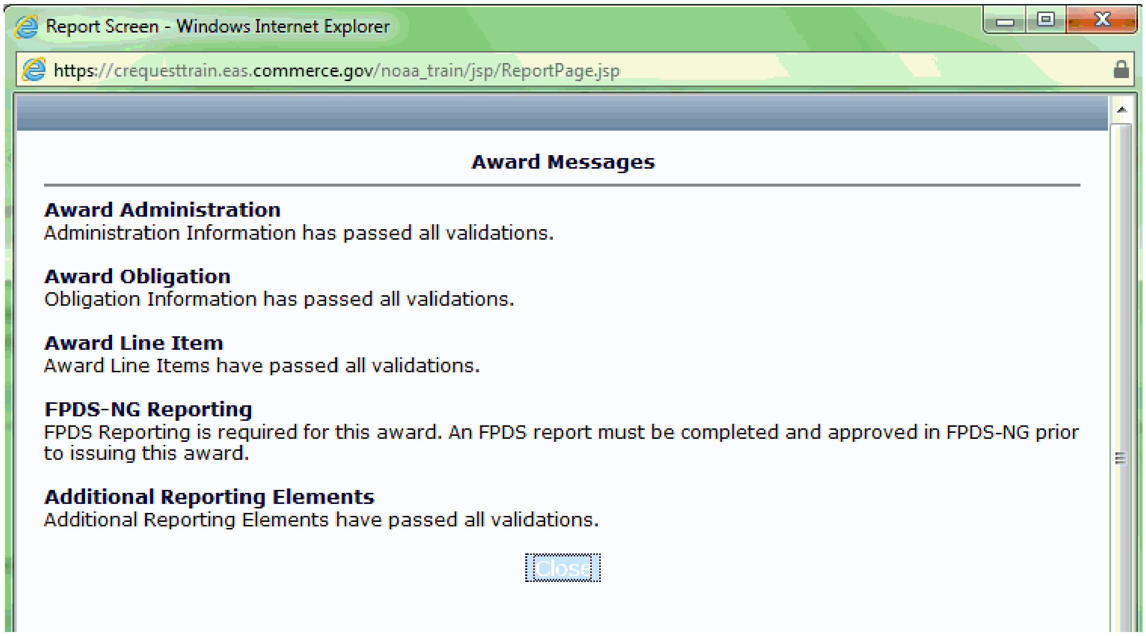
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>14</td><td>The Award Summary screen appears:


➢ Click on Totals menu option</td></tr>
<tr><td>15</td><td>The Award Totals Management screen appears:


➢ Validate the Award Totals
➢ Uncheck the FPDS Reporting (for training purposes)
➢ Click Save
➢ Click on Check menu option</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>16</td><td>

A pop-up screen appears:

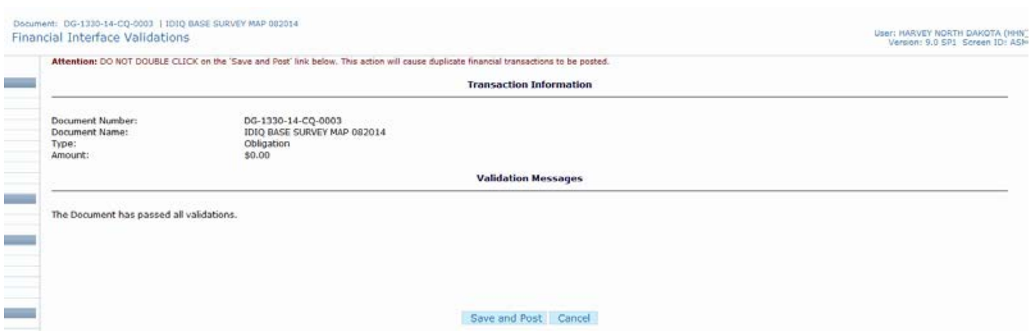


- Look to see if there are any errors, if not, then continue
- Click *Close*

</td></tr>
<tr><td>17</td><td>

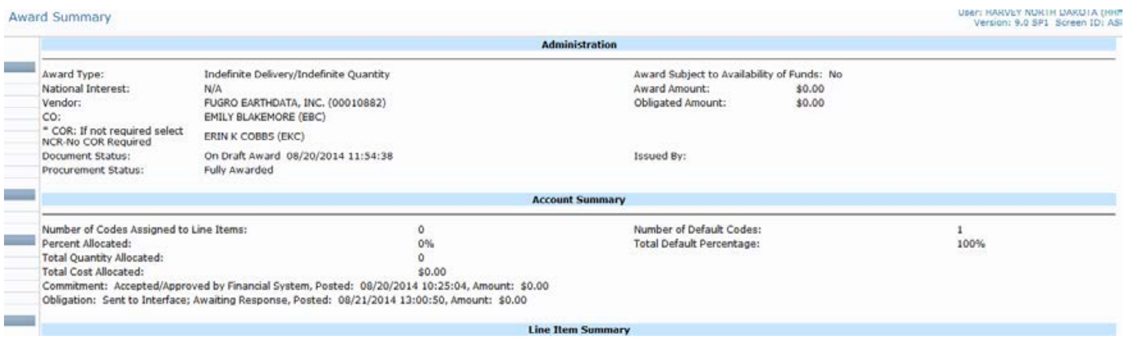
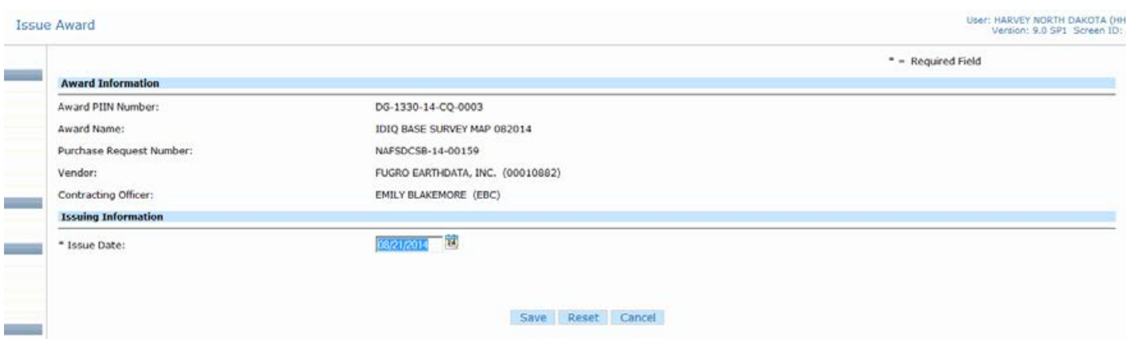
For training purposes, we're not routing to someone to obligate and issue the award, we will be doing that ourselves.

- Click on *Obligate* menu option



- Click *Save and Post* if no errors

</td></tr>
</table>

Step	Action
18	The **Award Summary** screen appears:  You're going to wait until the obligation changes from Sent to Interface to Accepted/Approved. Obligation: Accepted/Approved by Financial System, Posted: 08/21/2014 13:00:50, Amount: $0.00 ➢ Click on *Issue* menu option
19	A pop-up screen comes up, just click close. The **Issue Award** screen appears:  ➢ Change the **Issue date** (if needed) ➢ Click *Save*
20	The **Award Summary** screen appears with the following message:  Make note of your Award Number for any Task/Delivery Orders.

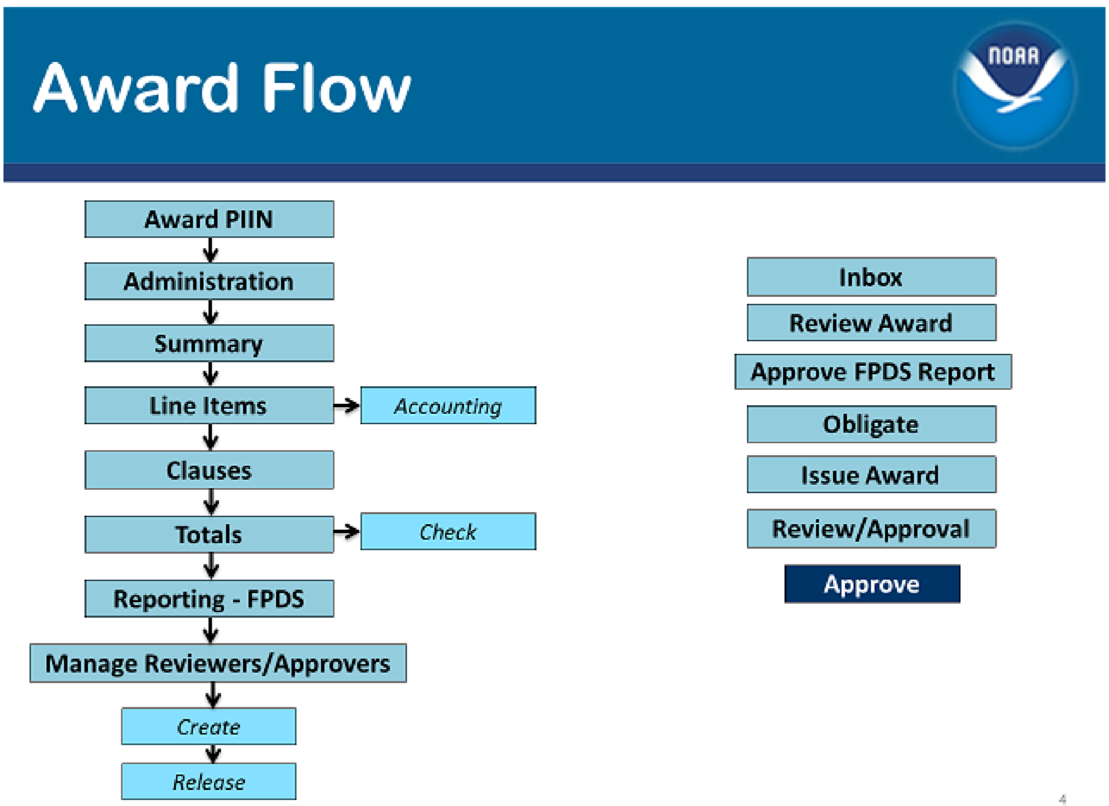
Exercise #13: Create a Task Order

Objectives:

- Navigate through C.Award
- Create a Task Order from a Purchase Request
- Follow flow chart

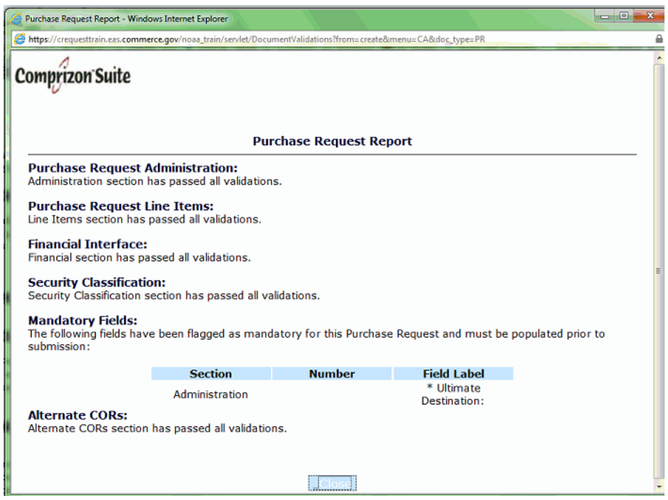
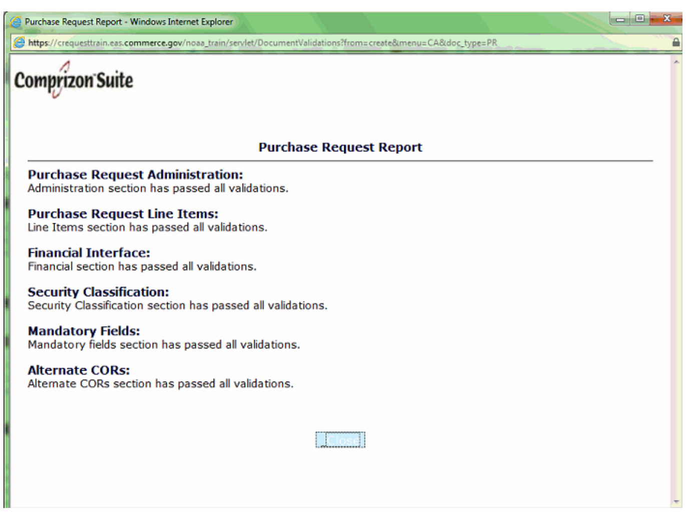
Instructions: Execute the following steps:

Notes: You need to set up a task order against a base award to provide shoreline mapping services. The Task Order will have both a quantity and Award Amount that meets the minimum and maximum amounts set out on the base award.



NOTE: For this training example, we will be skipping the solicitation & clauses.

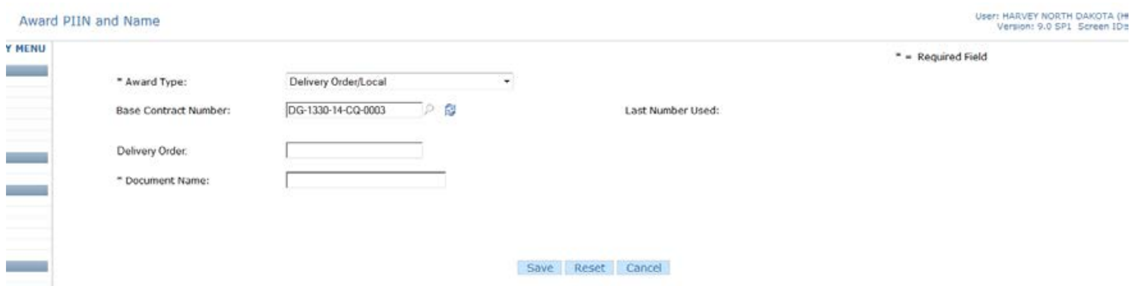
Step	Action
1	From the **Home** screen *Just In* view tab ➢ Click *PR#* ➢ Review the PR in its entirety

Step	Action
1a	If the PR looks good, then you will need to: ➢ Click on *Create Award* menu option
2	The **Purchase Request Report** pop-up window will appear. If anything doesn't pass validation, you will receive something like this:  If it passes, it might appear briefly looking like this:  You'll want to close it out to do so: ➢ Maximize the minimized window ➢ Click *Close*

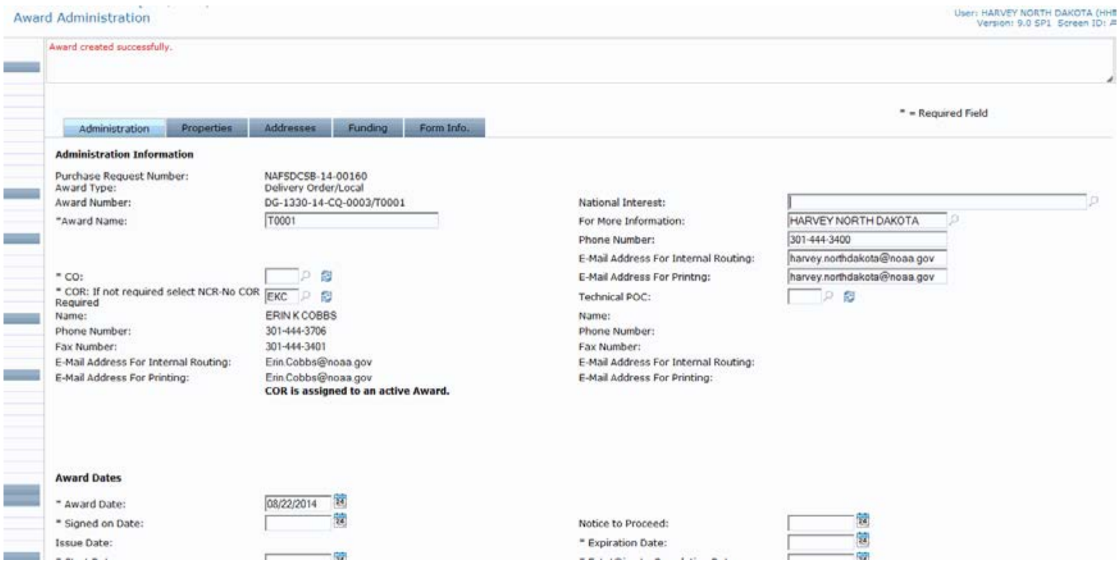
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>3</td><td>

The **Award PIIN and Name** screen appears:

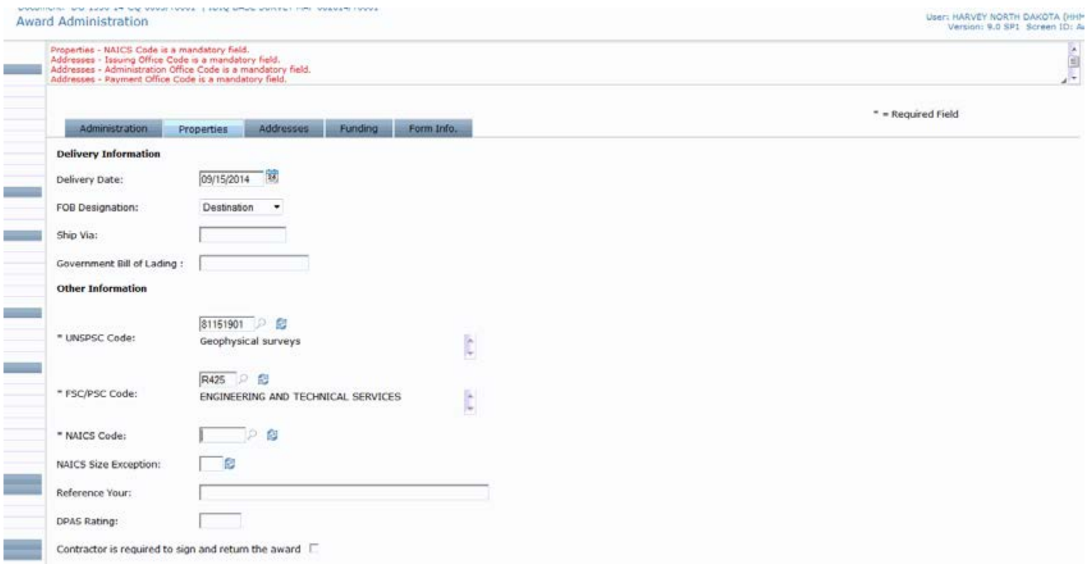
- Select the **Contract type** (i.e. Delivery Order/Local)
- Select the **Base Contract Number** (i.e. should automatically fill in – if not search)
- Type in **Delivery Order** (i.e. T0001 – Task 00001, if it was a Delivery.. then D0001)
- The **Document Name** should fill in with the same Delivery Order number
- Click *Save*



</td></tr>
</table>

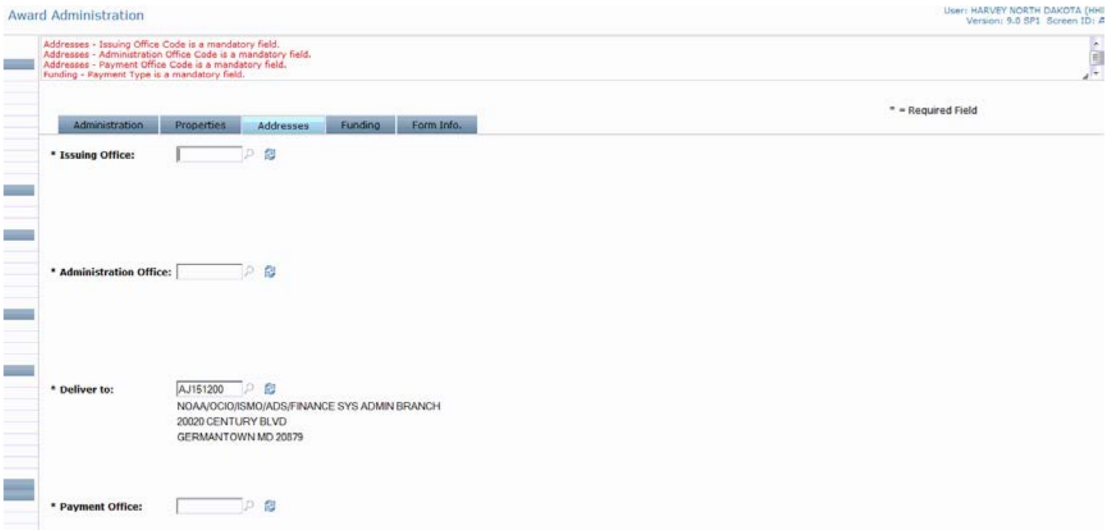
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>4</td><td>The Award Administration screen Administration tab appears:


➢ Enter CO (i.e. EBC)
➢ Change Award Date (Defaults to current date)
➢ Enter Signed On Date
➢ Enter Start Date
➢ Enter Expiration Date
➢ Enter Est. Ultimate Completion Date
➢ Enter Vendor
➢ Enter Business Size Indicator
➢ Click Apply</td></tr>
</table>

Step	Action
5	The **Award Administration** screen *Properties* tab appears:  ➢ Change **Delivery Date** (If needed) ➢ Change **FOB Designation** (if needed) ➢ Enter **Ship Via:** (if needed) ➢ Enter **NAICS Code** (i.e 541370) ➢ Enter **Reference Your** (i.e. Quote) ➢ Check **Contractor required to sign** checkbox ➢ Enter **# of copies to Issuing Office** (i.e. 3) ➢ Enter **# of Invoice Copies** (i.e. 3) ➢ Click *Apply* ➢ Click the *Addresses* view tab (if it doesn't go to it automatically)

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>6</td><td>

The **Award Administration** screen *Addresses* tab appears:



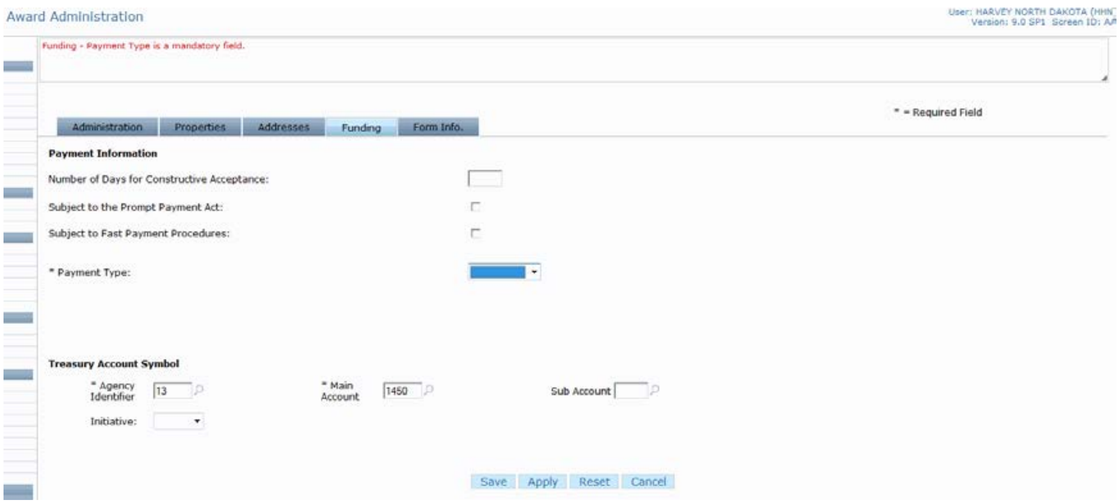
If not added or needs to be changed:

- Enter **Issuing Office** code
- Enter **Administration Office** code
- Verify **Deliver To** code
- Verify **Payment Office** code
- Enter **Invoicing Address** code
- Enter **Place of Inspection** (if necessary)
- Enter **Place of Acceptance** (if necessary)
- Enter **Receiving Office** (if necessary)
- Click *Apply*
- Click the *Funding* view tab

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>7</td><td>

The **Award Administration** screen *Funding* tab appears:



- Enter **# of days** for Constructive Acceptance
- Check **Subject to Prompt Pay** checkbox
- Select **Payment Type** (i.e. EFT)
- **Treasury Account Symbol** defaults from PR.
- Click *Apply*
- Click the *Form Info* view tab

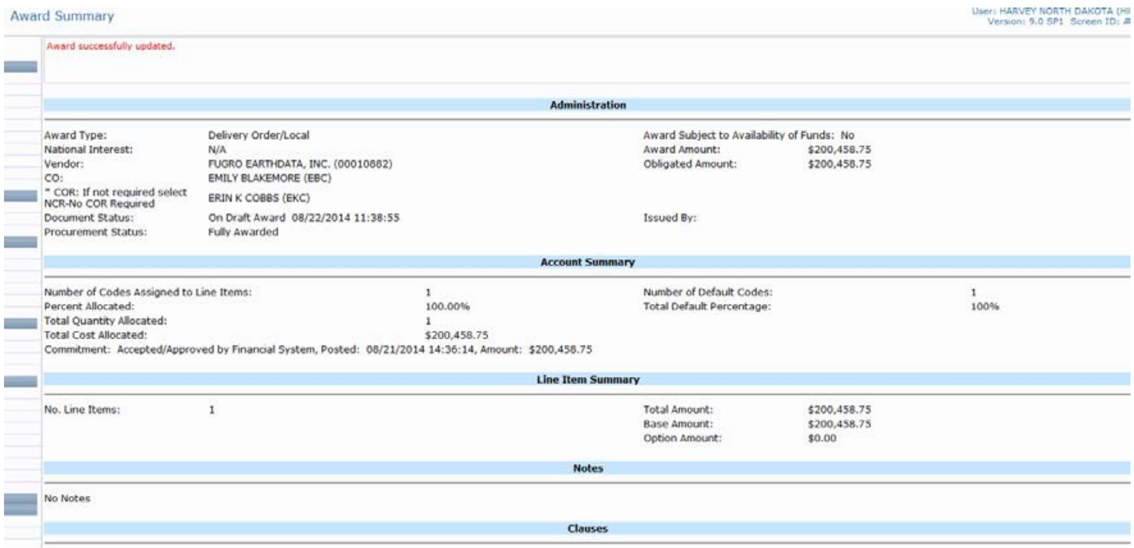
</td></tr>
<tr><td>8</td><td>

The **Award Administration** screen *Form Info.* tab appears:

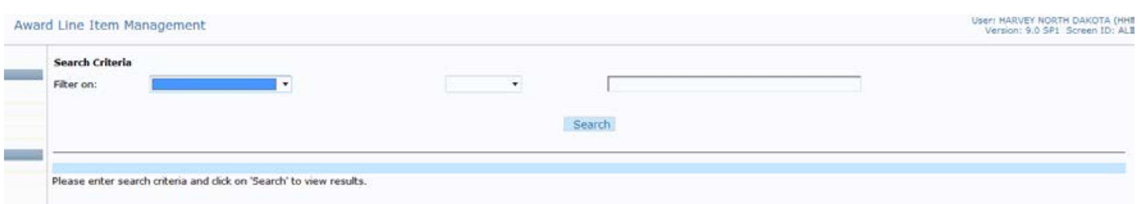
- Enter **Schedule B text** (if needed)
- Attach a **file** (if needed)
- Choose the **form**: (i.e. OF347)
- Click *Save*

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>9</td><td>
The Award Summary screen appears:



- Click on *Add to Hotlist* menu option
- Click on *Line Items* menu option
</td></tr>
<tr><td>10</td><td>
The Award Line Item Management screen appears:

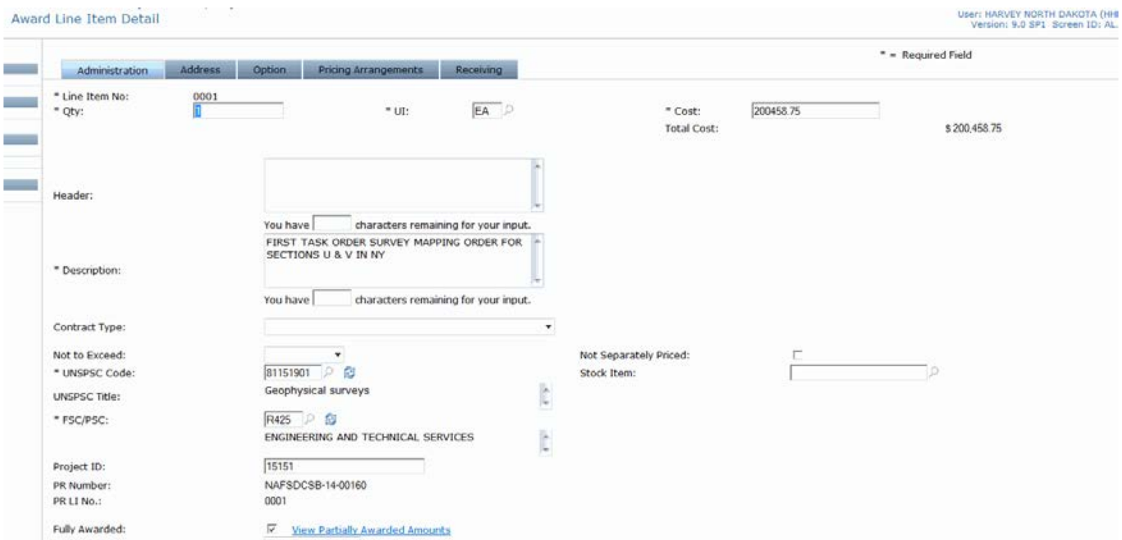


- Click on *Search*

- Click on *Line Item Number* (i.e. 0001)
</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>11</td><td>

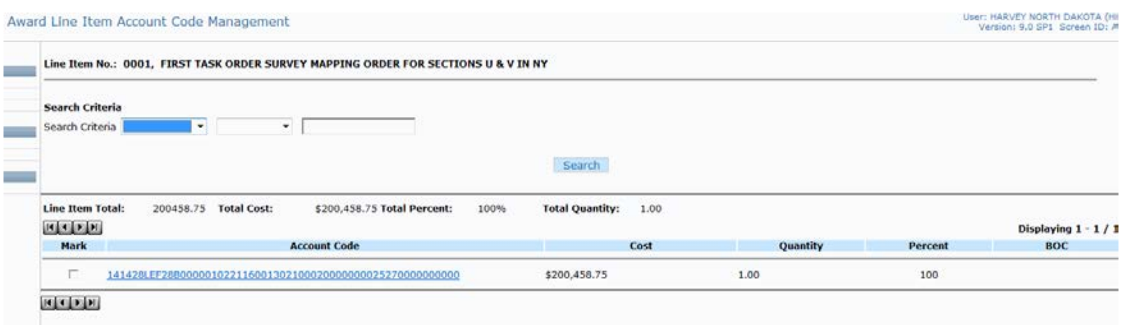
The **Award Line Item Detail** screen appears:



- Verify the amount, make changes if necessary. (just remember that total award amount needs to be more than what was set as the minimum on the base and that the line quantities fall between the minimum and maximum on the base.
- Click *Apply*
- Click on *Accounting* menu option

</td></tr>
<tr><td>12</td><td>

The **Award Line Item Account Management** screen appears:



- Verify the accounting (especially if you made changes to the line amount)
- Click on *Summary* menu option

</td></tr>
</table>

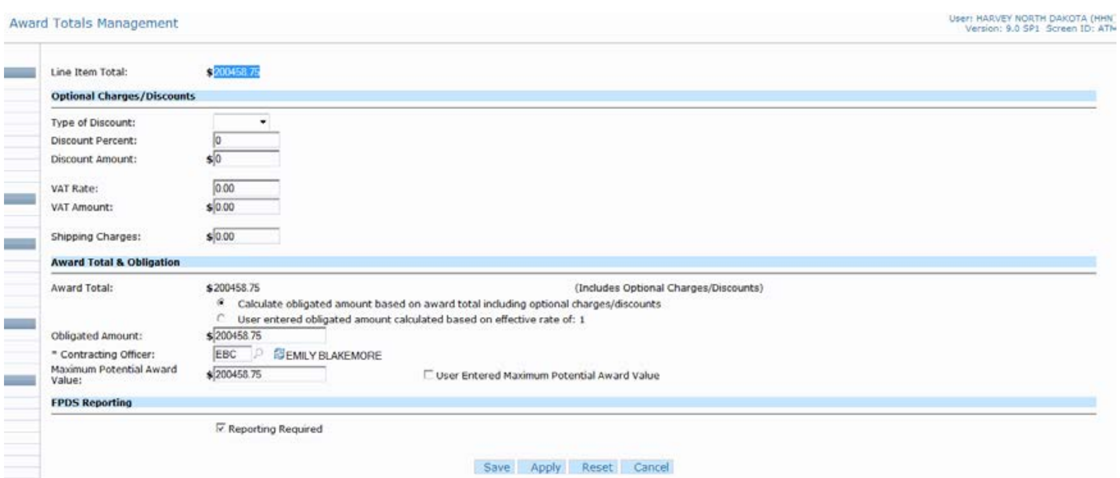
<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>13</td><td>

The **Award Summary** screen appears:

- Click on *Totals* menu option

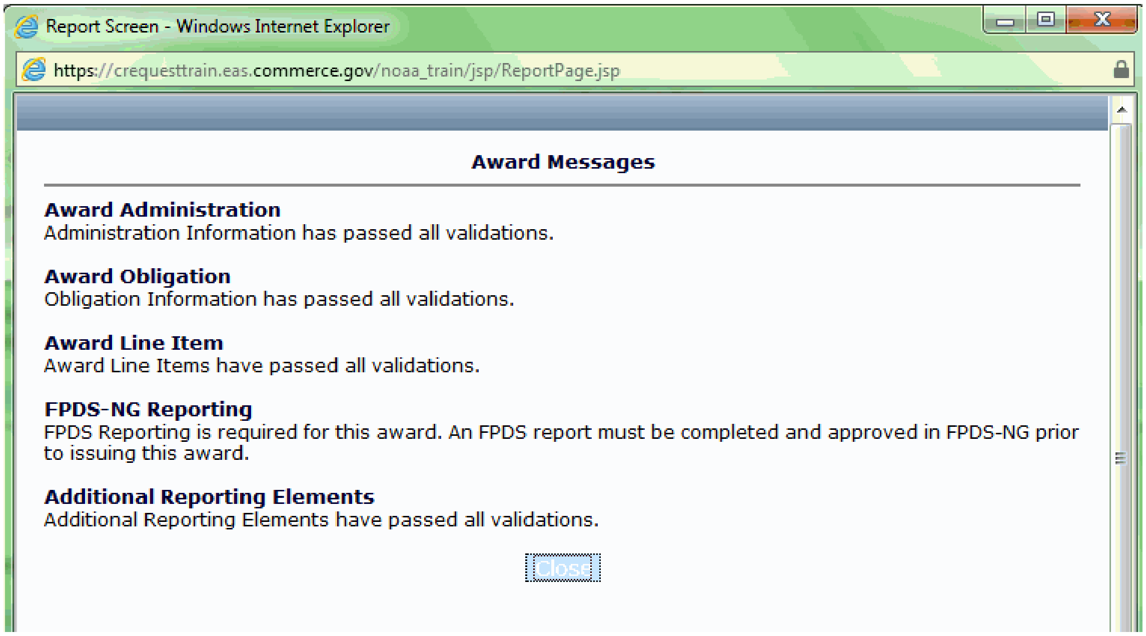
</td></tr>
<tr><td>14</td><td>

The **Award Totals Management** screen appears:



- Validate the Award Totals
- **Uncheck the FPDS Reporting** (for training purposes)
- Click *Save*
- Click on *Check* menu option

</td></tr>
</table>

<table>
<tr><th>Step</th><th>Action</th></tr>
<tr><td>15</td><td>A pop-up screen appears:


➢ Look to see if there are any errors, if not, then continue
➢ Click Close</td></tr>
<tr><td>16</td><td>➢ Set up your reviewer(s)/approver(s)
➢ Release the document to them
➢ At this point, following the flow chart, your approver must complete the process.
➢ Click Home from the Standard Menu Bar</td></tr>
</table>